

Overview

This job aid explains how to update your tax withholding elections in Workday. When preparing your tax withholding forms, consult a tax professional to ensure all information is accurate. Changes to tax withholding elections are effective immediately, unless a future effective date is selected. When you move to a new state and update your home address in Workday, you will receive an automatic action item to review your State and Local Tax Withholding Elections.

Important information regarding how to complete State and Local Withholding Elections

If you are a resident of MD, be sure to include your County of residence.

If you are a resident of VA, WV, DC, PA, or MA, you **MUST** complete BOTH a state tax form for your home state AND a MD state tax form (MW507) to be taxed in your home state. On the MD state tax form, indicate any applicable exemptions ([View Blank Form for form instructions](#)). If you do not complete BOTH state tax forms, you will be taxed in both states.

If you are **NOT** a resident of MD, VA, WV, DC, PA, or MA, then only complete a MD state tax form (MW507). On the MD state tax form, indicate any applicable exemptions ([View Blank Form for form instructions](#)). If no applicable exemptions apply, you will be taxed as a Non-Resident.

Federal Tax Withholding

1. From the Workday home page, select **View All Apps** then select the **Pay** application.
2. In the Tasks column, select **Withholding Elections**.
3. Select the **Federal Elections** tab.
4. Click **Update**.
5. The Complete Federal Elections screen displays.
6. The **Effective Date** defaults to today's date.
Note: You may edit this date to coincide with a future pay period if you would like your withholding changes to begin later.
7. Click **OK**.
8. Review the W-4 form and complete all required fields.

Note: Consult a tax professional to ensure the fields are filled out accurately.

9. Click the **I Agree** checkbox when finalized.
10. Click **OK**.

State & Local Tax Withholding

1. From the Workday home page, select **View All Apps** then select the **Pay** application.
2. In the Tasks column, select **Withholding Elections**.
3. Select the **State and Local Elections** tabs.
4. Click **Update**.
5. The Complete State and Local Withholding Elections screen displays.

Manage Tax Withholding Elections

Workday Job Aid for Employees

6. The **Effective Date** defaults to today's date.

Note: You may edit this date to coincide with a future pay period if you would like your withholding changes to begin later.

7. Confirm the **State** and **Withholding Form Type** that default.

8. Click **OK**.

9. Review the state form and complete all required fields.

Note: Consult a tax professional to ensure the fields are filled out accurately.

10. Click the **I Agree** checkbox when finalized. Click **OK**.