

## Introduction

The purpose of this article is to review and explain how to use the Tax Updates Wizard.

## Navigation

In order to make changes to your tax information (W-4 or state or local withholding), log into isolved using your Employee Self-Service email address and password. Please ensure that passwords are a minimum of 12 characters (at least one lower case alpha [a-z], one upper case alpha [A-Z], one numeric [0-9], and one special character). Spaces are allowed to support the use of easier to remember passphrases. Going forward, your password will not expire. Passwords may also not duplicate any of your previous 10 passwords.

If you key an incorrect password five times, you will be locked out of the system. You will receive a message after each incorrect attempt indicating the remaining number of attempts. After the fifth incorrect attempt, you will be locked out of the system for 10 minutes. Once the 10 minutes has passed, click on the "Forgot Password" link and change your password. If you need access sooner, you may contact your company's administrator to unlock your account.

**isolved** People Cloud

# Sign in

Welcome! Login to access  
isolved People Cloud  
applications.

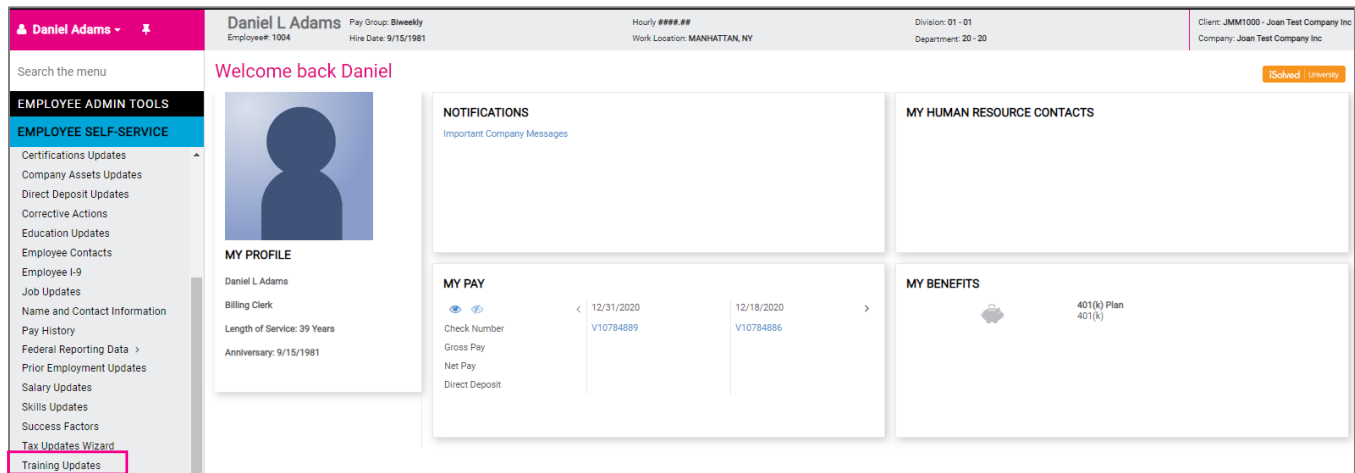
Username is required

You will be prompted for a  
password on the next step.

Continue

## Tax Updates Wizard

Navigate to Employee Self Service > Tax Updates Wizard.

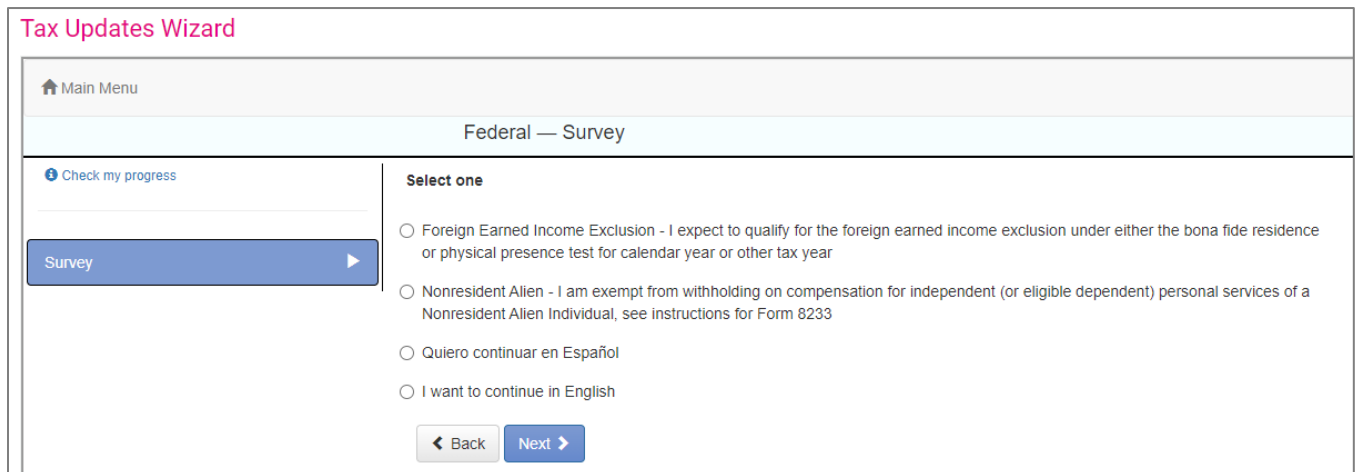


**Employee Self-Service Dashboard:**

- Header:** Daniel L. Adams, Employee# 1004, Hire Date: 9/15/1981, Pay Group: Biweekly, Hourly: \$###.##, Division: 01 - 01, Department: 20 - 20, Client: JMM1000 - Joan Test Company Inc, Company: Joan Test Company Inc.
- Left Sidebar:** Search the menu, EMPLOYEE ADMIN TOOLS, EMPLOYEE SELF-SERVICE (highlighted), Certifications Updates, Company Assets Updates, Direct Deposit Updates, Corrective Actions, Education Updates, Employee Contacts, Employee I-9, Job Updates, Name and Contact Information, Pay History, Federal Reporting Data >, Prior Employment Updates, Salary Updates, Skills Updates, Success Factors, Tax Updates Wizard (highlighted), Training Updates.
- Main Content:**
  - Welcome back Daniel**
  - MY PROFILE:** Daniel L. Adams, Billing Clerk, Length of Service: 39 Years, Anniversary: 9/15/1981.
  - NOTIFICATIONS:** Important Company Messages.
  - MY HUMAN RESOURCE CONTACTS:**
  - MY PAY:**

|                | < 12/31/2020 | 12/18/2020 > |
|----------------|--------------|--------------|
| Check Number   | V10784889    | V10784886    |
| Gross Pay      |              |              |
| Net Pay        |              |              |
| Direct Deposit |              |              |
  - MY BENEFITS:** 401(k) Plan 401(k).

1. Click **Tax Updates Wizard**.
2. Click **Start**
3. Select which forms you would like to complete. If not making changes to a specific jurisdiction, click "I want to skip this section."
4. Once your selection is complete, click **Continue**.
5. If available, respond to the questions on the Survey. Here is an example:



**Tax Updates Wizard**

**Federal — Survey**

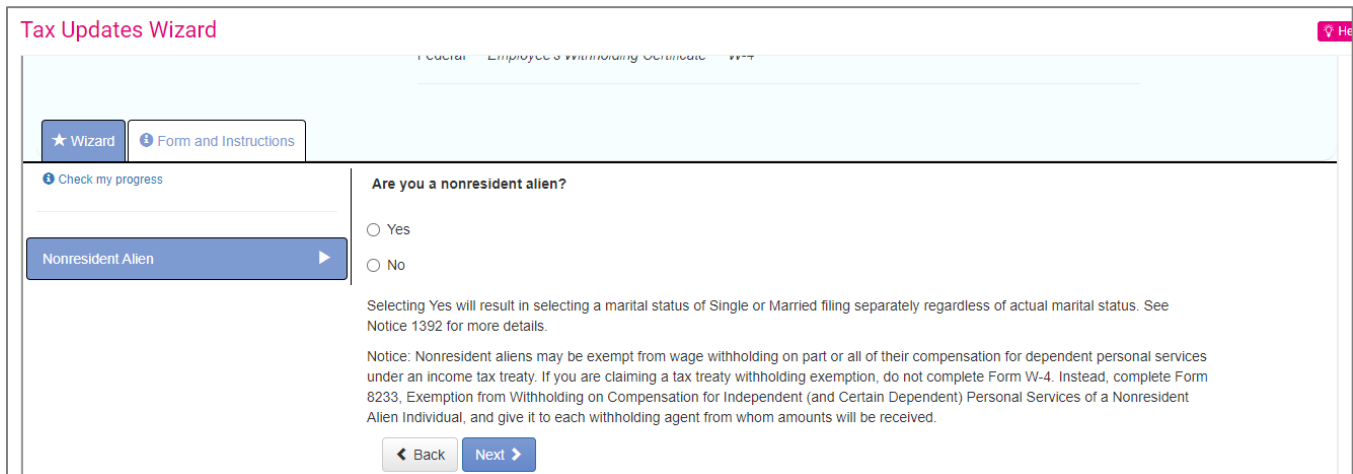
**Select one**

- ☐ Foreign Earned Income Exclusion - I expect to qualify for the foreign earned income exclusion under either the bona fide residence or physical presence test for calendar year or other tax year
- ☐ Nonresident Alien - I am exempt from withholding on compensation for independent (or eligible dependent) personal services of a Nonresident Alien Individual, see instructions for Form 8233
- ☐ Quiero continuar en Español
- ☐ I want to continue in English

**Buttons:** Survey, Back, Next

Then, click **Next**

Click **Start** next to the Form you which to complete. Respond to any questions available. This may vary based on form. Here is an example:



**Tax Updates Wizard**

★ Wizard    ⓘ Form and Instructions

Check my progress

Nonresident Alien ▶

**Are you a nonresident alien?**

☐ Yes

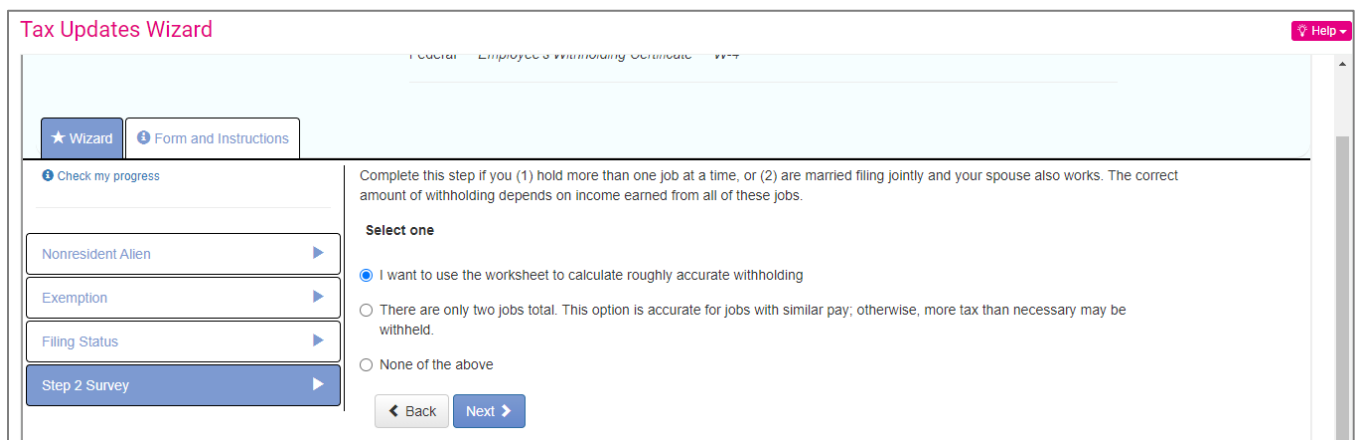
☐ No

Selecting Yes will result in selecting a marital status of Single or Married filing separately regardless of actual marital status. See Notice 1392 for more details.

Notice: Nonresident aliens may be exempt from wage withholding on part or all of their compensation for dependent personal services under an income tax treaty. If you are claiming a tax treaty withholding exemption, do not complete Form W-4. Instead, complete Form 8233, Exemption from Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual, and give it to each withholding agent from whom amounts will be received.

◀ Back    Next ▶

6. Once complete, click **Next**.
7. Select a **Filing Status** (if applicable) and click on **Next**.
8. Respond to any questions available (these may vary per form) and click **Next**.
9. The next questions will vary per form selected. Most forms have a worksheet to help you calculate your withholding or you can choose to fill out the form without the worksheet. Here is an example from the current Federal W-4 Tax Updates Wizard:



**Tax Updates Wizard**

★ Wizard    ⓘ Form and Instructions

Check my progress

Nonresident Alien ▶

Exemption ▶

Filing Status ▶

Step 2 Survey ▶

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

**Select one**

☒ I want to use the worksheet to calculate roughly accurate withholding

☐ There are only two jobs total. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

☐ None of the above

◀ Back    Next ▶

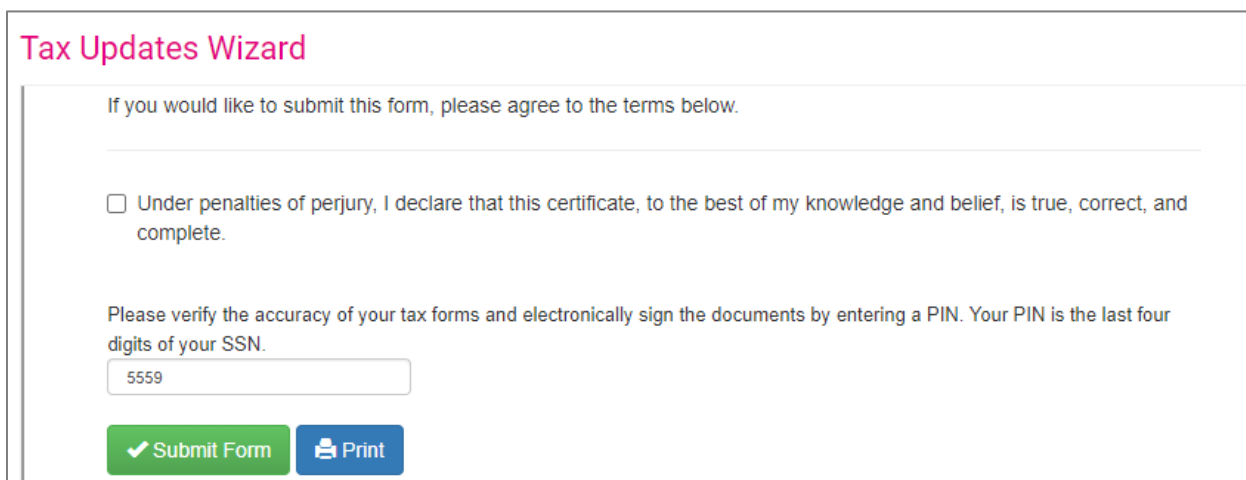
If you need assistance completing the entries from the W-4, please click on "I want to use the worksheet to calculate roughly accurate withholding." You may also refer to the [2020 W-4 Employee Withholding Certificate](#) article in the University Library.

10. Select the one that applies and click **Next**.
11. Complete **Dependent** information (if applicable) and click **Next**.
12. Review any other questions, make your selection (may vary per form) and click **Next**.

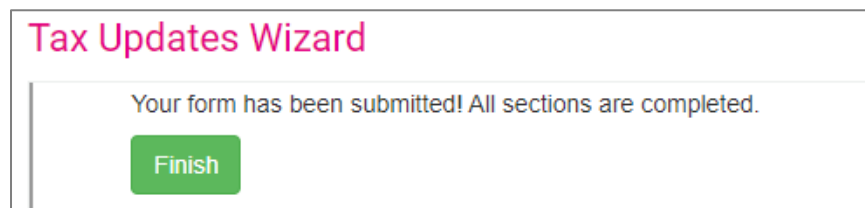
When you complete the Wizard, a copy of the form completed will appear on the screen. Please scroll down to see the complete form. Please review your changes. If you need to make any changes, please click **Return to the Previous Page**.

If you have reviewed and are ready to submit your changes:

1. Click on the box "Under penalties of perjury, I declare to the best of my knowledge and belief is true, correct and complete."
2. Enter the last (4) digits of your SSN.
3. Click **Submit Form**.



4. Once complete, you will receive a pop-up "Your form has been submitted – All sections are completed." You will have the option to click **"Finish"** or **"Continue"** if you have more forms to fill out.



If you have any additional tax forms to update, click **Next** and follow the same process as above.

## 2020 W-4 Help

For 2020 W-4 Employee's Withholding Certificate, the new 2020 W-4 will be available. For help with completing the form, go to [www.irs.gov](http://www.irs.gov) and review the [Frequently Asked Questions](#).

There is also a [Tax Withholding Estimator](#) available on the IRS website to assist you with the completion of the form.