

School District of Lee County-“Tax Status (W-4)”

The W4 is completed online in the PeopleSoft Employee Self Service. If you do not complete this online, you will be defaulted to Single with Zero Exemptions Tax Status.

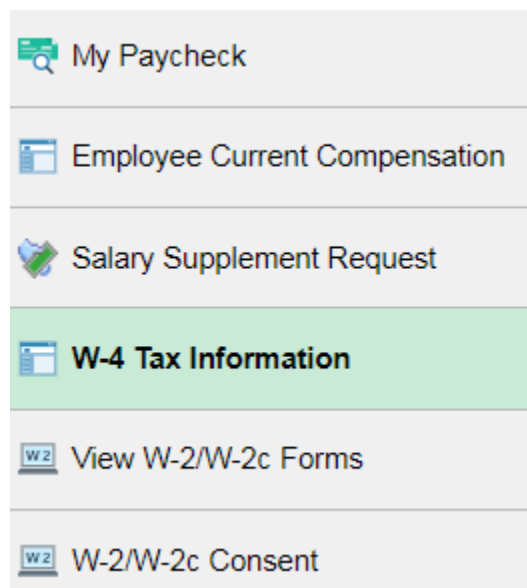
Once you have access to your School District e-mail account then you can access PeopleSoft.

Updating Your W-4 Tax Status Step by Step Instruction

1. Log into your District computer
2. Log into PeopleSoft (<https://peoplesoft.leeschools.net>)
 - a. Enter your username and password
3. Click on the “Payroll and Compensation” tile.



4. On the left sidebar, click on W-4 Tax Information



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5. Modify your tax status as desired under the “W-4 Tax Data” field.

W-4 Tax Data

Enter total number of Allowances you are claiming

Enter Additional Amount, if any, you want withheld from each paycheck

Indicate Tax Status Single Married

Check here and select Single status if married but withholding at single rate.
Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status.

Check here if your last name differs from that shown on your social security card.
You must call 1-800-772-1213 for a new card.

Enter the number of exemptions you are claiming. Instructions for exemptions are found on the W-4 form

Additional Amount to be deducted from each check.

This is where you claim your marital status for tax reporting.

6. Click the “Submit” button when done.

Submit

7. If you desire to claim Exempt (no federal taxes to be withdrawn from your check), under the “Claim Exemption” field, click the box that reads, “Check this box if you meet both conditions to claim exempt status.” Then click the “Submit” button.

Claim Exemption

I claim exemption from withholding for the year and I certify that I meet BOTH of the following conditions for exemption

- Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.
- This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

Check this box if you meet both conditions to claim exempt status.

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Submit

This section should only be filled out if you are claiming tax exemption

Saves your Federal Tax Changes