Withholding Elections for Multi-Institution Employees

This Tip Sheet is for SFCC employees holding positions at more than one CHESS institution.

Secondary CHESS Institution Job

When you are hired into positions at more than one CHESS member college, there are special considerations when configuring your tax withholdings.

When onboarding your secondary position, Workday will initiate several items in your **My Tasks** including:

- Complete State and Local Withholding Elections
- Complete Federal Withholding Elections

Complete State & Local Withholding Elections

Note: The selections you make in this task apply only to income from the secondary position.

When completing the task for State and Local Withholding Elections for your secondary position, the **Company** field will default to the institution of your primary position. It is important that you change the selection in the **Company** field to the college of your new position.

Select **OK**.

In the **New Mexico W-4 Data** box fill out:

- **Step 1. Marital Status** (Should match the selection of your primary job)
- **Step 2: Multiple Jobs or Spouse Works**
- For **Steps 3-4** You can use the estimator at www.irs.gov/W4App.
- **Step 5: Legal Notice**. Select the box to agree with the information you have entered and select **OK.**

Complete Federal Withholding Elections

The **Complete Federal Withholding Elections** task, for your secondary job(s), will default the **Company** field to the institution of your primary position and cannot be changed through this task. Any elections configured in this task will be reflected on the **Pay** tab in your primary CHESS Job profile.

Federal Withholding Election (W-4) forms for your secondary position will only be available on or after the start date of the secondary position.

- Complete Federal W-4 forms for your secondary position:
    1. From the vertical Navigation Panel on the left of the screen, hover over, **Personal** > Select **Benefits and Pay**.
    2. Select **Withholding Elections**.
    3. Select **Federal Withholding Elections**
    4. In the **Complete Federal Elections** window**,** Change the selection in the Company field to the institution of your secondary position and select OK

In the **Federal W-4 Data** box fill out:

- **Step 1. Marital Status** (Should match the selection of your primary job)
- **Step 2: Multiple Jobs or Spouse Works**
- For Steps 3-4 You can use the estimator at www.irs.gov/W4App.
- **Step 5: Legal Notice**. Select the box to agree with the information you have entered and select **OK.**

Review your tax elections for the secondary position to confirm they have been set up correctly.

1. From the vertical Navigation Panel on the left of the screen, hover over, **Personal** > Select **Benefits and Pay**.
2. Select **Pay**
3. Select **Tax**
4. Scroll down to **Tax Elections**
5. Select **Switch Positions** to view tax settings for your secondary position.

Note: See Determine-Primary-Institution-and-View-Multiple-Jobs tip sheet for instructions on changing job profiles