#### Purpose:

To ensure that all W-2s are correct and sent to employees' current addresses.

## **References:**

Workday: Employee Self Service and WPI Website.

#### **Definition:**

Please verify the accuracy of your personal information before year end.

### Procedure:

# 1. Verify your Legal Name in Workday:

**a.** From the Main Menu Click on *Personal Information:* 

	×		
Shortcuts			
d Order	(**	)	
Time			
Pay			
Benefits			
Absence			
Expenses			
Personal Information			
My Onboarding			
Favorites			
Purchases			
Career			
My Requisitions			
Expenses Hub			
	Shortcuts do Order Time Pay Benefits Absence Expenses Personal Information My Onboarding Favorites Purchases Career My Requisitions	Shortcuts  Shortcuts  Time Pay Benefits Absence Expenses Personal Information My Onboarding Favorites Purchases Career My Requisitions ExpensesHub	Shortcuts ad Order ad Order ad Order ad Order baseline ba

**b.** Click on *Name*:

Change	View
Home Contact Information	About Me
Work Contact Information	Addresses
Personal Information	Email Addresses
Emergency Contacts	Address Changes
Photo	Name
More (3)	More (2)

c. Verify your legal name under this section:

Legal Name 1 item	個 〒 □ □ Ⅲ Ⅲ
Name	

## 2. Verify your Home Address in Workday:

- a. Go to Personal Information (please see the screenshot above under step #1):
- **b.** Click on Address:

Change	View
Home Contact Information	About Me
Work Contact Information	Addresses
Personal Information	Email Addresses
Emergency Contacts	Address Changes
Photo	Name
More (3)	More (2)

c. Verify your Home Address. Please ensure that your state is correct:

Edit •				
Home Contact Information				
Addresses 1 item				ᆁ 束 🖬 다 🎟 🖽
Address	Usage	Visibility	Shared With	Effective Date

# 3. Verify Your State/Local Tax Withholdings in Workday:

**a.** From the Main Menu Click on *Pay*:

Menu		×
Apps	Shortcuts	
Your Save	ed Order	(† <sub>4</sub> )
O	Time	
<mark>, </mark>	Pay	
	Benefits	
ē	Absence	
6	Expenses	
	Personal Information	
$\mathbf{O}$	My Onboarding	
	Favorites	
	Purchases	
	Career	
	My Requisitions	
6	Expenses Hub	

**b.** Click on *Withholding Elections*:

2023 YEAR END PERSONAL INFORMATION VERIFICATION 12/15,				
Actions	View			
Withholding Elections	Payslips			
Payment Elections	Timesheets			
	My Tax Documents			
<b>c.</b> Verify your Federal/State and Local Elections:				
Federal Elections	State Elections Local Elections	Tax Allocations		

- 4. <u>Review Your Tax Elections in Workday:</u> follow the same steps as above (step #3). If you need to make changes, please update them. They will be reflected in your following payroll.
- If you want to claim an Exempt withholding status for Federal tax purposes, you must file an Internal <u>Revenue Service (IRS) Form W-4 in 2024.</u> The form will be available to you in 2024 in Workday. The deadline for completing the form is 02/15/2024.