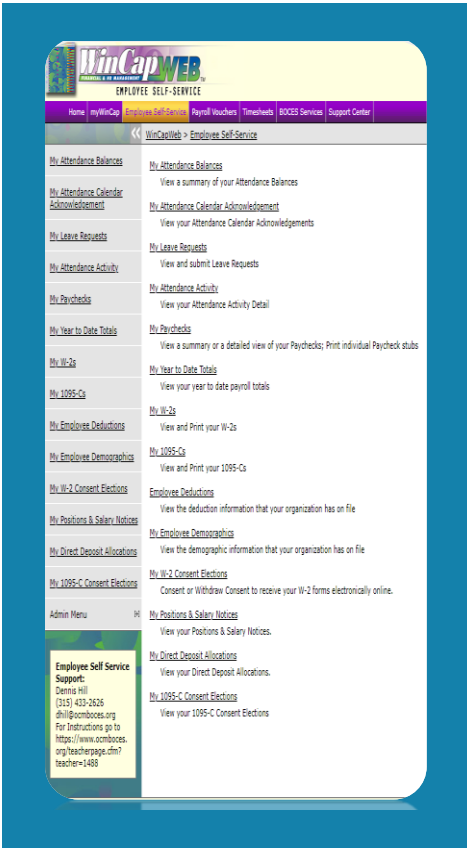


# WinCapWeb Tax Withholding Instructions



## NEED ASSISTANCE? GET IN TOUCH WITH US!

### Payroll Department

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## LET'S GET STARTED

WinCapWEB is accessible through any internet browser, at home or at work by going to [www.wincapweb.com](http://www.wincapweb.com) and using the username (BOCES email) and password you established upon setting up your account.

Once you have logged in, you will automatically be directed to the "Employee Self-Service" page in WinCapWeb.

Within the "Employee Self-Service" Page, you will need to select "My Employee Deductions" to make changes to your W-4 (Federal) or IT-2104(NYS) tax withholding elections.

If you are new to OCM BOCES, your withholdings are automatically preset to single with no dependents. Your election(s) will be updated once they are received.

## MY EMPLOYEE DEDUCTIONS

Now that you have navigated to the employee deductions page, you will notice three boxes.

W-4 Details		NYS IT-2104 Details	
Exempt:	<input type="checkbox"/> No	Marital Status	<input type="checkbox"/> Single
Marital Status:	<input type="checkbox"/> Single	NYC Resident	<input type="checkbox"/> No
Exemptions:	<input type="checkbox"/> 0	Yonkers Resident	<input type="checkbox"/> No
Additional Amt/Pct:	<input type="checkbox"/> 0.00	Allowances for NYS and Yonkers:	<input type="checkbox"/> 0
Only 2 Jobs:	<input type="checkbox"/> No	Allowances for New York City:	<input type="checkbox"/> 0
Under 17:	<input type="checkbox"/> 0	Additional Amount NY State:	<input type="checkbox"/> 0.00
Other Dependents:	<input type="checkbox"/> 0	Additional Amount NY City:	<input type="checkbox"/> 0.00
Other Income:	<input type="checkbox"/> 0	Additional Amount Yonkers:	<input type="checkbox"/> 0.00
Deductions:	<input type="checkbox"/> 0	Tax Notes:	<input type="text"/>

[+ Add Change Request](#)

Employee Withholding Allowance Changes					
0-0 of 0 First   Previous   Next   Last					
Change Type	Effective Date	Status	Comments	Date of Last Edit	Action
[no records]					
0-0 of 0 First   Previous   Next   Last					

Don't wait set up your tax withholdings!



**BOX 1 – W-4 Details:** this box shows your current W-4 (Federal) tax withholding elections.

**Box 2 – NYS IT-2104 Details:** this box shows your current IT-2104 (NY State) tax withholding elections.

**Box 3 – Employee Withholding Allowance Changes:** this box will show the status of any pending changes you have requested.

# WinCapWeb Tax Withholding Instructions

## MODIFY W-4 (FEDERAL TAXES) ELECTIONS

1. To make changes to your W-4 (Federal Tax) elections. Select the "+ Add Change Withholding" button below the "W-4 Details" box.

**W-4 Details**  
Exempt:   
Marital Status:   
Exemptions:   
Additional Amt/Pct:   

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Only 2 Jobs:   
Under 17:   
Other Dependents:   
Other Income:   
Deductions:   
Tax Notes:   
**+ Add Change Request**

2. A new window will pop up. In this window, you will see the full W-4 form with your current elections selected. Please use this link to access the [IRS Tax Withholding Estimator](#) if you need help calculating them.

W-4

Employee Number 02062  
First Name, M.I. Test  
Last Name Dummy  
Effective Date 5/2/2024 [\\*\\* Select Pay Date](#)  
Marital Status:  Note: If married, but legally separated, or spouse is a nonresident alien, select Single.  
**Does your name match the name on your social security card?** If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to [www.ssa.gov](http://www.ssa.gov)

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 the income earned from all of these jobs. Do **only one** of the following.  
**(a)** Use the estimator at [www.irs.gov/W4App](http://www.irs.gov/W4App) for the most accurate withholding; **or**  
**(b)** Use the Multiple Jobs Worksheet and enter the result in Additional Amount Withheld below for roughly accurate withholding; **or**  
**(c)** If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld

If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):  
Multiply the number of qualifying children under 17 by \$2,000 \$   
Multiply the number of other dependents by \$500 \$   
Total \$

**Other Income.** If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs \$   
**Deductions.** If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet and enter the result here \$   
**Extra withholding.** Enter any additional tax you want withheld each pay period \$   
 I claim exemption from withholding for 2024, 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 **and**  
• This year I expect a refund of **all** federal income tax withheld because I expect to have **no** tax liability.

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.  
Signature   
Typing your name in the signature box and clicking the update button is the same as a written signature and is legally binding.

Comments

⚠ Pending changes differ from current WinCap information

3. First you will need to select an "Effective Date". You are able to select any future date as the effective date.

Please note that when making decisions regarding your withholdings, it is advisable to consult with a licensed Certified Public Accountant (CPA) or tax professional. While the payroll office can provide assistance in understanding how various elections may impact your paycheck, we do not offer recommendations for your specific elections. Our role is solely to provide information on the effects of different scenarios to your pay.

4. Next, you will select the "Marital Status" from the drop-down options.

Marital Status:   
**Does your name**  Use  
 Use  
 Use  
Complete this step if you are not the primary wage earner in your household.

# WinCapWeb Tax Withholding Instructions

5. Then you will need to determine if the box at the end of line (c) should be checked or unchecked.

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 the income earned from all of these jobs. Do **only one** of the following.

(a) Use the estimator at [www.irs.gov/W4App](http://www.irs.gov/W4App) for the most accurate withholding; or

(b) Use the Multiple Jobs Worksheet and enter the result in Additional Amount Withheld below for roughly accurate withholding; or

(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

6. Next, you will need to determine if you need to add dependents. If you have not dependents, you can skip this step and move on to the next section. For children under the age of 17, you will multiply the number of children by \$2,000. (Ex. If you claim 2 children, you would enter \$4,000) Other dependents are multiplied by \$500. (Ex. If you claim 2 other dependents, you would enter \$1,000)

If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Multiply the number of qualifying children under 17 by \$2,000 \$

Multiply the number of other dependents by \$500 \$

Total \$

7. Then you will add in any other income or deductions you would like to claim. If you would like to have an additional amount withheld from each paycheck, you will add this in the “Extra withholding” box.

**Other Income.** If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs \$

**Deductions.** If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet and enter the result here \$

**Extra withholding.** Enter any additional tax you want withheld each pay period \$

I claim exemption from withholding for 2024, 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 and**
- This year I expect a refund of **all** federal income tax withheld because I expect to have **no tax liability.**

8. There is a box on this form you can check if your claim exemption from taxes. **Checking this box has serious tax implications so please make sure that this option is correct for you before checking this box.**

claim exemption from withholding for 2024, 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 and**
- This year I expect a refund of **all** federal income tax withheld because I expect to have **no tax liability.**

9. The last item needed to complete this form is a digital signature. Click in the box next to “Signature” and type your full name. You will not be able to proceed with the request until this is filled in.

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.  
Signature   
Typing your name in the signature box and clicking the update button is the same as a written signature and is legally binding.

10. Carefully review all of your elections to ensure you entered the details correct. Once you have confirmed everything is correct, click on the “Update” button.

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.  
Signature   
Typing your name in the signature box and clicking the update button is the same as a written signature and is legally binding.  
Comments   
⚠ Pending changes differ from current WinCap information

11. This will submit your form and bring you back to the Employee Deductions page. You will now see your request in the “Employee Withholding Allowance Changes” box.

Employee Withholding Allowance Changes					
Change Type	Effective Date	Status	Comments	Date of Last Edit	Action
W4	05/02/2024	Pending		05/02/2024	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

12. Your request has now been sent to the payroll department for final approval. The W-4 Details will not change until the request is approved by the payroll department.

Please note that when making decisions regarding your withholdings, it is advisable to consult with a licensed Certified Public Accountant (CPA) or tax professional. While the payroll office can provide assistance in understanding how various elections may impact your paycheck, we do not offer recommendations for your specific elections. Our role is solely to provide information on the effects of different scenarios to your pay.

# WinCapWeb Tax Withholding Instructions

## MODIFY IT-2104 (NEW YORK STATE TAXES) ELECTIONS

1. To make changes to your IT-2104 (NYS Tax) elections. Select the "+ Add Change Withholding" button below the "NYS IT-2104 Details" box.

**NYS IT-2104 Details**

Marital Status: Single or Head of household  
NYC Resident: No  
Yonkers Resident: No

Allowances for NYS and Yonkers: 0  
Allowances for New York City: 0  
Additional Amount NY State: 0.00  
Additional Amount NY City: 0.00  
Additional Amount Yonkers: 0.00

Tax Notes:

**+ Add Change Request**

2. A new window will pop up. In this window, you will see the full W-4 form with your current elections selected.

NYS IT-2104

Employee Number: 02062  
First Name, M.I.: Test  
Last Name: Dummy  
Effective Date: 5/2/2024  
Marital Status: Single or Head of household  
Check if you are a resident of New York City?  
Check if you are a resident of Yonkers?  
Total number of allowances for New York State and Yonkers if applicable: 0  
Total number of allowances for New York City: 0  
Enter any additional withholding per pay period under special agreement with your employer:  
New York State amount: 0.00  
New York City amount: 0.00  
Yonkers amount: 0.00  
Signature: [Signature Box]  
Comments: [Comments Box]  
Update Cancel

3. First you will need to select an "Effective Date". You are able to select any future date as the effective date.

Please note that when making decisions regarding your withholdings, it is advisable to consult with a licensed Certified Public Accountant (CPA) or tax professional. While the payroll office can provide assistance in understanding how various elections may impact your paycheck, we do not offer recommendations for your specific elections. Our role is solely to provide information on the effects of different scenarios to your pay.

4. Next, you will select the "Marital Status" from the drop-down options.

Effective Date: 5/17/2024  
Marital Status: Single or Head of household

5. Then you will add any allowances for New York State. Click in the box to add the number of allowances.

Total number of allowances for New York State and Yonkers if applicable: 0  
Total number of allowances for New York City: 0 Do not use

6. If you would like to have an additional amount withheld from each paycheck, you will enter it into the "New York State amount" box.

Enter any additional withholding per pay period under special agreement with your employer:  
New York State amount: 0.00  
New York City amount: 0.00 Do not use  
Yonkers amount: 0.00 Do not use

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## WinCapWeb Tax Withholding Instructions

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7. The last item needed to complete this form is a digital signature. Click in the box next to “Signature” and type your full name. You will not be able to proceed with the request until this is filled in.

Signature

I certify that I am entitled to the number of withholding allowances claimed on this certificate.


Typing your name in the signature box and clicking the update button is the same as a written signature and is legally binding.  
**Penalty** - A penalty of \$500 may be imposed for any false statement you make that decreases the amount of money you have withheld from your wages. You may also be subject to criminal penalties.

8. Carefully review all of your elections to ensure you entered the details correct. Once you have confirmed everything is correct, click on the “Update” button.





Signature

Typing your name in the signature box and clicking the update button is the same as a written signature and is legally binding.  
**Penalty** - A penalty of \$500 may be imposed for any false statement you make that decreases the amount of money you have withheld from your wages. You may also be subject to criminal penalties.

Comments

 Pending changes differ from current WinCap information

9. This will submit your form and bring you back to the Employee Deductions page. You will now see your request in the “Employee Withholding Allowance Changes” box.

Employee Withholding Allowance Changes					
Change Type	Effective Date	Status	Comments	Date of Last Edit	Action
W4	05/02/2024	Pending		05/02/2024	 
State Tax	05/02/2024	Pending		05/02/2024	 

10. Your request has now been sent to the payroll department for final approval. The IT-2104 Details will not change until the request is approved by the payroll department.

Please note that when making decisions regarding your withholdings, it is advisable to consult with a licensed Certified Public Accountant (CPA) or tax professional. While the payroll office can provide assistance in understanding how various elections may impact your paycheck, we do not offer recommendations for your specific elections. Our role is solely to provide information on the effects of different scenarios to your pay.