# ADP Portal Orientation

Performing essential functions in Workforce Now

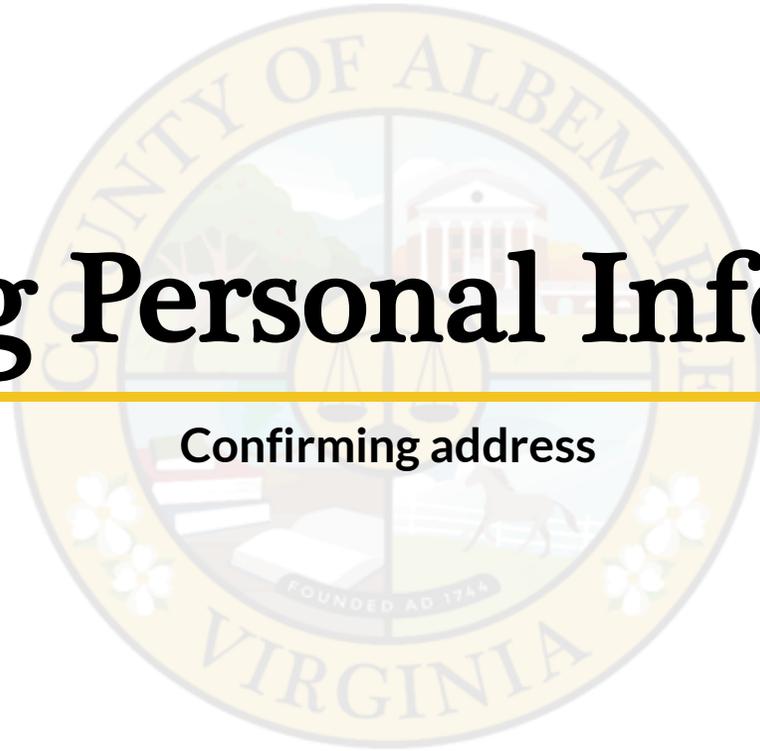# Table of Contents

# Updating Personal Information

**Confirming address**

# Updating Personal Information

Navigate to **Myself > Profile.**

# Updating Personal Information

To update Personal information, go to the tile labeled **Personal Info.**

Click **VIEW MORE** button. This action will bring up a new window.

**Note:** you may be asked to confirm your legal address.

# Updating Personal Information

Enter updates, while scrolling as necessary, and click **Save.**

BACK

## Personal Info

### Name

Salutation

Name *

Carlo E

Preferred Name

*First Name*

Middle Name

*Middle Name*

Preferred Middle Name

*Middle Name*

Last Name *

Garland

Preferred Last Name

*Last Name*

Payroll Name

Carlo E

Last Name *

Garland

Generation Suffix

SAVE

# Updating Personal Information

Once saved this opens a new window which will request you to select an option to verify your identity. Click the **corresponding arrow**.

Based on selection you will receive a text message or email which includes the code.

Once code is received you will have *10 minutes* to **enter the code** and select **Submit Code**.

# Updating Personal Information

Once code is submitted you should receive the below screen. Click **Continue.**



You're Good to Go

We verified your credentials, then saved your updates. Click Continue to resume your work.
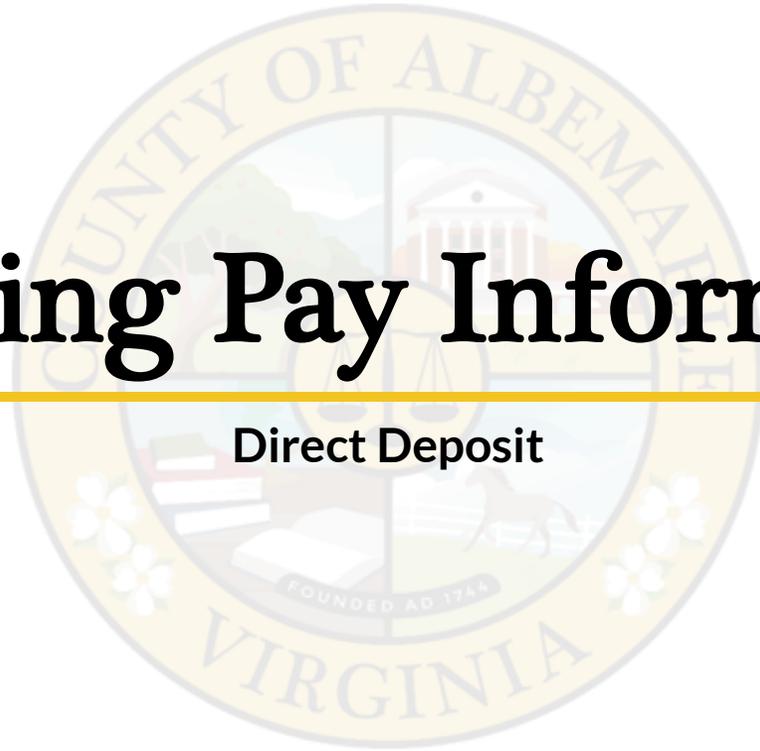
**Approved**

CONTINUE

# Updating Pay Information

Direct Deposit

# Updating Pay Information - Direct Deposit

To view Direct Deposit information, navigate to **Myself > Pay > Payment Options.**
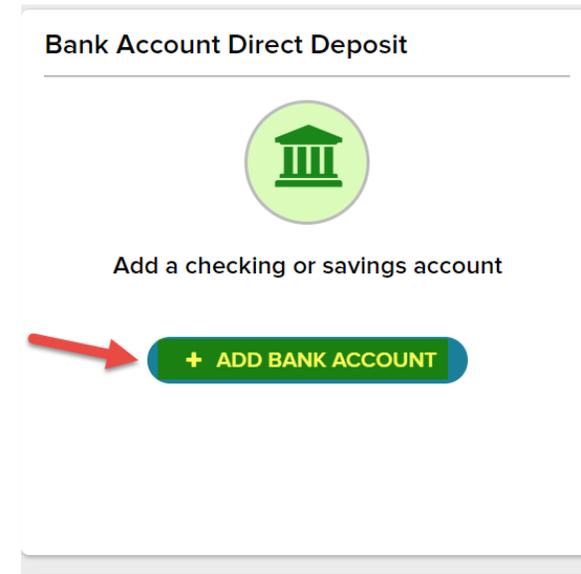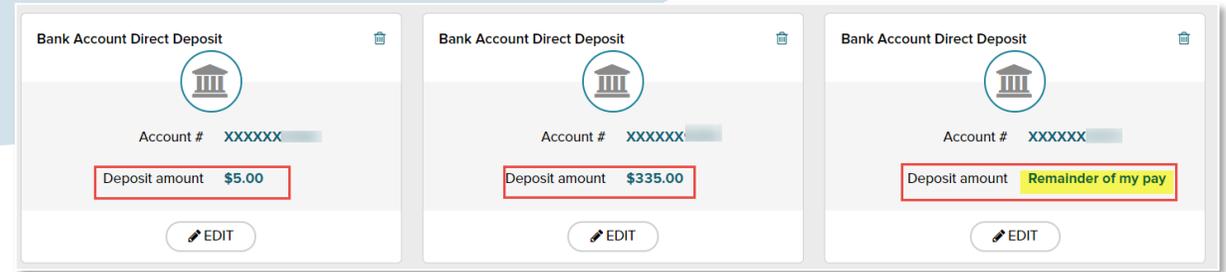
# Updating Pay Information–Adding Direct Deposit

Your Direct Deposit information should already be imported, if you use Direct Deposit. If you already see it, verify that all information is correct.

If you wish to add a bank account, click the **Add Bank Account** button to add a bank account or highlight an existing account.

# Updating Pay Information – Adding Direct Deposit

From your banking institution source document, enter the **Routing Number**, then click **Next**.

Enter the **Account Number**, then click **Next**.

**Note:** When changing routing or account numbers, you may receive a paper check for the upcoming pay period. Any changes to the account or routing information requires the bank's verification.

# Updating Pay Information – Adding Direct Deposit

- **Choose the Account Type.** You may have up to 5 different direct deposits, either checking or savings. If you are adding a second one, you would choose Checking2/Savings2, etc.

- **Choose the deposit type.** This can be **Full**, or you can enter a specified **amount** or **percentage** to be deposited into this account.

    - **For multiple accounts**, you can specify a specific amount to all but one account and have the final account designated as "Remainder of my pay". This will direct all dollar amounts to the various accounts and any remainder to the "remainder deposit" account. One account must be designated as the "remainder deposit".

- Click the **Next** button.

# Updating Pay Information – Adding Direct Deposit

- Verify that the **Routing** and **Accounting Numbers** and **Amount Per Pay Check** are correct.
- Click the **I've double-checked my account number** and **I agree to the terms and conditions** toggles to agree to the statements.
- Click **Add.**

# Verifying Direct Deposit Accounts

Verify that all of the Direct Deposit information is accurate.

*If you have multiple deposits, one will need to be a remainder deposit. For example, having $5.00 going to a one account, $335.00 into a second, and the final account indicated as "remainder of pay" for the remaining funds going to a third account.*

| Bank Account Direct Deposit | Bank Account Direct Deposit | Bank Account Direct Deposit |
|---|---|---|
| Account # XXXXXX | Account # XXXXXX | Account # XXXXXX |
| Deposit amount $5.00 | Deposit amount $335.00 | Deposit amount **Remainder of my pay** |
| ✏ EDIT | ✏ EDIT | ✏ EDIT |

# Updating Pay and Tax Withholding

**Taxes, Pay Statements**
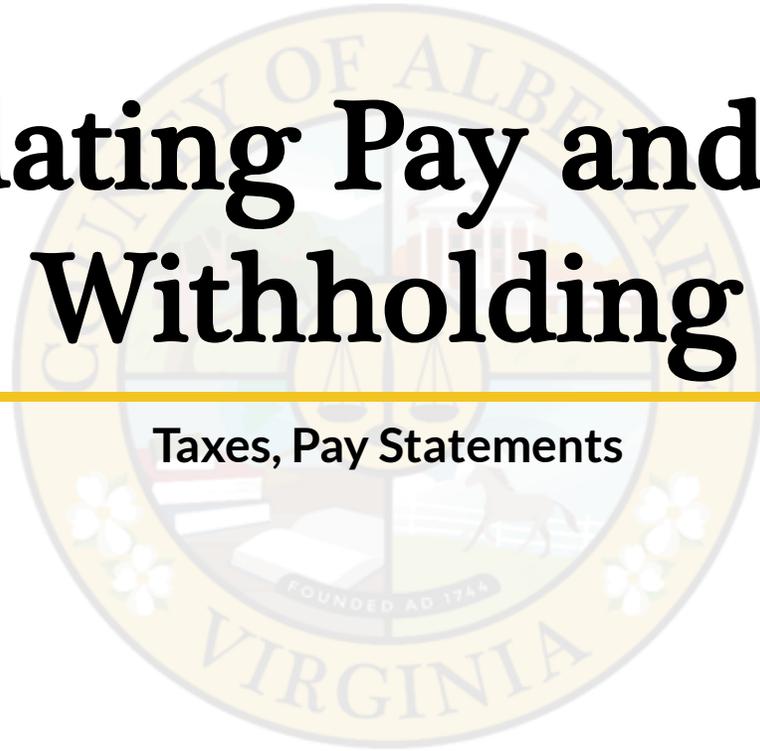
# Updating Pay Information – Tax Withholding

Click the **Myself** menu, then navigate to **Pay > Tax Withholdings.**

# Updating Pay Information – Tax Withholding

Click on the **Federal** tile and click **Start.**

# Updating Pay Information – Tax Withholding

Before you begin, it is *recommended* to download and review the copy of the W-4, instructions, and worksheets.

Click the **Next** button when ready to proceed.

## Federal Tax Withholding

### Before You Begin

Beginning with 2020, the Federal Withholding Form W-4 is significantly different from prior versions. It's recommended that you download and review the form, instructions, and worksheets prior to completing this process.

⤓ Download a blank copy of Form W-4

After you review the instructions, you can fill out your Form W-4 using this convenient tool. Complete the form so that your employer can withhold the correct federal income tax from your pay. The IRS recommends that you complete a new Form W-4 when your personal or financial situation changes.

If you need assistance completing your Form W-4, consult your tax professional.

CANCEL          NEXT

# Updating Pay Information – Tax Withholding

A window will open with a wizard that will take you through the requirements of the W-4 form.

Please verify and enter all information then click **Next**.

## Federal Tax Withholding

⬇ DOWNLOAD BLANK FORM W-4

Is this information correct?

If your name is incorrect, contact your HR Representative to have it fixed before you proceed.

Your first name, middle, and last name

Carlo E Garland

Your home address

549 West Areba Avenue
Hershey, PA 17033
US

SAMPLE ONLY

Your Social Security number

Applied For

Does your name match the name on your Social Security card? If not, to ensure you get credit for your earnings, contact the SSA at 800-772-1213 or go to www.ssa.gov

CANCEL          PREVIOUS          NEXT

# Updating Pay Information – Tax Withholding

Select your **residential status**, then click **Next.**

Federal Tax Withholding          ⬇ DOWNLOAD BLANK FORM W-4

Are you a nonresident alien?

You are considered a nonresident alien if you are not a US citizen and do not meet either the green card test or the substantial presence test for the calendar year (January 1 - December 31).

◯ I'm a nonresident alien.

◯ I'm a US citizen or a resident alien.

CANCEL          PREVIOUS     NEXT

# Updating Pay Information – Tax Withholding

Select your **filing/marital status**, then click **Next.**

## Federal Tax Withholding

⬇ DOWNLOAD BLANK FORM W-4

What is your filing/marital status?

○ Single or Married filing separately

○ Married filing jointly (or Qualifying widow(er))

○ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual)

CANCEL          PREVIOUS     NEXT

# Updating Pay Information – Tax Withholding

Select your **tax exemption status**, then click **Next.**



Are you tax exempt?

Refer to the General Instructions of ⬇ Form W-4 Employee's Withholding Certificate

○ I claim exemption from withholding for the current year, and I certify that I meet **both** of the conditions for exemption:

- For last year, I had **no** federal income tax liability
- For this year, I expect to have **no** federal income tax liability.

If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file next year's tax return.

○ I do not claim exemption from withholding

CANCEL     PREVIOUS     NEXT

# Updating Pay Information – Tax Withholding

If you have multiple jobs or your spouse works, complete the *Multiple Jobs or Spouse Works* form, then click **Next.**

# Updating Pay Information – Tax Withholding

If you need to make other adjustments, complete the below *Withholding* form, then click **Next.**

## Federal Tax Withholding

⬇ DOWNLOAD BLANK FORM W-4

**Other Adjustments**

Complete this section for only one job in the household.
Your withholding will be most accurate if you complete Other Income and Deductions for the highest paying job.

**Other Income** ❓

If you want tax withheld from other income you expect this year that won't have withholding, enter the amount of the 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

CANCEL          PREVIOUS          NEXT

# Updating Pay Information – Tax Withholding

Review W-4 Form to confirm accuracy. To agree to the statements, click the **checkbox** and click **DONE.**

If desired, click **Print Completed Form.**

**NOTE:** *It is recommended to print a copy of the completed W-4 for your records*

# Updating Pay Information – Tax Withholding

Once the federal tax withholdings form is complete, a pop-up window will appear reminding you to complete the state withholding form.

Click **OK**.
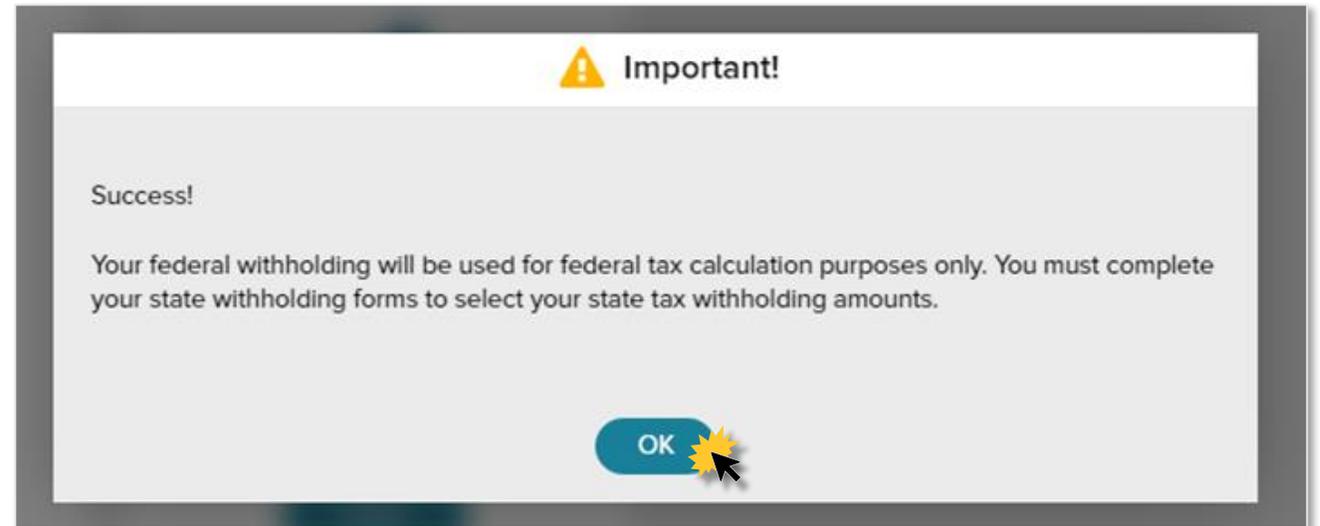
# Updating Pay Information – Tax Withholding

To update State withholding, click the **Start** button in the Virginia tile.

**NOTE:** *State W-4 forms are not available for completion until the Federal form is finalized.*

# Updating Pay Information – Tax Withholding

Before you begin, it is *recommended* to download and review the copy of the VA-4, instructions, and worksheets.

Click **Next** when ready to proceed.

## Virginia Tax Withholding

**Before You Begin**

If you want to claim more personal exemptions on Form VA-4 than you claimed on your federal Form W-4, you must get written permission from the Commonwealth of Virginia Department of Taxation.

You can complete your Form VA-4 using this convenient tool. However, some questions may require the use of supplemental worksheets and instructions. Therefore, it may be useful for you to ⬇ download a blank copy of the VA-4 for reference.

If you need assistance completing your Form VA-4, consult your tax professional.

CANCEL     NEXT

# Updating Pay Information – Tax Withholding

Verify that the information displayed is correct.

Click **Next**.

# Updating Pay Information – Tax Withholding

Enter the **number of exemptions** you wish to claim and any **additional withholdings**, if desired.

Click **Next**.

## Virginia Tax Withholding

⬇ DOWNLOAD BLANK FORM VA-4

How many exemptions are you claiming?

Subtotal of Personal Exemptions - line 4 of the Personal Exemption Worksheet

Subtotal of Exemptions for Age and Blindness - line 7 of the Personal Exemption Worksheet

Do you want to withhold additional taxes?

Additional amount, if any, you want withheld from each paycheck

CANCEL        PREVIOUS        NEXT

# Updating Pay Information – Tax Withholding

Select your **tax exemption status**, then click **Next.**

# Updating Pay Information – Tax Withholding

Review VA-4 Form to confirm accuracy. To agree to the statements, click the **checkbox** and click **DONE.**

If desired, click **Print Completed Form.**

**NOTE:** *It is recommended to print a copy of the completed VA-4 for your records*

# Updating Pay Information – Tax Withholding

The tax withholdings are now complete.

You may download and view the forms by clicking **View Saved Tax Forms**.

# Viewing Pay and Tax Statements

**Viewing and Printing Taxes and Pay Statements, Saving to Favorites**

# Viewing Pay Information

To view your pay statements, Navigate to **Myself > Pay > Pay & Tax Statements**

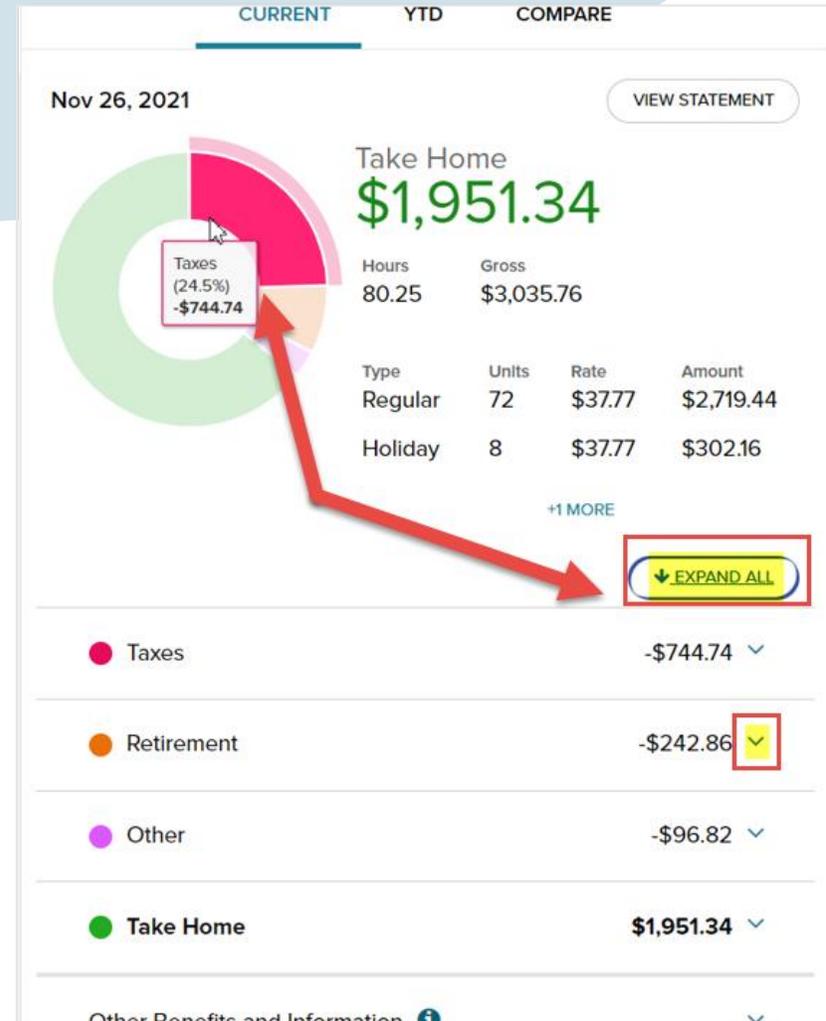# Viewing Pay Information – Dashboard View

To view your pay statements, you may use the Dashboard view or the Pay Statement view.

From the dashboard you can view the contents of the pay statement directly.

**Note:** The dashboard defaults to the most recent pay statement.

To drill down into the details of the pay statement, you can:

• Hover over the graph for the items you would like to view

• Select the down arrows next to the appropriate section.

• Select 'expand all' which will expand all categories.

# Viewing Pay Information – Pay Statement View

Producing a pay statement copy is simple. By following the steps below, you can view, download, and print a copy of your pay statement.

- Select the **pay statement** you wish to view from the list on the left-hand side.

- On the far right click the **View Statement** button.

# Viewing Pay Information – View Pay and Tax Statements

Once you click the view statement button, a new window appears with the pay statement included.

You will have the option to view on screen, download to a local location, or print this statement to a local printer.

# Viewing Pay Information – Printing Pay Statements

You may download or print the statement by placing your mouse on the icons in the top right-hand corner and clicking either the **Download** icon or the **Print** icon



Earnings Statement ADP

# Viewing Pay Information – Saving to Favorites

To save time it is suggested to save frequently visited tasks to your favorites area.

To do this, click the **star** icon on the far right of your screen. The system will automatically move this selection to your favorites area (star icon on the menu bar).
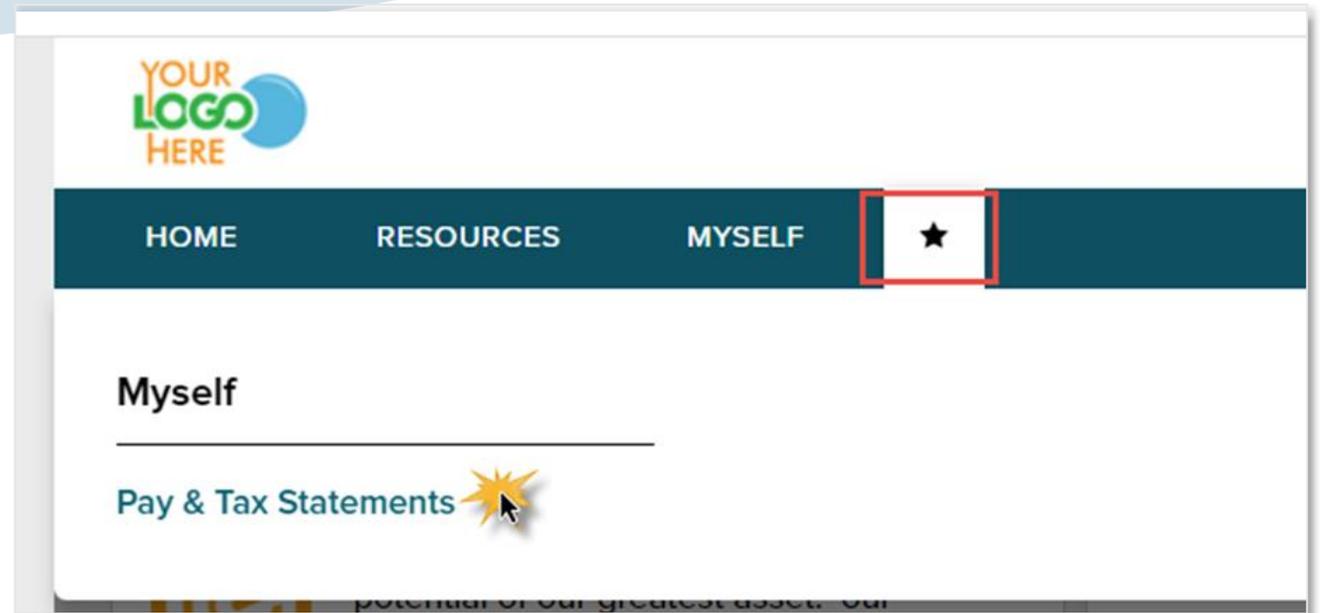
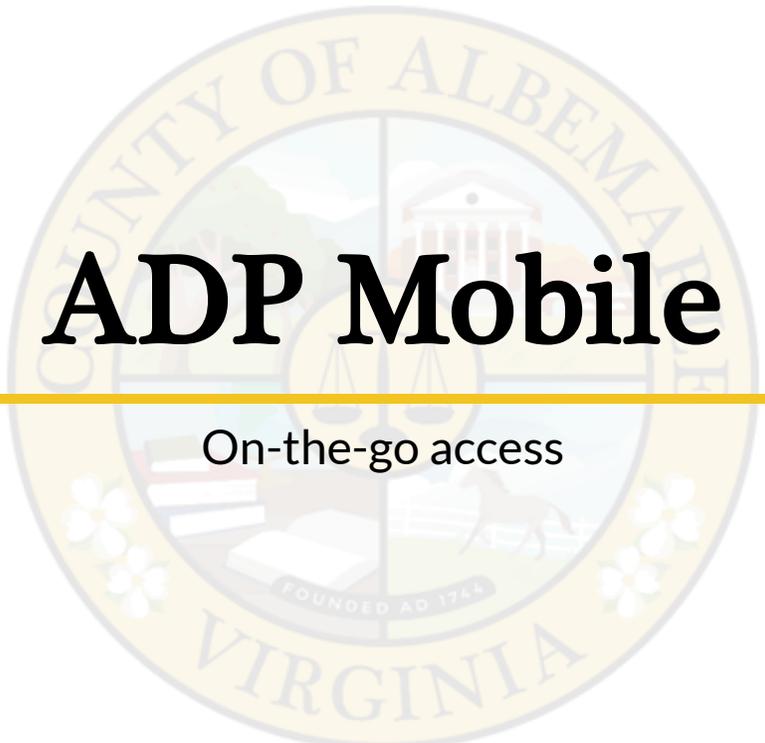**Note:** you can do this for many other activities as well.
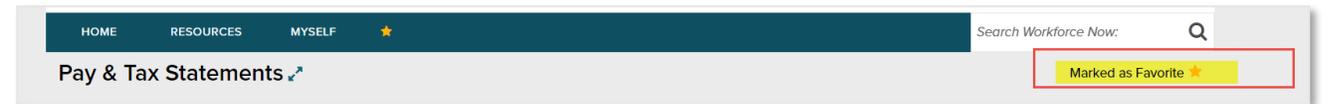
# Viewing Pay Information – Saving to Favorites

Once saved, the Pay & Tax Statements will appear in your Favorites location. Simply click the **star** icon and verify that the favorited page is in the menu that drops down.

# ADP Mobile

On-the-go access

# Downloading the App

There are two ways to download the app:

- Open the Apple App or Google Play store and download the ADP app
- Scan the QR code at the right with the Camera or Google Lens app, then tap the notification that appears.

# ADP Mobile App

If you already have a user ID and password for any of the following ADP products, you can activate your ADP Mobile Solutions account by logging in using the same credentials.
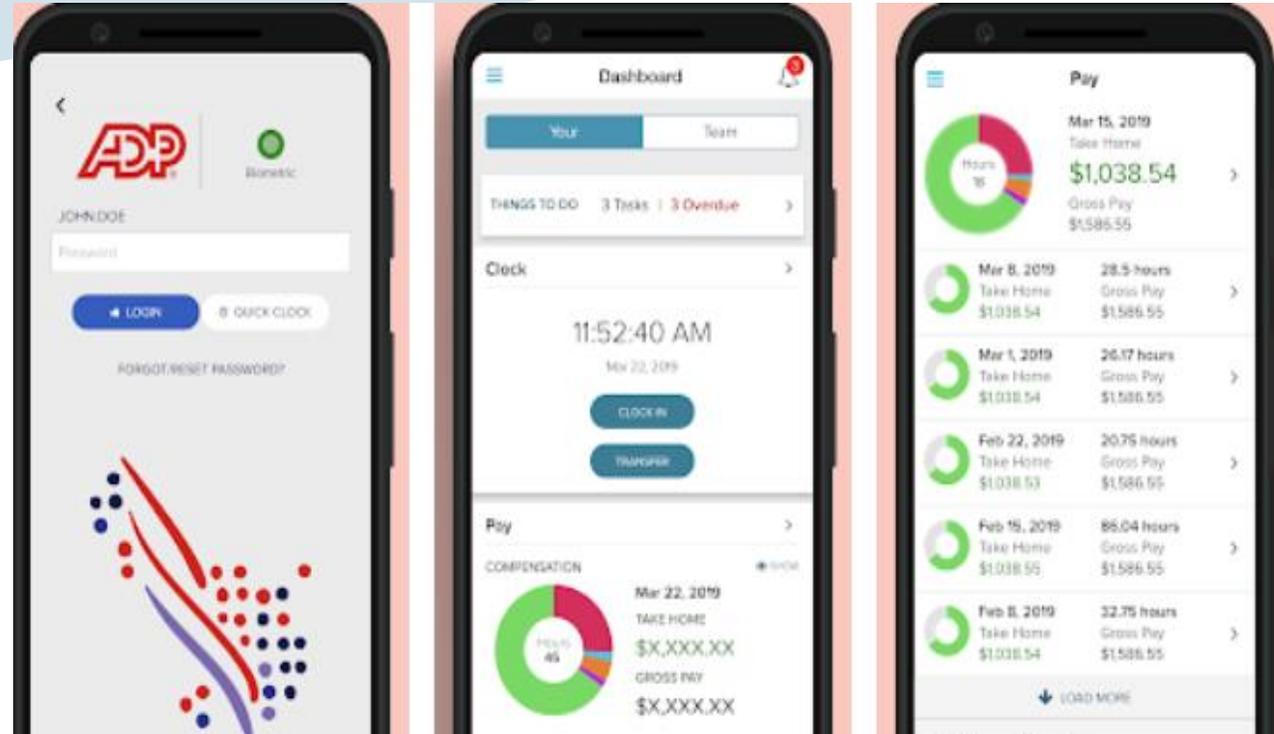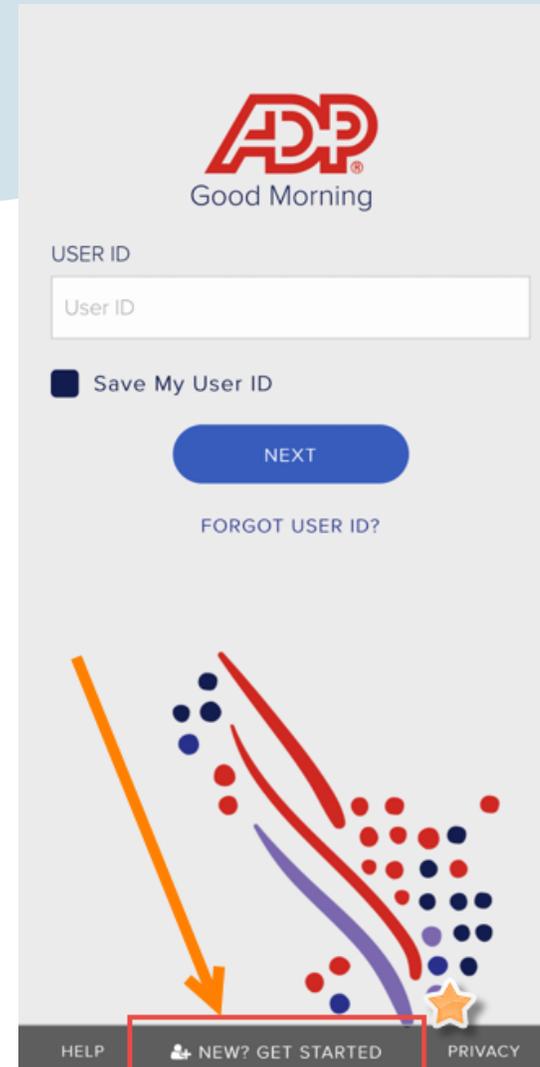
# ADP Mobile App

Don't have an ADP user ID or password?

Go to **New? Get Started** and follow the instructions to create your user ID and password. There is a video on the following slide.

*System requirements:* The latest version of ADP Mobile Solutions is available through the Apple App Store and Google Play. Users must have a mobile device running IOS v8+ or Android™ v4.4+

# ADP Mobile App

How to create your account with the ADP Mobile App