

PeopleSoft: Adding/Editing Residence, State Distribution(s), and Tax Form(s)

PEOPLESOFT 9.2

What's Covered in PeopleSoft: How to view and edit your home address, work/residence state(s), state tax distribution(s) and update and submit your federal and state tax form(s).

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General Information:

- Follow your school or unit's requirements and processes regarding flexwork. Visit the [Flexwork at Harvard website](#) for more information about Harvard's Flexwork Policy and Guidelines.
- If an employee has been approved for flexible work, current guidelines state that the employee must work from a [Harvard registered payroll state](#) and have taxes (where applicable) withheld for that state. Harvard expects individuals regularly and consistently working 20% or more of their time in a registered payroll state to allocate their time to that state for tax withholding purposes. See [Employment Outside of Massachusetts Policy](#).
- Individuals working outside the United States must be hired in a manner that complies with local laws. Contact [Global Support Services](#) for guidance.
- International Payees (aka Foreign Nationals / Nonresidents) will:
 - update Work/Resident States page, and
 - update State Tax Work Distribution page, and
 - complete and submit information using [Harvard's Tax Determination System](#). The Tax Withholding page cannot be directly updated.
 - NOTE: Some visas may restrict work location (e.g., on or off-campus work). Please review the [Remote Working Considerations for Foreign Nationals Chart](#) and contact the Harvard International Office to confirm work location eligibility or restrictions.
- It is your responsibility to update this information when approved for changes to work location and submit any required forms on a timely basis.
- Updates to PeopleSoft must be made at least five business days before a paycheck will be issued for appropriate tax withholding to be applied against that paycheck. International Payees (aka Foreign Nationals / Nonresidents) must complete and submit information using [Harvard's Tax Determination System](#). Please complete this process as soon as possible in order to have your PeopleSoft record updated in a timely manner. See the [International Payee Tax Compliance Office](#) website for guidance. Harvard will not adjust taxes retroactively (once a paycheck has been issued).
- Following state and federal requirements, earnings will be reported to both federal and state tax authorities on your W-2 or 1042-S Form. Employees working in more than one state will receive a separate form W-2 for each state they work in.
- Consult with a professional tax advisor for any questions on tax forms, filing, and reporting in multiple states.

Viewing and Editing Your Information

Navigation: PeopleSoft Home page > **My Pay** > **Tax Withholding and Addresses**

Update Work/Resident States

Harvard expects individuals regularly and consistently working 20% or more of their time in a registered payroll state to allocate their time to that state for tax withholding purposes. For work that is on an informal, incidental basis, there is no need to change their withholdings. For example, an employee traveling to Maine for vacation would not need to change their withholdings if the individual sent some work emails during the trip.

Steps

- ## 1. Review your home address

Start by reviewing your home address information, and update if necessary. For students, please update your address in my.harvard or contact your school's registrar with questions. International Payees (aka Foreign Nationals / Nonresidents) should also update their personal information in [Harvard's Tax Determination System](#).

✕ Exit

Tax Withholding and Addresses

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2 Addresses
Visited

3 Work/Resident States
Not Started

Step 2 of 6: Addresses

Home Address

100 Brattle Street
Cambridge, MA 02138
Middlesex

Current

>

Cancel

Home Address

Save

Instructions

Note: A home address change may impact Payroll/Benefits information. A change of home address either into or out of Massachusetts may result in termination of health coverage and require you to elect new coverage within 30 days.

Change As Of04/30/2024

Address TypeHome

*CountryUnited States

*Address 111 West 53 Street

Address 2

Address 3

*Postal10019

*CityNew York

*StateNew York

CountyNew York

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2. Review work/resident state(s):

Step 3 of 6: Work/Resident States

To ensure correct tax withholdings, verify that your state of primary U.S. residence and any additional states where you perform work are listed below. States where an employee is working must be a Harvard registered state.

If the data is correct on this page, go to the next step *State Tax Distribution* to review or update.

To Update Your Data: (see below for definitions)

- One state must be designated as **resident**.
- Use the + button to add any additional Harvard registered states from where you perform work or for where you are a **resident**.
- If the state has **local** withholding taxes, additional fields will be displayed. Use the + button to add additional **localities** as needed (e.g. live in Yonkers but work in New York City).
- Save your changes and go to the next step *State Tax Distribution*.

Company Harvard University

Tax States

State	Locality	Work Locality	Resident
Massachusetts			<input type="checkbox"/> No
New York			<input checked="" type="checkbox"/> Yes

[Add](#)

3. Select “Yes” for the state that is your primary physical residence. Only one state may be selected as primary resident state.

Note: Some areas may have additional local or municipal tax withholding requirements. If applicable, an additional locality field will appear. In this case, select the appropriate locality (if listed in pick list) and indicate if this is a work locality (where you work) and whether this is your primary residence.

Tax States

State	Locality	Work Locality	Resident
Massachusetts			<input type="checkbox"/> No
New York	<div> NEW YORK OTHER YONKERS </div>	<div> No No Yes </div>	<input checked="" type="checkbox"/> Yes

4. If you are approved to be working in multiple Harvard registered states, add those states using the “+” button.

5. Add as many Harvard registered states as needed.

6. Select **Save** on the upper right-hand side of the screen.

State Tax Work Distribution

- The State Tax Distribution page will be populated based on the state(s) selected in the Work/Resident States screen. If a state is not showing, return to the Work/Resident States screen and add that Harvard registered payroll state.
- If you have multiple paid appointments, each job will be listed. **Each job must be updated with the percent of distribution equaling 100%.**

Steps

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3 Work/Resident States
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4 State Tax Distribution
Visited

5 Tax Withholding
Not Started

6 Attestation
Not Started

Step 4 of 6: State Tax Distribution Save

To ensure correct tax withholdings, verify that the percentage of time you are working from each Harvard registered state and work locality for each job is shown below.

If the data is correct on this page, go to the next step *Tax Withholding* to review or update.

To Update Your Data:

- For **exempt/salaried jobs**, be sure to enter percentages appropriately if working in multiple localities in one state. The percentage for each job must add up to 100%.
- For **hourly or overtime eligible jobs**, indicate 100% for the state that you **most typically work in**. This will become the default location when entering time. If you work from another registered state, you must select that state when entering time to have tax withholding adjusted.
- For all job types, to indicate a state that you are no longer working from or residing in, distribution must be set to 0% on all jobs listed.
- Save your changes and go to the next step *Tax Withholding*.

Company Harvard University

Job Information

Department F

Business Title A

Tax Distribution		
State	Massachusetts	Percent of Distribution <input style="width: 50px;" type="text" value="0.000"/>
State	New York	Percent of Distribution <input style="width: 50px;" type="text" value="100.000"/>
		Distribution Percent Total 100

Job Information

Department

Business Title A

Tax Distribution		
State	Massachusetts	Percent of Distribution <input style="width: 50px;" type="text" value="0.000"/>
State	New York	Percent of Distribution <input style="width: 50px;" type="text" value="100.000"/>
		Distribution Percent Total 100

For Exempt Employees

Exempt employees are considered salaried employees who are not required to report their hours on a weekly basis. This includes those on the monthly payrolls (Faculty [MFC], Internal Postdocs [MIP] and Teaching Fellow [MTF]) exempt biweekly employees [PFX]).

- Determine the percentage of time working in each Harvard registered state shown.
 - Enter the percent distribution into each state for each PeopleSoft job listed.
 - For example, if you work on campus 3 days a week and at home in NH 2 days a week, enter 60% time for time worked in Massachusetts and 40% time worked in New Hampshire.

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NOTE:

- The percent of distribution for each job must equal 100%.
- To determine percentage of distribution, divide hours working in a specific state by the total scheduled hours (generally 35 for full-time employees). For the example about $14/35 = .40$ or 40%.

- For the distribution percentage total to update, select "Save" or tab from one of the Percentage of Distribution fields to another. An error message will appear if the percentage of distribution does not add up to 100% for each job.

Distribution percent total must equal 100
For each job, state tax distribution must sum to 100%

OK

- Select **Save** on the upper right-hand side of the screen.
- This percentage of distribution will be used for the next payroll cycle and any future payroll cycles.
- Add or remove states as needed.
 - To inactivate a state that you are no longer residing in or working from, set the percentage of distribution to "0." Add or adjust other states as needed so the percentage of distribution equals 100% for each job. See [Update Work/Resident States](#) to add a state and adjust primary physical residence.

For Hourly / Overtime Eligible Employees (Time Reporters)

Hourly employees are employees who enter their hours on a weekly basis in PeopleSoft. This includes those on the biweekly payroll (POU, PON) and weekly payroll (WTM, SPC, WRT)
Hourly employees must select only one state and would enter 100% for that state.

- Select the state where you will be working the majority of time.
 - If you will be working in New Hampshire 3 days a week and Massachusetts 2 days a week, enter 100% in New Hampshire.
 - This percentage of distribution will be the default for state tax withholdings unless you specify hours and work location when entering time in PeopleSoft (**Navigation:** Home page > My Time and Absence > Enter Time).

Tax Distribution

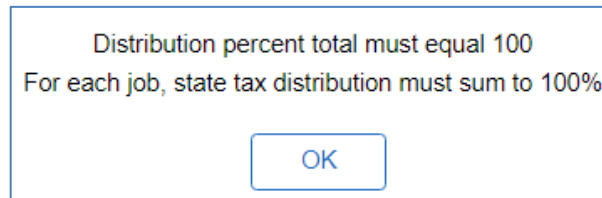
State	Massachusetts	Percent of Distribution	0.000
State	New Hampshire	Percent of Distribution	100.000
State	New York	Locality	NEW YORK
		Percent of Distribution	0.000

Distribution Percent Total 100

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- For the distribution percentage total to update, select "Save" or tab from one of the Percentage of Distribution fields to another to update the percentage calculation. An error message will appear if the percentage of distribution does not add up to 100% for each job.



- Select **Save** on the upper right-hand side of the screen.
- Add or remove states as needed.
 - To inactivate a state that you are no longer residing in or working from, set the percentage of distribution to "0." Add or adjust other states as needed so the percentage of distribution equals 100% for each job. See [Update Work/Resident States](#) to add a state and adjust primary physical residence.

Update Tax Withholding

Steps

Note: This page may only be completed by U.S. citizens / permanent residents. International Payees (aka Foreign Nationals / Nonresidents) will submit tax withholding information by completing and submitting information through [Harvard's Tax Determination System](#).

- Review or update federal and state(s) tax withholding.
 - The states listed in this section are based on the states you selected on the [Update State Tax Work Distribution](#) section. If a state is not listed, follow the steps in [Update Work/Resident States](#) and [Update State Tax Work Distribution](#) sections.
 - Tax forms that are not completed but have a tax distribution selected will be taxed at the state's default tax rate until a tax form is submitted.
 - Individuals working in states with no tax withholdings will not need to complete a state tax withholding form; however:
 - exempt employees must have entered a percentage of effort in the [Update State Tax Work Distribution](#) section.
 - hourly / overtime eligible employees may have entered 100% percentage of distribution in one of these states if working the majority of time in that state or will select the state when entering time in PeopleSoft.
- From the list, select the federal or state form to update.
- Select the state/federal allowance certificate and complete the tax form. Please note that the following is an example and each state's withholding form is unique and may have different fields and requirements.

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Step 5 of 6: Tax Withholding

To Update Your Data: (must be done on a laptop or desktop computer)

- For U.S. citizens and permanent residents, select the appropriate federal or state form requiring updates.
- Note: If you allocate time to multiple states, select the appropriate state form for each state.
- Make changes and save.

Company: Harvard University
Status: Active

Form Type	Jurisdiction
Federal	Federal
State	New York
Local	NEW YORK

State Tax Withholding Forms

Company: Harvard University

You may complete New York Form IT-2104 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. New York income tax is withheld from your wages based on what you claim on the Employee's Withholding Allowance Certificate (form IT-2104). You can file a new NY IT-2104 form anytime your tax situation changes.

Whether you are entitled to claim a certain number of allowances is subject to review by the State. Your employer may be required to send a copy of this form to the Agency.

You can make changes to your withholding allowances online using the updateable form below. Be sure to print or save a copy of the completed form for your records. These changes will not impact any payroll currently in progress.

Updateable Forms

Form Description
New York Withholding Allowance Certificate

← | ⌚ | ♥ | 🔍 Search in Menu | 🏠 | ⋮ | 🔄

State Tax Withholding

Save

New York Withholding Allowance

Complete New York Employee's Withholding Allowance so that your employer can withhold the correct New York income tax from your pay. Your withholding is subject to review by the State of New York. Please refer to the form for full details <https://www.tax.ny.gov/>. Instructions can be found here: [IT-2104-I](https://www.tax.ny.gov/it-2104/).

To file exemption from withholdings from New York, please contact [Central Payroll | Office of the Controller \(harvard.edu\)](mailto:Central Payroll | Office of the Controller (harvard.edu)).

For further questions, please refer to our website at <https://oc.finance.harvard.edu/>

Name

██████████

Address

100 Brattle Street
Cambridge, MA 02138

Withholding Allowance

Tax Filing Status:

Resident of New York City: ☐ No

Resident of Yonkers: ☐ No

Before making any entries, see the Note on Form IT-2104, and if applicable, complete the worksheet on Form IT-2104-I.

1. Total number of allowances you are claiming for New York State and Yonkers, if applicable:

2. Total number of allowances for New York City:

Use lines 3, 4, and 5 below to have additional withholding per pay period under special agreement with your employer.

3. New York State amount:

4. New York City amount:

5. Yonkers amount:

Acknowledgement

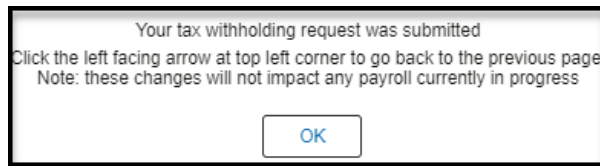
I certify that I am entitled to the number of withholding allowances claimed on this certificate.
Penalty - A penalty of \$500 may be imposed for any false statement you make that decreases the amount of money you have withheld from your wages. You may also be subject to criminal penalties.

- Update the Federal or state tax forms as appropriate. A link to the Federal form or state's specific tax form instructions can be found at the top of the document. Some states may require local or municipal tax also be withheld (sometimes called locality taxes). These tax withholdings may be based on city, county, or school district boundaries.

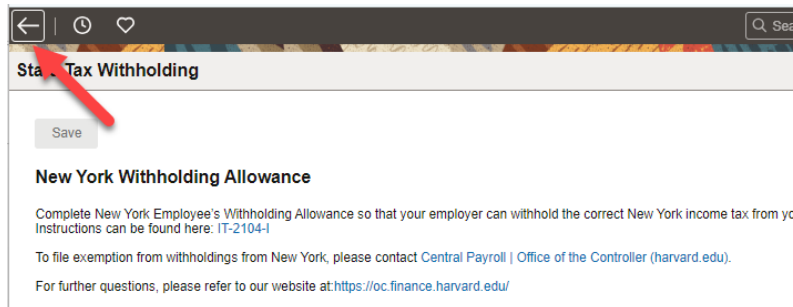
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6. Review your changes and the acknowledgement language and click save on the upper left-hand side of the screen
7. Upon saving, you will receive the following message:



8. Click OK
9. You may print this page or click on the left facing arrow at the top left corner of the screen to go back to the Tax Withholding page, which will display your new withholding information. Verify that the changes are correct. Please note that, due to timing, your change may not be reflected on the next paycheck.



For help or more detailed information see the [Office of the Controller Central Payroll website](#).