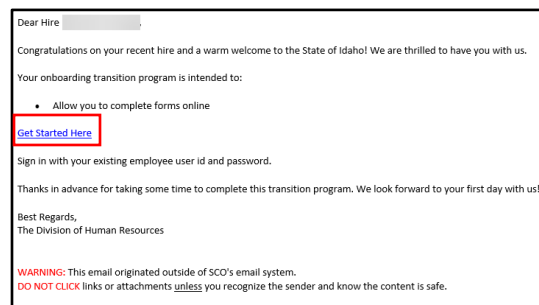## Complete Onboarding & W-4 Tasks (Employee)

Luma Role: Employee

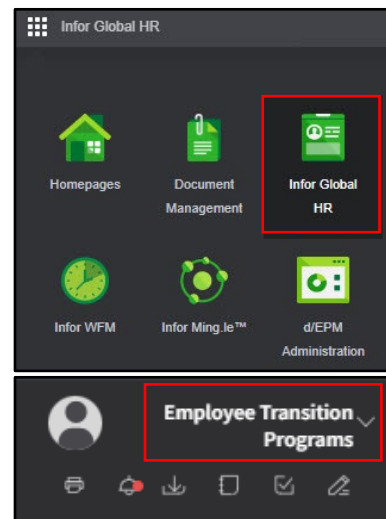**Reason:** An employee needs to complete onboarding and W-4 tasks.

1. In your **Onboarding Email**, click the **Get Started Here** link. This link opens into Luma.

   Note: If already logged into *Luma*, proceed to step 2.

Dear Hire ⬛⬛⬛⬛,

Congratulations on your recent hire and a warm welcome to the State of Idaho! We are thrilled to have you with us.

Your onboarding transition program is intended to:

- Allow you to complete forms online

Get Started Here

Sign in with your existing employee user id and password.

Thanks in advance for taking some time to complete this transition program. We look forward to your first day with us!

Best Regards,
The Division of Human Resources

WARNING: This email originated outside of SCO's email system.
DO NOT CLICK links or attachments unless you recognize the sender and know the content is safe.
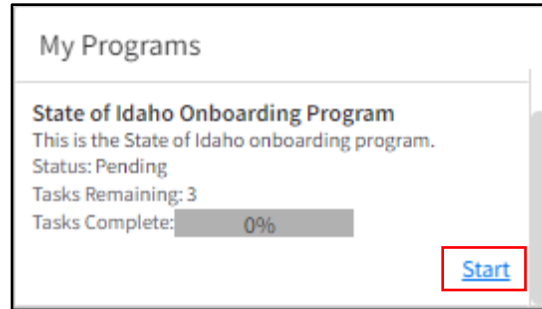
2. From the available application menu, select the **Infor Global HR** application.

   Ensure **Employee Transition Programs** is selected in the role switcher.

3. On the **Employee Transition Programs** page, in the **My Programs** tile, click the **Start** hyperlink next to the **State of Idaho Onboarding Program**.

4. On the **Personal Information** form, verify and update, if applicable, the information and check the **I Agree** box.

5. Click the **Next** button.

6. On the **Form W-4**, complete the fields listed below. Reference DHR policy regarding required* and optional fields.
- With Holding Category*
- Multiple Jobs
- Dependents Amount
- Other Income Amount
- Deductions Amount
- Extra Withholding
- Exemption Status - Select if conditions are met
- Nonresident Alien
- Your Name*

State of Idaho Onboarding Program
Form W-4

Print

View Form W-4 Instructions

Employee Withholding Information Section
With Holding Category

Multiple Jobs Or Spouse Works
☐ Multiple Jobs

Claim Dependents
Depenedents Amount

Other Adjustments (optional)
Other Income Amount

Deductions Amount

Extra Withholding

Exemption Status
I claim exemption from withholding for this year, and I certify that I meet both of the following conditions for exemption:
1. Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and
2. This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.
If you meet both conditions, select 'Exempt' here

Nonresident Alien
☐ If you are a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens and check here.

Signature
Your Name   Signed

7. Click the **Next** button.

Previous   Next

8. On the **Idaho State W4 Form**, complete the fields listed below. Reference DHR policy regarding required* and optional fields.
   - State*- ID
   - View ID Form W-4 Instructions
   - With Holding Category*
   - Allowances
   - Extra Withholding
   - Exemption Status
   - Your Name*

   Note: If the employee is living or working in Oregon, they will also receive an *Oregon W-4.* If the employee only has an *Idaho State W-4*, proceed to step 12.

   State of Idaho Onboarding Program
   Idaho State W4 Form

   Print

   State *

   View ID Form W-4 Instructions

   Employee Withholding Information Section
   With Holding Category *

   Allowances

   Other Adjustments (optional)
   Extra Withholding

   Exemption Status
   Select Exempt from dropdown if you meet both of the following conditions:
   1. Last year I had No Idaho income tax liability, and
   2. This year I expect to have no Idaho income tax liability.
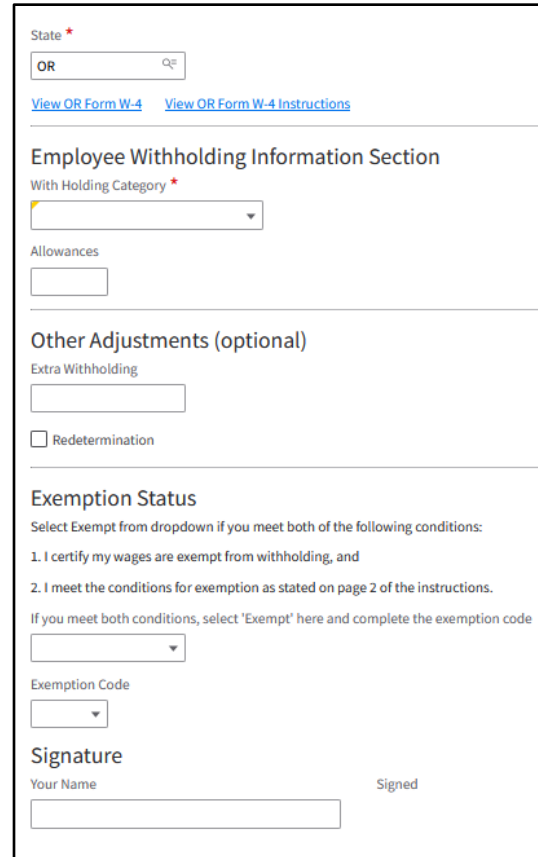   If you meet both conditions, select 'Exempt' here

   Signature
   Your Name   Signed

9. Click the **Next** button.

   Previous   Next

10. On the **Oregon State W4 Form**, complete the fields listed below. Reference DHR policy regarding required* and optional fields.
    - State* - OR
    - View OR Form W-4
    - View OR Form W-4 Instructions
    - With Holding Category*
    - Allowances
    - Extra Withholding
    - Redetermination
    - Exemption Status
    - Exempt Code
    - Your Name*

State *

OR

View OR Form W-4   View OR Form W-4 Instructions

Employee Withholding Information Section
With Holding Category *

Allowances

Other Adjustments (optional)
Extra Withholding

☐ Redetermination

Exemption Status
Select Exempt from dropdown if you meet both of the following conditions:
1. I certify my wages are exempt from withholding, and
2. I meet the conditions for exemption as stated on page 2 of the instructions.
If you meet both conditions, select 'Exempt' here and complete the exemption code

Exemption Code

Signature
Your Name   Signed

11. Click the **Next** button.

Previous   Next

12. The **Completion** form will populate.

Completion

Thank you for completing your program.
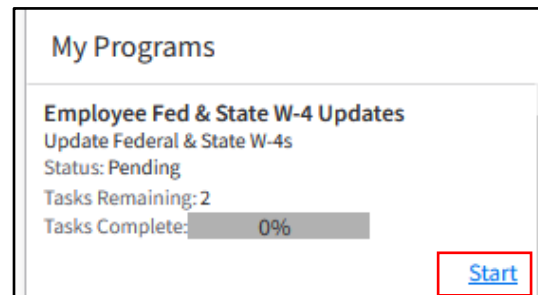
To Complete the Employee Fed & State W-4 Updates Program

1. From the available application menu, select the **Infor Global HR** application.
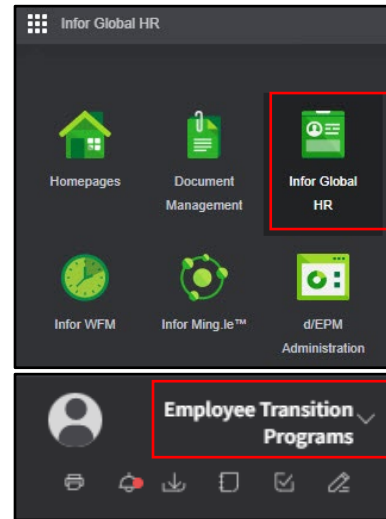
Ensure **Employee Transition Programs** is selected in the role switcher.

2. On the **Employee Transition Programs** page, in the **My Programs** section, click the **Start** hyperlink next to the **Employee Fed & State W-4 Updates**.

3.	On the **Form W-4**, complete the fields listed below. Reference DHR policy regarding required* and optional fields.
- With Holding Category*
- Multiple Jobs
- Dependents Amount
- Other Income Amount
- Deductions Amount
- Extra Withholding
- Exemption Status - Select if conditions are met
- Nonresident Alien
- Your Name*

State of Idaho Onboarding Program
Form W-4

Print

View Form W-4 Instructions

Employee Withholding Information Section
With Holding Category

Multiple Jobs Or Spouse Works
☐ Multiple Jobs

Claim Dependents
Depenedents Amount

Other Adjustments (optional)
Other Income Amount

Deductions Amount

Extra Withholding

Exemption Status
I claim exemption from withholding for this year, and I certify that I meet both of the following conditions for exemption:
1. Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and
2. This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.
If you meet both conditions, select 'Exempt' here

Nonresident Alien
☐ If you are a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens and check here.

Signature
Your Name   Signed

4.	Click the **Next** button.

Previous   Next

5. On the **Idaho State W4 Form**, complete the fields listed below. Reference DHR policy regarding required* and optional fields.

- State*
- View ID Form W-4 Instructions
- With Holding Category*
- Allowances
- Extra Withholding
- Exemption Status
- Your Name*

Note: If the employee is living or working in Oregon, they will also receive an *Oregon W-4*. If the employee only has an *Idaho State W-4*, skip to step 9.

State of Idaho Onboarding Program
Idaho State W4 Form

Print

State *

View ID Form W-4 Instructions

Employee Withholding Information Section
With Holding Category *

Allowances

Other Adjustments (optional)
Extra Withholding

Exemption Status
Select Exempt from dropdown if you meet both of the following conditions:
1. Last year I had No Idaho income tax liability, and
2. This year I expect to have no Idaho income tax liability.
If you meet both conditions, select 'Exempt' here

Signature
Your Name   Signed

6. Click the **Next** button.

Previous   Next

7. On the **Oregon State W4 Form**, complete the fields listed below. Reference DHR policy regarding required* and optional fields.

- State* - OR
- View OR Form W-4
- View OR Form W-4 Instructions
- With Holding Category*
- Allowances
- Extra Withholding
- Redetermination
- Exemption Status
- Exempt Code
- Your Name*

8. Click the **Next** button.

9. The **Completion** form will populate.

Result

You have successfully completed onboarding and W-4 tasks in Luma.

Date (05/05/2023)

Version 1