How do I change the allowances on my Form W-4 and NC-4?

Tell Me

The IRS is releasing a new Form W-4, Employee’s Withholding Certificate, for 2020. The new form is vastly different from the current Form W-4 and will be available in Banner Self Service after January 1, 2020. While you are not required to complete this form it should be more accurate for individual withholdings. Please note: if you do not submit a new form, withholding will continue based on your previously submitted form. For more information visit the Financial Services website.

Change the allowances on your Form W-4 and NC-4 when your personal or financial situation changes to update the amounts of federal and state income tax withheld from your pay. Employees are encouraged to use the IRS Withholding Calculator as a review to ensure their withholding is correct.

**Instructions**

**Federal:** Refer to complete Form W-4 instructions and allowance worksheets, as applicable before completing the online W-4 withholding form.

**North Carolina:** Refer to Form NC-4 instructions before completing the online NC-4 withholding form.

Unless you update your W-4 and NC-4 withholding information, both your federal and state income tax withholding allowances will default to single with zero allowances.

Employees can complete their Form W-4 and NC-4 (Employee’s Withholding Allowance Certificate) to update their withholding allowances anytime through My UNC Charlotte as follows:

1. Log into My UNC Charlotte
   a. Click the purple Banner Self Service icon from the quick links menu (same if in Student, Employee, or Faculty area of My UNC Charlotte)

2. Click Employee Information

Employees may complete their Form W-4 and NC-4 (Employee’s Withholding Allowance Certificate) to update their withholding allowances anytime through My UNC Charlotte as follows:

1. Log into My UNC Charlotte
   a. Click the purple Banner Self Service icon from the quick links menu (same if in Student, Employee, or Faculty area of My UNC Charlotte)

2. Click Employee Information
3. Click Tax Information

4. Select the withholding tax form you would like to set up or update from the Tax Information list (either the Federal Form W-4 or the NC State Form NC-4)

5. Your current withholding selection will be displayed
a. Federal Form W-4 screen

Federal Tax
As of Date: Oct 18, 2017
Name: [Redacted]
Address: [Redacted]

Last Name differs from SSN card: No
Deduction Status: Active
Start Date: Jan 01, 2015
End Date: [Redacted]
Filing Status: Married, but use Single rate
Number of Allowances: 0
Additional Withholdings: $0.00

Note: Additional amount, if any, you want withheld from each paycheck.

Click Update at the bottom of the screen to edit the form selected
Follow the screen instructions to add your withholding information (or edit the existing withholding information)
Click the Certify Changes button at the bottom of the screen to complete your withholding update
Read the attestation statement that pops-up and click OK if you have complied with aspects of this attestation.

b. North Carolina NC-4 screen

NC State Tax
As of Date: Oct 18, 2017
Status: Active
Start Date: Jan 01, 2015
End Date: [Redacted]
Filing Status: Married
# Exempt: 0
Additional Withholding: $0.00

Click Update at the bottom of the screen to edit the form selected
Follow the screen instructions to add your withholding information (or edit the existing withholding information)
Click the Certify Changes button at the bottom of the screen to complete your withholding update

Make sure your personal (non-uncc) mailing address and phone number are current in Banner by following these FAQ instructions.

9. Read the attestation statement that pops-up and click OK if you have complied with aspects of this attestation.
If you do not have access to the online tax information at my.uncc.edu, you may complete a paper Employee's Withholding Allowance Certificate (Form W-4 or NC-4) and securely deliver the form(s) to the Payroll Department using one of the following delivery methods:

<table>
<thead>
<tr>
<th>Hand Deliver</th>
<th>Mail</th>
<th>Fax</th>
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<tbody>
<tr>
<td>Hand deliver the form(s) to the Payroll Department on the 3rd floor of the Reese building.</td>
<td>Mail the form(s) via campus or regular mail to UNC Charlotte Attn: Payroll Department, Reese 3rd Floor, 9201 University City Blvd., Charlotte, NC 28223</td>
<td>Fax the form(s) to our secure fax 704-687-1416.</td>
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</tbody>
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**Security Note**

- For security purposes, **do not** email forms.

**Contact Information**

- Email PayrollDept@uncc.edu with questions (for security purposes, **DO NOT** include your social security number).

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Related Articles
• How do I change the allowances on my Form W-4 and NC-4?
• How do I view or edit my personal (non-uncc) address or phone number in Banner?
• Why are vacation balances no longer shown on my pay stub earnings summary?
• Why are there four wage amounts listed on my Form W-2?
• Who is exempt from FICA tax withholding?