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

Tell Me

The IRS released a new Form W-4, Employee’s Withholding Certificate, for 2020. The new form is vastly different from the old Form W-4 (there are no longer allowances, but rather five sections to review) and is now available in Banner Self Service. 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.

Update 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 Tax Withholding Estimator as a review to ensure their withholding is correct.

Instructions

Federal: Refer to complete Form W-4 instructions before completing the online W-4 withholding form.

North Carolina: Refer to Form NC-4 instructions before completing the online NC-4 withholding form. If you are performing services for the University from a state other than NC, you will need to complete that state’s withholding certificate and mail or fax it to the Payroll Department. Reference the delivery methods toward the bottom of this FAQ. For security purposes, do not email a form that contains your social security number.

Unless you update your W-4 and NC-4 withholding information, both your federal and state income tax withholding will default to single when you are originally hired and will continue to reflect those elections unless you opt to update using the current version of the form.

Employees can complete their Form W-4 (Employee’s Withholding Certificate) and NC-4 (Employee’s Withholding Allowance Certificate) to update their withholding 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.
Federal Form W-4 screen

- Your W-4 information determines the amount of Federal tax that is withheld from your pay.

**Federal Tax**
- As of Date: Jan 06, 2020
- Name: [Name]
- Address: [Address]
- Last Name differs from SSN card: No
- Deduction Status: Active
- Start Date: Jan 01, 2015
- End Date: 
- Filing Status: Married, but use Single rate
- Number of Allowances: 0
- Additional Withholdings: .00
- Note: Additional amount, if any, you want withheld from each paycheck.

Click **Update** and **Contributions or Deductions** to edit the form selected.

North Carolina NC-4 screen

**NC State Tax**
- As of Date: Jan 06, 2020
- Status: Active
- Start Date: Jan 01, 2015
- End Date: 
- Filing Status: Married
- # Exempt: 0
- Additional Withholding: .50

Click **Certify Changes** to complete your withholding update.

6. Click **Update** at the bottom of the screen to edit the form selected
7. Follow the screen instructions to add your withholding information (or edit the existing withholding information)

8. 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.
A confirmation screen will appear letting you know that your requested updates were successfully processed.

If you do not have access to the online tax information at my.uncc.edu, you may complete a paper Employee's Withholding 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>
</tr>
</tbody>
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Note

We cannot guarantee the clarity of faxed copies received in the Payroll Department.

Security Note

- For security purposes, do not email forms that include your social security number.

Contact Information

- Email PayrollDept@uncc.edu with questions (for security purposes, DO NOT include your social security number).
• How do I change the withholding 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?