

MY TAX WITHHOLDING FIO-22 | BUSINESS PROCESS PROCEDURE



The purpose of this Business Process Procedure is to explain how to access and modify Federal (W-4) and NCDOR (NC-4) Employee's Withholding Certificates within the Fiori **My Tax Withholding** application. Fiori applications are accessible via desktop, laptop, and mobile devices.

The following information can be used to manage the information on your Federal (W-4) or NC (NC-4), or other state withholding forms. Ensure the address information is accurate and up to date if you are making an in/out of state change. It is also important to notify your HR Representative of any in/out of state changes.

W-4 Federal

Employees should read the instructions within the Federal W-4 form. The Federal W-4 Employees Withholding Certificate form is available on the IRS website. If an employee has additional questions about the W4 form, please refer to the IRS Frequently Asked Questions. The Federal W-4 Employees Withholding Certificate form & the Federal Form W-4 FAQ's can also be accessed within the Fiori **My Reports & Resources** application on the *Personal Data* card.

1. Navigate to the Employee tab within the Fiori Application.

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Self-Identification of Disability Create/Maintain Disa	My Addresses Manage my addresses	eBenefits Enroll Benefit plans	My Communication Data Manage My Commu	My Bank Details Manage my Bank De	My Online Selections Manage My Online S	My W-2/W-2C View & Print	
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Ny Tax Withholding Nanage my W4/NC4	My Reports & Resources View Reports and Re						
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2. Click to open the **My Tax Withholding** application.

3. The application defaults to display the employees current W-4 Federal Tax Withholding selections for filing status, dependents, other income, deductions, and extra withholdings information.

My Withholding Certificates 🔻		
Jimmy M Moyette III (00000055) Facilities Maintenance Coordinator II		
 Image: Hard State of the state	2	
Federal North Carolina		
Valid from 07/23/2018		Edit
·	iling Status:	Married
Claim D	ependents:	0.00
Other Income (not	from jobs):	0.00

Completing the Form

The following steps explain how to maintain the information on the Federal (W-4) form.

NOTE: The following process can also be used for the NC (NC-4) or other state withholding forms.

1. Click Edit to make changes.

My Withholding Certificates 🔻			
Jimmy M Moyette III (00000055) Facilities Maintenance Coordinator II Organizational Unit: CCPS SHP FMG Analysis Landscape Grp 2 Organizational Unit: CCPS SHP FMG Analysis Landscape Grp 2			
Valid from 07/23/2018		Edit	
	Filing Status:	Married	
	Claim Dependents:	0.00	
	Other Income (not from jobs):	0.00	
	Deductions:	0.00	
	Extra Withholding:	0.00	

NOTE: Address information should be updated if making an in/out of state change. Notify your HR Representative if you are making an in/out of state change.

2. There are four areas within the Federal W-4: Tax Exemption Indicator, Certificate Information, Declaration, Validity Period.

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My Withho	Iding Certificates /		
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Edit Fe	deral		
i Main Is al	ntain the information on your Federal (W-4), NC (NC-4 so updated.), or other state withholding forms. NO	TE: If you are making an in/out state change, please ensure your address information
a Tax Exer	nption Indicator		
то	change between Exempt and Not Exempt, exit this sc	reen and contact your HR office.	
b .			
Certifica	te Information		
	Filing Status - Step 1(c):	Single or Married Filing Separately	\checkmark
	Claim Dependents - Step 3:	0.00	USD
	Other Income (not from jobs) - Step 4(a):	0.00	USD
	Deductions - Step 4(b):	0.00	USD
	Extra Withholding - Step 4(c):	0.00	USD
		Check here if your last name diffe	ers from that shown on your Social Security card.
		Check this box if there are only to	wo jobs total Step 2(c)
Declarat	ion		
*_ u	nder penalties of perjury, I declare that I have examine	ed this certificate and to the best of my	knowledge and belief, it is true, correct, and complete on Tuesday, September 27,
d	022.		
Validity	Period		

- a. Tax Exemption Indicator
 - i. This area is grayed out and cannot be modified by the employee.
 - ii. The grayed-out information states "To change between Exempt and Not Exempt, exit this screen and contact your HR office."



NOTE: Employees must contact their HR office to change between Exempt and Non-Exempt.

- b. Certificate Information
 - i. Certificate Information area can be edited by the employee. Employees can use the Federal W-4 form and additional IRS worksheets to calculate the information for each field.

NOTE: These forms can be found/accessed on the *Personal Data* card within the **My Reports & Resources** application/title.

Certificate Information		
Filing Status - Step 1(c):	Single or Married Filing Separately	~
Claim Dependents - Step 3:	0.00	USD
Other Income (not from jobs) - Step 4(a):	0.00	USD
Deductions - Step 4(b):	0.00	USD
Extra Withholding - Step 4(c):	0.00	USD
	Check here if your last name diffe	ers from that shown on your Social Security card.
	Check this box if there are only to	wo jobs total Step 2(c)

ii. Select the dropdown box for **Filing Status -Step 1(c)** to select the appropriate filing status from the available options: Single or Married Filing Separately; Married Filing Jointly/ Qualifying Widow; Head of Household.

Certificate Information		
Filing Status - Step 1(c):	Single or Married Filing Separately	~
Claim Dependents - Step 3:	0.00	USD
Other Income (not from jobs) - Step 4(a):	0.00	USD

iii. Click the field **Claim Dependents – Step 3** and enter the credits for dependents. The amount entered must be \$500 or more.

Certificate Information					
Filing Status - Step 1(c):	Single or Married Filing Separately	\sim			
Claim Dependents - Step 3:	0.00	USD			
Other Income (not from jobs) - Step 4(a):	0.00	USD			
Deductions - Step 4(b):	0.00	USD			
Extra Withholding - Step 4(c):	0.00	USD			

iv. Click the field **Other Income (not from jobs) - Step 4(a)** to enter the amount of other income not from jobs.

Certificate Information		
Filing Status - Step 1(c): Claim Dependents - Step 3:	Single or Married Filing Separately 0.00	↓ USD
Other Income (not from jobs) - Step 4(a):	0.00	USD
Deductions - Step 4(b):	0.00	USD
Extra Withholding - Step 4(c):	0.00	USD
	 Check here if your last name diffe Check this box if there are only to 	ers from that shown on your Social Security card. wo jobs total Step 2(c)

v. Click the field **Deductions -Step 4(b)** to enter deductions, other than the standard deduction, calculated from the Federal W-4 form.

Certificate Information			
Filing Status - Step 1(c):	Single or Married Filing Separately	\sim	
Claim Dependents - Step 3:	0.00	USD	
Other Income (not from jobs) - Step 4(a):	0.00	USD	-
Deductions - Step 4(b):	0.00	USD	
Extra Withholding - Step 4(c):	0.00	USD	1
	 Check here if your last name diffe Check this box if there are only to 	ers from th wo jobs to	aat shown on your Social Security card. tal Step 2(c)

vi. Click the field **Extra Withholding – Step 4(c)** to enter any additional tax you want withheld each pay period.

Certificate Information			
Filing Status - Step 1(c):	Single or Married Filing Separately	~	
Claim Dependents - Step 3:	0.00	USD	
Other Income (not from jobs) - Step 4(a):	0.00	USD	
Deductions - Step 4(b):	0.00	USD	
Extra Withholding - Step 4(c):	0.00	USD	
	Check here if your last name diffe	ers from th	at shown on your Social Security card.
	Check this box if there are only to	wo jobs to	tal Step 2(c)

vii. If your last name appears differently on your security card than the name displayed in the top header of the Tax Withholding, click the check box below the Extra Withholding selection.

Certificate Information		
Filing Status - Step 1(c):	Single or Married Filing Separately	\sim
Claim Dependents - Step 3:	0.00	USD
Other Income (not from jobs) - Step 4(a):	0.00	USD
Deductions - Step 4(b):	0.00	USD
Extra Withholding - Step 4(c):	0.00	USD
	Check here if your last name diffe	ers from that shown on your Social Security card.
	Check this box if there are only to	wo jobs total Step 2(c)

viii. The last checkbox (Check this box if there are only two jobs total – Step 2(c)) can be checked if there are only a total of two jobs.

Certificate Information		
Filing Status - Step 1(c):	Single or Married Filing Separately	~
Claim Dependents - Step 3:	0.00	USD
Other Income (not from jobs) - Step 4(a):	0.00	USD
Deductions - Step 4(b):	0.00	USD
Extra Withholding - Step 4(c):	0.00	USD
	Check here if your last name difference Check this box if there are only to	ers from that shown on your Social Security card. vo jobs total Step 2(c)

NOTE: All Certificate Information fields are referenced with the same field titles and reference numbers to the Federal W-4 Employees Withholding Certificate.

- c. Declaration
 - i. The employee must check the checkbox to declare the information placed in the Certificate information is true and correct.

Decla	ration	
*X	Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete on Tuesday, September 27, 2022.	

NOTE: The Declaration field is required when there has been a change in the Certificate Information. The checkbox must be checked for the changes to be saved.

- d. Validity Period
 - i. The default date displayed is future dated by a standard defined date from today's date.
 - ii. Select any future date after the defaulted displayed date for the changes to take effect. The future date must be at least seven days from today's date.

Validity Period		
	*From: 10/04/2022	
	1	

NOTE: Do not enter a date that occurs before the default date. If a date is selected that occurs before the default date, an error message will generate.

3. Click **Save**, once all modifications have been entered, the declaration checked, and the validity period selected.

	,,) E: If you are making an in/out state change, please ensure your address information
x Exemption Indicator		
To change between Exempt and Not Exempt, exit this	screen and contact your HR office.	
rtificate Information		
Filing Status - Step 1(c)	: Single or Married Filing Separately	~
Claim Dependents - Step 3	0.00	USD
Other Income (not from jobs) - Step 4(a)	0.00	USD
Deductions - Step 4(b)	0.00	USD
Extra Withholding - Step 4(c)	. 0.00	USD
	Check here if your last name diff	ers from that shown on your Social Security card.
	Check this box if there are only t	wo jobs total Step 2(c)
claration		
Under penalties of perjury, I declare that I have exam 2022.	ined this certificate and to the best of my	y knowledge and belief, it is true, evect, and complete on Tuesday, September 27,
lidity Period		
*From: 10/04/202	2	
		×.

NC-4 North Carolina

The North Carolina tab delivers Tax Withholding information for the current NCDOR Employees Withholding selections for Filing Status, Total Number of Allowance, and Additional Withholdings.

- 1. Navigate to the Employee tab on the Fiori Application.
- 2. Click to open the My Tax Withholding application.

News HR-Payroll News	Need Help? How-To Videos and	My Paystubs View my paystubs	My Timesheet Manage working time	My Leave Request Manage my leave re	My Time Statements View my Time State	My Benefits Display Benefit plans	
L) Updates and Messages	?	Sonfidential	-	بخ	6	益	
Self-Identification of Disability Create/Maintain Disa	My Addresses Manage my addresses	eBenefits Enroll Benefit plans	My Communication Data Manage My Commu	My Bank Details Manage my Bank De	My Online Selections Manage My Online S	My W-2/W-2C View & Print	
∠ Voluntary	<u>ââ</u>	Enrollment Platform	2 _e	≙\$	-	=	
My Tax Withholding Manage my W4/NC4	My Reports & Resources View Reports and Re						

3. Click the North Carolina tab.

2	My Withholding Certificates 🔻		
	Jimmy M Moyette III (00000055) Facilities Maintenance Coordinator II III +1 (919) 707-0707 IIII JIMMY.MOYETTE@NCSHP.ORG Federal North Carolina	onal Unit: CCPS SHP FMG Analysis Landscape Grp 2	
	Valid from 07/23/2018	Ed	it
		Filing Status: Married	
		Claim Dependents: 0.00	
		Other Income (not from jobs): 0.00	

Completing the Form

The following steps explain how to maintain the information on the North Carolina Employee's Withholding Allowance Certificate (NC-4) form. NOTE: If you are making an in/out state change, please ensure your address information is also updated.

NOTE: The following process can also be used for the Federal (W-4) or other state withholding forms.

- 1. Click **Edit** to make changes.
- 2. There are four areas within the North Carolina (NC-4): Tax Exemption Indicator, Certificate Information, Declaration, Validity Period.

K My Withholding Certificates •	Q	?	8
My Withholding Certificates / Edit North Carolina			I
 Maintain the information on your Federal (W-4), NC (NC-4 is also updated. 	, or other state withholding forms. NOTE: If you are making an in/out state change, please ensure your address information]	L
a Tax Exemption Indicator			L
To change between Exempt and Not Exempt, exit this scr	een and contact your HR office.		
Certificate Information			
Filing Status:	Married Filing Jointly/ Surviving Sp V		L
Additional Withhholding:	0.00 USD		
	Check here if your last name differs from that shown on your Social Security card.		
Declaration			L
Under penalties of perjury, I declare that I have examine 2022.	d this certificate and to the best of my knowledge and belief, it is true, correct, and complete on Wednesday, September 28,		
d Validity Period			
*From: 10/05/2022			L
	Save	ancel	

NOTE: Address information should be updated if making an in/out of state change. Notify your HR Representative if you are making an in/out of state change.

- a. Tax Exemption Indicator
 - i. This area is grayed out and cannot be modified by the employee.
 - ii. The grayed-out information states "To change between Exempt and Not Exempt, exit this screen, and contact your HR office. "

< <	My Withholding Certificates 🔻		Q	?	8
	My Withholding Certificates /				
	Edit North Carolina				
	Maintain the information on your Federal (W-4), NC (NC is also updated.	4), or other state withholding forms. NOTE: If you are making an in/out state change, please ensure your address inforr	nation		L
	Tax Exemption Indicator			٦	
	To change between Exempt and Not Exempt, exit this s	reen and contact your HR office.			
Ľ	Certificate Information				1
	Filing Status:	Married Filing Jointly/ Surviving Sp 🗸			
	Total number of allowances you are claiming:	00			
	Additional Withhholding:	0.00 USD			
		Check here if your last name differs from that shown on your Social Security card.			

NOTE: Employees must contact their HR office to change between Exempt and Non-Exempt.

b. Certificate Information

i. Certificate Information area can be edited by the employee. Employees can use the NCDOR forms as all fields are mapped with the same field titles.

i Maintain the inform			
is also updated.	ation on your Federal (W-4), NC (NC-	4), or other state withholding forms. NOTE: If you are making an in/out state change, please ensure your address information.	tion
Tax Exemption Indic	ator		
To change betwee	n Exempt and Not Exempt, exit this s	creen and contact your HR office.	
Certificate Informatio	on		
Total pur	Filing Status:	Married Filing Jointly/ Surviving Sp	
TOTAL HER	Additional Withhholding:	0.00 USD	
		Check here if your last name differs from that chewn on your Social Socurity card	
		Creck here it your tast hame unlets norm that anown on your Social Security card.	
Declaration			
	f perjury, I declare that I have examin	ned this certificate and to the best of my knowledge and belief, it is true, correct, and complete on Wednesday, Septembe	r 28,
Under penalties of 2022.			
Under penalties of 2022.			

NOTE: These forms can be accessed on the *Personal Data* card within the **My Reports & Resources** application. ii. Select the dropdown box for **Filing Status** to select the appropriate filing status from the available options: Single or Married Filing Separately; Married Filing Jointly/ Qualifying Widow; Head of Household.

Ty Withholding Certificates /				
Edit North Carolina				
(i) Maintain the information on y is also updated.	our Federal (W-4), NC (NC-4), or other state withholding forms. NOTE: If you are ma	king an in/out state change, please ensu	ure your address information
Tax Exemption Indicator				
Tax Exemption Indicator	and Not Exempt, exit this scr	een and contact your HR office.		
Tax Exemption Indicator	and Not Exempt, exit this scr	een and contact your HR office.		
Tax Exemption Indicator	and Not Example, and this scr Filing Status:	wen and contact your HR office. Married Filing Jointly' Surviving Sp		

iii. In the **Total number of allowances, you are claiming** field, enter the number of allowances.

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(II) Majataja the j	fermilie as an Esten ALA, MAAN, A. es aber data vibbalding form NATE. If we are maling as into distance and an address information	_
is also update	normation on your recent (w-+), no (w-+), or other state withholding forms. No.1.2: If you are making an involt state change, please ensure your address information d.	"
Tax Exemption I	ndicator	
Tax Exemption I	ndicator	
Tax Exemption In	ndicator tween Exempt and Not Exempt, exit this screen and contact your HR office.	
Tax Exemption In	ndicator itween Exempt and Not Exempt, exit this screen and contact your HR office.	
Tax Exemption In	ndicator Itween Exempt and Not Exempt, exit this screen and contact your HR office. nation	
Tax Exemption In	ndicator tween Exempt and Not Exempt, exit this screen and contact your HR office. nation	
Tax Exemption II	Indicator Interest and Not Exempt, exit this screen and contact your HR office. Ination Interest of ellevances way an elaborate	

iv. Click the field **Additional Withholding** to enter any additional tax you want withheld each pay period.

My Withholding Certificates /			
Edit North Carolina			
Maintain the information on your F is also updated.	ederal (W-4), NC (NC-4), or other state withholding forms. NOTE: If you are making an in/out state change, please ensure your address information]
Tax Exemption Indicator			
To change between Exempt and	Not Exempt, exit this sci	een and contact your HR office.	
Certificate Information			
	Filing Status:	Married Filing Jointly' Surviving Sp	
Total number of allowar Ad	nces you are claiming: Iditional Withhholding:	0.00 USD	
		nown on your Social Security card.	
Declaration			
Under penalties of perjury, I dec 2022.	lare that I have examine	d this certificate and to the best of my knowledge and belief, it is true, correct, and complete on Wednesday, September 28,	
Validity Period			
	From: 10/05/2022		

v. If your last name appears differently on your security card than the name displayed in the top header of the Tax Withholding, click the check box below the Extra Withholdings selection.

My Withholding Certificates 🔻	٩	?	2
My Withholding Certificates /			
Edit North Carolina			
(1) Maintain the information on your Federal (W-4), NC (NC-4) is also updated.), or other state withholding forms. NOTE: If you are making an in/out state change, please ensure your address information		
Tax Exemption Indicator			
To change between Exempt and Not Exempt, exit this so	een and contact your HR office.		
Certificate Information			
Filing Status:	Married Filing Jointly/ Surviving Sp 🗸		
Total number of allowances you are claiming:	00		
Additional Withhholding:	0.00 USD		
	Check here if your last name differs from that shown on your Social Security card.		
Declaration			

c. Declaration

i. The employee must check the checkbox to declare the information placed in the Certificate information is true and correct.

wy withfolding certificates /			
Edit North Carolina			
 Maintain the information on your Federal is also updated. 	(W-4), NC (NC-4), or other state withholding forms. NOTE: If you are making an in/out state change, please ensure your address information	
Tax Exemption Indicator			
To change between Exempt and Not Ex	empt, exit this sc	een and contact your HR office.	
Certificate Information			
	Filing Status:	Married Filing Jointly/ Surviving Sp 🗸	
Total number of allowances ye	ou are claiming:	00	
Additiona	I Withhholding:	0.00 USD	
		Check here if your last name differs from that shown on your Social Security card.	
Declaration			ה
Dootalaan			
* Under penalties of perjury, I declare th	at I have examine	d this certificate and to the best of my knowledge and belief, it is true, correct, and complete on Wednesday, September 26	i,
2022.			┛
Validity Period			
*From:	10/05/2022		

NOTE: The Declaration field is required when there has been a change in the Certificate information. The checkbox must be checked for the changes to be saved.

- d. Validity Period
 - i. The default date displayed is future dated by a standard defined date from today's date.
 - ii. Select any future date after the defaulted displayed date for the changes to take effect. The future date must be at least seven days from today's date.

i Maintain the is also upda	Carolina e Information on your Federal (W-4), NC (NC-4) ated.	n, or other state withholding forms. NOTE: If you are making an in/out state change, please ensure your address inform	ation	
Tax Exemptior	n Indicator			
To change	between Exempt and Not Exempt, exit this scr	een and contact your HR office.		
Certificate Info	ormation			
	Filing Status:	Married Filing Jointly/ Surviving Sp \checkmark		
1	Total number of allowances you are claiming:	00		
	Additional mannotaing.	Check here if your last name differs from that shown on your Social Security card.		
Declaration				
* Under pe 2022.	nalties of perjury, I declare that I have examine	d this certificate and to the best of my knowledge and belief, it is true, correct, and complete on Wednesday, Septem	er 28,	
Validity Period				

NOTE: Do not enter a date that occurs before the default date. If a date is selected that occurs before the default date, an error message will generate.

3. Click **Save**, once all modifications have been entered, the declaration checked, and the validity period selected.

My Withholding Certificates	•				Q	?	
Ma Milaba di az Cantificatas (
Edit North Carolina							
Edit North Carolina							
						_	
 Maintain the information on your Federal (W is also updated. 	V-4), NC (NC-4), or other state withholding forms. NOT	E: If you are m	naking an in/out state change, please	ensure your address information		
Tax Exemption Indicator							
To change between Exempt and Not Exem	pt, exit this sc	reen and contact your HR office.					
Certificate Information							
T	Filing Status:	Married Filing Jointly/ Surviving Sp	~				
Total number of allowances you	are claiming:		USD				
Additional V	vitnnnolaing:	0.00	050				
		Check here if your last name differ	s from that sho	own on your Social Security card.			
Dederation							
Declaration							
Under penalties of perjury, I declare that I	I have examine	ed this certificate and to the best of my l	nowledge and	def, it is true, correct, and compl	ete on Wednesday, September 28,		
Validity Period							
*From:	10/05/2022						
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						and the second second	

Additional References

Users can use the Help? feature available within all Fiori applications.



Additional Help documentation, such as the Federal W-4 Employee Withholding Certificate, About Form W-4, or NCDOR Employees Withholdings Certificate can be accessed from the **My Reports & Resources** My *Personal Data* card.

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Personal Data			
About Form W-4			
Federal W-4 Employees With	holding	g C	
IRS's Tax Withholding Estima	tor		
NCDOR Employees Withhold	dings Co	erti	

- PY-12_Federal_W4_Form reference
 - https://www.osc.nc.gov/media/7157/open
- Federal W-4
 - https://www.irs.gov/pub/irs-pdf/fw4.pdf
- About Form W-4
 - https://www.irs.gov/forms-pubs/about-form-w-4

- NCDOR Employee's Withholding Allowance Certificate NC-4
 - <u>https://www.ncdor.gov/taxes-forms/withholding-tax/withholding-tax-forms-and-instructions/employees-withholding-allowance-certificate-nc-4</u>

Change Record

- 10/17/22 Initial creation L. Lee
- 11/24/22 Revision L.Lee
- 12/13/22 Content Edit J. Boyette
- 2/2/23 Grammatical changes and updated Employee Tab Fiori Application screenshot. L.Lee