



# My Tax Withholding

## FIO-22 | BUSINESS PROCESS PROCEDURE

FIO

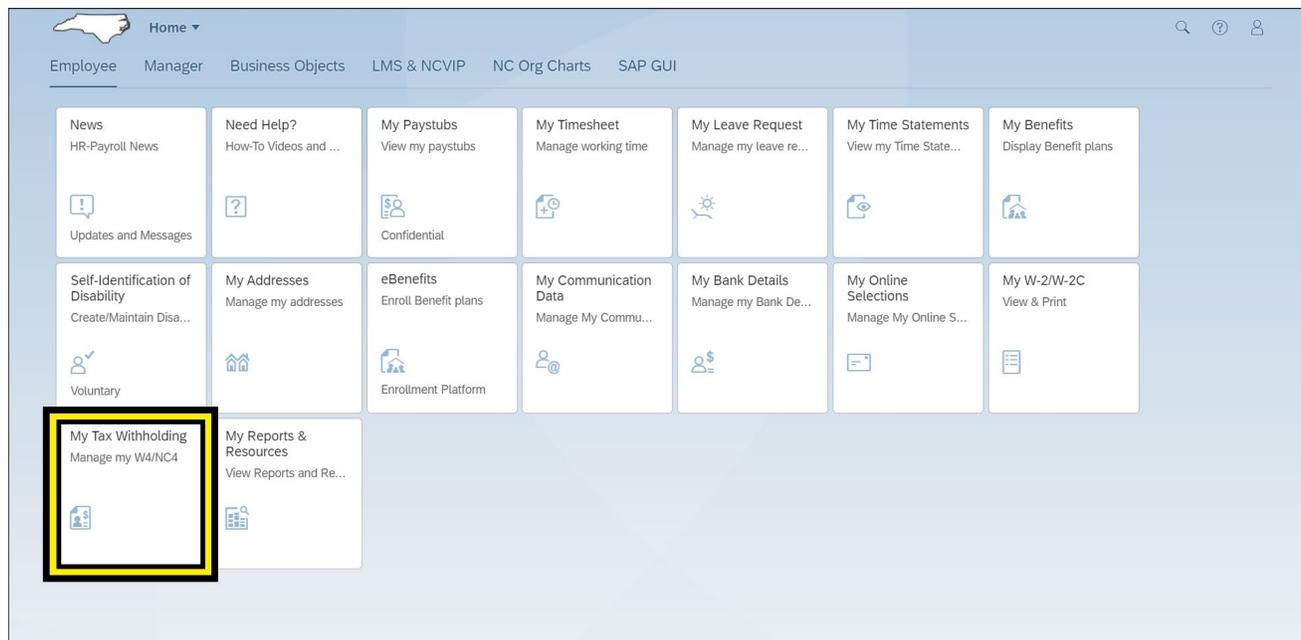
The purpose of this Business Process Procedure is to explain how to access and modify Federal (W-4) and NCDOR (NC-4) Employee's Withholding Certificates within the Fiori **My Tax Withholding** application. Fiori applications are accessible via desktop, laptop, and mobile devices.

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.
2. Click to open the **My Tax Withholding** application.



- 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

+1 (919) 707-0707  
JIMMY.MOYETTE@NCSHP.ORG

Organizational Unit: CCPS SHP FMG Analysis Landscape Grp 2

Federal North Carolina

Valid from 07/23/2018 Edit

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 Federal (W-4) form.

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

- Click **Edit** to make changes.

My Withholding Certificates

Jimmy M Moyette III (00000055)  
Facilities Maintenance Coordinator II

+1 (919) 707-0707  
JIMMY.MOYETTE@NCSHP.ORG

Organizational Unit: CCPS SHP FMG Analysis Landscape Grp 2

Federal North Carolina

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.

My Withholding Certificates / Edit Federal

Maintain the information 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 is also updated.

**a** Tax Exemption Indicator

To change between Exempt and Not Exempt, exit this screen and contact your HR office.

**b** Certificate Information

Filing Status - Step 1(c):

Claim Dependents - Step 3:  USD

Other Income (not from jobs) - Step 4(a):  USD

Deductions - Step 4(b):  USD

Extra Withholding - Step 4(c):  USD

Check here if your last name differs from that shown on your Social Security card.

Check this box if there are only two jobs total. - Step 2(c)

**c** Declaration

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.

**d** 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.”

Tax Exemption Indicator

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 differs from that shown on your Social Security card.

Check this box if there are only two 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 ▾

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): 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 differs from that shown on your Social Security card.

Check this box if there are only two 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

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 differs from that shown on your Social Security card.

Check this box if there are only two jobs total. - 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 differs from that shown on your Social Security card.

Check this box if there are only two jobs total. - 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 ▼

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 differs from that shown on your Social Security card.

Check this box if there are only two 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 differs from that shown on your Social Security card.

Check this box if there are only two 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.

**Declaration**

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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

**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 / Edit Federal

Maintain the information 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 is also updated.

Tax Exemption Indicator

To change between Exempt and Not Exempt, exit this screen and contact your HR office.

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 differs from that shown on your Social Security card.

Check this box if there are only two jobs total. - Step 2(c)

Declaration

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.

Validity Period

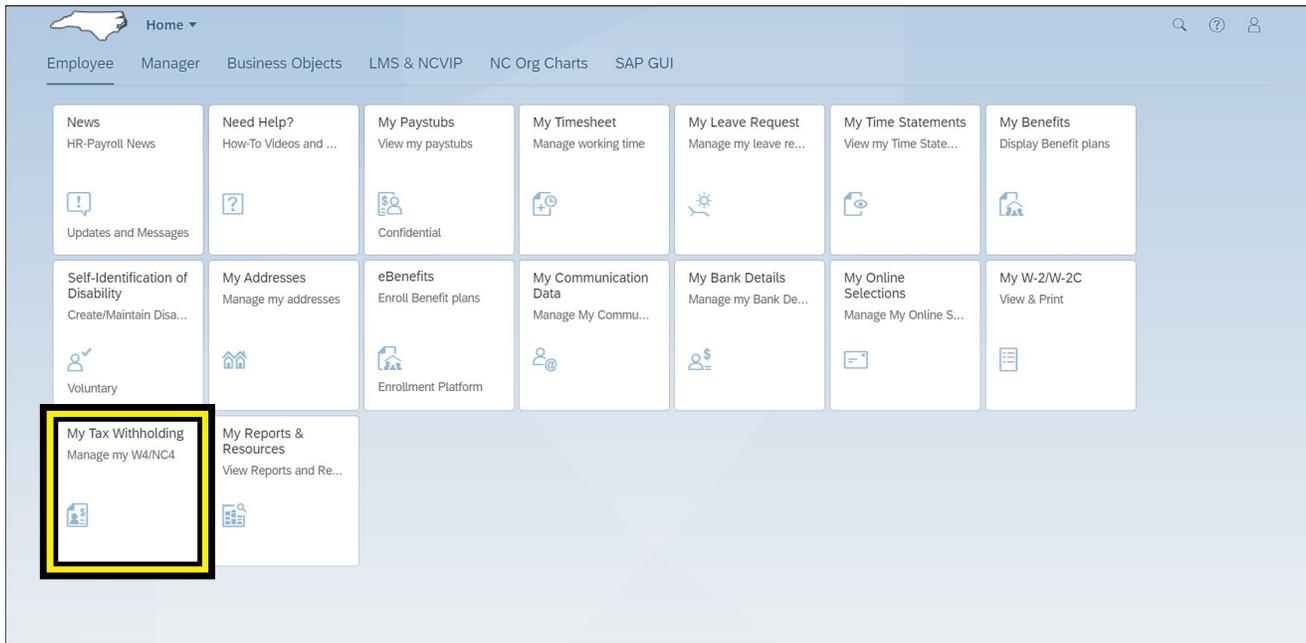
\*From: 10/04/2022

**Save** Cancel

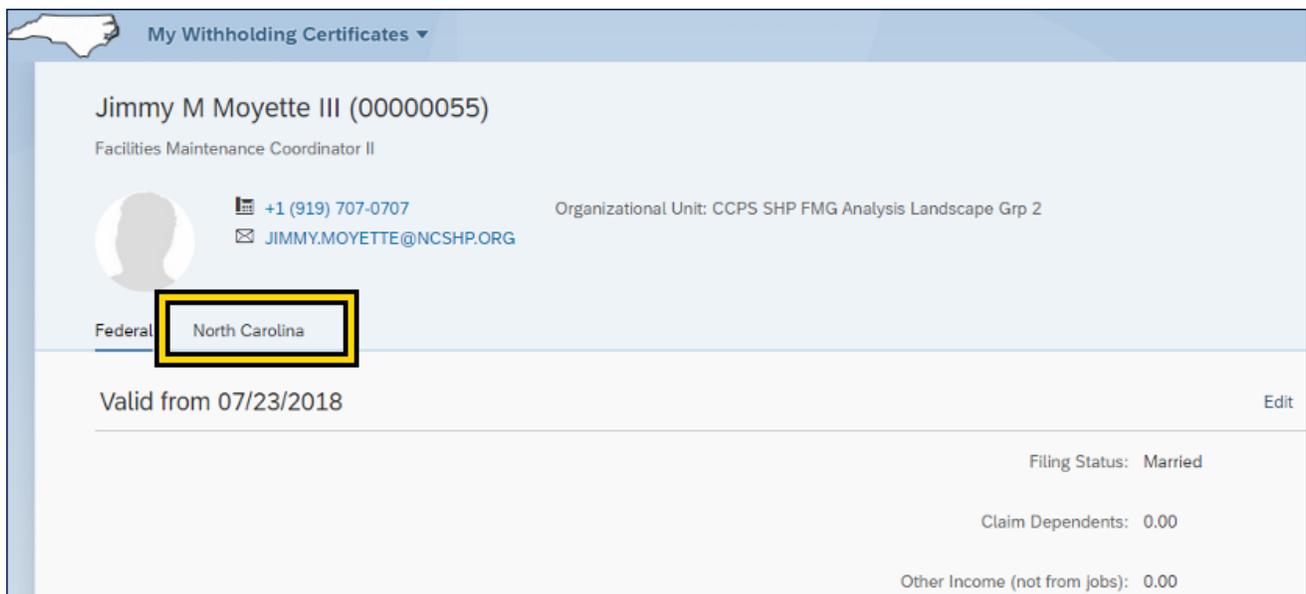
**NC-4 North Carolina**

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.



3. Click the **North Carolina** tab.



## 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.

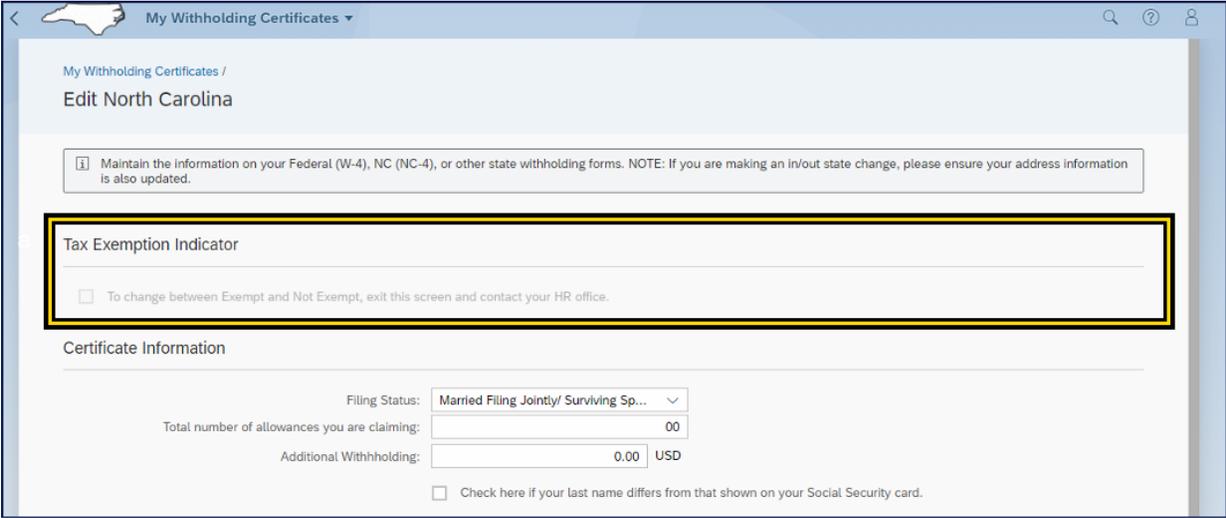
**NOTE:** The following process can also be used for the Federal (W-4) or other state withholding forms.

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.

The screenshot shows a web interface for editing a North Carolina withholding certificate. At the top, there's a navigation bar with a map of North Carolina and the text 'My Withholding Certificates'. Below that, the page title is 'Edit North Carolina'. A note at the top states: 'Maintain the information 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 is also updated.' The form is divided into four sections, each with a lettered label on the left: 'a' for 'Tax Exemption Indicator', 'b' for 'Certificate Information', 'c' for 'Declaration', and 'd' for 'Validity Period'. The 'Certificate Information' section includes a 'Filing Status' dropdown menu set to 'Married Filing Jointly/ Surviving Sp...', a field for 'Total number of allowances you are claiming' with the value '00', and a field for 'Additional Withholding' with the value '0.00 USD'. There is also a checkbox for 'Check here if your last name differs from that shown on your Social Security card.' At the bottom, there is a 'From' date field set to '10/05/2022' and a 'Save' button.

**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. “



**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.

My Withholding Certificates

My Withholding Certificates / Edit North Carolina

Maintain the information 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 is also updated.

Tax Exemption Indicator

To change between Exempt and Not Exempt, exit this screen and contact your HR office.

**Certificate Information**

Filing Status: Married Filing Jointly/ Surviving Sp...  
Total number of allowances you are claiming: 00  
Additional Withholding: 0.00 USD  
 Check here if your last name differs from that shown on your Social Security card.

Declaration

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 Wednesday, September 28, 2022.

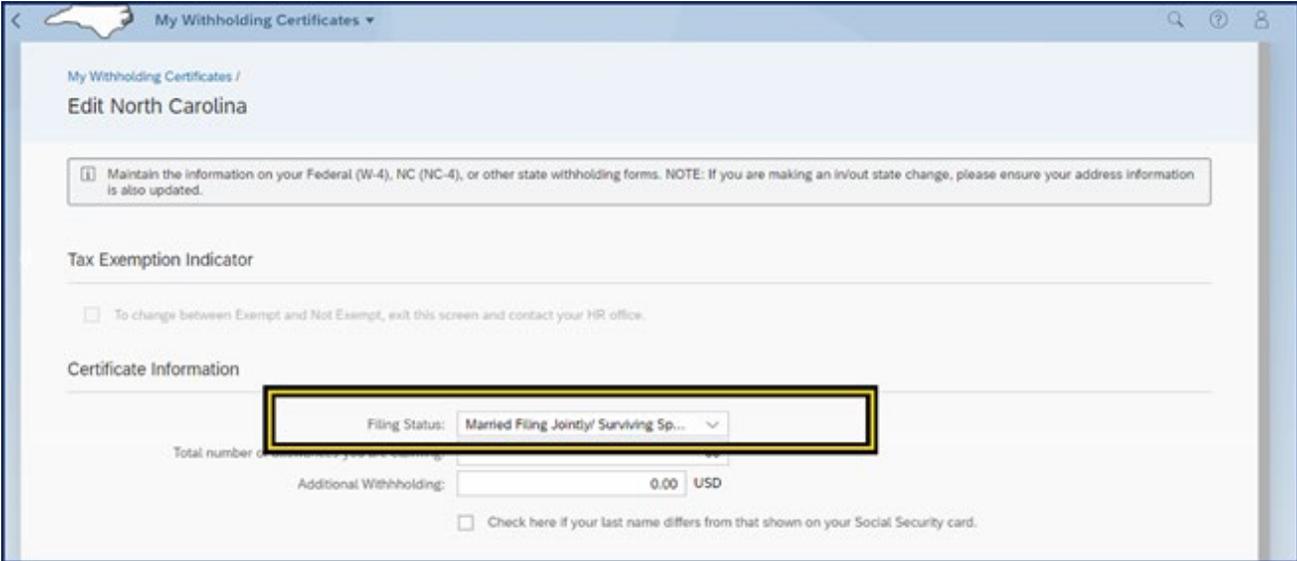
Validity Period

\*From: 10/05/2022

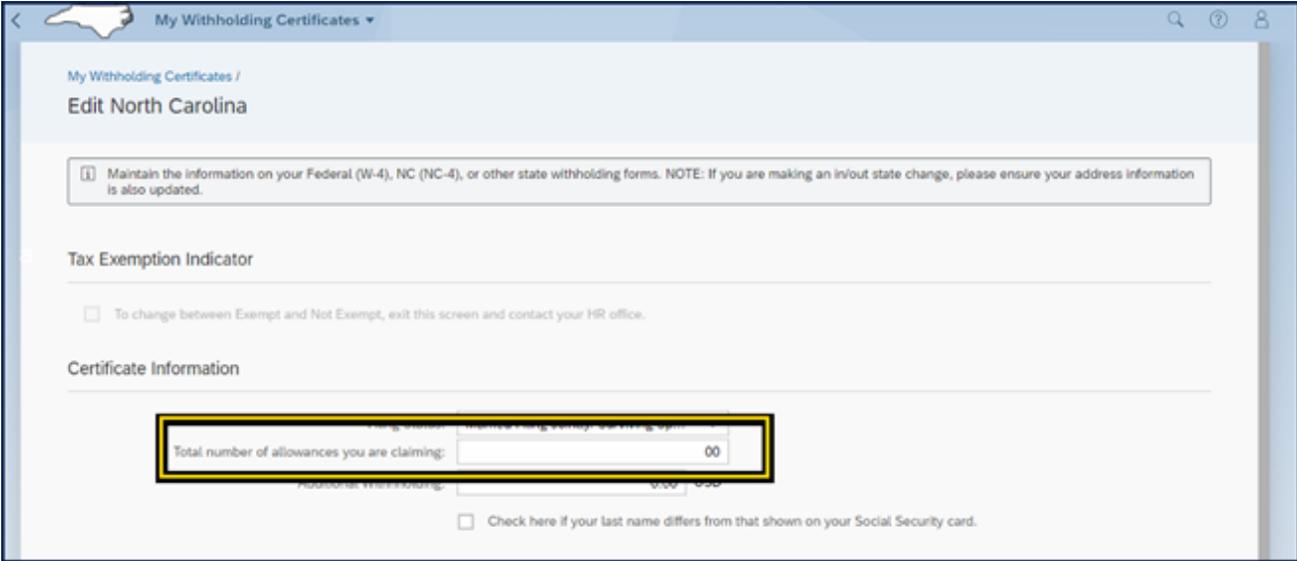
Save Cancel

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

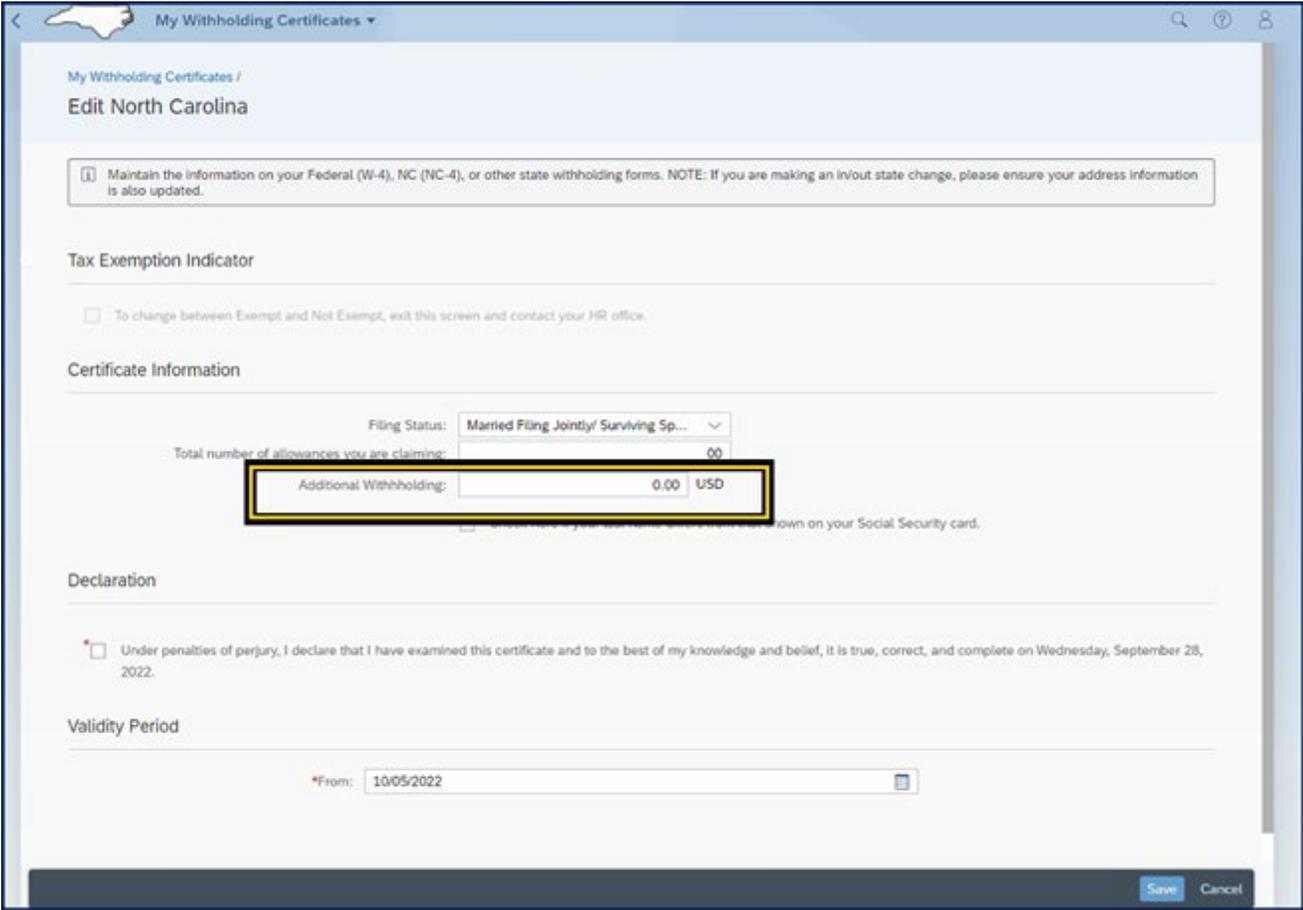
- ii. Select the dropdown box for **Filing Status** to select the appropriate filing status from the available options: Single or Married Filing Separately; Married Filing Jointly/Qualifying Widow; Head of Household.



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



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



My Withholding Certificates

My Withholding Certificates / Edit North Carolina

Maintain the information 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 is also updated.

Tax Exemption Indicator

To change between Exempt and Not Exempt, exit this screen and contact your HR office.

Certificate Information

Filing Status: Married Filing Jointly/ Surviving Sp...  
Total number of allowances you are claiming: 00

Additional Withholding: 0.00 USD

Declaration

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 Wednesday, September 28, 2022.

Validity Period

\*From: 10/05/2022

Save Cancel

- 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 / Edit North Carolina

Maintain the information 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 is also updated.

**Tax Exemption Indicator**

To change between Exempt and Not Exempt, exit this screen and contact your HR office.

**Certificate Information**

Filing Status: Married Filing Jointly/ Surviving Sp...  
Total number of allowances you are claiming: 00  
Additional Withholding: 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.

My Withholding Certificates / Edit North Carolina

Maintain the information 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 is also updated.

Tax Exemption Indicator

To change between Exempt and Not Exempt, exit this screen and contact your HR office.

Certificate Information

Filing Status: Married Filing Jointly/ Surviving Sp...  
Total number of allowances you are claiming: 00  
Additional Withholding: 0.00 USD  
 Check here if your last name differs from that shown on your Social Security card.

**Declaration**

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 Wednesday, September 28, 2022.

Validity Period

\*From: 10/05/2022

Save Cancel

**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.

The screenshot shows a web interface for editing a North Carolina withholding certificate. The page title is "Edit North Carolina". A note at the top states: "Maintain the information 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 is also updated." The form includes sections for "Tax Exemption Indicator" (with a checkbox to contact HR), "Certificate Information" (with fields for Filing Status: "Married Filing Jointly/ Surviving Sp...", Total number of allowances: "00", and Additional Withholding: "0.00 USD"), and a "Declaration" section with a checkbox for a sworn statement. The "Validity Period" section is highlighted with a yellow border and a black arrow pointing to the "From:" date field, which is set to "10/05/2022". At the bottom right, there are "Save" and "Cancel" buttons.

**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 / Edit North Carolina

Maintain the information 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 is also updated.

**Tax Exemption Indicator**

To change between Exempt and Not Exempt, exit this screen and contact your HR office.

**Certificate Information**

Filing Status: Married Filing Jointly/ Surviving Sp...  
Total number of allowances you are claiming: 00  
Additional Withholding: 0.00 USD  
 Check here if your last name differs from that shown on your Social Security card.

**Declaration**

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 Wednesday, September 28, 2022.

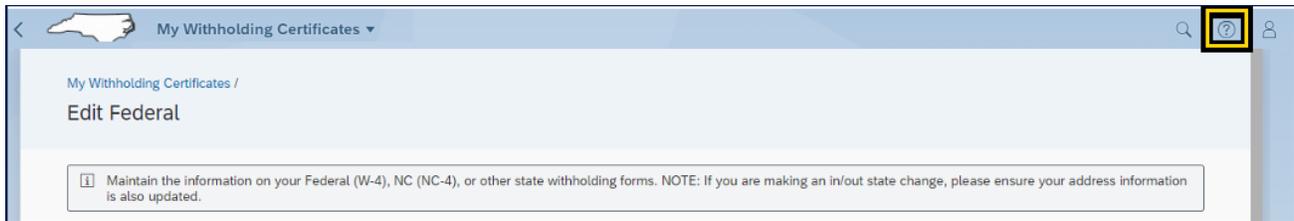
**Validity Period**

\*From: 10/05/2022

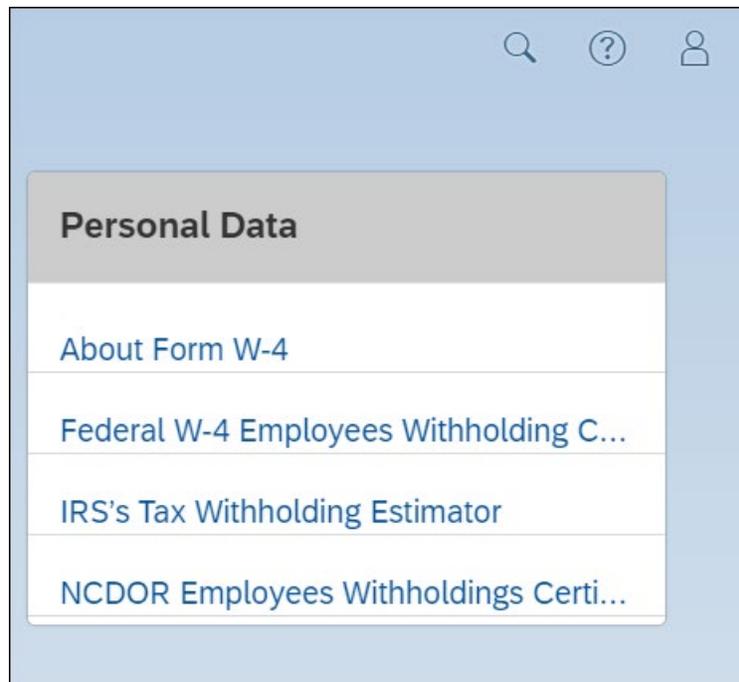
Save Cancel

## 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.



- 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
  - <https://www.ncdor.gov/taxes-forms/withholding-tax/withholding-tax-forms-and-instructions/employees-withholding-allowance-certificate-nc-4>

### 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