FEDERAL W-4 AND STATE TAX CHANGES

JOB AID ESS-20

ESS

The purpose of this job aid is to explain how to update Federal W-4 and State Tax changes in ESS in the Integrated HR-Payroll System.

Federal W-4 and State Tax changes can be made by logging in to ESS and selecting:

1. My Personal Data
2. Tax Withholding Information

| Overview | My Working Time | My Benefits | My Pay | My Personal Data | Help |

My Data (ESS) > My Personal Data > My Personal Data

My Personal Data

My Personal Information

Voluntary Self-Identification of Disability
Create and/or maintain your disability status.

Addresses
Maintain your addresses.
NOTE: Both address lines 1 and 2 are limited to 32 characters.
If you are making an in/out of state change to your permanent residence, please ensure your Tax Withholding Information is also updated.

Tax Withholding Information
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.

Federal W-4 Employee's Withholding Certificate

NCDOR NC-4 Employee's Withholding Allowance Certificate

Federal Form W-4 FAQs
The IRS has also published Frequently Asked Questions that you may find helpful as you complete the form.

IRS's Tax Withholding Estimator
To conduct a checkup, you can use the IRS's Tax Withholding Estimator.

Work Communication Data
Display your email address and your main work contact telephone number.

Change Personal Communication
Occasionally it is necessary to communicate important information to state employees, including during non-work hours. This could include emergency or other time-sensitive information. To help ensure that you receive this information in a timely manner, please consider providing your mobile phone number and personal email address. Your personal contact information provided here will be used exclusively for state business and will never be shared with other parties or organizations for any reason. To add or update your home phone number, go to "Addresses."

3. Select the Federal or State Tax Authority that you would like to edit: *Choose the current valid from date to edit.*

W4_Tax_Withholding

W-4

🖫 Save

Tax Authority	Filing Status	Dependents	Other income	Deductions	Additional Withholding	Number of Allowances	Valid From	Valid To
Federal	Married Filing Jointly /Qualifying Widow	0.00	0.00	0.00	0.00		03/01/2021	12/31/9999
North Carolina	Head of Household	0.00	0.00	0.00	0.00	00	03/01/2021	12/31/9999

4. If the Federal Tax Authority is selected: Follow the steps below to complete the form. *If you are claiming exempt, please exit and contact your HR Dept.*

W-4

🖫 Save

▼ Selection and Overview

Tax Authority	Filing Status	Dependents	Other income	Deductions	Additional Withholding	Number of Allowances	Valid From	Valid To
Federal								
North Carolina								

▼ W-4 Details   ✖ Cancel

1 — Edit   2 — Review and Confirm

Tax Authority: Federal

▼ Step 1: Filing Status

* Filing Status: [   ] ▼

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

Complete Steps 2-4 ONLY if they apply to you. (link to page 1 & 2 of W-4 from W-4 Withholidng form)

▼ Step 2: Multiple Jobs

a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4); or
b) Use the Multiple Jobs Worksheet on page 3 W-4 Withholding form and enter the result in Step 4(c) below for roughly accurate withholding; or
c) Only two jobs with similar pay ☐

▼ Step 3: Dependents

If your income will be $200,000 or less ($400,000 or less if married filing jointly):
 Multiply the number of qualifying children under age 17 by $2,000
 Multiply the number of other dependents by $500
Add the amounts above and enter the total ($500 or greater) [0.00] USD

▼ Step 4: Other Income, Deductions & Extra Withholding

4(a) Other income [0.00] USD
4(b) Deductions Use the deduction Worksheet on page 3 W-4 Withholding Form [0.00] USD
4(c) Additional withholding Enter any additional tax you want withheld each [0.00] USD
      pay period

Tax exempt indicator: Not exempt   To change between Exempt and Not Exempt, exit this screen and contact your HR office.

▼ Step 5: Certify

Declaration:
☐ * Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate or that I am entitled to claim exempt status.

Valid as of Future Date: 05/10/2021 📅

Review ▶   Exit

Step 1 – Enter your filing status:

- Single or Married filing Separately
- Married filing jointly/Qualifying Widow(er)
- Head of Household

Step 2 is for households with multiple jobs. Choose only one:

Option (a): Use the IRS' Tax Withholding Estimator, Tax Withholding Estimator (irs.gov), and enter the results on Steps 3 & 4 if applicable.

Option (b): Use the Multiple Jobs Worksheet – Page 3, https://www.irs.gov/pub/irs-pdf/fw4.pdf, and enter the result in Step 4(c).

Option (c): Check the box - If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

Step 3 is used to claim tax credits for dependents:

Dependents under age 17 - $2000.00

All other dependents - $500.00

Enter total the total amount of tax credit for dependents, must be greater than $500.

If you enter less than $500.00 you will receive an error message.

Step 4 is for other adjustments:

4(a) Other Income - Additional income such as interest, dividends, retirement income, etc.

4(b) Claim itemized deductions that exceed the standard deduction.

4 (c) Extra tax you want withheld.

Step 5 is your Certification:

Check the box to certify your changes.

Confirm Future Date

Select Review to confirm changes are accurate. If you select Exit, you will need to start over.

Step 6 – Review to ensure your changes are correct and Save:

Confirmation that changes were saved – Exit W-4. You will be able to see your updated tax changes on the overview screen.
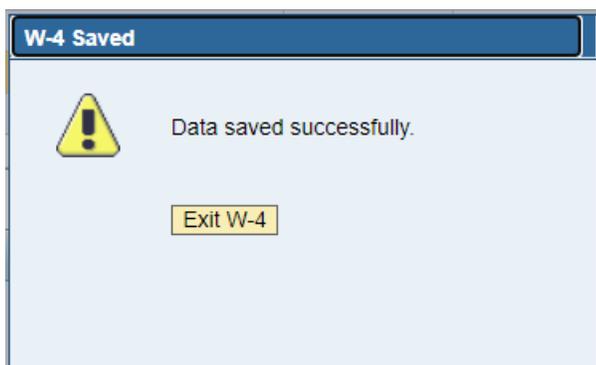
5. If the State Tax Authority is selected: Follow the steps below to complete the form. *If you are claiming exempt, please exit and contact your HR Dept.*
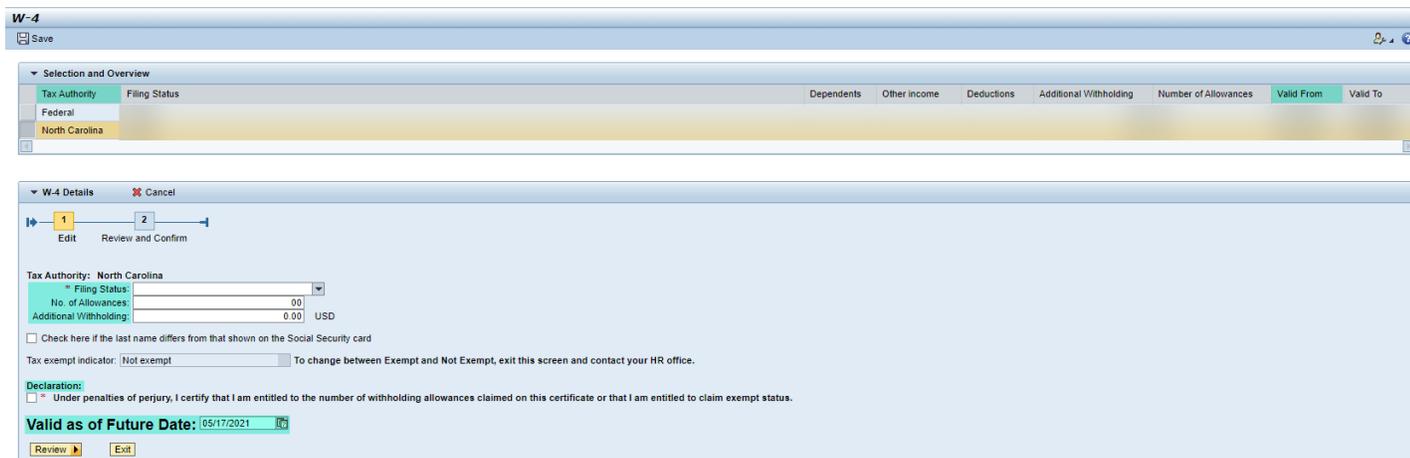
Step 1 – Enter your filing status:

- Single or Married filing Separately
- Married filing jointly/Surviving Spouse
- Head of Household

Step 2 – Enter Number of Allowances

Step 3 – Additional Withholding

Step 4 – Certification:

Check the box to certify your changes.

Confirm Future Date

Select Review to confirm changes are accurate. If you select Exit, you will need to start over.

Step 5 – Review your changes are correct and hit Save:

Confirmation that changes were saved – Exit W-4. You will be able to see your updated tax changes on the overview screen.