Banner Self Service Instructions for completing a NC-4 Employee State Withholding Allowance Certificate

December 9, 2013
Please consider these options before you print these instructions

• Banner Self Service is fairly intuitive and instructions are simple to follow.
• Simple text instructions without the pictures, are available on page 5.
• Open two browsers to simultaneously view these instructions AND access Banner Self Service.
• If you must print the instructions:
  o Share a copy among your co-workers and office mates.
  o Print two or three slides to a page and/or two sided.
Banner Self Service or Paper....but not BOTH!

• You may submit the NC-4 Form through Banner Self Service OR by paper NC-4 Form. **DO NOT** do both.

• You can review your NC-4 History through Self Service Banner (follow instructions in this document) at any time.
If you experience any problems completing your NC-4 form through Banner Self Service please send an e-mail to:

Payrolltax@ecu.edu

Please include a screen shot and/or a complete explanation of the problem encountered.
Can’t you just make it simpler? Give me the step by step instructions

Through One-Stop Banner Self Service:

• Select Employee
• Select Tax Forms
• To update your Federal Withholding Select W4 or to update your State Withholding Select NC4
• Select Update
• Choose your Filing Status
• Choose your Number of Allowances
• Choose any Additional Amount if desired
• Select Certify Changes
• Click in the box to certify your changes
• Click Submit
• View your confirmation
• YOU’RE DONE!!!!!
From the www.ecu.edu home page select One Stop.
Login using your Pirate ID and Passphrase.

**OneStop Login**

Pirate ID: [ ]
Passphrase: [ ]

Submit

Manage your passphrase at piratoid.ecu.edu

**Announcements**

**ANNOUNCING ECU PIRATE PORT STUDENT BETA**

- Beginning Fall 2013, the ECU Onestop will be replaced with a new campus portal, ECU Pirate Port.
- While not all features and applications will be immediately available in the Student beta release, give ECU Pirate Port a try at http://pirateport.ecu.edu and take a peek into the future!

**ECU OFFERS ELECTRONIC 1098-T TUITION STATEMENTS**

- The 2013 1098-T tuition statement will be available electronically. In order to receive your tax form electronically, you must consent to electronic delivery by December 31.
- Your 1098-T tuition statement will be mailed on or before January 31 if you do not choose the electronic option.
- For more information, please visit www.ecu.edu/cashier and select Electronic 1098-T Statements.

**IMPORTANT DATES FOR SPRING 2014:**

- December 16, 2013 - Last day to enroll in the Sallie Mae monthly payment plan.
- If paying by mail, payments must be postmarked by the US Postal Service by December 11, 2013 to allow sufficient time for processing.
- If paying in person or on-line, payments must be made by 5:00 p.m. on January 6, 2014, to avoid a late fee.
- Schedules will be cancelled for non-payment after 5:00 p.m. on January 8, 2014.
- **NOTE:** Please note - The on-line payment system will NOT be available after 5:00 p.m. on the late fee and schedule cancellation dates.
- January 13, 2014 - First day of class.
Under Tools, Banner, Select “Banner Self Service”
Welcome, Joseph E. Pirate, to the WWW Information System! Last web access on Dec 04, 2013 at 09:44 am

DATA SECURITY NOTICE FOR ALL USERS:
This system gives you secure access to your confidential data. In order to protect your confidential data, when you are finished, you must logout of Banner, logout of OneStop, and exit your browser. Failure to perform all three of these actions can enable others to use your session to access your confidential data.

IMPORTANT CHANGE FOR ALL EMPLOYEES:
The North Carolina General Assembly recently enacted House Bill 998 which requires every NC employee to complete a NEW NC-4 Withholding Allowance Certificate. This law requires that all employees who have not completed a new 2014 withholding form be set to the default status of "Single" with "0" (zero) allowances effective 1/1/2014. For more information regarding the changes and copies of the new forms, please visit: http://www.ecu.edu/financial_serv/payroll/payrollforms.cfm

Important Billing Change:
Beginning with the Fall 2009 semester, East Carolina University's Cashier's Office will no longer mail paper bills. With this transition to eBilling, only students and their authorized users will receive email notifications from cashier@ecu.edu when a new billing statement is available for review online. For more information, please visit http://www.ecu.edu/cs-admin/financial_serv/cashier/ebilling.cfm.

Select "Employee"
Select “Tax Forms”.

Click here
Before We Get Started

Please verify your Home Address - Permanent

Through One-Stop Banner Self Service:

• Select Personal Information
• Select Update Addresses & Phones
• Under Home Address – Permanent if Current Address is incorrect – Select Current
• Enter Current Days Date in Valid From This Date
• If needed, update Address in Lines 1, 2, & 3
• If needed, update City, State or Province, Zip or Postal Code, County and Nation
• Click Submit
• Your Current Address should now be listed under Home Address-Permanent
• YOU’RE DONE!!!!!
Select “NC-4 State Employee’s Withholding Allowance Certificate”
This is information about your CURRENT NC-4 Withholding Allowance Certificate.

As of Date: Today’s date

Deduction Status:
ACTIVE indicates you are subject to NC employee withholding tax.
EXEMPT indicates you met one of the following conditions:
• You certified that you are exempt from NC withholding tax because you met specific conditions (see NC-4EZ for exempt conditions).
• You are a Foreign National being taxed as a nonresident alien for tax purposes on a special NRA tax deduction code for NC withholding.
• You are a nonresident alien or resident alien receiving tax treaty benefits and exempt up to the maximum wage amount allowed under the treaty.

Start Date: The start date of your first NC deduction record.
End Date: Always blank for active employees. Please notify Payroll if an end date is reflected.
This is information about your CURRENT NC-4 Withholding Allowance Certificate (continued)

THE FOLLOWING IS BASED ON YOUR CURRENT NC-4 ON FILE WITH THE PAYROLL OFFICE:

Filing Status: Choices are:
- Single
- Married or Qualifying Widow(er)
- Head of Household

Number of Allowances: The current number of allowances selected.

Additional Amount: This is the additional amount you have previously instructed ECU to withhold on EACH semi-monthly pay.
Select “Update”

Non-citizens will not have access to the “Update” feature and should contact the Payroll International Tax Specialist to complete new forms.
To change your NC-4 Withholding Certificate for the next available payroll, do **NOT** make any changes to the effective date.

You **may** elect to begin your change on a future date. Key in the date you would like the change to begin-use a pay period begin date (e.g. 1<sup>st</sup> or 16<sup>th</sup> of the month).

**Update NC-4**

Access HELP for information on completing the NC-4.

You will be required to certify your changes on the next page.

* - indicates a required field.

**State Tax**

**Deduction Effective as of:**

**Effective Date of Change MM/DD/YYYY:**

Note: Effective Date must be after your last pay period ending date.

**Deduction Status:**

If you meet the following conditions for exemption from NC withholding, an original NC-4EZ form will need to be submitted to the payroll department. This request is not able to be processed via Banner Self Service.

I certify that I am exempt from North Carolina withholding because I meet both of the following conditions:

* Last year I was entitled to a refund of all State income tax withheld because I had no tax liability; and
* For tax year 2014, I expect a refund of all State income tax withheld because I expect to have no tax liability.

I certify that I am exempt from North Carolina withholding because I meet the requirements of the Military Spouses Residency Relief Act and I am legally domiciled in a state other than NC.

**Filing Status:**

Select your filing status.

**Number of Allowances:**

Enter the number of allowances you wish to claim.

**Additional Amount:**

Enter any additional amount you wish to have withheld.

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

**Certify Changes**

**Restore Original Values**
Your Deduction Status may show as Active or Exempt. If you meet the conditions for exemption from NC withholding as shown, you MUST complete a paper NC-4EZ Form and submit it to the Payroll Department.

If you no longer meet the conditions for exemption, select Active.

Update NC-4

Access HELP for information on completing the NC-4.

You will be required to certify your changes on the next page.

* - indicates a required field.

State Tax

Deduction Effective as of: Jan 01, 2014

Effective Date of Change MM/DD/YYYY: *
Note: Effective Date must be after your last pay period ending date.

Deduction Status: *
If you meet the following conditions for exemption from NC withholding, an original NC-4EZ form will need to be submitted to the payroll department. This request is not able to be processed via Banner Self Service.
I certify that I am exempt from North Carolina withholding because I meet both of the following conditions:
* Last year I was entitled to a refund of all State income tax withheld because I had no tax liability; and
* For tax year 2014, I expect a refund of all State income tax withheld because I expect to have no tax liability.
I certify that I am exempt from North Carolina withholding because I meet the requirements of the Military Spouses Residency Relief Act and I am legally domiciled in a state other than NC.

Filing Status: * Single
Number of Allowances: 0
Additional Amount: .00

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

Certify Changes
Restore Original Values
Select the appropriate Filing Status:
- Head of Household
- Married or Qualifying Widow(er)
- Single

Update NC-4

Access HELP for information on completing the NC-4.

You will be required to certify your changes on the next page.

* indicates a required field.

State Tax

Deduction Effective as of: Jan 01, 2014

Effective Date of Change MM/DD/YYYY:* 01/01/2014

Note: Effective Date must be after your last pay period ending date.

Deduction Status:* Active

If you meet the following conditions for exemption from NC withholding, an original NC-4EZ form will need to be submitted. This request is not able to be processed via Banner Self Service.

I certify that I am exempt from North Carolina withholding because I meet both of the following conditions:
* Last year I was entitled to a refund of all State income tax withheld because I had no tax liability; and
* For tax year 2014, I expect a refund of all State income tax withheld because I expect to have no tax liability.

I certify that I am exempt from North Carolina withholding because I meet the requirements of the Military Spouse Exception.

Filing Status:* Single

Number of Allowances: 0

Additional Allowances:

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

Certify Changes

Restore Original Values

NC-4 State Employee's Withholding Allowance Certificate

Key in your number of allowances as determined from your review of the tables on the NC-4EZ Form or from the NC-4 Form worksheets.

Update NC-4

Access HELP for information on completing the NC-4.

You will be required to certify your changes on the next page.

* indicates a required field.

State Tax

Deduction Effective as of: Jan 01, 2014

Effective Date of Change MM/DD/YYYY:* 01/01/2014
Note: Effective Date must be after your last pay period ending date.

Deduction Status:* Active

If you meet the following conditions for exemption from NC withholding, an original NC-4EZ form must be submitted on or before the due date of the employee's State income tax return.

This request is not able to be processed via Banner Self Service.

I certify that I am exempt from North Carolina withholding because I meet both of the following:

* The year I was entitled to a refund of all State income tax withheld because I had no tax liability.
* For tax year 2014, I expect a refund of all State income tax withheld because I expect to have a refund of Federal income tax.

I certify that I am exempt from North Carolina withholding because I meet the requirements of one of the following:

* I am legally domiciled in a state other than NC.

Deduction Status:* Single

Number of Allowances: 0

Additional Amount: .00

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

Certify Changes

Restore Original Values

NC-4EZ:

NC-4:
Key in an additional amount, if any, that you would like withheld from each semi-monthly payment.

Access HELP for information on completing the NC-4.

You will be required to certify your changes on the next page.

* - indicates a required field.

**State Tax**

Deduction Effective as of: Jan 01, 2014

Effective Date of Change MM/DD/YYYY:* 01/01/2014

Note: Effective Date must be after your last pay period ending date.

Deduction Status:* Active

If you meet the following conditions for exemption from NC withholding, an original NC-4EZ form will need to be submitted to the payroll department. This request is not able to be processed via Banner Self Service.

I certify that I am exempt from North Carolina withholding because I meet both of the following conditions:
* Last year I was entitled to a refund of all State income tax withheld because I had no tax liability; and
* For tax year 2014, I expect a refund of all State income tax withheld because I expect to have no tax liability.

I certify that I am exempt from North Carolina withholding because I meet the requirements of the Military Spouses Residency Relief Act and I am legally domiciled in a state other than NC.

Filing Status:* Single

Number of Allowances: 0

Additional Amount: 0.00

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

Certify Changes

Restore Original Values

NC-4 State Employee's Withholding Allowance Certificate
When you have completed your changes, select "Certify Changes".

PLEASE NOTE: You will be required to certify your changes on the next page.

If for any reason you would like to restore the original values before selecting "Certify Changes", you may do so by selecting "Restore Original Values".
Click on the check box in front of the Certification statement and then select Submit.

Ensure that you receive this highlighted message that “The updates you requested were successfully processed”.

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**Personal Information Employee**

Search [Go]

**NC-4 Certification**

- I certify, under penalties provided by law, that I am entitled to the number of withholding allowances claimed on previous page.

[Submit]

NC-4 State Employee's Withholding Allowance Certificate

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**NC-4 Update Confirmation**

The updates you requested were successfully processed.

NC-4 State Employee's Withholding Allowance Certificate
To view and confirm your changes...Select “NC-4 State Employee’s Withholding Allowance Certificate”
NOTE: This screen will NOT reflect the change(s) you just made.

This screen reflects the withholding status for the current payroll.
The History screen shows the full history of the past changes to your State Withholding.

## NC-4 History

This is a list of all changes to your State Tax deduction.

### State Tax

**Benefit or Deduction from and to dates:**

<table>
<thead>
<tr>
<th>Current Plan</th>
<th>Effective Date</th>
<th>Status</th>
<th>Filing Status</th>
<th># Allow</th>
<th>Additional Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Current Plan</td>
<td>Dec 04, 2013</td>
<td>Active</td>
<td>Married or Qual Widow(er)</td>
<td>2</td>
<td>10.00</td>
</tr>
<tr>
<td></td>
<td>Jan 01, 2014</td>
<td>Active</td>
<td>Married or Qual Widow(er)</td>
<td>1</td>
<td>.00</td>
</tr>
</tbody>
</table>

*NC-4 State Employee’s Withholding Allowance Certificate*
Verify that the change(s) you made on the previous screen are now reflected on the History Tab.

### NC-4 History

This is a list of all changes to your State Tax deduction.

#### State Tax

**Benefit or Deduction from and to dates:**

<table>
<thead>
<tr>
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<td>Married or Qual Widow(er)</td>
<td>2</td>
<td>10.00</td>
</tr>
<tr>
<td></td>
<td>Jan 01, 2014</td>
<td>Active</td>
<td>Single</td>
<td>0</td>
<td>.00</td>
</tr>
<tr>
<td></td>
<td>Jan 16, 2014</td>
<td>Active</td>
<td>Married or Qual Widow(er)</td>
<td>1</td>
<td>.00</td>
</tr>
</tbody>
</table>

**NC-4 State Employee’s Withholding Allowance Certificate**
If you are satisfied with your changes, select “EXIT”. If you want to make additional changes select “NC-4 State Employee’s withholding Allowance Certificate”.

**NC-4 History**

This is a list of all changes to your State Tax deduction.

**State Tax**

<table>
<thead>
<tr>
<th>Benefit or Deduction from and to dates:</th>
<th>Status</th>
<th>Filing Status</th>
<th># Allow</th>
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</tr>
</thead>
<tbody>
<tr>
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<td>2</td>
<td>10.00</td>
</tr>
<tr>
<td>My Current Plan</td>
<td>Active</td>
<td>Single</td>
<td>0</td>
<td>.00</td>
</tr>
</tbody>
</table>

NC-4 State Employee’s Withholding Allowance Certificate
If you are finished, please close your browser to protect your privacy by selecting the X or select File Exit to close your browser.
Congratulations!

• You’re finished and now have the knowledge and ability to make changes to your NC State Withholding Allowance Certificate at ANY TIME in the future.

• REMEMBER: You do NOT have to complete a paper NC-4 Form if you have successfully completed the Form through Banner Self Service.