

Change W-4 & State Tax Filing

HOW TO CHANGE INFORMATION OF YOUR FEDERAL (FORM W-4) AND STATE TAX FILING (STATE WITHHOLDING) CERTIFICATE

The UKG Portal allows changes of Federal (w-4) and State (where applicable) tax filing information by the employee. Updating the UKG Portal eliminates the need for submission of e-mails or hard copy forms to Payroll.

Follow the steps below when necessary to change your tax filing information.

Note: In order to meet certain deadlines, we ensure that any changes to your Tax Filing Information performed up to 6 business days prior to payday will be processed with the upcoming payroll, otherwise the change may be processed with the next payroll.

1. Log in to [UKG](#)
2. Click the Income Tax icon shown in the UKG Smart Dashboard as shown in Figure 1.

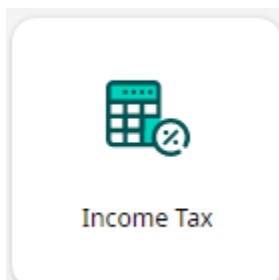


Figure 1: Income Tax icon

If you work in a state requiring state income tax withholding, your screen will look like Figure 2 shown below.

Note: In the example, NC State Income Tax appears in addition to the Federal Income Record as shown in the figure.

Description	Form	History
Federal Income Tax	Paper	
NC State Income Tax	Paper	
North Carolina Remote		

Figure 2: Example of State Requiring State Income Tax Withholding

- To change your tax filing information, click Add/Change Withholding Form (right-hand side of the page under Things I Can Do) as shown in Figure 3.



Figure 3: Add/Change Withholding Form (W-4)

- The options shown in Figure 4 will be displayed.

Add/Change Withholding Form (W-4)	
Description	Form
Federal	<ul style="list-style-type: none">Employee's Withholding Certificate (W-4)Certificado de Retenciones del Empleado (W-4SP)Employee's Withholding Certificate (W-4 Non-Resident Alien)
North Carolina	<ul style="list-style-type: none">North Carolina (NC-4EZ)North Carolina (NC-4)

Figure 4: Options Screen

- Click the appropriate link.
 - For Federal Withholding: click Employee's Withholding Allowance Certificate (W-4).
 - For State Withholding: click the Tax form for the state. (i.e., in the example Figure 2)
- Follow the instructions on the screen.
- Be sure to print the form for your review if needed.
- Make sure to click the Submit icon to save the update.

Note: The Effective Date depends on the timing of your change – the new information may go into effect with the next payroll or the one after.

