

How to Change Your W4 Information via Banner Self Service

Step 1:

Please log into **Banner Self Service**

Step 2:

Once logged in click on the **Employee Services** tab as shown below:

PACIFIC LUTHERAN UNIVERSITY
Inquiry. Service. Leadership. Care.

BANNER SELF-SERVICE

[Personal Information](#) | **[Employee Services](#)** | [Financial Services](#) | [Administrative Services](#)

Search

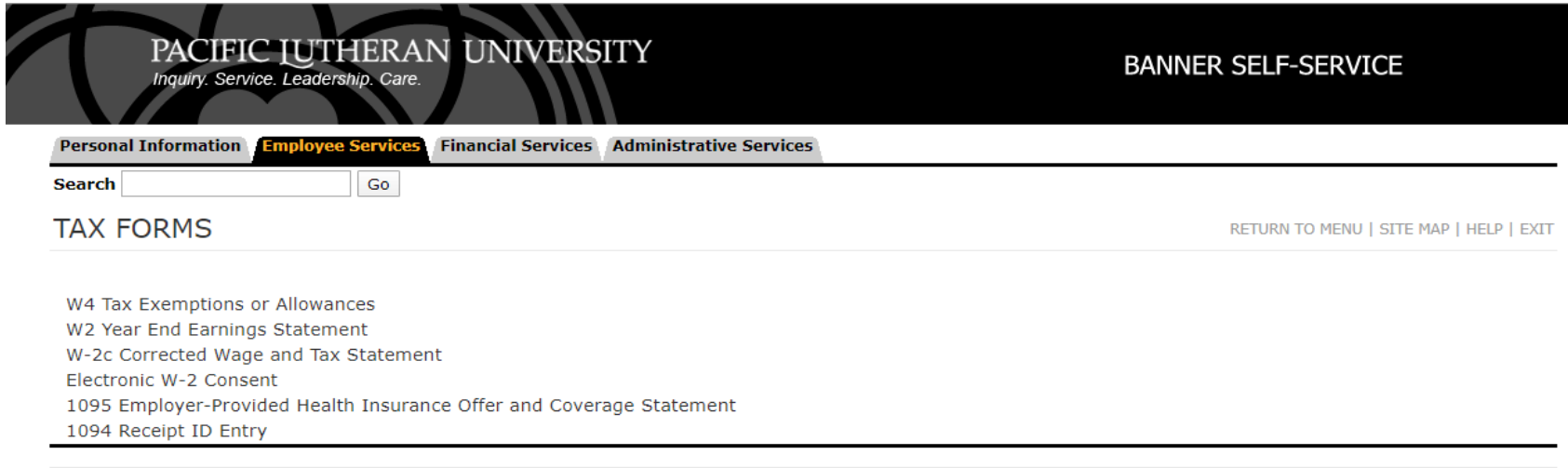
EMPLOYEE [RETURN TO MENU](#) | [SITE MAP](#) | [HELP](#) | [EXIT](#)

Please note: Information from the current payroll cycle may change until finalized on payday.

- Time Sheet**
Enter and review time sheet information. *Avoid errors - Do not use the Back Arrow button on your browser.*
- Leave Report**
Enter leave (salaried employees only).
- Leave Balances**
View your sick and vacation leave balances and history.
- Benefits and Deductions**
View your retirement plans, health insurance information, flex spending accounts, miscellaneous deductions.
- Pay Information**
View your direct deposit breakdown, earnings and deductions history, and pay stubs.
- Tax Forms**
View your W-4 information and W-2 form.
- Employee Profile**
Banner 9 Employee Profile
- Update Primary Campus Location**
This information is used by the Emergency Building Coordinators in the event of a campus emergency or emergency preparedness drill.

Step 3:

Next click on **Tax Forms**. This is where you can view your W-4 information and W-2 forms.

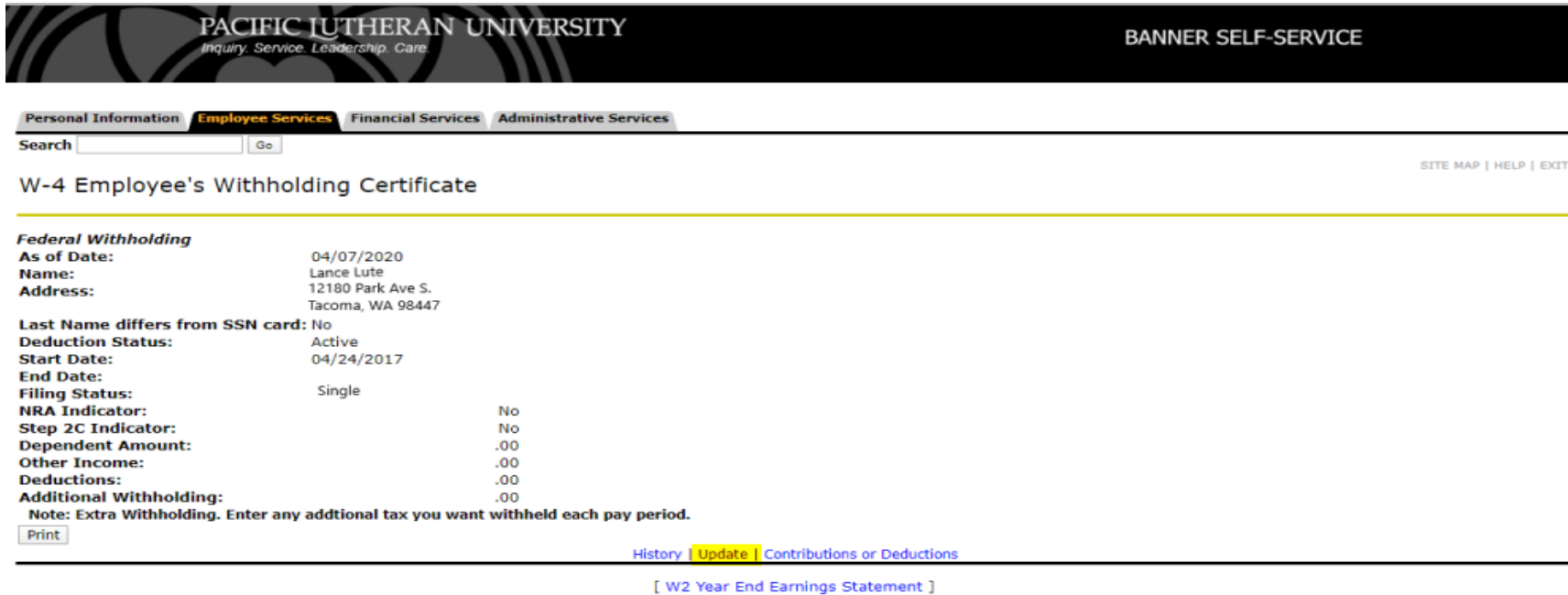


The screenshot shows the Banner Self-Service interface. At the top, the Pacific Lutheran University logo is on the left, and "BANNER SELF-SERVICE" is on the right. Below the logo is the tagline "Inquiry. Service. Leadership. Care." A navigation bar contains "Personal Information", "Employee Services" (highlighted), "Financial Services", and "Administrative Services". A search bar with a "Go" button is present. The main heading is "TAX FORMS" with a "RETURN TO MENU | SITE MAP | HELP | EXIT" link on the right. A list of options is provided: "W4 Tax Exemptions or Allowances", "W2 Year End Earnings Statement", "W-2c Corrected Wage and Tax Statement", "Electronic W-2 Consent", "1095 Employer-Provided Health Insurance Offer and Coverage Statement", and "1094 Receipt ID Entry".

Step 4:

Click on **W4 Tax Exemptions or Allowances** under Employee Services (it is the first option).

This screen will show you what you are currently claiming:



The screenshot shows the Banner Self-Service interface for the "W-4 Employee's Withholding Certificate" page. The top navigation bar is identical to the previous screenshot, with "Employee Services" highlighted. The main heading is "W-4 Employee's Withholding Certificate" with a "SITE MAP | HELP | EXIT" link on the right. The page displays the following information:

Federal Withholding
As of Date: 04/07/2020
Name: Lance Lute
Address: 12180 Park Ave S.
Tacoma, WA 98447

Last Name differs from SSN card: No
Deduction Status: Active
Start Date: 04/24/2017
End Date:
Filing Status: Single

NRA Indicator:	No
Step 2C Indicator:	No
Dependent Amount:	.00
Other Income:	.00
Deductions:	.00
Additional Withholding:	.00

Note: Extra Withholding. Enter any additional tax you want withheld each pay period.

Print

History | Update | Contributions or Deductions

[W2 Year End Earnings Statement]

Step 5:

To update/change your information, click on **Update** at the bottom of the screen (highlighted on the screenshot above).


If you are unsure of what you should be claiming on your W-4 please consult your tax preparer. There is an example of what the 2020 W-4 looks like if you click [Review Form W-4](#). There are also instructions on page 2 of the PDF.

Personal Information | **Financial Aid Services** | **Student Services** | **Employee Services** | **Financial Services** | **Administrative Services**

Search

[SITE MAP](#) | [HELP](#) | [EXIT](#)

Update W4

 Review [Form W-4](#) for required information on completing a new form W-4. Once you have made changes you will be required to certify those changes by clicking on Certify Changes and then clicking on OK in the pop up window. If the delete option is available select the check box then click on Certify Changes to remove the record.

* - indicates a required field.

Federal Withholding

Deduction Effective as of:

If your last name differs from that shown on your Social Security Card, check here.
Note: See Form W-4 instructions.

Effective Date of Change MM/DD/YYYY:*
Note: Effective Date must be after 01/15/2023 the date you were last paid.

I claim exemption from withholding for the tax year specified, and I certify that I meet both of the following conditions for exemption.

- * Last year I had no tax liability and
- * This year I expect to have no tax liability. If you meet both conditions, select "Exempt" in Deduction Status field.

Deduction Status:*

Step 1(c): Enter Personal Information

Filing Status:*

Filing Statuses are Single, Married Filing Separately, Married filing jointly (select this option if Qualifying widow(er)), Head of Household (Select only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual).

Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Certify Changes. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Do only one of the following.

- (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 and enter the result in Step 4(c) below for roughly accurate withholding; or
- (c) 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 2C Indicator:

TIP: To be accurate, submit a Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents

If your total 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 here. :

Step 4 (optional): Other Adjustments

(a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. :

(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here :

(c) Extra withholding. Enter any additional tax you want withheld each pay period :

Nonresident alien:

If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Nonresident Alien:

Let's go over the fields:

- **Deduction Effective as of** is the date of the latest change to your W4. This could be your hire date, or your last day paid.

- **Effective Date of Change** date is the day you would like the changes to become effective. The date that you should use would be the beginning of the current pay period or any future pay period. It will not let you select a day prior to your last paid date.

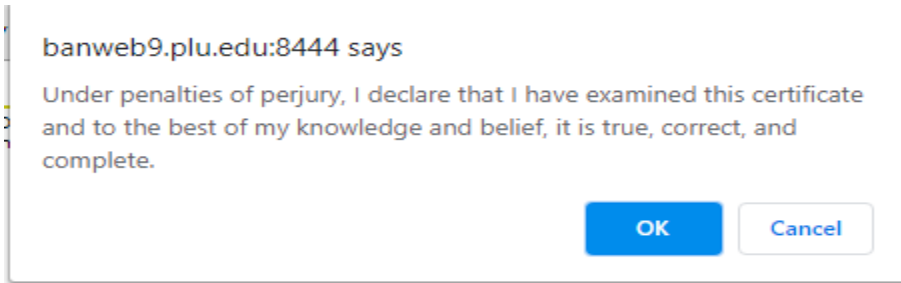
Students: 11th or the 26th
Hourly Staff 1st or the 16th
Faculty/Exempt Staff: 1st

- **Deduction Status** – If you meet the conditions to claim exempt, click on the dropdown and select '**Exempt**'. If you do not meet the specification, leave as **Active**. If you are unsure, please consult your tax advisor. If you claim exempt no federal withholding will be taken out of your paychecks.
- **Filing Status** is pretty straight forward, do you file as **Single, Married, or Head of Household**? You can also choose Married, but use the higher single rate for the possibility of a larger amount of federal taxes to be withheld.
- **If you are a Non-Resident Alien (NRA), please reach out to Payroll directly. A paper version of the W-4 form is required. Please do not complete the online form.**
- **Step 2C Indicator** is if you have more than one job (multiple positions at PLU does not mean you have multiple jobs, PLU is one employer and you will receive one paycheck) or if your spouse is working. For specific rules or instructions, please look at an original version of the W-4 form.
- **Dependents Under 17 / Other Dependents** – These fields do not do anything and are mainly for your personal calculations. The number sequence illustrated above '999999.99' is meant to be utilized as an example of the correct number format. If you have 3 children who are 6, 8 and 10 you can select \$2,000 x 3 children for a total Dependent Amount of 6,000. **Make sure to put your amount under Dependent Amount. It will not calculate properly if you do not.**
- **Dependent Amount** is the total amount you wish to claim for dependents (add up Dependents Under 17 and Other Dependents). This field will decrease the amount of taxes withheld from your paycheck, similar to claiming an allowance on the previous form.
- **Other Income** is income that would not be automatically subject to Federal Withholding, but could make you liable to pay taxes come next year. Please see the 2020 W-4 PDF form to get specific instructions.
- **Deductions** are for those who do not expect to claim the Standard Deduction when filing. Please see the 2020 W-4 PDF form to get specific instructions.
- **Additional Withholding** is where you can select any dollar amount that you wish to be taken out of **each paycheck**. Some of the worksheets included on the 2020 W-4 PDF form will prompt you to enter a dollar amount into this field. This field is voluntary and does not need to be completed unless you choose to have an additional amount deducted from your paycheck.

Step 6:

Once all of your fields are filled out appropriately, click on **Certify Changes**.

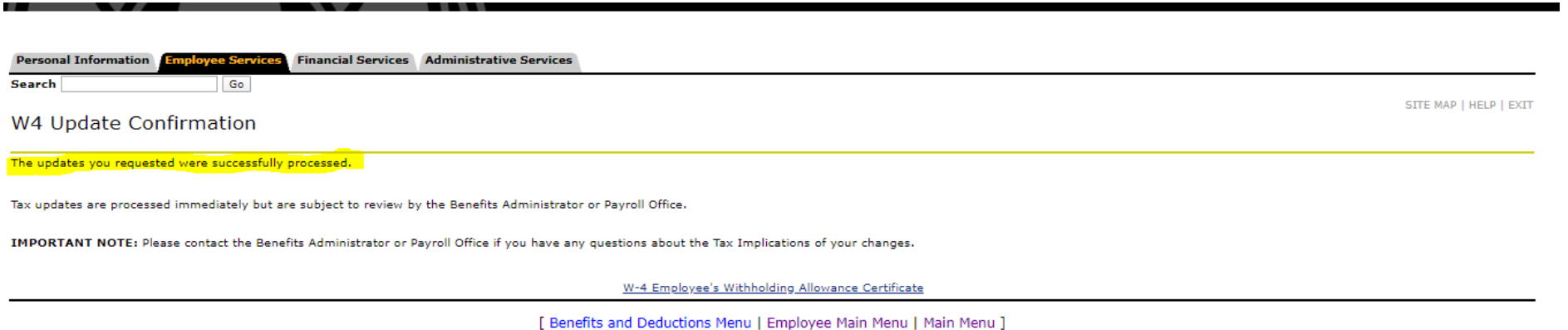
This dialog box will pop up asking if you accept the changes you made on the form. Click 'Ok' if yes. If no, 'Cancel'.



If you made a mistake, you can click on cancel to go back to the form. If you would like to start over, click on **Restore Original Values**.

Step 7:

W-4 Update process is now complete.



You **do not** need to reach out to Payroll to verify changes. We run daily reports that show us any changes made.

You can also go back to the Employee Service Tab>W-4 to verify changes.

Please note, that depending on the time/day of your change it may or may not be effective for the current payroll. Please submit all changes by the time sheet due date for your Payroll.

We are still accepting paper W-4 changes, if that is your preferred method. Due to the recent changes of our department working remotely, you can get these forms to us by mail or by sliding it under the Payroll Office door.

If you have any questions or urgent issues, please email Payroll at: payr@plu.edu.