

### UAB Self Service Applications: Online Tax Form

To access the form, go to: **UAB Self Service Applications > Online Tax Form**

**NOTE: UAB Payroll Services employees are not allowed to give tax advice.**

#### Completing the Federal Tax Form

1. The **Tax Form** page will load with the employee's federal tax withholding selections visible. The default, meaning that the employee has not made any adjustments to the filing status or withholding amounts, is **Single** and **0 (zero)** for both Allowances and Additional Amount Withheld.

To make changes to federal withholdings, click **Update**.

2. The **Update Tax Form: Federal W-4 Details** window will load and the employee may make the necessary changes.

To obtain the **Form W-4** worksheet which will assist in completing the form, click on the hyperlink found under **Federal W-4 Details**. The employee will be directed to the **Employee's Withholding Certificate** form provided by the Internal Revenue Service.

3. Once the employee has made the necessary changes on the **Update Tax Form: Federal W-4 Form**, place a check (✓) mark in the box beside **I Agree**.



## Completing the State Tax Form

1. To access the State Tax Form, go to the **Tax Form Type** and click the option for **State**.

The **State W-4 Details** page will load with the employee's state tax withholding selections visible. The default, meaning that the employee has not made any adjustments to the filing status or withholding amounts, is **"S" Claiming \$1500 Exemption** and **0 (zero)** for both Allowances and Additional Amount Withheld.

**State Tax Form**

Employee Name Employee, Example Employee Number 1000002  
Organization Email Address workflow@uab.edu Business Group 11111111A UAB

**Tax Form Region**

**Tax Form Type**

Federal  State

**State W-4 Details (Alabama)**

Filing Status  "S" Claiming \$1500 Exemption  
 "M" Claiming \$3000 Exemption  
 "0" Claiming No Personal Exemption  
 "H" Claiming \$3000 Exemption  
 "MS" Claiming \$1500 Exemption

Allowances 0 ⓘ  
Additional Amount Withheld 0 ⓘ

**Additional Information**

[Alabama Withholding Form\(PDF\)](#)  
The above link comes with worksheets and tax information that may be helpful in completing this form. Click this link to view the full form in a new window.

**Update**

2. To make changes to state withholdings, click **Update**.

3. The **Update Tax Form: State W-4 Form** window will load and the employee may make the necessary changes.

To obtain the state withholding form, click on the hyperlink under **Additional Information**.

**Update Tax Form : State W-4 Form** Cancel Continue

Employee Name Employee, Example Employee Number 1000002  
Organization Email Address workflow@uab.edu Business Group 11111111A UAB

**Tax Form Region**

**Tax Form Type**

Federal  State

**State W-4 Details (Alabama)**

Filing Status  "S" Claiming \$1500 Exemption  
 "M" Claiming \$3000 Exemption  
 "0" Claiming No Personal Exemption  
 "H" Claiming \$3000 Exemption  
 "MS" Claiming \$1500 Exemption

Allowances 0 ⓘ  
Additional Amount Withheld 20 ⓘ

**Agreement**

Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate, or I am entitled to claim exempt status. "Click" CANCEL to return without saving. "Click" NEXT to continue.

I Agree

**Additional Information**

[Alabama Withholding Form\(PDF\)](#)  
The above link comes with worksheets and tax information that may be helpful in completing this form. Click this link to view the full form in a new window.

- Once the employee has made the necessary changes on the **Update Tax Form: State W-4 Form**, place a check (v) mark in the box beside **I Agree**.

**Agreement**

Under penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate, or I am entitled to claim exempt status. "Click" CANCEL to return without saving. "Click" NEXT to continue.

I Agree

- Click **Continue**.

- The **Online Tax Form: Review** form will load. Confirm that the changes are correct.

**Online Tax Form: Review** Cancel Printable Page Back Submit

Employee Name Employee, Example Employee Number 1000002  
Organization Email Address workflow@uab.edu Business Group 11111111A UAB

Indicates Changed Items.

**Tax Information**

	Current	Proposed
Filing Status	"S" Claiming \$1500 Exemption	"S" Claiming \$1500 Exemption
Allowances	0	0
Additional Amount Withheld	0	20

Please review changes. Click "Submit" to process.

Confirmation page **MUST BE RECEIVED** for add/change/delete to update your record. Do NOT exit the system without receiving a confirmation page or the system will abandon the change.

- Click **Submit**.

The **Confirmation** page will load indicating that the changes have been applied. Click **Return to Overview**. The employee will receive an email notification stating that changes have been made.

**Confirmation**

Your changes have been applied.

 Return to Overview