

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

 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 *O (zero)* for both Allowances and Additional Amount Withheld.

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

 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.

Employee Name Employee, Example Organization Email Address <u>workflow@uab.edu</u>	Empi Bu	loyee Number usiness Group	1000002 11111111A UAB
ax Form Region			
Tax Form Type			
● Federal 🔿 State			
Federal W-4 Details			
Filing Status (Single Married Married hut Withhold at Hinher Single Rate		
Allowances			
Additional Amount Withheld FIT Exempt	.00 D		

Employee Name Organization Email Address	Employee, Example workflow@uab.edu	Employee Num Business Gr	ber 1000002 oup 11111111A UAB
ax Form Region			
Tax Form Type			
● Federal O State			
Federal W-4 Details			
If claiming exempt, the IRS requires a copy Please refer to the federal W-4 worksheet fo	of the W-4 form. Please or further information. IR	complete the W-4 using the link below and fax the form S Federal W-4 Form(PDF)	n to Payroll Services at (205) 975-4739.
	Filing Status 🔘	Single or married filing separately	
	0	Married filing jointly (or Qualifying widow(er))	

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

ſ	Agreement	
	Under penalties of p CANCEL to return w	erjury, 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" ithout saving. "Click" NEXT to continue.

- 4. Click Continue.
- 5. The **Online Tax Form: Review** page will load. Confirm that the changes are correct.
- 6. Click Submit.



7. 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.



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	State Tax Form			
page will load with the employee's state tax	Employee Name Organization Email Address	Employee, Example workflow@uab.edu	Employee Number Business Group	1000002 11111111A UAB
withholding selections	Tax Form Region			
visible. The default,	Tax Form Type			
meaning that the	🔿 Federal 💿 State			
employee has not	State W-4 Details (Alabama)			
made any adjustments				
to the filing status or withholding amounts, is "S" Claiming \$1500		Filing Status	ming \$1500 Exemption ming \$3000 Exemption ming No Personal Exemption ming \$3000 Exemption alming \$1500 Exemption	
Exemption and O (zero)	Additional	Allowances 0		
for both Allowances and Additional Amount Withheld.	Additional Information Alabama Withholding Form(PDF) The above link comes with worksheets an	d tax information that may be he	lpful in completing this form. Click this link to view t	ne full form in a new window.

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

3. The Update Tax	Update Tax Form : State W-4	Form		Cancel Continue
Form: State W-4 Form window	Employee Name Organization Email Address Tax Form Region	Employee, Example workflow@uab.edu	Employee Number Business Group	1000002 111111111A UAB
employee may make the	Tax Form Type O Federal State State W 4 Dataile (Alabama)			
changes.		Filing Status 💿 "S" Claiming \$ 〇 "M" Claiming \$	51500 Exemption 53000 Exemption	
To obtain the state withholding form. click on	Additional	"0" Claiming N "H" Claiming S "MS" Claiming S Ilowances 1	lo Personal Exemption 53000 Exemption § \$1500 Exemption 1 1 1	
the hyperlink under Additional Information.	Agreement Under penalties of perjury. I certify that exempt status. "Click" CANCEL to retu I Agree Additional Information Alabama Withholding Form(PDF) The above link comes with worksneets and	t I am entitled to the number of withh rn without saving, "Click" NEXT to c difference of the saving	olding allowances claimed on this certific ontinue. n completing this form. Click this link to view t	ate, or I am entitled to claim

4. Once the employee has made the necessary changes on the **Update Tax Form: State W-4 Form**, place a check (ν) 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.	
	-

5. Click Continue.

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

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 E	xemption	
Allowances 0		0		
Additional Amount Withheld	Additional Amount Withheld 0 20			
Please review changes. Click "Submit" to proces	25			

7. 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