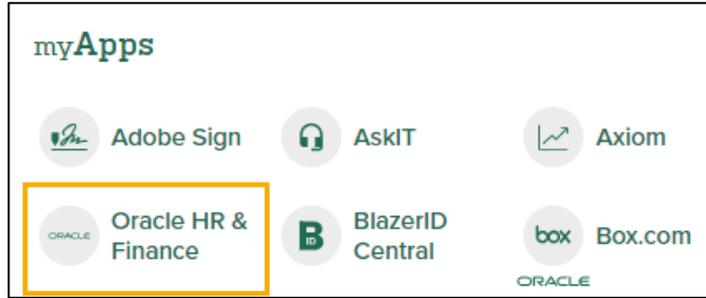


Note: UAB Payroll Services employees are not allowed to give tax advice.

COMPLETING THE FEDERAL TAX FORM

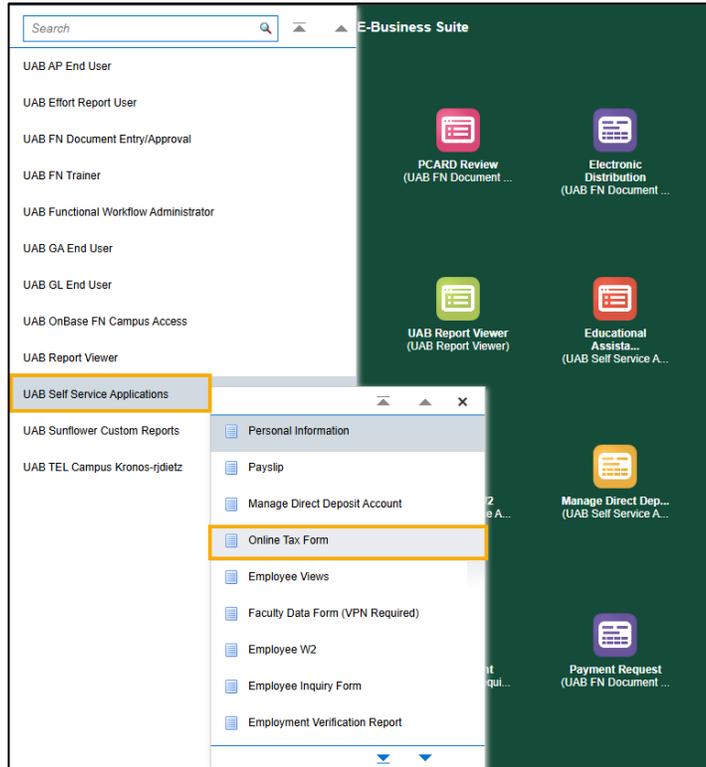
To log in to Oracle HR & Finance

- Navigate to the [myUAB portal](#).
- Click **Oracle HR & Finance**.



Navigate to **Online Tax Form**

- Click the **3-lined navigation button** in the top left of the Oracle homepage.
- Choose **UAB Self Service Applications**.
- Then select **Online Tax Form**.



The **Tax Form** page will load

- The employee's current Federal Tax withholding selections are shown.
- The default for a new employee is Single and 0 (zero) for both Allowances and Additional Amount Withheld.
- To make changes, click **Update**.

The **Update Tax Form** page will load

- The employee may make any necessary changes on this page.

To obtain the **Form W-4 Worksheet** that will assist in completing the form

- Scroll to **Step 4 (optional) Other Adjustments**.
- Click the hyperlink **IRS Federal W-4 Form (PDF)**

Step 4 (optional): Other Adjustments

(a) Other income (not from jobs). If you want tax withheld on other income you expect this year that won't have withholding, enter the amount of other income 4(a) \$ 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 of the IRS Federal W-4 Form(PDF) and enter the result here. 4(b) \$

(c) Extra withholding. Enter any additional tax you want withheld each pay period. 4(c) \$

After completing desired changes on the **Update Tax Form** page

- Under **Step 5 – Sign Here (Agreement for Signature)**, check the box **I Agree**.
- Click **Continue**.

Step 5 - Sign Here (Agreement for Signature)

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

Exempt from Withholding

*"Click" CANCEL to return without saving. "Click" NEXT to continue.

Exempt

Cancel Continue

The **Online Tax Form: Review** page will load

- Confirm that changes are correct.
- Click **Submit**.

Online Tax Form: Review

Employee Name: [Redacted] Employee Number: [Redacted]
 Organization Email Address: [Redacted] Business Group: [Redacted]

Cancel Printable Page Back Submit

Indicates Changed Items.

Tax Information

AOLDataStreaming.jsp 1 / 1 56%

Form W-4 Employee's Withholding Certificate OMB No. 1545-0074 2025

Department of the Treasury Internal Revenue Service Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Your withholding is subject to review by the IRS.

Step 1: Enter Personal Information

(a) First name and middle initial: [Redacted] (b) Social Security number: [Redacted]
 (c) Address: [Redacted] (d) State: [Redacted] (e) City or town, state, and ZIP code: [Redacted]
 (f) Single or Married filing separately
 Married filing jointly or Qualifying surviving spouse
 (Head of household (Check only if you are unmarried and you own 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 Step 5. See page 2 for more information on each step, who can claim exemption from withholding, and when to use the exemption at www.irs.gov/efile.

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/efile for most accurate withholding for this step (and Steps 3-4). If you or your spouse have self-employment income, use the estimator.
 (b) Use the Multiple Jobs Worksheet on page 2 and enter the result in Step 4(c) below, or
 (c) If there are only two jobs total, you may check this box. On the same or forms filed for the other job, this option is generally more accurate than (b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, (b) is more accurate.

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

Step 3: Claim Dependents and Other Credits

If your tax income will be \$20,000 or less (>\$40,000 or more if married filing jointly):
 (a) Claim: Multiply the number of qualifying children under age 17 by \$2,000.
 (b) Dependents: Multiply the number of other dependents by \$500.
 (c) Credits: Add the amounts above for qualifying children and other dependents. You may add to the amounts above for qualifying children and other dependents. You may add to

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.

The **Confirmation** page will load

- Changes have been applied.
- Click **Return to Overview**.
- The employee will receive an email stating that changes have been made.

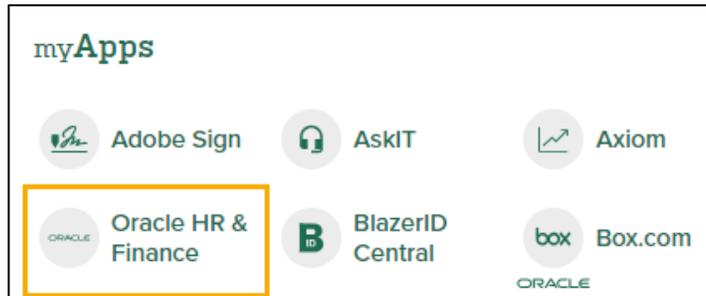


COMPLETING THE STATE TAX FORM

To log in to

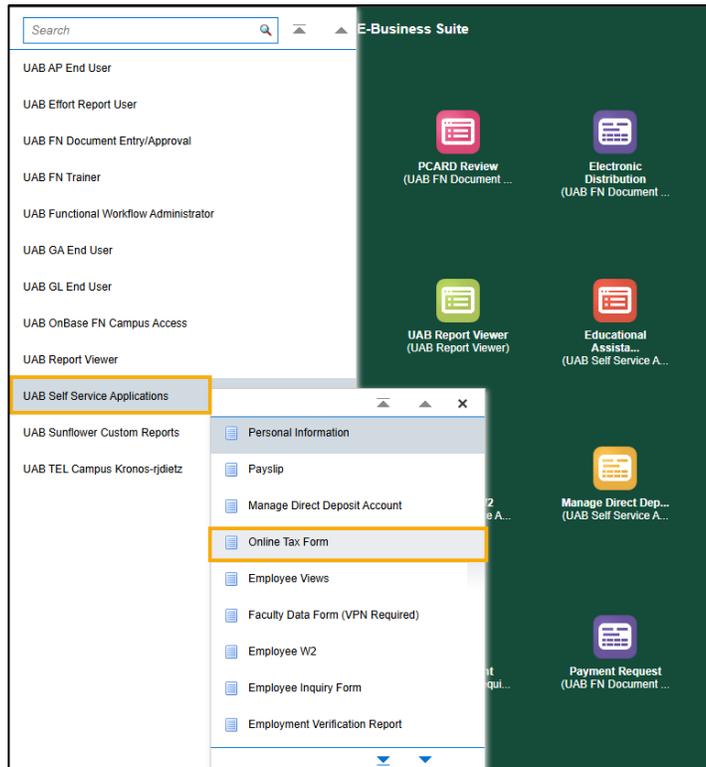
Oracle HR & Finance

- Navigate to the [myUAB portal](#).
- Click **Oracle HR & Finance**.



Navigate to **Online Tax Form**

- Click the **3-lined navigation button** in the top left of the Oracle homepage.
- Choose **UAB Self Service Applications**.
- Then select **Online Tax Form**.



The **Tax Form** page will load

- The employee's current Federal Tax withholding selections are shown.
- Click **State** to access the State Tax Form page.

Tax Form

Employee Name: [Redacted] Employee Number: [Redacted]
 Organization Email Address: [Redacted] Business Group: [Redacted]

Tax Form Region: [Redacted]

Tax Form Type: Federal State

Federal W-4 Details

Step 1(c): Filing Status Single or Married filing separately
 Married filing jointly or Qualifying surviving spouse
 Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

Step 2: Multiple Jobs or Spouse Works No

Step 3: Claim Dependent and Other Credits \$ 0.00

Step 4 (optional) Other Adjustments

(a) Other income (not from jobs)	\$ 0.00	<input type="button" value="ID"/>
(b) Deductions	\$ 0.00	<input type="button" value="ID"/>
(c) Extra withholding	\$ 0.00	<input type="button" value="ID"/>

FIT Exempt No

The **State Tax Form** page will load

- The default for a new employee is "S" Claiming \$1500 Exemption and 0 (zero) for both Allowances and Additional Amount Withheld.
- To make changes, click **Update**.

State Tax Form

Employee Name: [Redacted] Employee Number: [Redacted]
 Organization Email Address: [Redacted] Business Group: [Redacted]

Tax Form Region: [Redacted]

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.

The **Update Tax Form: State W-4 Form** page will load

- To obtain the State Withholding Form to assist in completing the State W-4 Form, click the hyperlink **Alabama Withholding Form (PDF)**.

Update Tax Form : State W-4 Form

Employee Name: [Redacted] Employee Number: [Redacted]
 Organization Email Address: [Redacted] Business Group: [Redacted]

Tax Form Region: [Redacted]

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

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.

After completing desired changes on the **Update Tax Form** page

- Under **Agreement**, check the box **I Agree**.
- Click **Continue**.

The **Online Tax Form: Review** page will load

- Confirm that changes are correct.
- Click **Submit**.

	Current	Proposed
Filing Status	"H" Claiming \$3000 Exemption	"H" Claiming \$3000 Exemption
Allowances	0	0
Additional Amount Withheld	0	0

The **Confirmation** page will load

- Changes have been applied.
- Click **Return to Overview**.
- The employee will receive an email stating that changes have been made.