Human Resources at UC Berkeley

Human Resources
University of California, Berkeley
2150 Shattuck Ave. Suite 750
Berkeley, CA 94704-3540
510-642-9046

Instructions for Entering W-4 Tax Allowances via At Your Service Online

The page in HRMS 8.3 that departmental administrators currently use to input employee income tax withholding allowances will not be available in HCM 9.0.

This functionality was removed because:

- the data could not remain synchronized with PPS due to tax treaty updates made to PPS but not HRMS
- the functionality is not delivered with HCM 9.0 and would require extensive customization
- routine errors were introduced in HRMS due to the complexity of international taxes

For most employees there is little impact from this change because they can make their withholding allowances themselves through UCOP's online W-4. Detailed instructions for entering withholding allowances can be found at the end of this document.

Special Considerations

Non-resident and resident aliens (e.g., H-1B, J-1, F-1 visa holders):

Non-resident and resident aliens are not able to access At Your Service Online and will need to complete the UC W-4NR form, which can be found at http://www.ucop.edu/ucophome/cao/paycoord/w4nr.pdf, and fax it to Human Resources (HR) Records Management at 510-642-1882.

Out-of-State Exemptions

For Out-of-State Exemptions (employees who pay state taxes other than California's), the process remains the same: employees must complete form UPAY 830, which can be found at http://www.ucop.edu/ucophome/cao/paycoord/upay830.pdf, and sent to the Payroll Office (fax number: 510-643-9339) for manual processing.

Note: Employees who file UPAY 830 Out-of -State Exemptions cannot access At Your Service Online to initiate changes to their Federal withholding or additional withholding. This group will need to complete the UC W-4, which can be found at http://www.ucop.edu/ucophome/cao/paycoord/ucw4-de4.pdf and fax it to Human Resources (HR) Records Management at 510-642-1882.

Employees without computer access

Employees who do not have computer access or who need computer assistance should work with their department's HR representative(s) for assistance with At Your Service Online.

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Timelines for Making Withholding Allowances

The default withholding allowance for all new hires is: Single, 0.

1. Employees hired up to 2 days before their pay cycle deadline must use At Your Service Online (AYSO -- https://atyourserviceonline.ucop.edu/ayso/) to make changes to their withholding allowances in time for their primary pay date. AYSO transactions for a specific day should be made between 3:00 a.m. and 3:00 p.m. Instructions for AYSO can be found in this document.

2. Employees hired one day prior to their pay cycle deadline must fax their paper UC W-4 form or the UC W-4NR form to HR Records Management at 642-1882 no later than 3:00 p.m. that day. Note: forms should be faxed as soon as possible rather than waiting for the final deadline.

3. Employees hired on their pay cycle deadline will default to withholding Single 0.

4. During heavy hiring periods (e.g., fall hiring), departments should be proactive to make sure their new hires are entered into the system in a timely manner.

Important Pay Cycle Deadlines

PAY CYCLE*	1. Final deadline for employees hired two days prior to pay cycle deadline. Employee initiates W-4 changes on AYSO by 3:00 p.m.	2. Final deadline for employees hired one day prior to pay cycle deadline. Fax W-4 forms to HR Records Management by 3:00 p.m.	PRIMARY PAY DATE
MA	04/01/09	04/02/09	04/08/09
SM	04/16/09	04/17/09	04/23/09
MO	04/23/09	04/24/09	05/01/09
MA	04/30/09	05/01/09	05/08/09
SM	05/14/09	05/15/09	05/22/09
MO	05/21/09	05/22/09	06/01/09
MA	06/01/09	06/02/09	06/08/09
SM	06/12/09	06/15/09	06/23/09
MO	06/19/09	06/22/09	07/01/09
MA	0629/09	06/30/09	07/08/09

* MA = Monthly Arrears; SM = Semi Monthly; MO = Monthly Current

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As a University of California employee, you have access to the Human Resources and Benefits website, At Your Service. With this tool you can update your W-4 tax withholding exemptions.

To Access AYSO, visit https://atyourserviceonline.ucop.edu/ayso/.

Sign In Process:

- Enter Username
- Enter Password - Click "Sign In"

For new users click:

1. Enter your Social Security number and your temporary password. As a new employee, you are assigned a temporary password (your birthdate in the format mmddyyyy, with no dashes or slashes; for example, if your date of birth is June 17, 1967, your temporary password is 06171967) then select "Sign In."

2. Follow the instructions to create your permanent password. It must contain 6 to 12 alpha-numeric characters. Then agree to the Password Authorization.
3. Next, follow the instructions to create a Username.
4. You will also be prompted to create a security word that a Customer Service or Benefits Representative can use to help identify you when you call for information.
5. After you create a personal email address, answer any 6 of the 12 Challenge Questions. Providing answers to the challenge questions will allow you to access your personal information if you forget your password.

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If you forget your user name or password click:

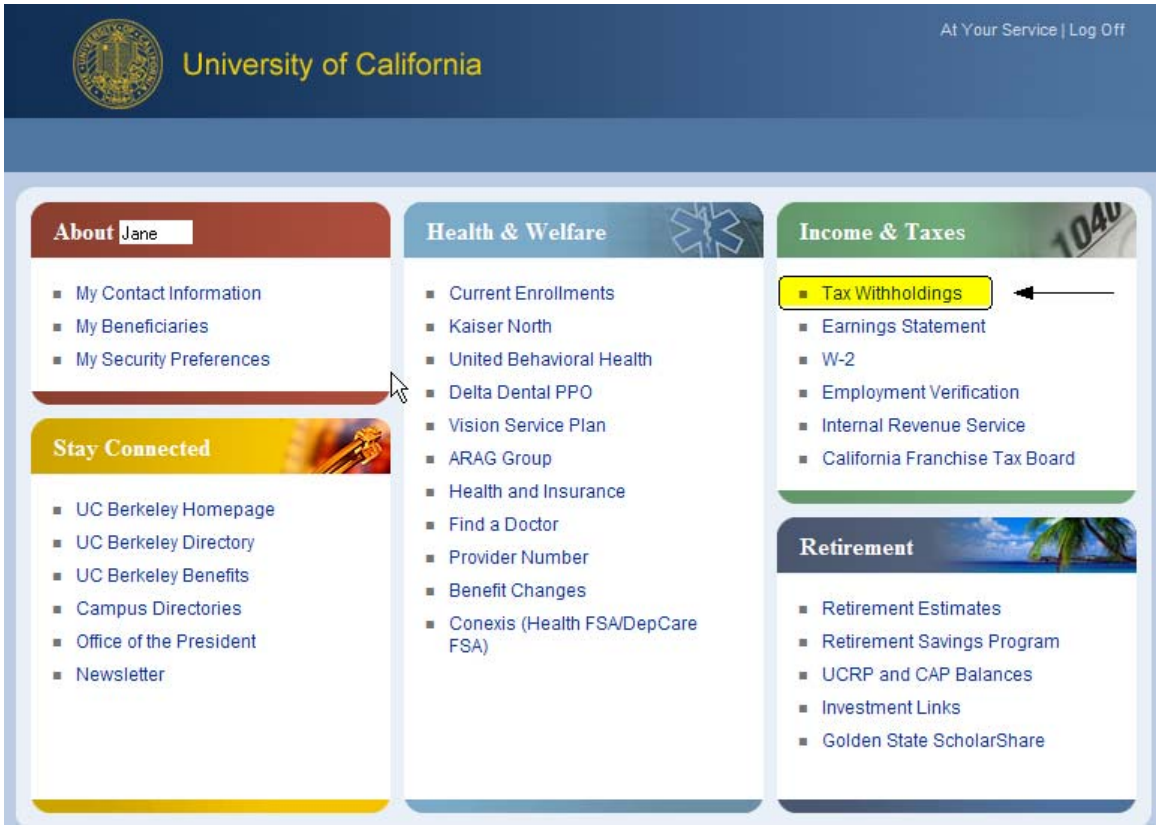
→ Forgot your Username or Password?

Follow the instructions to retrieve your username or password.

Navigation:

Once sign-in has been completed you will be taken to the main page.

Under "Income & Taxes" > click "Tax Withholdings."



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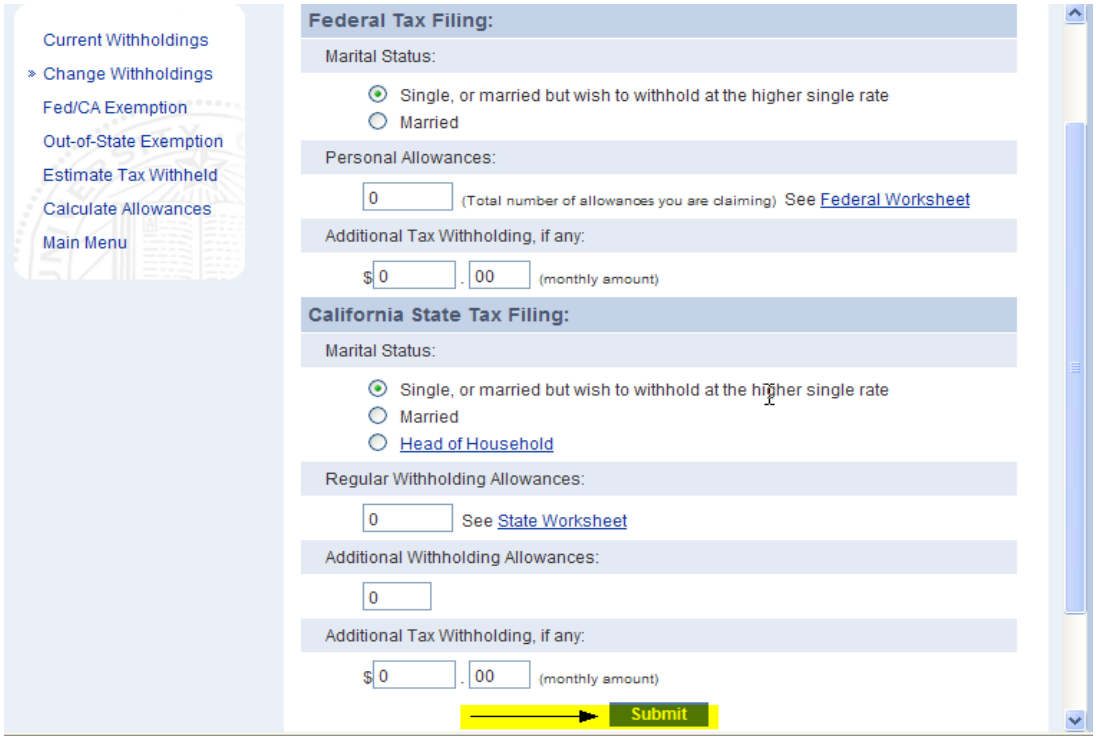
Change Withholdings:

To make changes to tax withholdings > click "Change Withholdings."

Make the appropriate changes to Federal and State filings, then **review it for accuracy**. When ready, click the "Submit" button.



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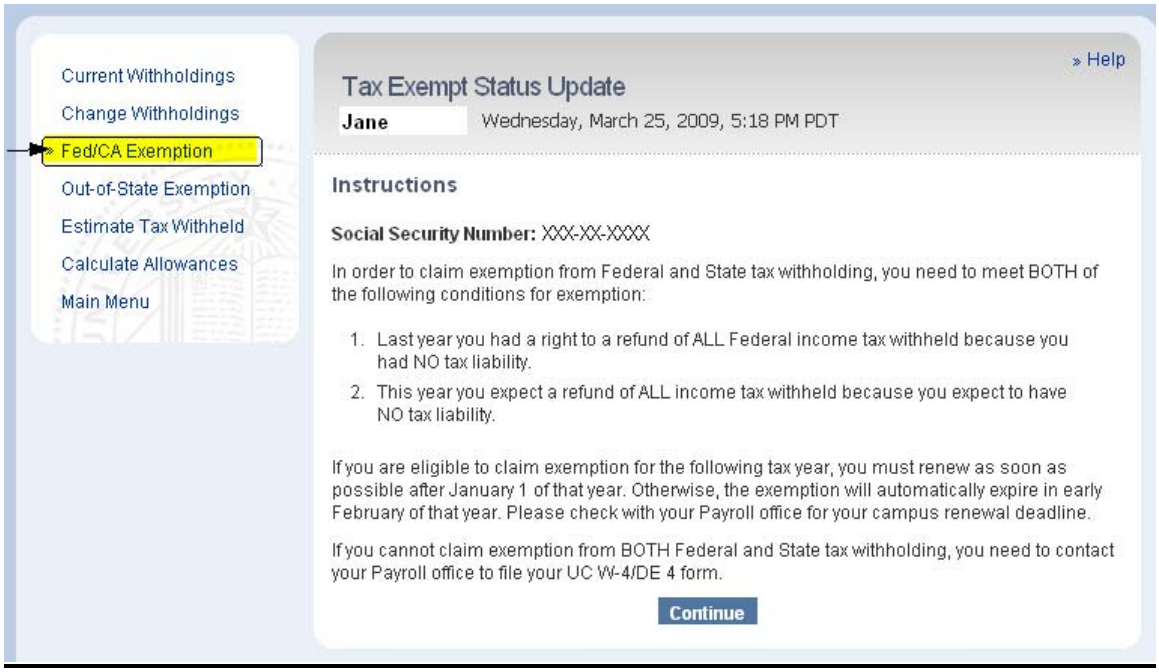
Exempt Status:

To claim or file exempt status > click "Fed/CA Exemption" and follow the instructions on the screen.