

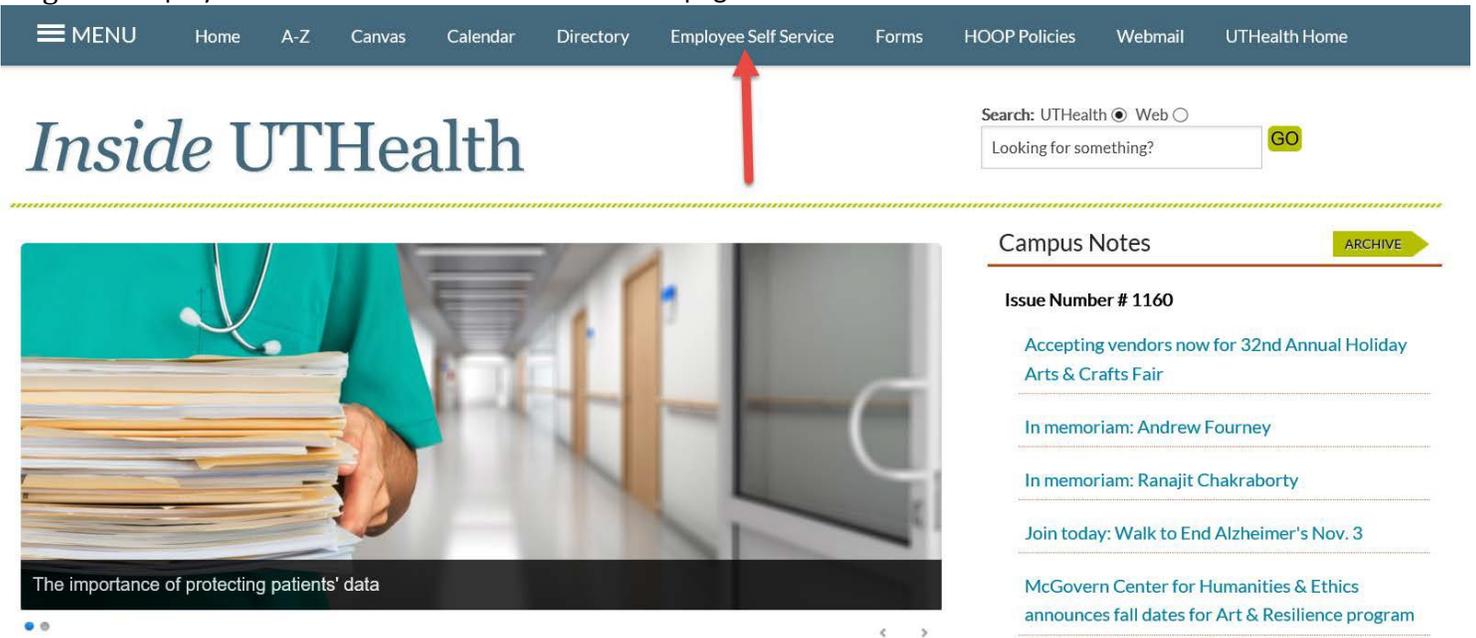
# Direct Deposit and W4 Tax Setup

Please follow the below step-by-step instructions to setup your Direct Deposit and W4.

\*\* You **MUST** use a computer on the UTHealth network or VPN with limited access to setup direct deposit\*\*

**PLEASE NOTE:** You **MUST** complete both the W4 and Direct Deposit information, as soon as you receive your userid and password, or you run the risk of being setup with the Federal default tax rate of Single with 0 withholdings, and receiving a physical check. **Payroll no longer accepts paper forms of the W4 or Direct Deposit.**

Log into Employee Self Service from inside.uth.edu webpage



The screenshot shows the top navigation bar of the Inside UTHealth website. The navigation bar is dark blue with white text. The items in the navigation bar are: MENU (with a hamburger icon), Home, A-Z, Canvas, Calendar, Directory, Employee Self Service (highlighted with a red arrow), Forms, HOOP Policies, Webmail, and UTHealth Home. Below the navigation bar is the 'Inside UTHealth' logo. To the right of the logo is a search bar with the text 'Search: UTHealth Web' and a 'GO' button. Below the search bar is a yellow dashed line. Below the dashed line is a large image of a person in a teal lab coat holding a stack of papers. Below the image is a black bar with the text 'The importance of protecting patients' data'. To the right of the image is a 'Campus Notes' section with an 'ARCHIVE' button. Below the 'Campus Notes' section are several links: 'Issue Number # 1160', 'Accepting vendors now for 32nd Annual Holiday Arts & Crafts Fair', 'In memoriam: Andrew Fourney', 'In memoriam: Ranajit Chakraborty', 'Join today: Walk to End Alzheimer's Nov. 3', and 'McGovern Center for Humanities & Ethics announces fall dates for Art & Resilience program'.

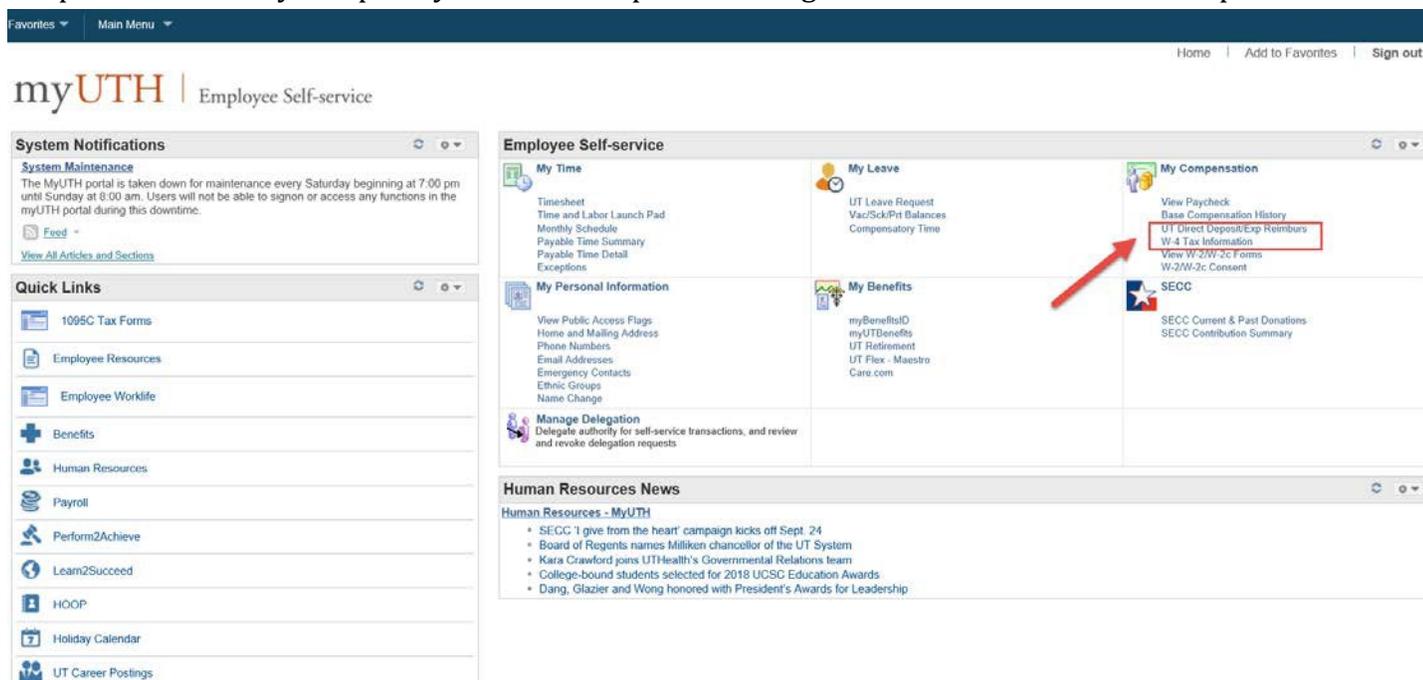
# Direct Deposit and W4 Tax Setup

Login using your user id and password here:



The image shows the login page for the UTHealth Employee Self Service portal. It features the UTHealth logo and the text 'The University of Texas Health Science Center at Houston'. Below the logo, there is a section titled 'Employee Self Service Login' with input fields for 'Username' and 'Password', and a 'Log in' button. A large padlock icon is centered on the page, indicating a protected resource. A warning message at the bottom states: 'WARNING! You are currently accessing a protected information resource. Unauthorized use is PROHIBITED! Usage of this system may be subject to security testing and monitoring. Misuse is subject to criminal prosecution. There is no expectation of privacy except as otherwise provided by applicable privacy laws.' Navigation links for 'Change Password | Password Help', 'Privacy & Security | Contact | UTHealth' are also present.

Once you have logged in a “Self Service” menu will be brought up, navigate to My Compensation. You will then see the UT Direct Deposit/Exp Reimburs and the W-4 Tax information. Please go through each of these steps to successfully complete your Direct Deposit banking information and W4 Tax setup.



The image displays the myUTH Employee Self-service dashboard. The top navigation bar includes 'Favorites', 'Main Menu', and 'Home | Add to Favorites | Sign out'. The dashboard is divided into several sections: 'System Notifications' (System Maintenance), 'Quick Links' (1095C Tax Forms, Employee Resources, Employee Worklife, Benefits, Human Resources, Payroll, Perform2Achieve, Learn2Succeed, HOOP, Holiday Calendar, UT Career Postings), 'Employee Self-service' (My Time, My Personal Information, Manage Delegation), 'My Leave' (UT Leave Request, Vac/Sck/Prt Balances, Compensatory Time), 'My Benefits' (myBenefitsID, myUTBenefits, UT Retirement, UT Flex - Maestro, Care.com), 'My Compensation' (View Paycheck, Base Compensation History, UT Direct Deposit/Exp Reimburs, W-4 Tax Information, View W-2/W-2c Forms, W-2/W-2c Consent, SECC), and 'Human Resources News' (SECC 'I give from the heart' campaign, Board of Regents names Milliken chancellor, Kara Crawford joins UTHealth's Governmental Relations team, College-bound students selected for 2018 UCSC Education Awards, Dang, Glazier and Wong honored with President's Awards for Leadership). A red arrow points to the 'W-4 Tax Information' link in the 'My Compensation' section.

\*\* You may also Consent to receive and view your W2 electronically, as well as view your Paycheck stub in the same navigation.

# Direct Deposit and W4 Tax Setup

## UTHealth Direct Deposit Setup

\*When setting up direct deposit you are **required** to set up the **Expense Reimbursement Account**. There is a separate tab next to the "Payroll Direct Deposit Acct" tab. If you choose not to receive your expense reimbursements through direct deposit then select the drop down for \*Direct Deposit Account Type and choose "Please Issue a Check". If you choose to receive your expense reimbursements through direct deposit then select the drop down for \*Direct Deposit Account Type and choose "Please Issue a Check". You **MUST** select one the other (add bank account or choose check) before setting up your payroll direct deposit.

The Direct Deposit self-service panel must be completed to receive your paycheck as a direct deposit. There is not a limit to how many accounts you can enter, however you must have a balance record. If you are just setting up **one account** select "**balance**" as the deposit type. If you are setting up multiple accounts select "amount" or "percent" and put a number between 1 and 998 into the deposit sequence. The last account **MUST** have "balance" as the deposit type which will default to a deposit sequence of 999. Having a balance record will ensure that your net pay gets deposited appropriately. You must also enter a Deposit Sequence for each of your Deposit types of amount or percent. The highest sequencing number will dictate the "last" in the order of deposits. The lower the number is, the higher the priority.

Payroll Direct Deposit Acct **Expense Reimbursement Acct**

### Payroll Direct Deposit Bank Account

Jane M. Doe

**Changes to your direct deposit are your responsibility!**

Please verify your account information (routing and account numbers) before submitting changes.  
Deposits are made based on the deposit sequence number which identifies the priority of the deposit.  
This number can be from "1" to "999".

**\*Note: do not use a routing number that starts with "5".**

I DO NOT wish to receive a pay advice email notification each pay period.

Direct Deposit Details							
*Account Type	Routing Number	Account Number	*Deposit Type	Percent	Amount in Dollars	Deposit Sequence	
Checking	111000025	98768432	Amount		100.00	997	+ -
Checking	313090561	0000654321	Balance			999	+ -

I authorized the University of Texas Health Science Center at Houston to credit my account with the depository named above. If UTHSC-H erroneously deposits funds into my account, I authorize the necessary debit entries, not to exceed the total of the original credits. The authorization will remain in effect until UTHSC-H has received written notification from me that it is to be discontinued in such time and manner for the University to act on it 30 days after or until my employment is terminated. In the event one or more of my accounts is inactive causing my funds to be rejected and returned by the bank, the rejected portion will be deposited to one of my active accounts and I will be notified of this action in writing. Additional information regarding UTHSC-H Direct Deposit is available at: <https://inside.uth.edu/finance/payroll/dd-faq.htm#widd>

If you have questions or need assistance please contact the payroll department at (713) 500-3962.

Select the box above that states "I DO NOT wish to receive a pay advice email notification each payperiod", if you would **not like** to receive an email stating your direct deposit advice is ready to be viewed. You will still be able to view your advice in "View your Paycheck" in the self-service.

Once you have entered all direct deposit information, click Save. A confirmation will appear, click Ok.

# Direct Deposit and W4 Tax Setup

## W4 Tax Information

The W4 entry screen is for Federal taxes only. Please verify your SS#, as well as your address. Please click view instruction for a brief explanation. If you have any concerns or questions regarding how you should file, please contact the IRS. The New Tax Tables can be found at [www.irs.gov](http://www.irs.gov)

### W-4 Withholding Certificate

Jane M. Doe  
UT Health Science Ctr-Houston

Social Security Number 123-45-6789

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 [www.irs.gov](http://www.irs.gov).

#### Step 1: Personal Information

Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to [www.ssa.gov](http://www.ssa.gov).

#### Address

3333 Fannin  
Houston, Tx 77030

#### Filing Status

- Single or Married filing separately  
 Married filing jointly (or Qualifying widow(er))  
 Head of Household (Check only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual).

Complete Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or you have concerns about your privacy, see instructions for Form W-4 on the IRS website.

#### 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 these jobs.

[View Instructions](#)

Multiple Jobs or Spouse Works

Complete Steps 3 through 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 through 4(b) on the Form W-4 for the highest paying job.)

#### Step 3: Claim Dependents

[View Instructions](#)

If your 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   
Other tax credits   
Total

#### Step 4: Other Adjustments

[View Instructions](#)

(a) Other Income   
(b) Deductions   
(c) Extra Withholding

#### Claim Exemption from Withholding

I claim exemption from withholding for the year  and I certify that I meet BOTH of the following conditions for exemption from withholding:

- Last year I owed no federal income tax.
- This year I expect to owe no federal income tax.

Check this box if you meet both conditions to claim exemption from tax withholding

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Submit

Once you have entered all the tax information, click Submit.