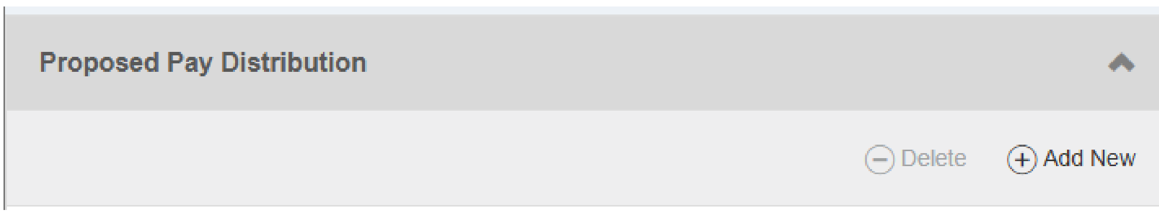
University of Idaho
Payroll Services

Direct Deposit and W-4 Setup Instructions

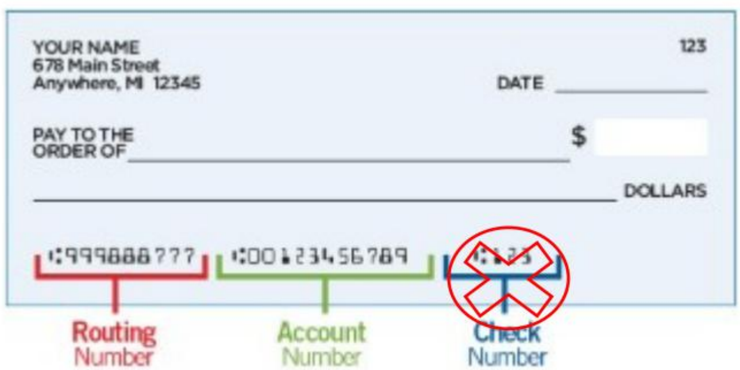
For new and returning employees, online setup is available within two weeks of your start date.

Setting up Direct Deposit

1. Log into MyUI. On the **Employee Self-Service** card, select **Employee Dashboard** > **Direct Deposit Information**.
2. Add your information:
    a. Under “Proposed Pay Distribution”, select “Add New”.

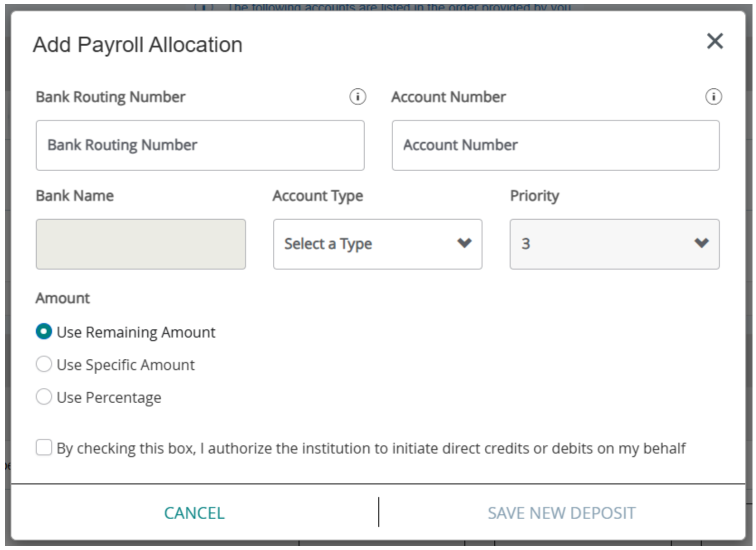


    b. Enter your bank’s routing number.

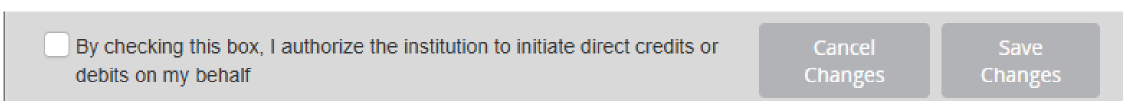


        i. Routing numbers for checking accounts are typically found at the bottom left corner of checks between the two “ |: ” (see above).
        ii. If you are routing to a savings account, you may need to contact your bank and ask for your account’s routing number.

    c. Once the routing number is added, the bank name will automatically generate under “Bank Name”. Confirm that the bank name is correct.
        i. If the bank name is not accurately reflected, please **stop** and contact our office directly; a voided check will need to be presented to our office so we can manually update the routing number and bank name association.
    d. Enter the account number. Do not include your check number.
    e. Indicate if the account is a checking or savings account.



   f. Enter the amount allocation.
      i. Indicate if you want a flat dollar amount or a percentage of your paycheck contributed to this account (IF YOU WANT ALL OF YOUR PAYCHECK TO GO INTO THIS ACCOUNT, PLEASE ENTER 100 PERCENT).
   g. Select “Save New Deposit”.
3. Repeat Step 2 to add additional accounts if needed.
   a. REMEMBER: when splitting your paycheck over multiple accounts, ensure that either all percentages add up to 100% or one account has the “Use Remaining Amount” option selected. If you enter a specific dollar amount or percentage less than 100%, it will be flagged as an error.
4. Select “Save Changes”.



Updating Existing Direct Deposit Information

To update your account information

Please note: You must delete your old allocation before adding the new one.

1. To delete an allocation:
    a. Under "Proposed Pay Distribution", select the check box next to the bank name and then select "Delete".
    b. You will see a pop-up message asking you to confirm the deletion. Select "Delete" to confirm.
2. To add an allocation:
    a. Select "Add New"
    b. Enter your information (see "Setting up Direct Deposit" above for guidance).
    c. Select "Save New Deposit".
3. Select "Save Changes".

To split your paycheck between multiple accounts

1. Under "Proposed Pay Distribution", select the check box next to the bank name of the current allocation you wish to change.
2. Update the "Amount" or "Percent" and select "Save".
3. Add additional accounts. You can use percentages or select the remaining amount for the rest of your payroll check to go into this account.
    - REMEMBER: When splitting your check over multiple accounts, be sure that the total percentage adds up to 100%.
4. Select "Save Changes".

What happens if I don't set up Direct Deposit?

Your paychecks will be mailed to the address Payroll has on file for you. Please submit an address change and we will ensure we have your most current mailing address on file or update your address.

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Setting up Your W-4 Allocations

Please note: the Federal W-4 and Idaho W-4 are separate. You must submit both forms to make changes to federal and state withholding.

Employees who live and work outside of Idaho must submit a form W-4 for their state as they will be exempt from Idaho withholding. DO NOT submit an Idaho W-4 if you do not live AND work in Idaho.

Setting up your Federal W-4

1. Log into MyUI. On the Employee Self-Service card, select **Employee Dashboard** > **Taxes** > **W-4 Employee's Withholding Allowance Certificate.**
2. Select "Update" at the bottom of the page.
3. Enter the "Effective Date".
    a. Make sure the effective date is **on or after your first day of work.**
4. Enter your information.
    a. If you need assistance, please access the IRS withholding calculator or consult with a qualified tax professional. A link to the IRS site is included on the page. Human Resources and Payroll staff are not qualified to give tax advice and cannot provide any assistance completing the form.
5. Once completed, select "Certify Changes" and then "OK".

Setting up your Idaho W-4

1. Log into MyUI. On the Employee Self-Service card, select **Employee Dashboard** > **Idaho W-4.**
2. Select your Withholding Status.
3. Enter your total number of allowances.
    a. The higher number of allowances, the less is withheld.
4. Entering an amount in the box for additional withholding will add this amount to what is already being withheld based on your status and allowances.
5. Confirm your mailing address.
    a. If your address listed is incorrect, please submit an address change. This address is where your W-2 and paychecks will be mailed to if direct deposit is not set up in time or if you do not elect to receive your W-2 electronically.
6. Select the box under "Signature" to electronically sign.
7. Select "Certify and Submit" and then select "OK".