University of Idaho
Payroll Services

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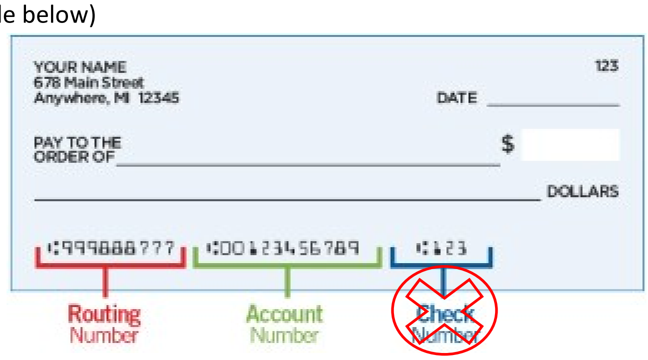
Direct Deposit and W-4 Setup Instructions

For new and returning employees, online set-up should be available within 2 weeks of your start date – when the "Employees" button appears on your VandalWeb menu.

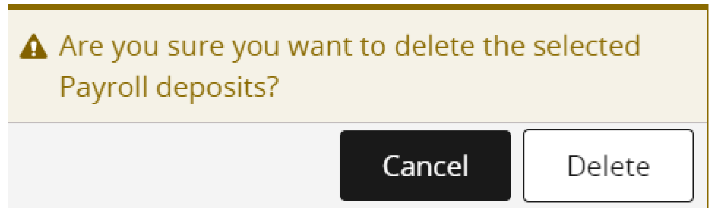
Setting up Direct Deposit:

1. Log into VandalWeb
   a. Select: "Employees" > "Payroll" > "Direct Deposit Review or Update"
2. **Adding your information** Follow the appropriate steps below in which apply to you
   a. If you have never set up direct deposit with UI before
   *****This will be added under the "Proposed Pay Distribution" Section***
      i. Select "Add New Direct Deposit" *(make sure this is being added for Payroll, not Accounts Payable)*
      ii. Enter your bank's routing number (see example below)
         1. Routing numbers are typically found at the bottom left corner of checks between the two " **|:** "
         2. If savings account is being used, you may need to contact your bank and ask for your account's routing number

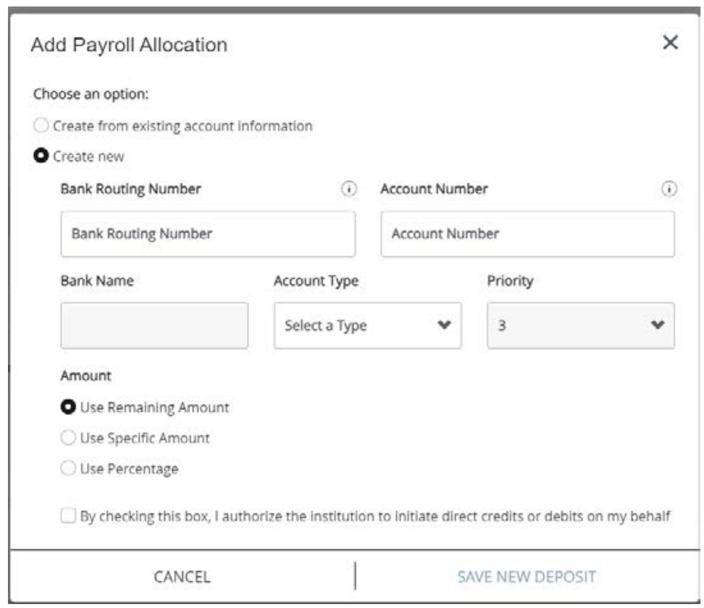


      iii. Once the routing number is added, the bank name will automatically generate under "Bank Name"
         1. If the bank name is not accurately reflected, please stop and contact our office directly; a voided check will need to be presented to our office in order to manually update the routing number and bank name association
         2. If the bank name is accurately reflected, please continue to the next field
      iv. Enter the account number (see example above)
      **__Do not__ include your check number
         1. Enter the account number a second time to ensure accuracy
         2. Indicate if it is a checking or savings account.
      v. Amount Allocation
         1. 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)**
         2. If you enter a specific dollar amount or a percentage less than 100%, the remaining amount will be entered as a check and sent to wherever your check mailing address is.
         3. Select "Save Changes"

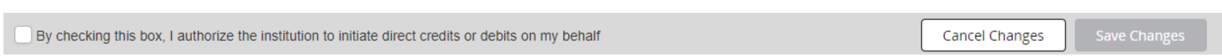
3. **Updating your Direct Deposit Information**
   a. **If you currently have Direct Deposit setup and need to delete and/or change your allocation**
      i. Under “Proposed Pay Distribution” select the check box next to the bank name under your current allocation you wish to change
      ii. To delete an allocation
         1. Select the check box next to the “Bank Name” for the allocation and select “Delete”
         2. The following message will pop up, select “Delete”



      iii. To add an allocation
         1. Select “Add New”
         2. Choose “Create from existing account information” or “Create new”
      iv. Select “Save New Deposit”
      **If you do not inactivate your old direct deposit first, you will get an error message



   b. **If you want to split your paycheck between multiple accounts**
      i. Under “Proposed Pay Distribution” select the check box next to the bank name under your current allocation you wish to change
      ii. Change the “Amount” or “Percent” to your new amount then select “Save”
      iii. Enter the percentage or dollar amount and then click on save.
      iv. Click on “Update Direct Deposit Allocation”
      v. Enter the other account information the same way as above.
      vi. Then 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%.
      vii. Select “Save Changes”



Don’t have a checking or savings account to setup for 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.

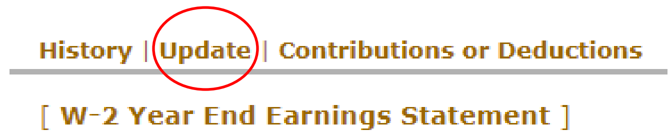
Please contact Payroll Services at 208-885-3868 or payroll@uidaho.edu with any questions.

Setting up Your W-4 Allocations:

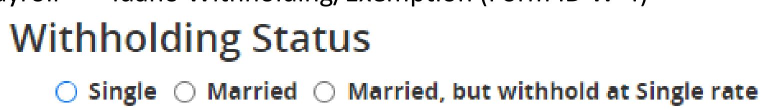
The Federal W-4 and Idaho W-4 are separate

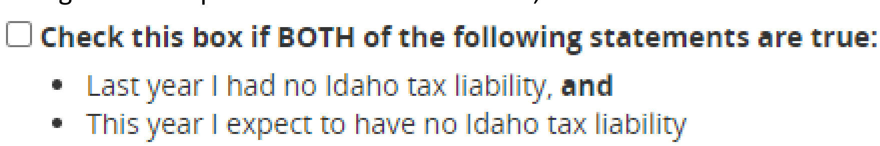
Please note, you must submit both forms to make changes to federal and state withholding**.** Employees who live and work outside of Idaho must submit a form W-4 for their state as they will be exempt from Idaho withholding**. DO NOT** submit an Idaho W-4 if you do not live AND work in Idaho

1. **Setting up your Federal W-4**
    a. Log into VandalWeb
    b. Select: "Employees" > "Payroll" > "Federal W-4"
2. Select "Update" located 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. Set the deduction status as "Active"
    a. Change to "Exempt" ONLY if you meet the two criteria listed
        i. Your earnings will be reported to the IRS, but no amount will be withheld for income taxes
5. Enter your information
    a. If you need assistance, you can access the IRS withholding calculator or consult with a qualified tax professional. A link to the IRS site is at the top of the page
    b. Human Resources and Payroll staff are not qualified to give tax advice and cannot provide any assistance on completing the form
6. Once completed, select "Certify Changes" then "OK"

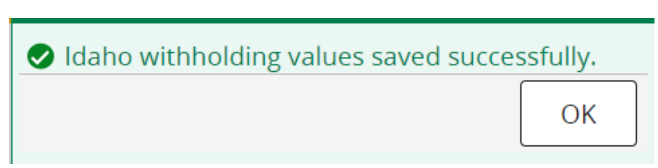


1. **Setting up your Idaho W-4**
    a. Log into VandalWeb
        i. Select: "Employees" > "Payroll" > "Idaho Withholding/Exemption (Form ID W-4)"
    b. Select your Withholding Status
        i. Default is Single
2. Enter "Total number of Idaho allowances you're claiming"
    a. The higher number of allowances, the less is withheld
        i. Default is zero allowances
3. Check the box ONLY if both statements are true
    a. Checking the box will exempt you from Idaho income tax withholding
    b. Your earnings will be reported to the State of Idaho, but no amounts will be withheld for income taxes





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. Check your "Current Mailing Address"
    a. If your address listed is incorrect, please visit our Payroll Services Address Change to update this
    b. 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" then select "OK"



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