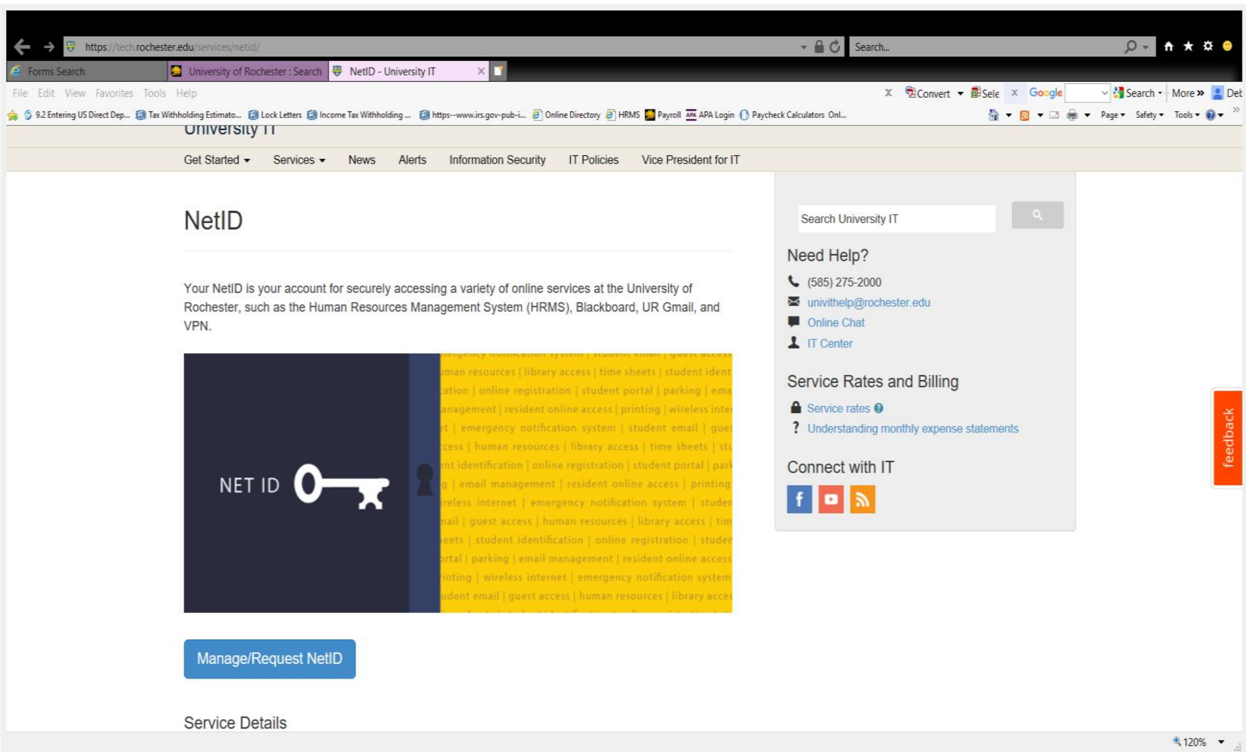
Payroll Self-Service:

NetID and PASSWORD

Most individuals receive their NetID and password as part of orientation/onboarding, but visit University IT's NetID page or call 275-2000 for help initializing or managing your NetID. NetID will be your key for accessing multiple systems across the University and Medical Center.

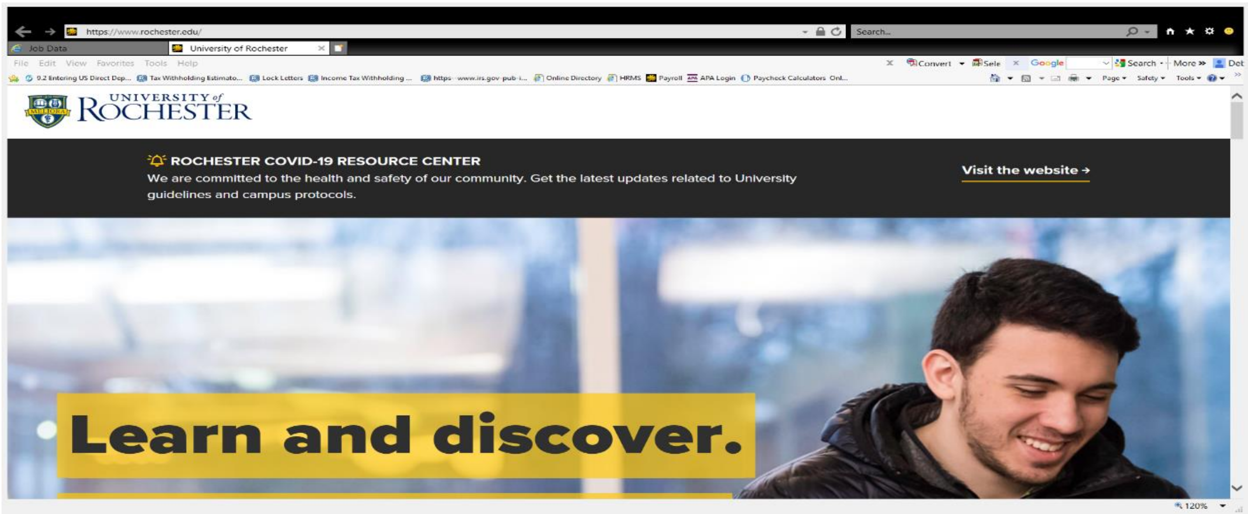


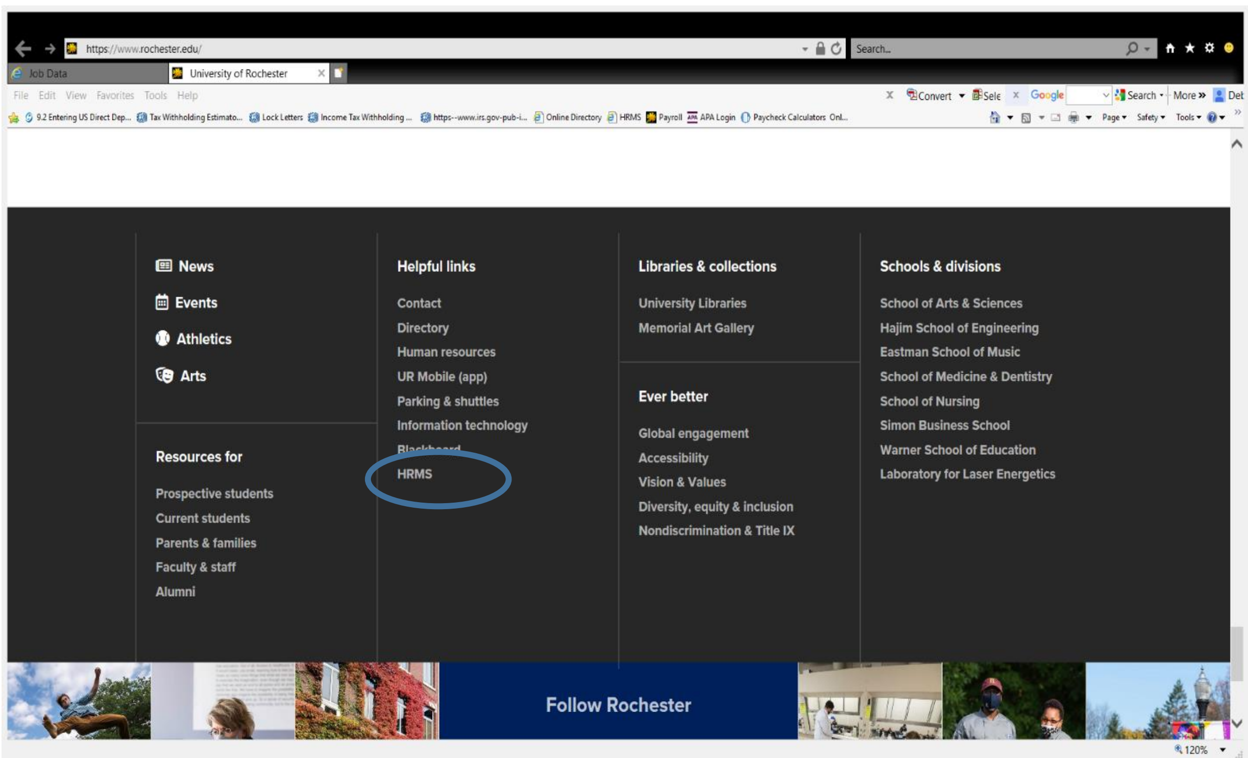
HRMS Login:

From the UR homepage, scroll to the bottom of the page and select the link for HRMS under the Helpful links section. Or, in the search bar, www.rochester.edu/people.

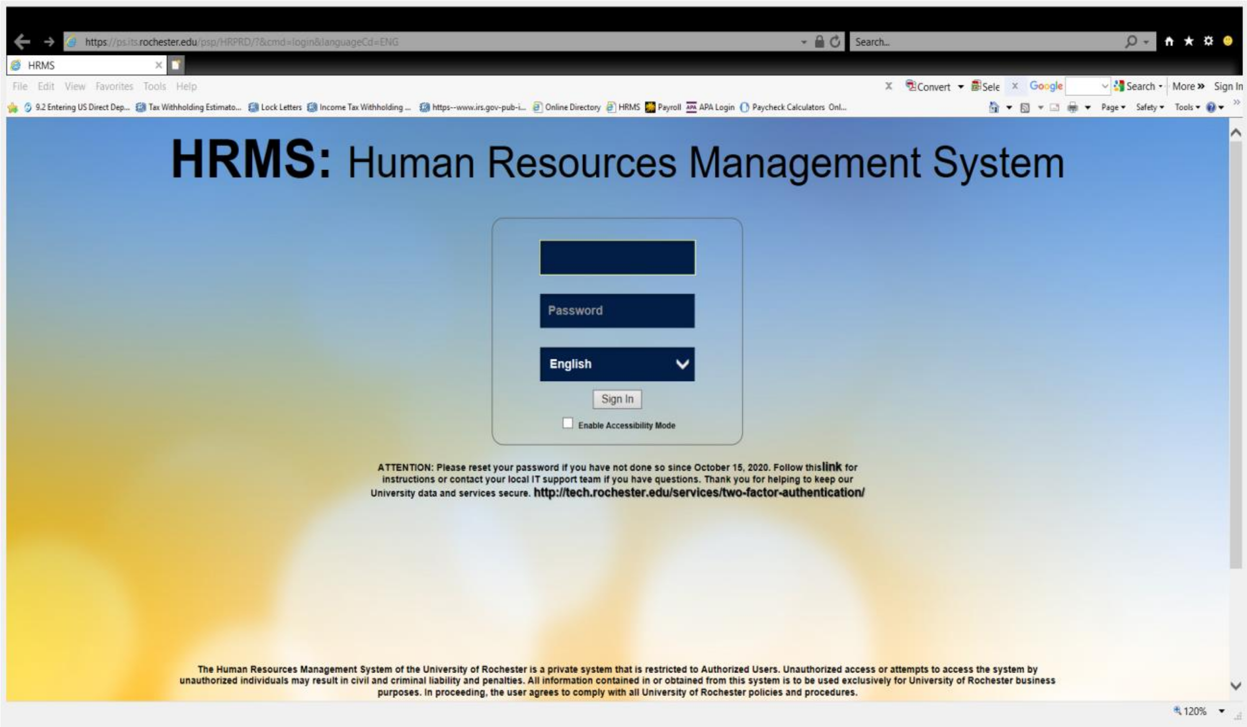
If you have forgotten your password for your NetID, it can be re-set by contacting the IT Center at (585) 275-2000 or via email at univithelp@rochester.edu. Once it is re-set, you will be given instructions on creating a new password.

To access HRMS from outside the University's network, you need to enroll in Duo Security. Enrollment and more information about how the process works is available at http://tech.rochester.edu/services/two-factor-authentication/.

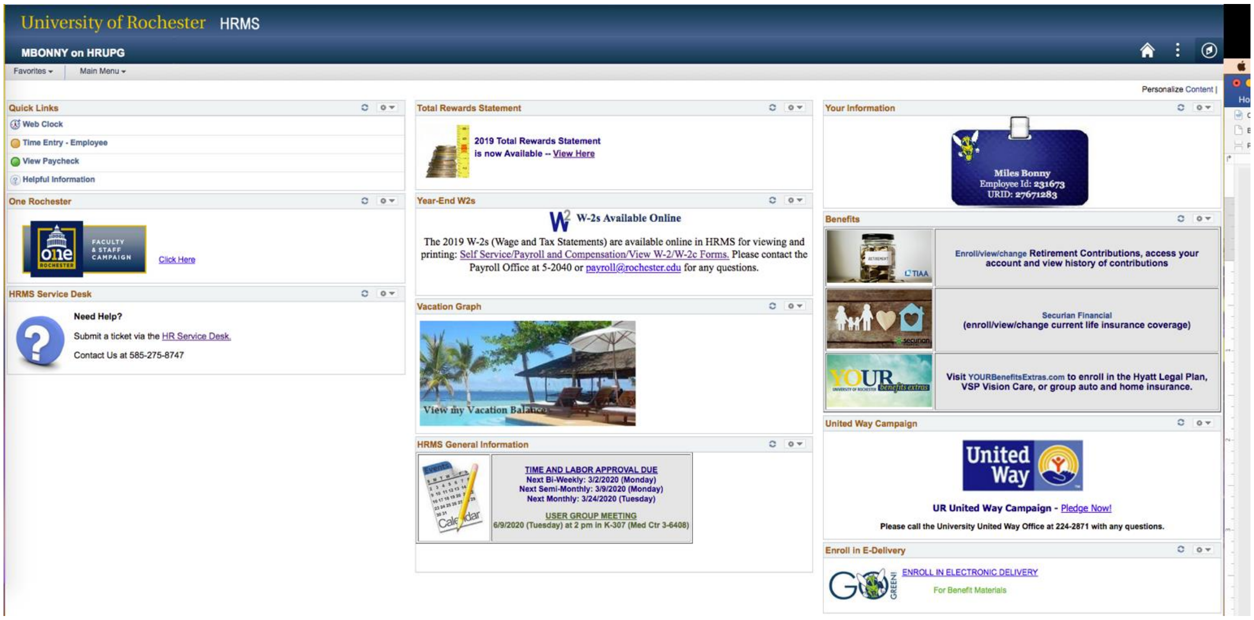




Type in your NetID and Password (both are case sensitive).



Once logged into HRMS, the **homepage** will appear.



SELF SERVICE: PAYROLL AND COMPENSATION

Use the navigation below to view your **Pay** information.

Main Menu → Self Service → Payroll and Compensation → **Pay**

View select or all of your paycheck statements. This page will highlight the check date, company, pay begin/end dates, your net pay and the paycheck number. Use the "**>**" to the PDF of your paycheck statement.

Note: An employee can access their paycheck from the HRMS homepage. Under the Quick Links section on the HRMS homepage, select *View Paycheck*. Select the desired Check Date to bring up the PDF for that pay period. PDF statements will display Year-to-Date balances and will print to one-page, if desired.

SELF SERVICE: PAYROLL AND COMPENSATION

Use the navigation below to view your **Direct Deposit** information.

Main Menu → Self Service → Payroll and Compensation → **Direct Deposit**

By submitting a direct deposit request or change, I authorize my wage payment to be sent to the designated financial institution(s) to be deposited into the specified account(s). The authority is to remain in full force and effect until the Payroll Office has received notification from me of its termination in such time and in such manner as to afford the University of Rochester a reasonable opportunity to act on it. *I also understand that the University of Rochester will cancel direct deposit within 60 days in the event I separate from service.* Further, I agree not to hold the University of Rochester responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution or due to an error on the part of my financial institution in depositing funds to my account. In the event that University deposits funds erroneously into my account, I authorize the University of Rochester to debit my account for amount not to exceed the original amount of the erroneous credit.

Direct Deposit

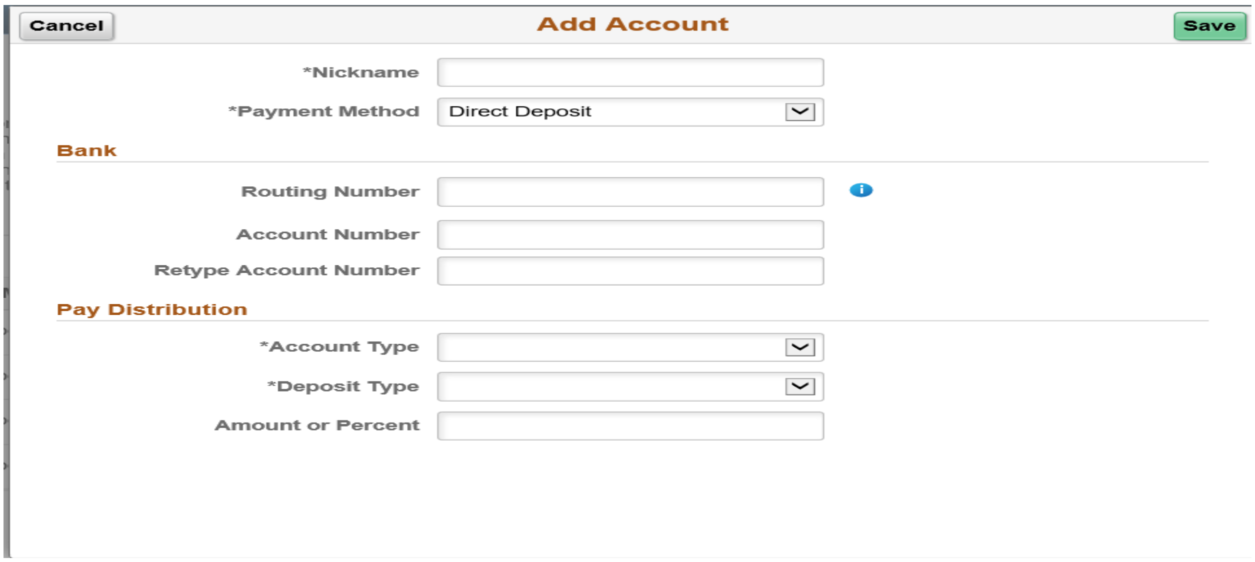
By submitting a direct deposit request or change, I authorize my wage payment to be sent to the designated financial institution(s) to be deposited into the specified account(s). The authority is to remain in full force and effect until the Payroll Office has received notification from me of its termination in such time and in such manner as to afford the University of Rochester a reasonable opportunity to act on it. I also understand that the University of Rochester will cancel direct deposit within 60 days in the event I separate from service. Further, I agree not to hold the University of Rochester responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution or due to an error on the part of my financial institution in depositing funds to my account. In the event that University deposits funds erroneously into my account, I authorize the University of Rochester to debit my account for amount not to exceed the original amount of the erroneous credit.

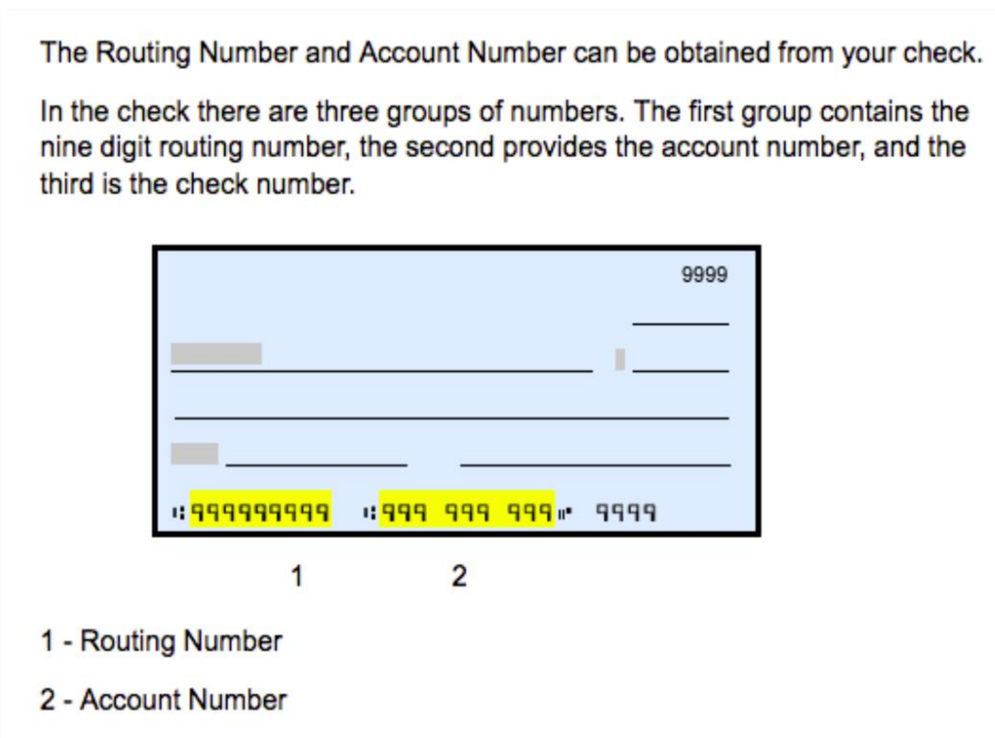
Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
Last	Checking999	Direct Deposit	221370030	5412105909	Checking	Remaining Balance

Direct Deposit: Adding Direct Deposit Information

1. To add an account, select the "+" button and a dialog box will appear, "Add Account."
2. Provide a nickname and payment method (direct deposit) for your account. In the appropriate fields within the Bank information section, provide the routing number and account number.





**Click the information icon for more insight about the location of the routing number and account number from a check.*

3. Be sure to complete the areas on the form where the **asterisk** (*) appears, especially under the Pay Distribution section. Choose **Account Type** from drop-down box (Checking, Savings). Choose Deposit Type (Amount, Percent, Remaining Balance).

4. To deposit 100% of your net pay in one bank account you must use **Remaining Balance** as the Deposit Type. To add another account, click on the plus sign.

5. Select the **Save** button.

If you want your pay to be deposited in **more than one account**:

- Select Add Account sign “**+**” and select the order of your deposits/accounts.
- Select the **Save** button.

Note: You are responsible for ensuring your information is correct.

Example of single account

Direct Deposit

Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent	
Last	Test1	Direct Deposit	063107513	XX4123	Checking	Remaining Balance	›

Example of multiple accounts

Direct Deposit

Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent	
5	Checking5	Direct Deposit	[illegible]	[illegible]	Checking	[illegible]	›
15	Savings15	Direct Deposit	[illegible]	[illegible]	Savings	[illegible]	›
Last	Checking999	Direct Deposit	[illegible]	[illegible]	Checking	Remaining Balance	›

Reorder

NOTE: When setting up multiple direct deposits, the Remaining Balance deposit must occur last. The Remaining Balance will deposit the remaining balance of your pay after all other amounts have been deposited.

Direct Deposit: Removing an Account

1. To modify your Direct Deposit account, select the “**>**” button and a dialog box will appear.
2. Click **Remove**, then the **Save** button.

Note: If you remove the account, you will not be able to add a new account(s) until the following business day.

SELF SERVICE: PAYROLL AND COMPENSATION

Use the navigation below to view your **Tax** information.

Main Menu → Self Service → Payroll and Compensation →
- W4 Tax Information
- IT-2104 NYS Tax Information
- View W2/W2c Forms
- W2/W2c Consent

Review or change your W-4 Information (Federal)

1. Visit the *W-4 Tax Information* page.

W4 Federal Tax Form

You can review and update your Form W-4 anytime using Employee Self Service. New employees who do not submit a Form W-4 will be treated as a single filer with no other adjustments per IRS guidelines.

Note: The Payroll staff cannot advise individuals on what to put on the W-4 Form. There are several tools available to assist individuals:

- IRS Tax Withholding Estimator- https://www.irs.gov/individuals/tax-withholding-estimator
- Paycheck Calculator- https://www.paycheckcity.com/calculator/salary/

To complete a W-4 Form in Self-Service:

Step 1: Indicate your filing status by selecting one of the radio buttons

- Single or Married filing separately
- Married filing jointly (or qualifying widower)
- 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).

** Steps 2, 3 and 4 are optional. Employees should complete Steps 2, 3 and/or 4 if relevant to their personal situations. These steps show adjustments that will affect the withholding calculation.

Step 2: 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.

Step 3: Claim Dependents – Please click on View instructions for help completing this section.

View Instructions

Step 4: Other Adjustments

(a) Other Income. If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs.

(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet and enter the result here.

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

Step 5: Submit your changes by clicking on the submit button at the bottom of the page

Submit

Employees wishing to claim exemption from federal income tax withholding:

Complete this section by indicating the tax year, and certify you meet both conditions. Submit your changes by clicking on the submit button. If you chose to claim exempt this means there will be no federal tax withholding from your paycheck. You may end up owing these taxes when you file your personal tax form with the IRS if you do not meet BOTH conditions below. In addition, the IRS can issue a Lock Letter if you do not have enough withheld. This Lock Letter could prohibit you from changing your taxes withholding in the future.

Claim Exemption from Withholding

I claim exemption from withholding for the year 2020 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

Submit

Note: The exemption from withholding is valid for the current tax year only.

Sample W-4 Page

W-4 Withholding Certificate

Betty Locherty

Global Business Institute

Social Security Number 341-95-7245

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.

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.

Address

343, Hill stone road

Buffalo NY 74940

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 2020 **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

Review and edit your NYS withholding IT-2104 form

The New York State income tax withheld from your paycheck is based on your marital status and the number of allowances you enter on NY Form IT-2104 (Employee Withholding Allowance Certificate). Generally, the more allowances that you claim on NY Form IT-2104, the less New York state income tax withholding you will have in your paycheck. As described below, employees can request an additional amount of NY state income tax withheld from each paycheck, in addition to the NY state income tax withholding based on your marital status and number of allowances.

You can review and update your NY Form IT-2104 anytime using Employee Self Service. Employees who do not complete an IT-2104 form prior to the processing of their first paycheck are defaulted to single status with zero withholdings per NYS guidelines.

Employees wishing to claim exempt will need to complete a paper form IT-2104 E, as this cannot be done in Self-Service. Please refer to the instructions included on the IT-2104 E on eligibility criteria for claiming exemption from NYS taxation to see if you qualify to claim exempt, https://www.tax.ny.gov/pdf/current_forms/it/it2104e_fill_in.pdf

Note: The Payroll staff cannot advise individuals on what to put on the IT-2104 Form. There are tools available to assist individuals:

- Paycheck Calculator- https://www.paycheckcity.com/calculator/salary/

To complete an IT-2104 Form in Self-Service:

- Indicate the number of allowances you are claiming
- Indicate if you wish to have an additional amount withheld
- Indicate the tax status of Single or Married
- Click “Submit”

Sample IT-2104 page

Favorites ▾ | Main Menu ▾ > Self Service ▾ > Payroll and Compensation ▾ > IT-2104 NYS Tax Information

UNIVERSITY of ROCHESTER HRMS

IT-2104 NYS Tax Information

Rhonda Red
University of Rochester

Social Security #: 345-67-8901

You must complete Form IT-2104 so the Payroll Department can calculate the correct amount of New York State tax to withhold from your pay. New York State tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form IT-2104 anytime your tax situation changes and you choose to have more, or less, tax withheld.

Home Address

123 Main Street
Rochester NY 12345

IT-2104 Tax Data

Please fill out an IT-2014 form and send to Payroll for processing if:

- Claiming Allowances over 9 for New York State or
- Resident of New York City or Yonkers.

If you have any questions, please contact the Payroll Office at 5-2040 or payroll@rochester.edu.

You can download the IT-2014 form by clicking the below link:

Form IT-2104: Employee's Withholding Allowance Certificate

Review worksheet on page 3 of the IT-2104 form before making any entries for New York State below:

Enter total number of Allowances you are claiming:

Enter Additional Amount, if any, you want withheld from each paycheck:

Indicate Tax Status

(●) Single or
Head of household or
Married, but withhold at a higher single rate or
Married, but legally separated

( ) Married

Submit Process

Penalty - A penalty of $500 may be imposed for any false statement you make that decreases the amount of money you have withheld from your wages. You may also be subject to criminal penalties.

Submit

I certify that I am entitled to the number of withholding allowances claimed on this certificate.

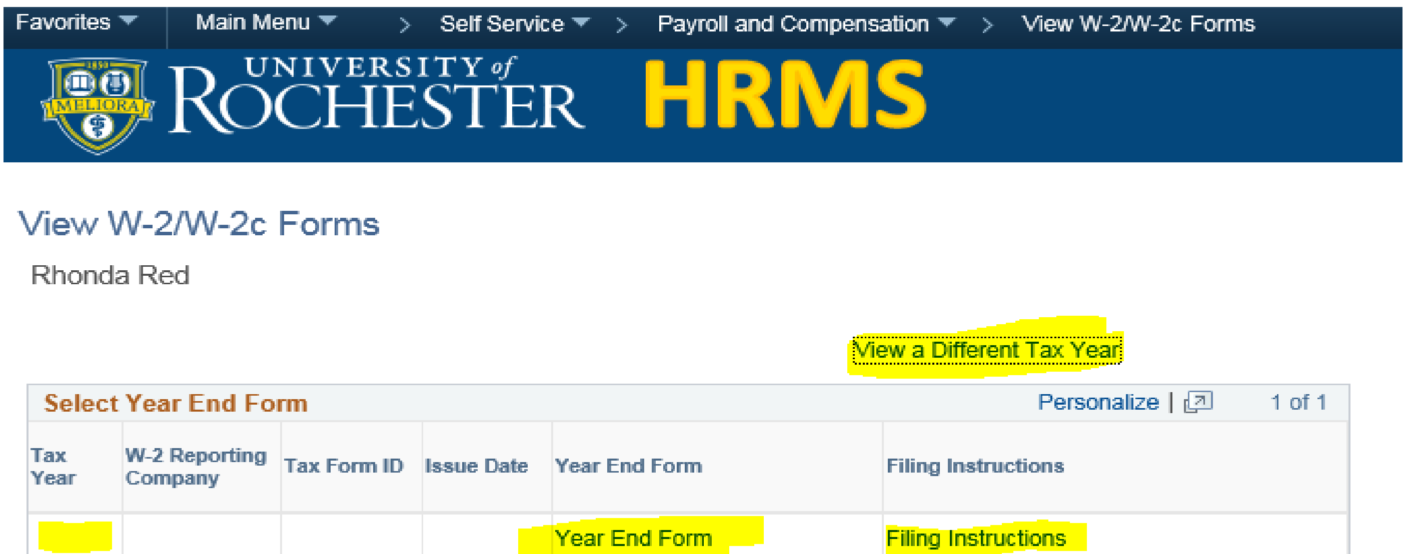
View and print W2/W2c forms

The W-2 form is your wage and tax statement. The W-2 form provides information regarding taxable wages paid to you, and the taxes withheld from those wages for the calendar year specified on the W-2 form. Employees need the W-2 form for filing personal income tax returns.

Employees can view and print W-2 and W-2C forms from 2009 through the present year.

The current year form appears. Click on Year End Form to open and view/print your most recent W-2 Form. If your require a copy of a previous year, select View a Different Tax Year and all prior year W-2/W-2C forms will appear on the screen. A description of each box of the W-2 can be viewed/printed by selecting Filing Instructions.

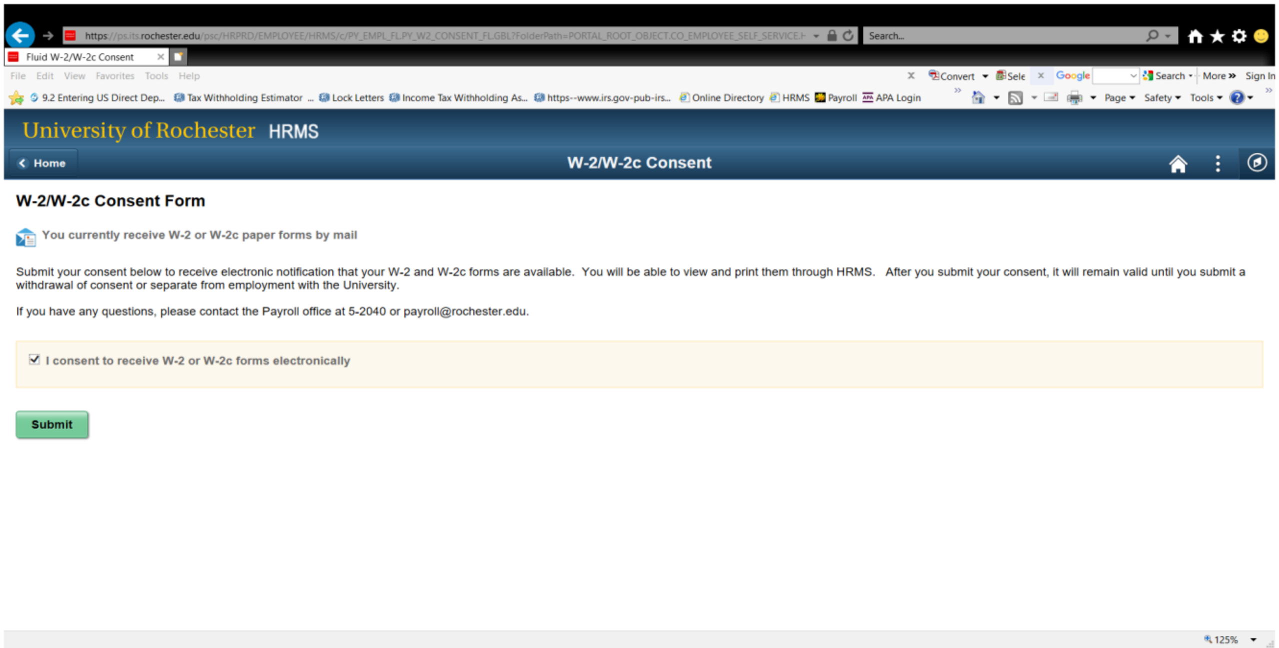
NOTE: Pop-up blocker must be turned off in order for the pdf file to open up



W2/W2c Consent

Consent to receive notification when W2 forms are available. Once W2 forms are available you will receive an email letting you know your W2 form is available to view/print. If you consent to the electronic notification, a paper form will not be mailed to your address on file in HRMS.

Check the box "I consent to receive W-2 or W-2c forms electronically". Then select submit.



Once you submit, the following message will appear.