



Employee Self-Service – W-4 Tax Information in HR Direct

Through HR Direct, you can complete your W-4 Tax Information so that the university can withhold the correct Federal income tax from your pay. Follow the steps below to indicate how you would like Federal income taxes to be withheld.

Step 1 - Navigate to [UMass Boston HR Direct](#).

Step 2 - Select the "**Log in to HR Direct Button**".

Step 3 - Enter your user id and password.

A blue banner with a pattern of rounded squares in the background. The text 'HR Direct' is written in a large, white, serif font across the center of the banner.

HR Direct

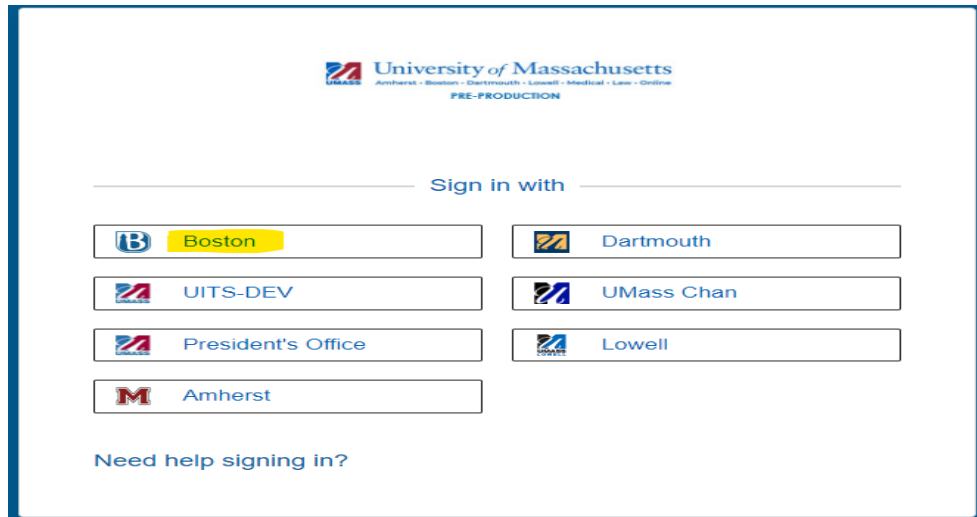
One-Stop Shop for Personal Information

Access your paycheck, tax forms, time entry and more.

[Login to HR Direct](#)

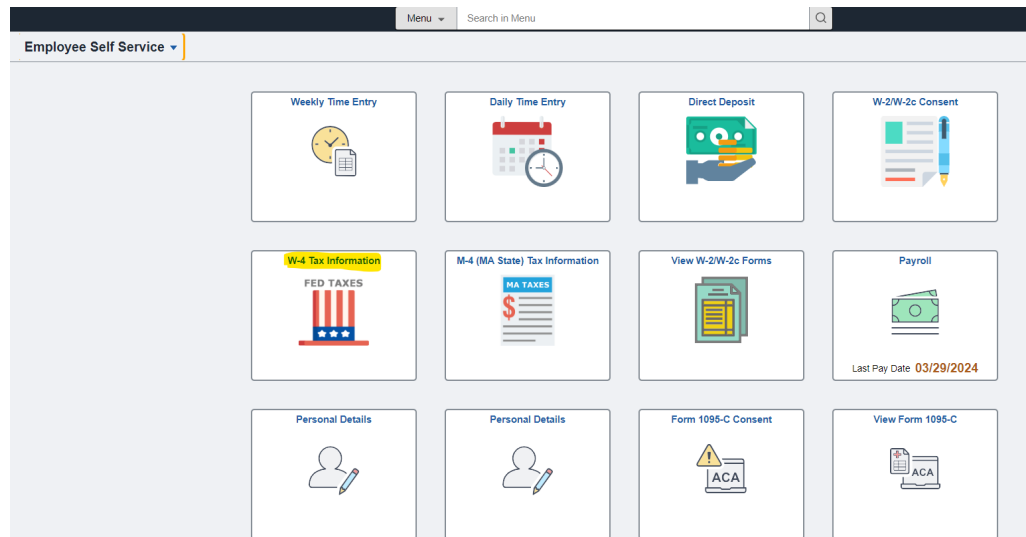


Step 4 - When prompted to sign in to a campus, select "**Boston**".



Step 5 - You should now see the Employee Self-Service Screen. If you do not, select the drop down on the top left.

Step 6 - Select the "**W-4 Tax Information**" tile.





Step 7 - If you have any questions, please select the [UMass President's Office Form W-4 Information](#) link highlighted in yellow below. Carefully select all the options in the areas provided under Filing Status, Multiple Jobs or Spouse Works, Claim Dependents, Other Adjustments, and Claim Exemption from Withholding.

The HR Direct W-4 Withholding Certificate screenshots below show the information to confirm as well as selectable options separated by steps.

Within step 1, you will confirm your personal information as well as select your filing status. The filing status options are:

Single or Married filing separately

Married filing jointly or Qualifying Surviving Spouse

Head of Household

Within step 2, you will complete this section if (1) you hold more than one job at a time or (2) you are married filing jointly and your spouse also works.



Employee Self Service W-4 Withholding Certificate

W-4 Withholding Certificate

Commonwealth of Massachusetts

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. Please see <https://www.umass.edu/tax-and-compliance-portal/tax-and-compliance-forms/new-2020-form-w-4> for questions regarding this form.

If you make changes to your W-4, please review your M-4 and update as needed

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

Filing Status

Single or Married filing separately

Married filing jointly or Qualifying Surviving Spouse

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.)

Within step 3, if your income will be \$200,000 or less (\$400,00 or less if married filing jointly). In the first box, multiply the number of qualifying children under the age of 17 by \$2,000. In the second box, multiply the number of other dependents by \$500. In the third box, indicate any other tax credits you have.

Within step 4, indicated any other adjustments in the boxes provided for (a) Other income, (b) Deductions, or (c) Extra Withholding.



For the “Claim Exemption from Withholding” area, please read the Exemption from withholding below:

Exemption from withholding. You may claim exemption from withholding for 2026 if you meet both of the following conditions: you had no federal income tax liability in 2025 **and** you expect to have no federal income tax liability in 2026. You had no federal income tax liability in 2025 if (1) your total tax on line 24 on your 2025 Form 1040 or 1040-SR is zero (or less than the sum of lines 27a, 28, 29, and 30), or (2) you were not required to file a return because your income was below the filing threshold for your correct filing status. If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2026 tax return. To claim exemption from withholding, certify that you meet both of the conditions by checking the box in the Exempt from withholding section. Then, complete Steps 1(a), 1(b), and 5. Do not complete any other steps. You will need to submit a new Form W-4 by February 16, 2027.

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

Submission

By clicking the Submit button, I acknowledge 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.

Step 8 - When your selections are finalized, hit the “**Submit**” button to update HR Direct.