Table of Contents

HR Direct Self Service

Login
Login to HR Direct

Personal Information
Personal Information Summary
Home and Mailing Address
Phone Numbers
Email Address
Emergency Contacts

Payroll and Compensation
View Pay Advice (Paycheck)
Direct Deposit
W-4 (Federal tax information)
M-4 (MA State tax information)
View W-2 Forms

Time Reporting
Hourly

Payroll Calendars
Pay Calendar 2016
Pay Calendar 2017
HR Direct Self Service

Login to HR Direct

Through the development of existing faculty and staff, and the continued integration of new and talented contributors, UMass Boston is powered by a motivated, talented, and diverse workforce. Emphasizing a culture of continuous learning and professional development, UMass Boston staff and faculty are afforded the opportunity for individual and interdisciplinary growth, in an environment that promotes innovative thought and professional expression.

At UMass Boston, you are part of something special!

Please click here to log onto HRDirect
Please use the following information when logging in:

<table>
<thead>
<tr>
<th>Campus user ID:</th>
<th>Your UMass Boston account name (i.e., John.Doe)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password:</td>
<td>Your UMass Boston email password</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Go to <a href="http://www.umb.edu/hr">www.umb.edu/hr</a></td>
</tr>
<tr>
<td>2.</td>
<td>Click on the HR Direct Logo</td>
</tr>
</tbody>
</table>

Secure Access Login

Campus User ID: [firstname.lastname]
Password: [not visible]
Campus:

Choose Campus:
Amherst
Boston
Dartmouth
Lowell
President’s Office
Service
Worcester

Forgot Password? | Need Help?
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Enter your username (first name.lastname)</td>
</tr>
</tbody>
</table>
| 4.   | Enter your password (password is you email password)  
Note: if your email password is changed your HR Direct login password will change. |
| 5.   | Click on the arrow and choose the campus (Boston) |
| 6.   | Click login |

Note: Please Note if you are using a public computer please always remember to sign out of the HR Direct system and do not save any passwords

**Congratulations you have successfully logged into HR Direct**
Personal Information
Upon completion of this topic, you will be able to review personal information, review and update your home and mailing address, add or update phone numbers, or specify your primary phone number and change your emergency contact.

Personal Information Summary

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Begin by navigating to the **Personal Information Summary** page  
      Click the **Self Service** link |
| 2.   | **Click the Personal Information link** |
| 3.   | **Personal Summary**  
      Click the **Personal Information Summary** link  
      Review your current data  
      Verify the **Employee Name** information **Note**: The employee name is view only. If the name is incorrect, contact the Human Resources Department. |

**Congratulations you have successfully reviewed your personal information**
Add/Edit Home Mailing Address

1. Click Menu (top left hand corner), Click Self Service, Click Personal Information  Click Home and Mailing Address

2. Your Address will appear. If you would like to add an address click Add if you would like to change your address click Edit.
3. To Edit and address click QuickAddress

4. Enter the address into the appropriate fields.

5. Click Search

6. Click the correct address link: “QUICK ADDRESS”

7. Information will auto populate click Save

**Congratulations you have successfully Added/Edited your Home and Mailing Address**
Add/Edit Phone Number

Phone Numbers

1. Click Menu (top left hand corner), Click Self Service, Click Personal Information  Click Phone Numbers

2. Your Phone number will appear. If you would like to add a phone number click Add Phone number and enter new information. if you would like to change your current phone number click delete and add a new number

Congratulations you have successfully Added/Edited your Telephone Number
Add/Edit Email Addresses

1. Click Menu (top left hand corner), Click Self Service, Click Personal Information Click Email Addresses

2. You email address will appear. If you would like to add an email address click: Add email address and enter new information.

   NOTE: The email address that appears is your UMB email address which should not be deleted.

   Congratulations you have successfully Added/Edited Email Address
Add/Edit Emergency Contacts

1. Click Menu (top left hand corner), Click Self Service, Click Personal Information  Click Emergency Contacts

2. Your Emergency Contact Information will appear. If you would like to add an Emergency Contact click Add Emergency Contact and enter new information. If you would like to change your current contact click delete and add a new contact.

Congratulations you have successfully added an Emergency Contact
Payroll and Compensation

View your Pay Advice (Paycheck)

1. Click on "Select Paycheck"

2. Click the date of the advice that you would like to view and your pay advice will appear. If you are unable to view your pay advice please turn off any pop up blockers on your computer.
3. View, print or save your pay advice.

4. Once you have finished please click the \( \boxed{\text{X}} \) in the corner to exit out of your pay advice.

Congratulations you have successfully viewed your pay advice.
Add/Change Direct Deposit

1. Click Menu (top left hand corner), Click Self Service, Click Payroll and Compensation, Click Direct Deposit

2. If you would like to change your bank information you can click either edit or delete. If you would like to add a new account click Add Account

3. For security purposes, enter one account number currently associated with your direct deposit into the **Confirm Acct Nbr** field.

   **Note:** If you need assistance locating your **Account Number**, use a personal check associated with the bank account and click the **View check example** link next to the **Routing Number** field to find the **Account Number**.

   Press **Enter** or tab out of the field to finish confirming the account number.
4. Enter Routing number and account number

5. Click on the arrow and choose Account Type

6. Click on the arrow and choose Deposit Type. For one account must choose “Balance”.

7. Amount or percent is to be left blank if using only one account. If more than one account specify a percent or amount for one and select “Balance” in deposit type for other account.

8. The Deposit Order field will default to “999” for deposit type of “Balance”, which will display upon saving the page.

9. Click Save then click the OK button.

*Required Field

**Congratulations you have successfully added/changed Direct Deposit information**
View/Change W-4 (Federal) Tax Information

1. Click Menu (top left hand corner), Click Self Service, Click Payroll and Compensation, Click View W02/W02c Forms
2. Change any necessary information.
3. To get additional information click on following link above home address
4. Click Submit

**NOTE:**

7. Right click the [Click here to access W-4 form instructions and worksheet link](#)
8. Make any updates or changes. Click **Submit**

*Congratulations you have successfully updated/changed your W-4 form.*
**View/Change M-4 (MA State) Tax Information**

1. Click Menu (top left hand corner), Click Self Service, Click Payroll and Compensation, Click View M-4 (MA State) Tax Information.

---

Employees who live and work entirely outside the Commonwealth of Massachusetts should contact their campus HR/Payroll department to discuss state tax withholding.

Click here to access instruction.

**Home Address**

**M-4 Tax Information**

Enter total number of Allowances you are claiming

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

- [ ] Check if you will file as head of household on your tax return
- [ ] Check if you are blind
- [ ] Check if spouse is blind and not subject to withholding
- [ ] Check if you will file as blind and head of household
- [ ] Check if you will file as blind and your spouse is blind and not subject to withholding
- [ ] None of the Above

**Claim Exemption**

- [ ] Check if you are a full-time student engaged in seasonal, part-time, or temporary employment whose estimated annual income will not exceed $8,000

Submit

I certify that the number of withholding exemptions claimed on this certificate does not exceed the number to which I am entitled.
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Change any necessary information.</td>
</tr>
<tr>
<td>3.</td>
<td>To get additional information click on following link above home address “Click here to access M4 form instructions”</td>
</tr>
<tr>
<td>4.</td>
<td>Click Submit</td>
</tr>
</tbody>
</table>

*Congratulations you have successfully updated/changed your M-4 form.*
**View W-2/W-2C Forms**

1. Click Menu (top left hand corner), Click Self Service, Click Payroll and Compensation, Click View W02/W02c Forms

![Menu and Self Service Selection](image)

2. For Security purposes you will need to provide the last 4 digits of your Social Security Number and click OK

![Security Challenge](image)

<table>
<thead>
<tr>
<th>Tax Year</th>
<th>W2 Reporting Company</th>
<th>Tax Form ID</th>
<th>Issue Date</th>
<th>Year End Form</th>
<th>UMass W2 Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>UMS</td>
<td>W-2</td>
<td>01/22/2014</td>
<td>Year End Form</td>
<td>UMass W2 Information</td>
</tr>
</tbody>
</table>
3. To then view your W-2/W-2C click on *Year End Form* link

4. To get additional information on W-2/W-2C Form click on *UMASS W2 Information* link

5. To view a different tax year click on *View a Different Tax Year* link

Note: Once you are in the forms you may print them utilizing the print function

*Congratulations you have successfully viewed your W-2/W-2C forms*
**Reporting Time Using a Timesheet (HOURLY)**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Main Menu</strong> button.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Self Service</strong> menu.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Time Reporting</strong> menu.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Report Time</strong> menu.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Timesheet</strong> menu.</td>
</tr>
<tr>
<td>6.</td>
<td>Use the Timesheet page to report hours and time reporting codes for the current week.</td>
</tr>
</tbody>
</table>

**Date**

This automatically defaults to the beginning of the present week. You can change this date by choosing the calendar icon and clicking on the desired week.
Example: Example entering Time

Mary works 8.00 hours a day Monday through Friday.

Begin by entering 8.00 in each field of the days that were worked

Click the Time Reporting Code arrow

Choose the code REE – Regular

Click the Submit button.

The system will provide you with a confirmation that you have successfully entered the information.

Click Ok

*Congratulations you have successfully entered your hourly time*
### NOTE:

| Leave/Compensatory Time | This tab shows your sick time earned. |

---

For additional information regarding Massachusetts Sick Leave see UMass Boston’s - Earned Sick Leave Policy (Mass Sick Time for Non-Benefitted employees)

[https://www.umb.edu/hr/policies](https://www.umb.edu/hr/policies)
<table>
<thead>
<tr>
<th>January</th>
<th>February</th>
<th>March</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="calendar_image.png" alt="Calendar" /></td>
<td><img src="calendar_image.png" alt="Calendar" /></td>
<td><img src="calendar_image.png" alt="Calendar" /></td>
</tr>
</tbody>
</table>

**Legend:**
- **◎** Last Day to Input
- **Bold** Payroll Processing Day
- ▲ Pay Period Begins
- ◄ Pay Period Ends
- □ Pay day
- □ Holiday