

FLUID – W-4 Tax Information Job Aid

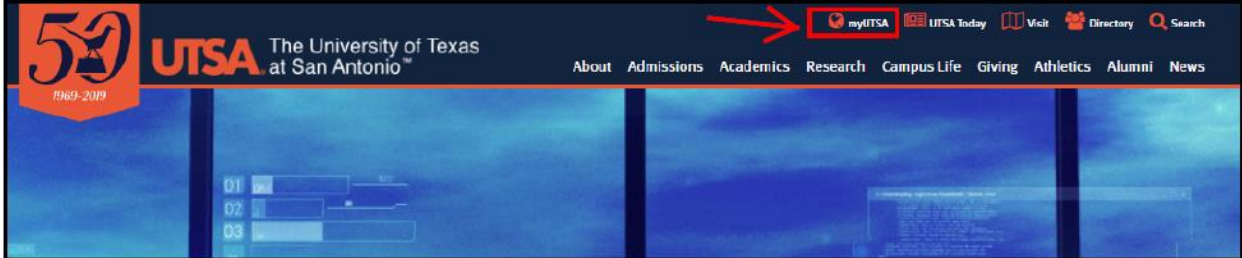
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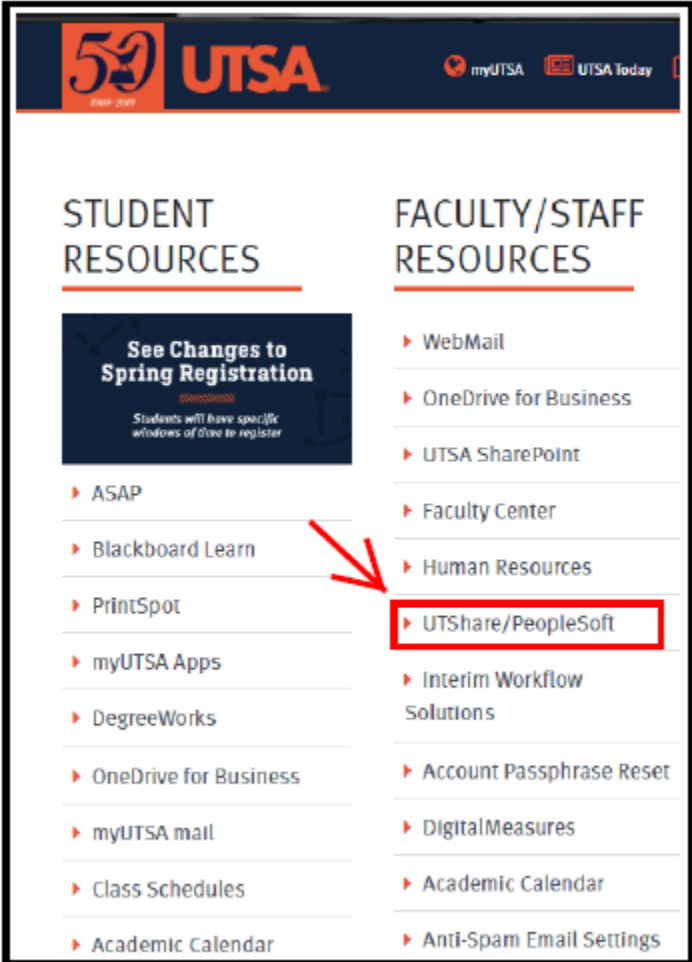
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1. Log into UTShare/FLUID

- Go to www.utsa.edu
- From the UTSA home page, click on **myUTSA**



- Click on **UTShare/PeopleSoft**



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- Select **The University of Texas at San Antonio** from the drop down list

UT SHARE

Select your home institution

UT Share requires that you authenticate with your home institution. Please either select it from the list below, then click 'Select', or you may use the search-as-you-type feature by typing a partial name into the search box below, then clicking 'Search'.

Please do not create a bookmark or favorite in your web browser on this page. This page is not part of the application you are accessing. You may create a bookmark/favorite after you complete the authentication process.

Enter organization name (partials ok):

Or choose from a list:

The University of Texas at San Antonio Remember for session

Need assistance?
Send email to your local help desk with a description of the problem:
University of Texas at Arlington

- Enter your login credentials with your network ID and passphrase

UTSA
The University of Texas at San Antonio™

Login to
my.utshare.utsystem.edu

myUTSA ID

Password

> Forgot your password?
> Need Help?
> Acceptable Use Policy

For security reasons, please exit your Web browser and/or log out completely when you are done accessing services that require authentication, especially if you are using a public computer or kiosk.

This is a logon server for multiple web services, please do not bookmark this page.

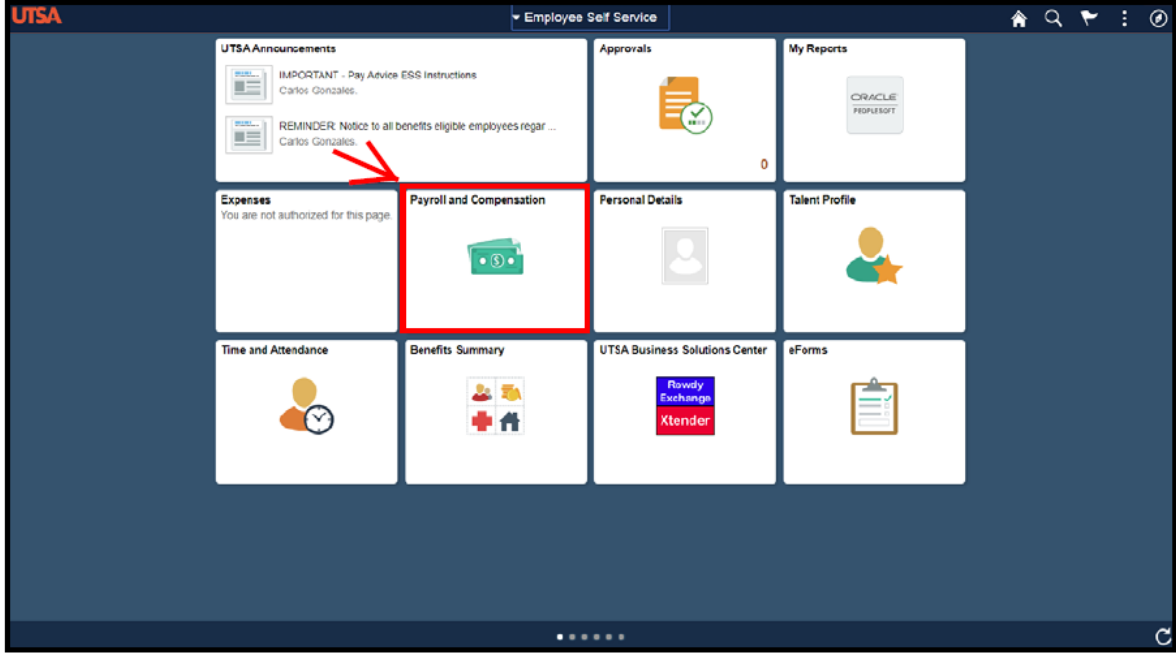
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2. View W-4 Tax Information

Upon entering PeopleSoft/UTShare, the home page is your Employee Self Service page.

- Select **Payroll and Compensation** Tile



You are taken by default to the Pay check section

- Select **W-4 Tax Information**



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Your current withholding are shown. Change the information as needed.

Basic Instructions:

- Enter total number of **Allowances** you are claiming
- Indicate your Tax Status, tax filing status: (**Single** or **Married**)
- Click on the **Submit** button; review the additional instructions before submission

Special Additional Instructions:

- If you want additional withholding per paycheck, enter the amount in box 1
- If you want to claim Single withholding (more withheld) status, select the check box [2]
- If your name does not match your Social Security Card, select the check box [3] and call Social Security Administration for an updated card.
- If you are claiming withholding exemption, ensure you meet the criteria, and select the check box [4].

The screenshot shows the 'W-4 Tax Data' section of a form. It includes fields for 'Enter total number of Allowances you are claiming' (with a red box around the input '2' and a callout '2'), 'Enter Additional Amount, if any, you want withheld from each paycheck' (with a red box around the input '1' and a callout '1'), and radio buttons for 'Single' and 'Married' (with a red box around the 'Married' button and a callout '2'). Below these are two checkboxes: 'If married filing separately, check here and select Single status for "Married, but withhold at higher Single rate."' (with a green box around the checkbox and callout '2') and 'Check here if your last name differs from that shown on your social security card. You must call 1-800-772-1213 for a new card.' (with a green box around the checkbox and callout '3'). The 'Claim Exemption' section has a year dropdown set to '2019' and a statement 'I claim exemption from withholding for the year 2019 and I certify that I meet BOTH of the following conditions for exemption'. Two bullet points follow: 'Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.' and 'This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.' (with a green box around the checkbox and callout '4'). A third checkbox 'Check this box if you meet both conditions to claim exempt status.' is also present. At the bottom, there is a 'Submit' button (with a red box around it) and a declaration: '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.'

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- You will receive a *Submit Confirmation* page
- Select **OK** to finalize the process and exit the W-4 page.



End of W-4 Tax Information Job Aid