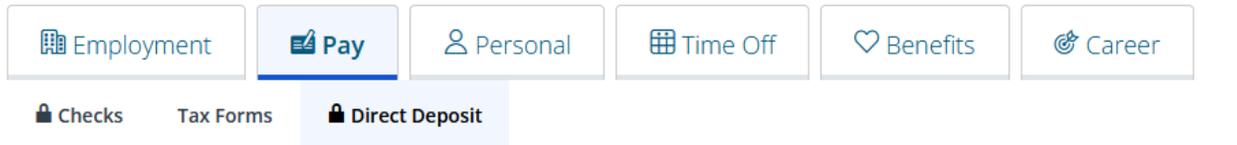


Add Direct Deposit Account Information in Paylocity

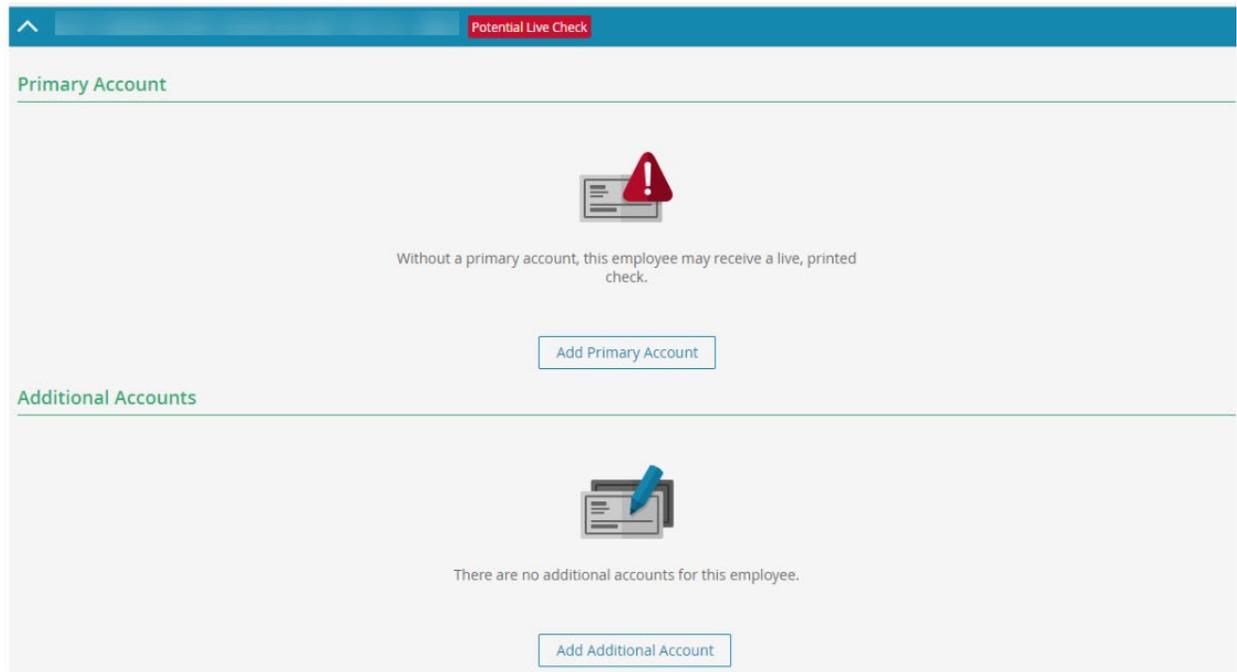
Must be done on the browser and not in the app.

Use the process below to make any necessary updates to employee direct deposit accounts.

1. Employees navigate to **HR & Payroll > Employees > Person Record** to add or edit their own direct deposit account(s).



2. Select the edit pencil to edit an existing account or select **Add Primary Account** to add a new direct deposit account.



3. Select an existing bank account or **Add New Direct Deposit Account** from the **Add or Edit Account** dropdown menu.
4. Select the one of the following from the **Account Type** dropdown menu:
 - o Checking
 - o Savings

- Pay Card

Routing	Account	Type
Potential Live Check		

Additional Deposit Account(s)

↑ ↓	Routing	Account	Type
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Add or Edit Account

Add New Direct Deposit Account

Bank Account

Account Type
Checking

Account Number
.. . . .

5. Enter the nine-digit American Banker's Association (ABA) Transit Routing Number in the Routing Number field, without dashes or spaces. Valid Routing Number start with 0, 1, 2, or 3.
 - Find the Routing Number by looking at the first set of numbers at the bottom of a check. The account number is the second set of numbers in the same area.
 - Employees should provide the Routing Number listed on a check, do not use the routing number from a deposit slip. Deposit slip routing numbers are typically for internal use only, and banks are likely to reject them.
 - If the bank name does not populate or shows an unknown bank, use the routing number to search the [website for the Federal Reserve](#). If listed there, the bank is a valid institution, but if not, the direct deposit can be rejected.
6. Enter the account number in the **Account Number** field (17 character limit).

- If an incorrect character is in the **Account Number** field, the system prompts the user with a message stating **Account Number cannot contain the character**.
- Although rare, some Bank Account Numbers may contain letters or dashes within the Account Number.

7. Complete the following if this is not the main account:

- Enable the **Additional Deposit Account** checkbox.
 - Select if the amount should be a **Flat** amount, a **Percent**, or a **Net Minus** from the **Amount Type** dropdown menu.
 - Selecting **Net Minus** issues a live check to the user for the number entered in the **Amount** field and deposit the remaining balance, if any, into the account entered via the steps above.
 - Choosing a **Percent** type and entering 100% results in no additional money going into any other Additional Account(s).

Additional Deposit Account ?

Amount Type

The image shows a screenshot of a web form. At the top, there is a checkbox labeled 'Additional Deposit Account' which is checked. Below it is a dropdown menu titled 'Amount Type'. The dropdown menu is open, showing five options: 'Flat', '-- Select --', 'Flat', 'Net Minus', and 'Percent'. The 'Flat' option is highlighted in blue, indicating it is the selected option. A mouse cursor is visible over the dropdown menu.

- Based on the type just chosen, enter the amount the account should receive in the **Amount** field.
 - ✂ **EXAMPLE:** A user chose the **Percent** type and enters 30 into the **Amount** field so that 30% of the pay goes into this account.
- Select the radio button next to an additional account and use the arrow icons above that account to change the order in which money deposits into an additional account.
- Ensure that at least one account is present as the **Main** account.

- The **Main** account is where all funds not allocated to an additional account remain.
- This ensures deposits allocate correctly and no potential live checks generate.

8. Select **Save**.

- The entered amount deposits into each additional account listed.
- The net check deposits into the main account.