New Employee Bank for DD
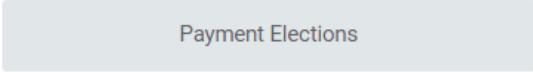
On your Home page click on the Menu on the left side of the page
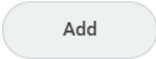
MENU

Pay

Click on the Pay widget

Payment Elections

Click on Payment Elections

Add

Click Add

Preferred Payment Method

Expense Direct Deposit * × Direct Deposit - Electronic Disbursements

Regular Payroll * × Direct Deposit - Payroll

The Preferred Payment Method will auto populate

At this point you will enter your routing, bank name and account number and click on checking or savings

Account Information

Account Nickname (optional)	
Routing Transit Number *	
Bank Name *	
Bank Identification Code	
Account Type *	○ Checking ○ Savings
Account Number *	

OK

Click Ok when done

This will route to payroll to be approved in order for it to go to the bank and verify the information

To update a bank account

Remember your main bank account goes to both Payroll and Accounts Receivable even if you add a bank

On your Home page click on the Menu on the left side of the page

≡ MENU

Click on the Pay widget

Pay

Click on Payment Elections

Payment Elections

To update the bank and/or account number click on the Edit button under Accounts

Accounts 2 items

Country	Bank Name	Account Type	Account Number	
United States of America	Jpmorgan Chase Bank Na	Checking	▮▮▮▮	Edit
				Remove

On the next screen make your changes

Account Informatic

Account Nickname (optional)

Routing Transit Number   *

Bank Name   *

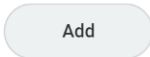Bank Identification Code

Account Type   *

Account Number   *

Click ok when done
This will update both the Expense Direct Deposit and the Regular Payroll Direct Deposit

This will route to payroll to be approved in order for it to go to the bank and verify the information

To Add a second Bank Account

If you want to Add a second bank account and want to split funds, first click the Add button under

Add

Accounts
And add your new account

Fill in Account Information

Account Informatic

Account Nickname (optional)

Routing Transit Number   *

Bank Name   *

Bank Identification Code
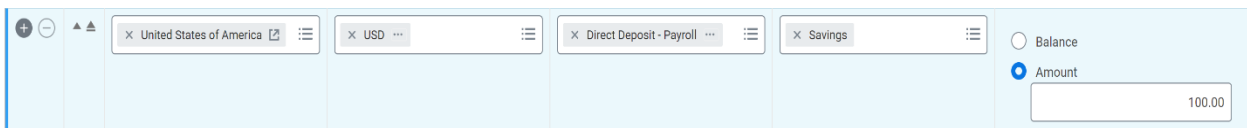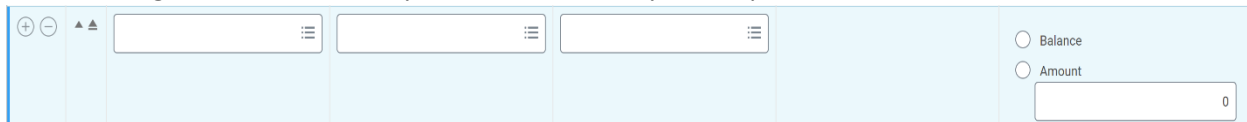
Account Type   *

Account Number   *

Once you have done that under your Payment Elections area and click on the Edit button on the Regular Payroll line ONLY

Payment Elections   2 items

Regular Payroll	Direct Deposit - Payroll			Balance Yes	Edit

This is where you split your bank accounts

Click on the + button to add a row ⊕ ⊖
This will bring in a blank row that you will need to use your drop downs to fill in.

⊕ ⊖ ▲ ▲	☰	☰	☰	○ Balance ○ Amount 0

⊕ ⊖ ▲ ▲	✕ United States of America ↗ ☰	✕ USD ··· ☰	✕ Direct Deposit - Payroll ··· ☰	✕ Savings ☰	○ Balance ⦿ Amount 100.00

Before clicking done if this is the second account you need to move it above the one that has Balance on it so that it is the second account touched.
Click ok when done

This will route to payroll to be approved in order for it to go to the bank and verify the information

Please verify your Payment Elections match what you are trying to change after you save/submit to Payroll.

Payment Elections 3 items

		Payment Elections		
Pay Type	Payment Type	Account	Account Number	Distribution