

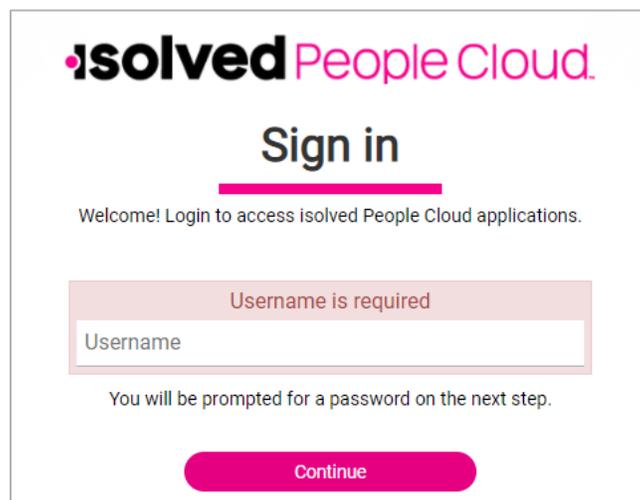
Introduction

The purpose of this article is to review and explain the options under Direct Deposit in Employee Self-Service.

Navigation

In order to view or add/change your Direct Deposit information, log into isolved using your Employee Self-Service email address and password. Please ensure that passwords are a minimum of 12 characters, at least one lower-case alpha (a-z), one upper-case alpha (A-Z), one numeric (0-9), and one special character. Spaces are allowed to support the use of easier to remember passphrases. Going forward, your password will not expire. Passwords may also not duplicate any of your previous 10 passwords.

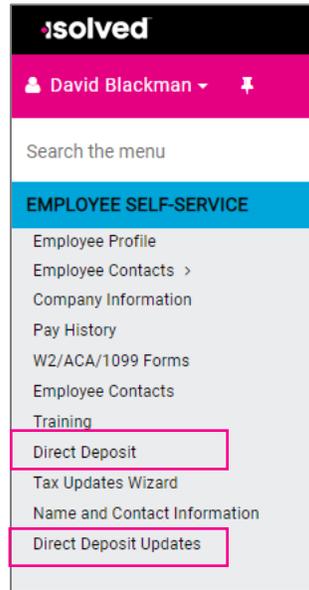
If you key in an incorrect password five times, you will be locked out of the system. You will receive a message after each incorrect attempt indicating the number of tries left. After the fifth incorrect attempt, you will be locked out for 10 minutes. After 10 minutes, please click on the "Forgot Password" link and change your password. If you need access immediately, you may contact your company's administrator to unlock your account.



Navigate to Employee Self Service and click on either:

- Direct Deposit
- Direct Deposit Updates

Usually, you will only have one option or the other.



Note: If you do not have either option, your employer has opted out of this service. In order to make Direct Deposit changes or additions, you will need to contact your employer directly.

Direct Deposit

If you have the access to **Direct Deposit**, click on the option to view the information for your direct deposit account(s).

Status	Account Type	Sequence	Frequency	Amount	Percent	Routing Number	Account Number	Description
Active (1)	Savings	Remaining Net	Every Pay			041000124	33334	

If you have multiple direct deposits, click on the account you want to review to check the details of the direct deposit account in a different format.

The details include:

- Status
- Account Type
- Sequence
- Remaining Net
- Every Pay
- Amount
- Percent
- Routing Number
- Account Number
- Description
- Is Corporate Account

Since this is a view only screen, you are unable to make any changes. It is for informational purposes only. Contact your Employer to add or change a direct deposit account.

Direct Deposit Updates

If you have the access to **Direct Deposit Updates**, click on the option to view, add or change the information your employer has for your direct deposit account(s).



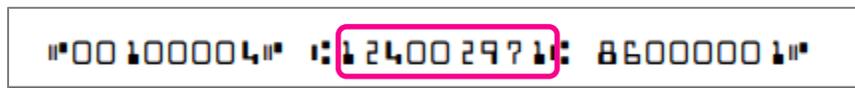
Add New

If you are adding a new Direct Deposit account, click on the **Add New** icon on the blue action bar.



Add the following information for your new account:

- **Status:** Options include "Active," "Prenote" and "Inactive." Check with your employer to see if you should be using "Active" or "Prenote" for new direct deposit accounts.
- **Account Type:** Options include "Checking," "Savings," "Pay Card (Checking)," and "Pay Card (Savings)."
- **Sequence:** Options are "Remaining Net" or a number to reflect which direct deposit is first.
Example: Net Pay \$800
 - **Remaining Net:** The \$800 Net Pay will be added to the account with this sequence.
 - 1 and Amount of \$500 - \$500 of the Net Pay will be added to the account with this sequence, and the remainder of \$300 will be in a check.
 - 1 and Amount of \$500 and a different account indicating Remaining Net - \$500 of the Net Pay will be added to the account with sequence "1," and the remaining \$300 will be deposited in the account with the sequence "Remaining Net."
- **Frequency:** How often you want funds to go into the account. The default is "Every Pay."
- **Amount:** If using a number sequence, you can enter any dollar amount. If your check is less than the dollar amount indicated, all funds will go to the lowest sequence and up if any funds are remaining.
- **Percent:** If using a number sequence, enter a percent of your Net Pay to be deposited in the account. Do not enter 100%, use Sequence Remaining Net for that option
- **Routing Number:** The nine digit number on the bottom of your check stub. Do not use the number on your deposit ticket.



- **Account Number:** The number after the Routing Number.



- **Description:** This setting is optional.
- **Is Corporate Account:** if this option is selected, the bank account entered will be considered a corporate account.

The screenshot shows a 'Direct Deposit' form with the following fields and values:

- *Status: Active
- *Account Type: Savings
- *Sequence: Remaining Net
- *Frequency: Every Pay
- Amount: [Empty]
- Percent: [Empty]
- *Routing Number: 041000124
- Account Number: 333334
- *Update Acct. Number: [Empty]
- Description: [Empty]

The 'Is Corporate Account' checkbox is unchecked. A tooltip points to it with the text: "Select this checkbox if this bank account is considered a corporate account by the bank."

- Click on the **Save** icon.

Edit

If you need to edit existing Direct Deposit information, click on the **Edit** icon from the blue action bar.



Change any of the fields above. The only exception is the **Account Number**, which will be greyed out. However, there is another field called **Update Account Number**.

The screenshot shows the 'Direct Deposit' form with the following fields and values:

- *Status: Active
- *Account Type: Checking
- *Sequence: Remaining Net
- *Frequency: Every Pay
- Amount: [Empty]
- Percent: [Empty]
- *Routing Number: 041000124
- Account Number: 222226 (greyed out)
- *Update Acct. Number: [Empty]
- Description: [Empty]

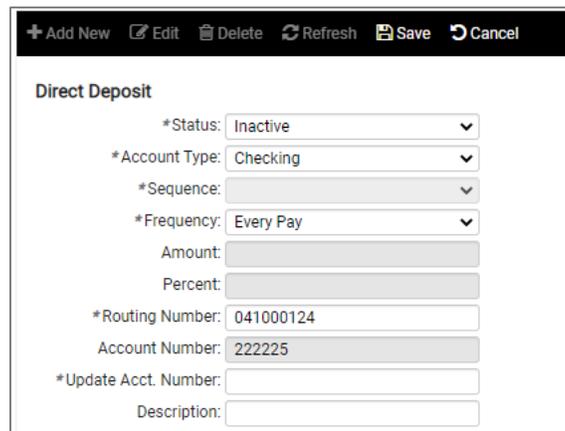
Key the Account Number into this field and click on **Save** to replace the greyed-out information. This is done to keep the bank account information secure. The account number will be encrypted and stored in a secure database.

*Routing Number:	041000124
Account Number:	222225

Note: If the Direct Deposit information has been used to deposit funds previously, it is best to **Add New** to enter the new bank information and inactivate the account you no longer wish to use. See instructions for inactivating below. **Edit** is most often used when an error occurs or the bank corrects the information from a prenote.

Edit – Change Status to Inactive

If you no longer wish to use an existing direct deposit account, click on the **Edit** icon. Using the drop-down menu, change the **Status** from “Active” or “Prenote” to “Inactive.” Click on the **Save** icon.



The screenshot shows the 'Direct Deposit' form with a black action bar at the top containing icons for '+ Add New', 'Edit', 'Delete', 'Refresh', 'Save', and 'Cancel'. The form fields are as follows:

- *Status: Inactive (dropdown menu)
- *Account Type: Checking (dropdown menu)
- *Sequence: (dropdown menu)
- *Frequency: Every Pay (dropdown menu)
- Amount: (text input)
- Percent: (text input)
- *Routing Number: 041000124 (text input)
- Account Number: 222225 (text input)
- *Update Acct. Number: (text input)
- Description: (text input)

This account will no longer be used for depositing any funds.

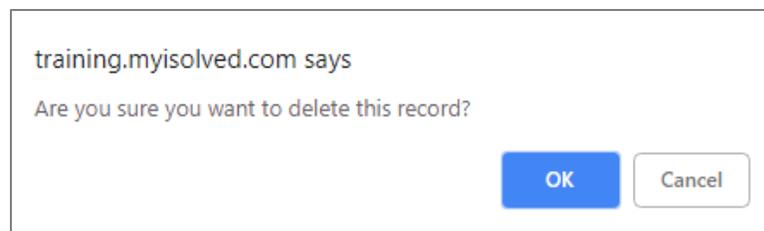
Delete

If you wish to delete an account, click on **Delete** from the blue action bar.



The screenshot shows the black action bar with icons for '+ Add New', 'Edit', 'Delete', 'Refresh', 'Save', and 'Cancel'. The 'Delete' icon, which is a trash can, is highlighted with a red box.

A pop-up box will appear, asking you if you are sure if you want to delete. This is to confirm your decision.



The screenshot shows a white confirmation dialog box with a black border. The text inside reads:

training.myisolved.com says
Are you sure you want to delete this record?

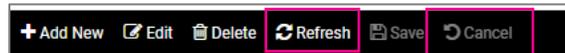
At the bottom right of the dialog box are two buttons: a blue 'OK' button and a white 'Cancel' button with a grey border.

Help Docs

- If you click **OK**, your Direct Deposit information will be deleted.
- If you click **Cancel**, your Direct Deposit information will remain in its current status.

Refresh/Cancel

The **Refresh** and **Cancel** icons also appear in the blue action bar:



These options are available if:

- **Cancel:** If you have started to make a change (Edit or Add), and you want to cancel out of it and delete the information entered.
- **Refresh:** This option is used if your view of the screen is not proper. It will refresh your browser.

Approval/Rejection

If your employer wishes to approve or reject your Direct Deposit additions or changes, you may receive an email confirming or denying the change.

Here is an example of an approval email:

Your direct deposit change has been approved and will be effective with your next scheduled payroll.

Note: Each employer can customize the verbiage in the approval or rejection email.