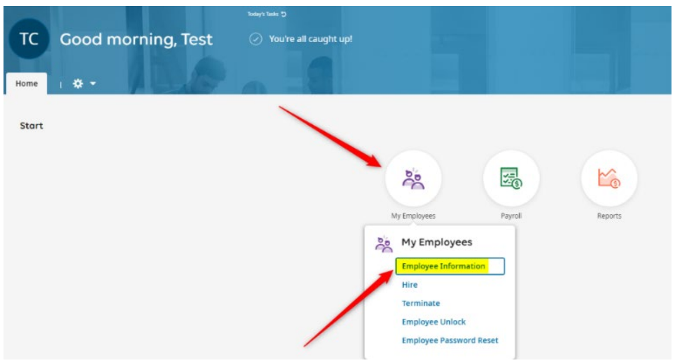
How To: Add a Direct Deposit to an Employee

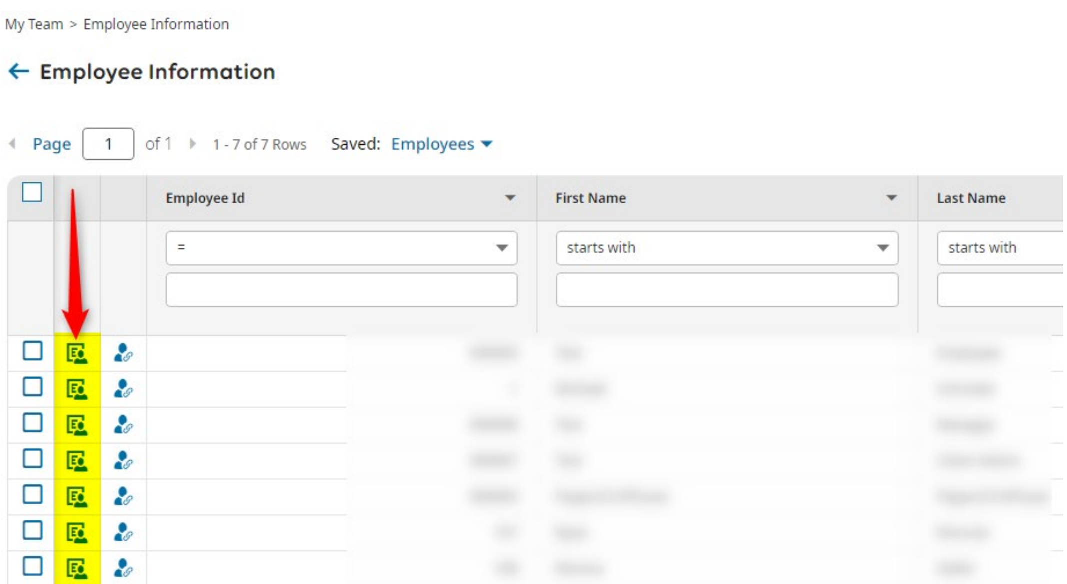
Add a Direct Deposit to an Employee Record

When setting up direct deposits for employees, you need the bank ABA routing number and account number. The system automatically generates a live check if no direct deposit or reserve live check records exist for an employee.

1. Hover over the "My Employees" Icon and click on "Employee Information."

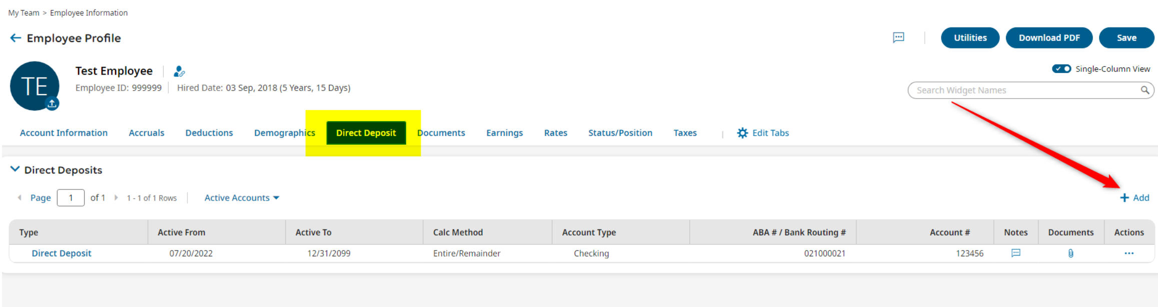


2. Click on the icon highlighted below, on the row for the employee's name.

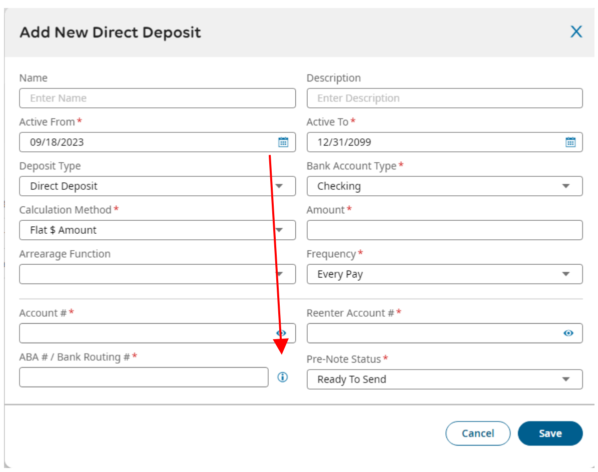


3. Click on the Direct Deposit tab.

   a. To the right click the +Add button



   b. You can enter all the banking details.

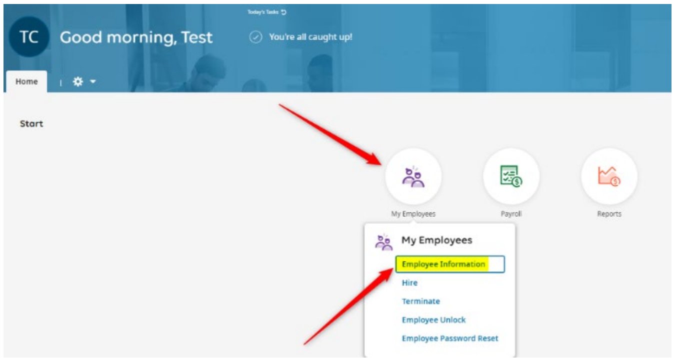


      i. **Visible**: Uncheck to make the direct deposit not visible, but still saved in the system.
      ii. **Name**: The name of the financial institution.
      iii. **Description**: Optional description of the direct deposit.
      iv. **Active From / To:** Enter the From date, as to when the direct deposit is active. The To date is optional. If the direct deposit will not expire, leave the date set as-is.
      v. **Deposit Type:** This will default to Direct Deposit and is not editable.
      vi. **Bank Account Type:** Select either Checking or Savings.
      vii. **Calculation Method:** Select the Calc Method to apply to this employee direct deposit. There are several direct deposit calculation method options available in the drop-down menu. Based on some of the selections the screen will display additional fields for completion.
      viii. **Entire/Remainder:** Select if the balance / remainder of the net pay after all taxes, deductions and other direct deposit types should be deposited into this account.
      ix. **Flat USD Amount**: Select if a fixed dollar amount is to be deposited into this account. Enter the amount in the Amount field that will display upon selecting this option.
      x. **% Of Gross Earnings:** Select if a percentage of gross wages should be used as the amount for this direct deposit account.
      xi. **% Of Net Pay:** Select if a percentage of net pay before any other direct deposits are taken should be used as the amount for the direct deposit account.
      xii. **% of Remaining Net:** Select if a percentage of net pay after all other direct deposits except Entire/Remainder should be used as the amount for the direct deposit account.
      xiii. The icon to the right of the ABA # / Bank Routing # allows the system to validate that the ABA # / Bank Routing # is a valid number.

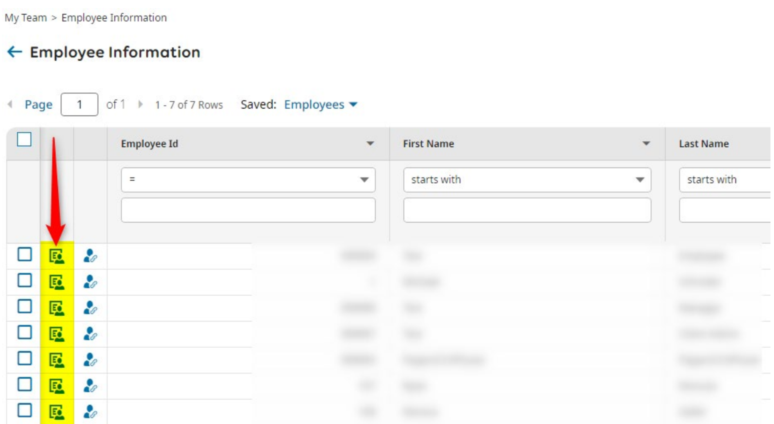
4. Select **Save**.

How To: Edit or End a Direct Deposit on an Employee

5. Hover over the “My Employees” Icon and click on “Employee Information.”



6. Click on the icon highlighted below, on the row for the employee’s name.



7. Click on the Direct Deposit tab.

   a. To the right click the “View/Edit” button to edit any details or place an end date.