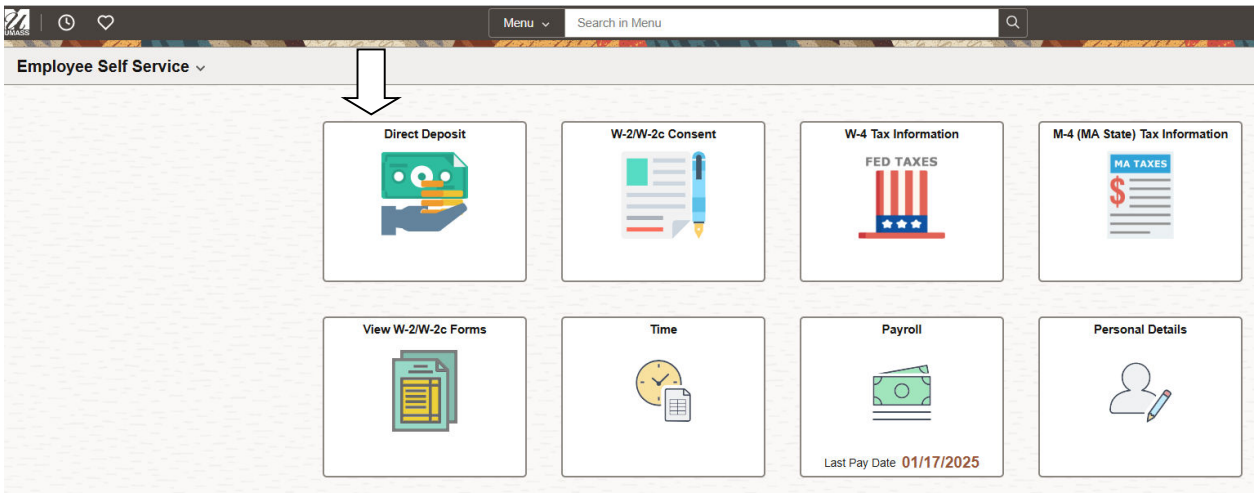
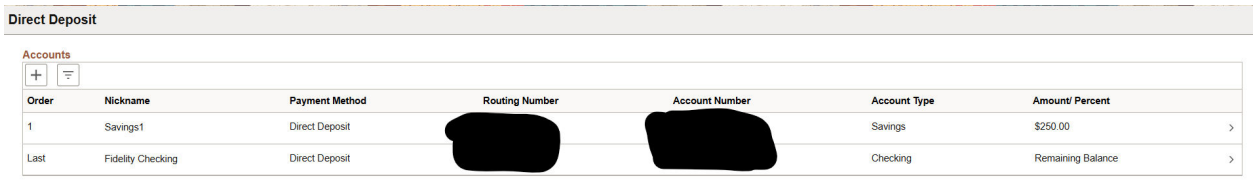
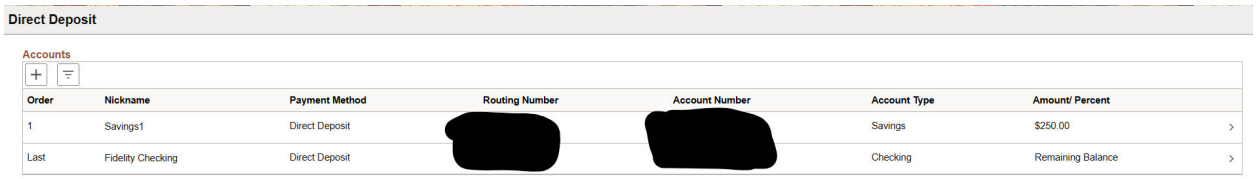
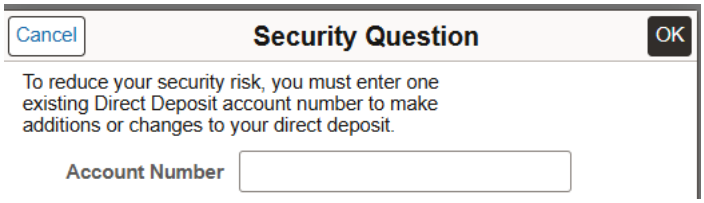
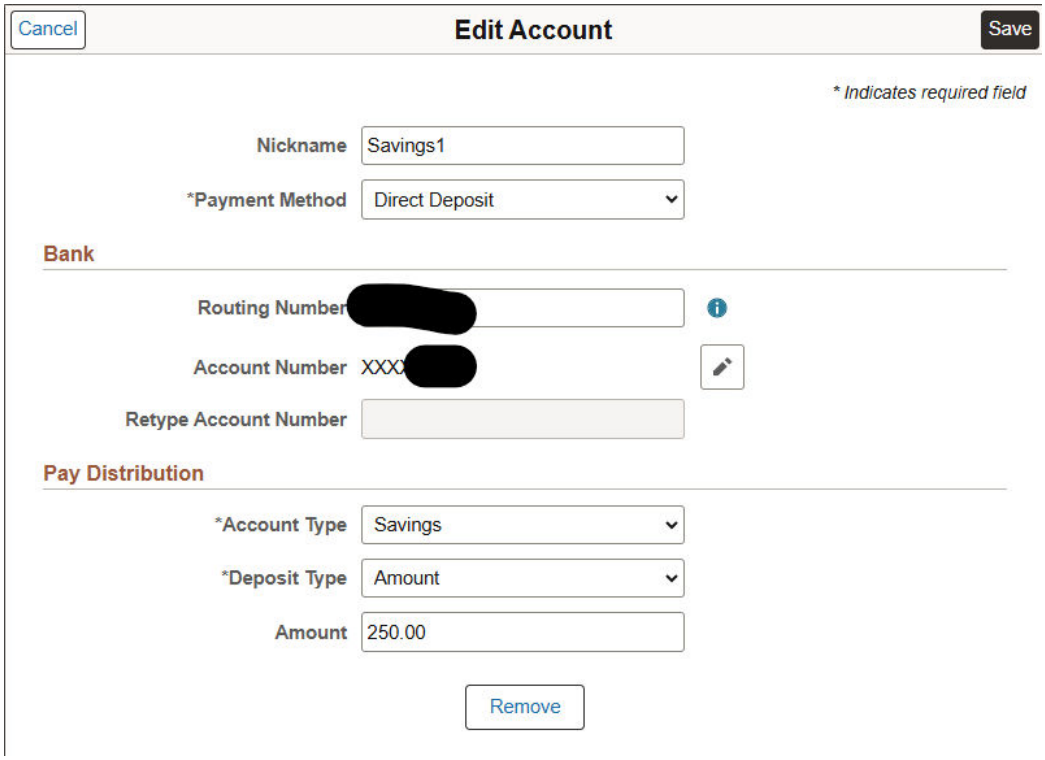
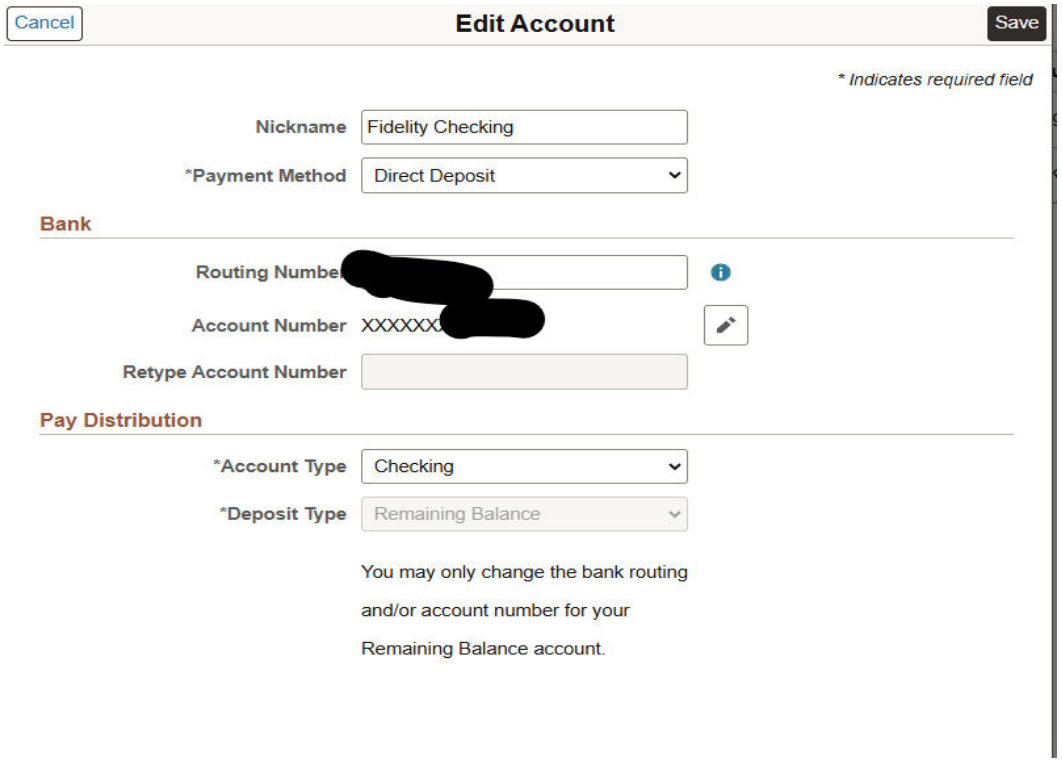
UMass Chan MEDICAL SCHOOL

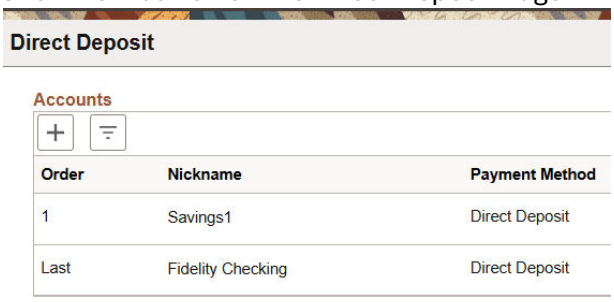
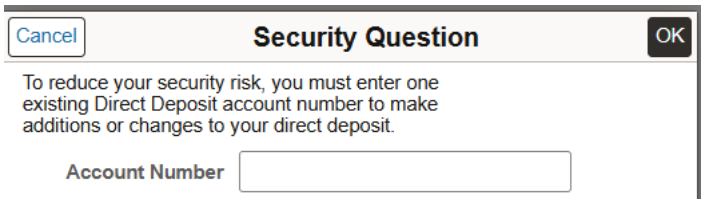
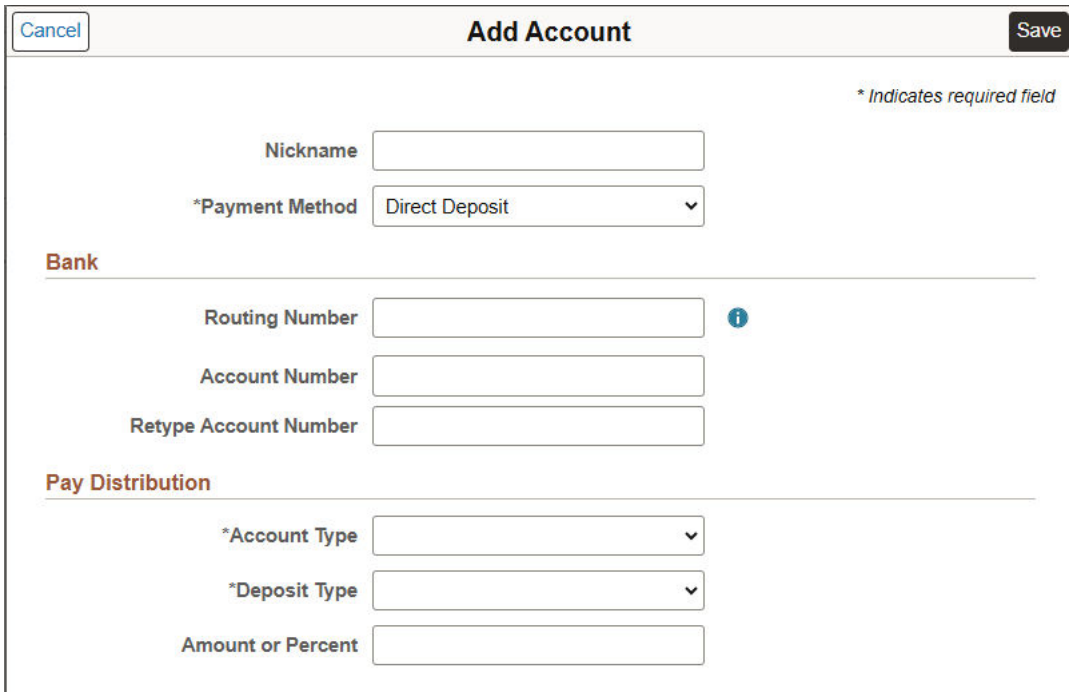
Maintaining Direct Deposit Information

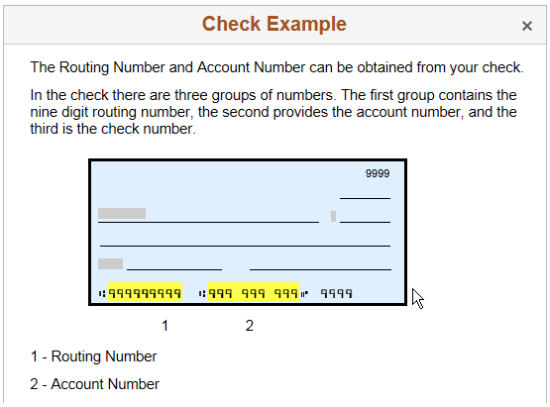
Use the **Direct Deposit** page to **view** current direct deposit information, **edit** an existing direct deposit, **add** a new account or **reorder** the processing order of your accounts.

1.	Begin by navigating to the **Direct Deposit** tile within Employee Self Service. 
2.	In the Direct Deposit page, you can **view** the list of your existing direct deposit accounts with details. 
3.	All employees must have a **Remaining Balance** account, even if you have other direct deposit accounts for set **Amounts** or **percentage** of pay. You cannot remove your existing **Remaining Balance** account. If you have a new bank account or other changes, you must **edit** the existing **Remaining Balance** account. If you set up additional direct deposit accounts (either **Amounts** or **percentage** of pay) these will process first and any remaining paycheck funds will be automatically paid to the **Remaining Balance** account.

4.	To **EDIT** an existing Direct Deposit. From the Direct Deposit Page, click the > button corresponding to a specific direct deposit account that you would like to edit. 
5.	To reduce your security risk, you must enter one existing Direct Deposit account number to make additions or changes to your direct deposit. Click OK. 
6.	Use the **Edit Account** page to modify your direct deposit information. Click the icon to update an existing direct deposit account number. Click Save. If you would like to remove an existing **amount** or **percentage** direct deposit use the **remove** button. Click Save. You may only change the bank routing and/or account number for your **Remaining Balance** account, you may not remove it.

7.	Example screen to edit Account with Deposit Type of set **amount** or **percentage**. 
8.	Example screen to edit Account with Deposit Type of **Remaining Balance**. 

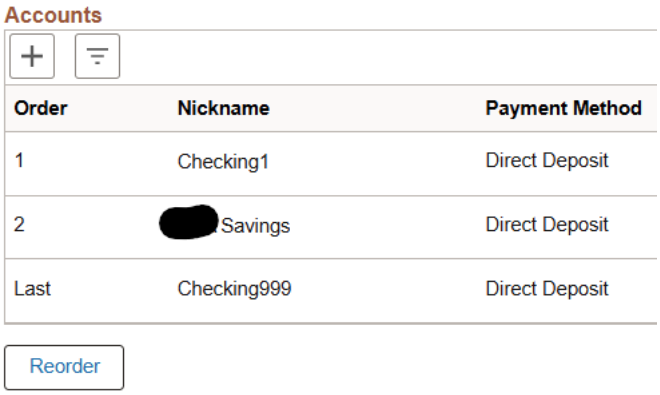
9.	To **Add** a Direct Deposit. Click the + button on the Direct Deposit Page. 
10.	To reduce your security risk, you must enter one existing Direct Deposit account number to make additions or changes to your direct deposit. Click OK. 
11.	Complete the following Screen following the guidance below. When complete click Save. 
12.	**Nickname** You can enter a unique account name for each direct deposit entry. If you leave this field blank the system will assign a name.

13.	**Bank** You must provide the routing and account information from your bank so that your payroll is deposited into the correct account. You can get this information from your personal checks or from your Bank. Example Check: 
14.	**Pay Distribution** Use the **Account Type** field to select the type of account you are adding. Options are **Checking** or **Savings**
15.	**Pay Distribution** Use the **Deposit Type** field to specify whether you would like to deposit a flat **amount**, or a **percentage**. **Amount**: Select this option if you want a fixed dollar amount to be deposited in this account type. **Percent**: Select this option if you want a specific percentage of net pay to be deposited in this account type. Any net pay remaining after processing your **amount** and/or **percentage** direct deposit accounts will be automatically paid to the **Remaining Balance** account. The **Remaining Balance** account will be the last account processed to pay out all remaining funds. All employees must have a **Remaining Balance** account, even if you have other direct deposit accounts for set **Amounts** or **percentage** of pay.
16.	When you have completed the **Add Account** Screen, click **Save**. A new direct deposit account is created and you will be routed to the Direct Deposit Page.

17. **Reorder Accounts**

Use the Reorder button to change the priority in which the accounts are processed.
You will only see the reorder button if you have 2 or more accounts *in addition* to your balance account.

This example illustrates the Reorder Accounts page.



18. Click Reorder

Follow instructions on page to make changes and click Save.