

MANAGING PAYMENT ELECTIONS: ADDING A DIRECT DEPOSIT ACCOUNT

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MANAGING PAYMENT ELECTIONS: ADDING A DIRECT DEPOSIT ACCOUNT

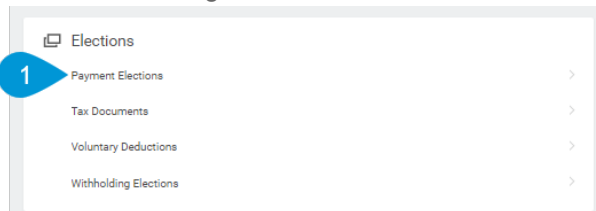
Distribute payroll and expense payments between different bank accounts (checking or savings), and specify the payment method, such as check or direct deposit. This job aid provides step-by-step instructions on how to manage your payment elections, including adding direct deposit accounts.



IMPORTANT: All instructions in this job aid start from the Pay worklet.

ADDING A DIRECT DEPOSIT ACCOUNT

1. Click **PAYMENT ELECTIONS** located under the Elections menu on the far right.



2. Click the **ADD** button under the Accounts section.



3. Enter in bank account information using the sample check:
 - A. Routing Transit Number
 - B. Bank Name
 - C. Account Type (Checking or Savings)
 - D. Account Number



Note: There is an option to add an account nickname to help identify the account.

4. Click **OK** to save.

A screenshot of the "Account Information" form. It includes a "Sample Check" image at the top with callouts A, B, and D pointing to the routing number, bank name, and account number fields respectively. Below the sample check are input fields for "Account Nickname (optional)", "Routing Transit Number", "Bank Name", "Bank Identification Code", "Account Type" (with radio buttons for "Checking" and "Savings"), and "Account Number". A blue callout bubble with the number "4" points to the "OK" button at the bottom.

MANAGING PAYMENT ELECTIONS: EDIT, REMOVE OR VIEW PAYMENT ELECTIONS

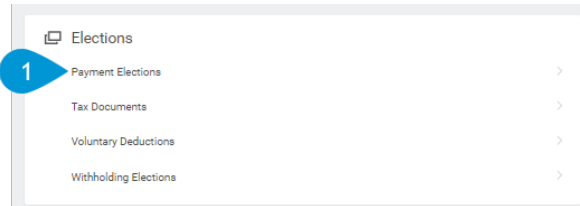
Distribute payroll and expense payments between different bank accounts (checking or savings), and specify the payment method, such as check or direct deposit. This job aid provides step-by-step instructions on how to manage your payment elections.



IMPORTANT: All instructions in this job aid start from the Pay worklet.

EDIT, REMOVE & VIEW PAYMENT ELECTIONS

1. Click **PAYMENT ELECTIONS** located under the Elections menu on the far right.



2. Click the **EDIT** button to edit and/or update bank account information. All required information will be indicated with a red asterisk.
3. Click the **REMOVE** button to delete a bank account.



Note: An account can only be removed if it is no longer being used as a payment election.

4. Click the **VIEW** button to view current bank account information.

Accounts 1 item

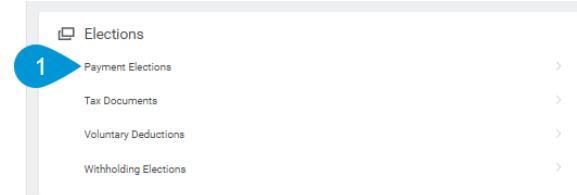
Account Nickname	Country	Bank Name	Account Type	Account Number
Checking	United States of America	Vibe Credit Union	Checking	

Buttons: Edit, Remove, View (Callouts 2, 3, 4)

5. Click **OK** to save.

EDIT PAYMENT ELECTION AMOUNTS

1. Click **PAYMENT ELECTIONS** located under the Elections menu on the far right.



2. Click the **EDIT** button in the Payment Elections section to modify a payment election.

Payment Elections 2 items

Pay Type	Payment Type	Account	Account Number	Distribution	
Reimbursements	Direct Deposit	Checking		Balance	Edit
				Yes	
Payroll - Active Employee	Direct Deposit	Checking		Balance	Edit
				Yes	

Callout '2' on the 'Edit' button for the second row.

3. Change the amount or percent that is deposited into the account or the account that receives the balance of payments for the payment type.
4. Click **OK** to save.

Account: x Checking

*Balance / Amount / Percent

Balance
 Amount

Input field: 0.00

Callout '3' on the input field.