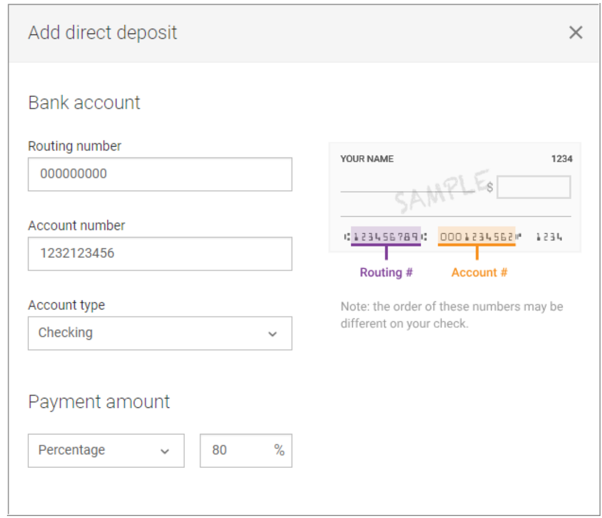
The Direct Deposit - new user interface design - feature is now available in Advanced HR 2.0. The Direct Deposit feature enables employees to add a new direct deposit request, and importantly - **make changes to their existing direct deposit elections**. Previously, employees could not make changes to their existing direct deposits; they had to create a new request.

This guide describes how users perform the following tasks using the new Direct Deposit user interface:

- How employees **view** their existing direct deposit elections
- How employees **add** a new direct deposit request
- How employees edit or **make changes** to their direct deposit elections
- How employees can **delete** their direct deposit elections
- How the Supervisor/Manager **approves** an employee's direct deposit new/changed election (note that this process has not changed)

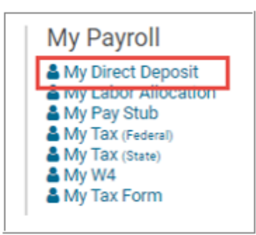


Note: Before an Employee or Manager can use the Direct Deposit functionality in Advanced HR 2.0, the E/D codes for Direct Deposit must be created and setup (added to the Company) in Evolution Classic.

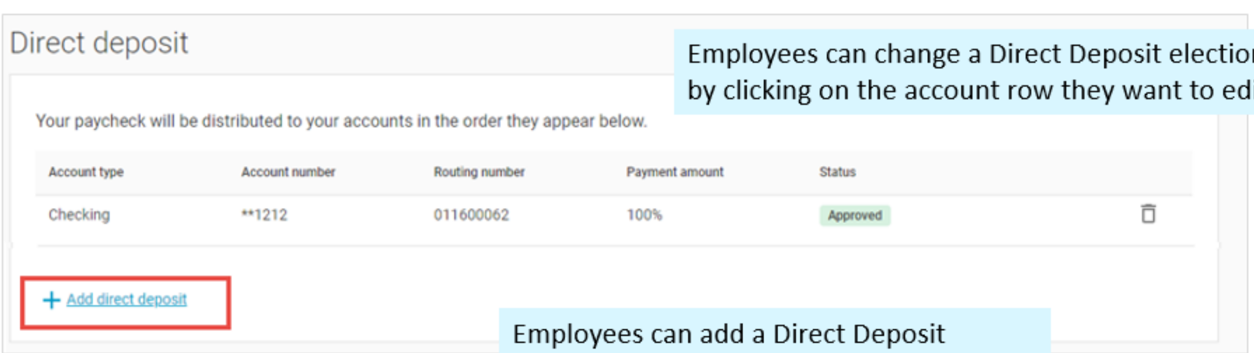
When an employee submits their Direct Deposit allocations for approval, their supervisor receives an email notification of the submission, including a link to follow so that they can approve or reject the Direct Deposit request.

Note that this new Direct Deposit feature interface is one of the first implementations of the Evolution HCM product redesign that will reflect a consistent, contemporary user interface across all Evolution products. The Direct Deposit approval process, including the input of the corresponding Evolution Classic E/D Deduction code information, is the same as before; it does not use the new interface.

Viewing your current direct deposit elections



Employees view their current Direct Deposit elections from their **My HR – My Payroll – My Direct Deposit** screen.

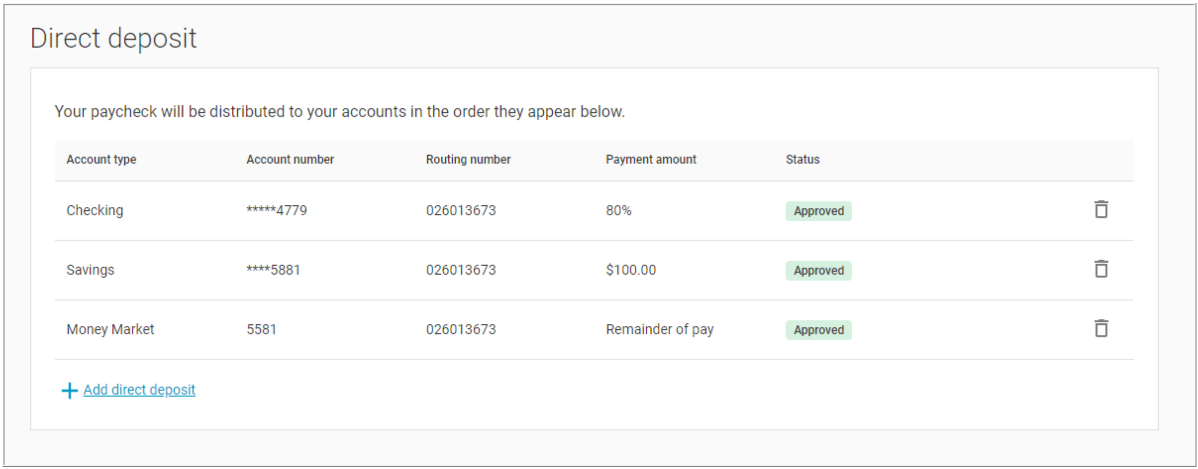


Employees can change a Direct Deposit election by clicking on the account row they want to edit.

Employees can add a Direct Deposit election by clicking the **+ Add direct deposit** link on the **Direct Deposit** screen.

Employees can view their existing direct deposit elections at any time by doing the following steps:

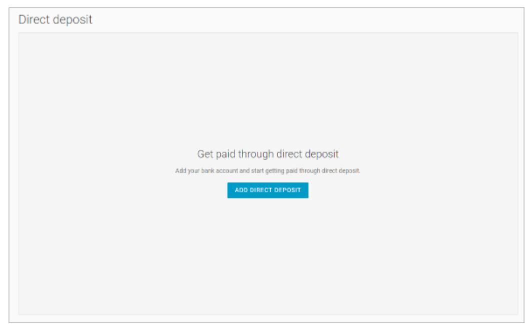
1. Go to **My HR – My Payroll – My Direct Deposit**.
2. The system displays either the **Direct Deposit** screen, showing, if applicable, their existing Direct Deposit elections.



Account type	Account number	Routing number	Payment amount	Status
Checking	*****4779	026013673	80%	Approved
Savings	****5881	026013673	$100.00	Approved
Money Market	5581	026013673	Remainder of pay	Approved

For each Account Type, the screen shows the last four digits of the account number, the routing number, the payment amount and the status of request (**Approved**, **Pending**).

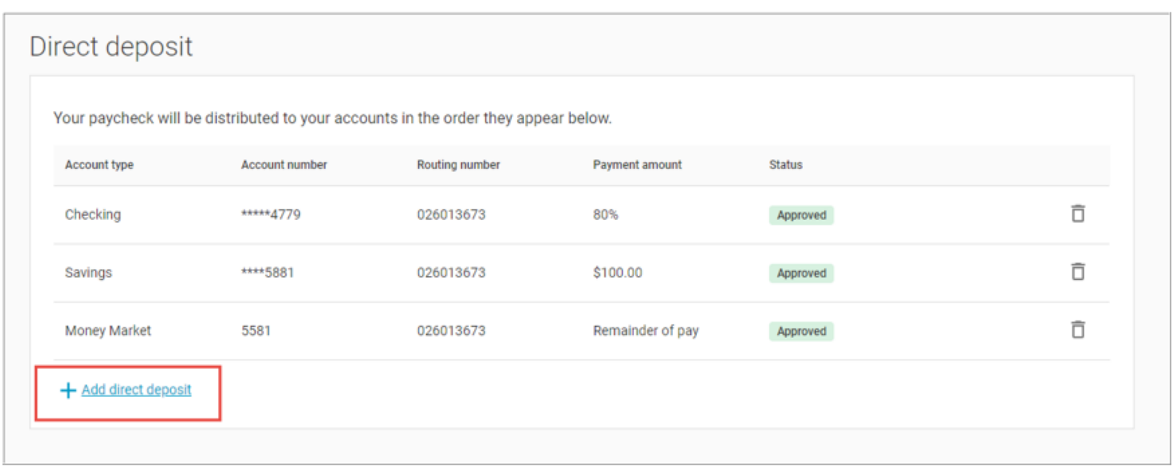
Or, if the employee has no existing direct deposit elections, the system will instead display a screen indicating that they do not have any direct deposits currently set up but can add their bank account(s) if they want.



This screen contains an **Add Direct Deposit** button they can click on to get started with direct deposit. Clicking the **Add Direct Deposit** button will bring them directly to the **Add Direct Deposit** screen.

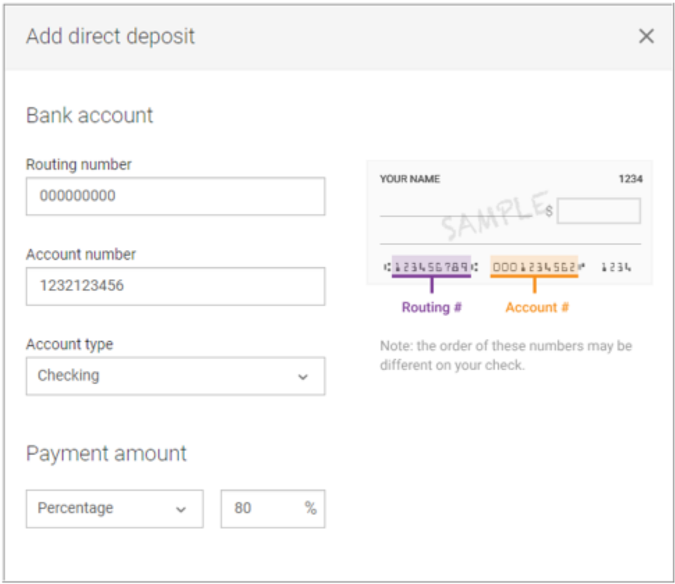
Adding a new direct deposit request

Employees have the ability to add or change their Direct Deposit requests, for one bank account or for multiple accounts, using the new **Direct Deposit** screen.

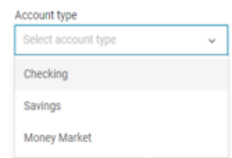


Account type	Account number	Routing number	Payment amount	Status
Checking	*****4779	026013673	80%	Approved
Savings	****5881	026013673	$100.00	Approved
Money Market	5581	026013673	Remainder of pay	Approved

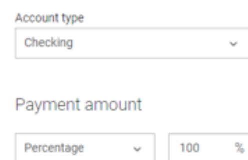
After clicking the **Add direct deposit** link on the **Direct Deposit** screen, employees set their Direct Deposit elections on the **Add Direct Deposit** screen.



- Enter the **Routing number**
- Enter the **Account number**
- Select the **Account type**



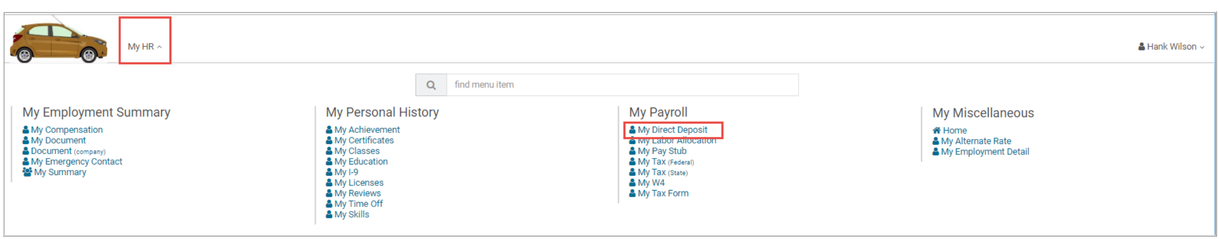
- Select the **Payment amount:**
  For example: **100% to Checking**



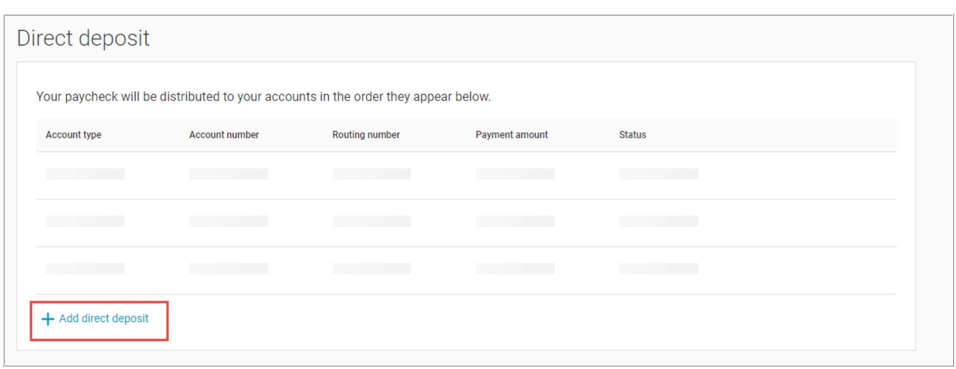
How the employee completes their Direct Deposit request:

To add a new direct deposit request, the employee does the following steps:

1. Go to **My HR – My Payroll – My Direct Deposit**.



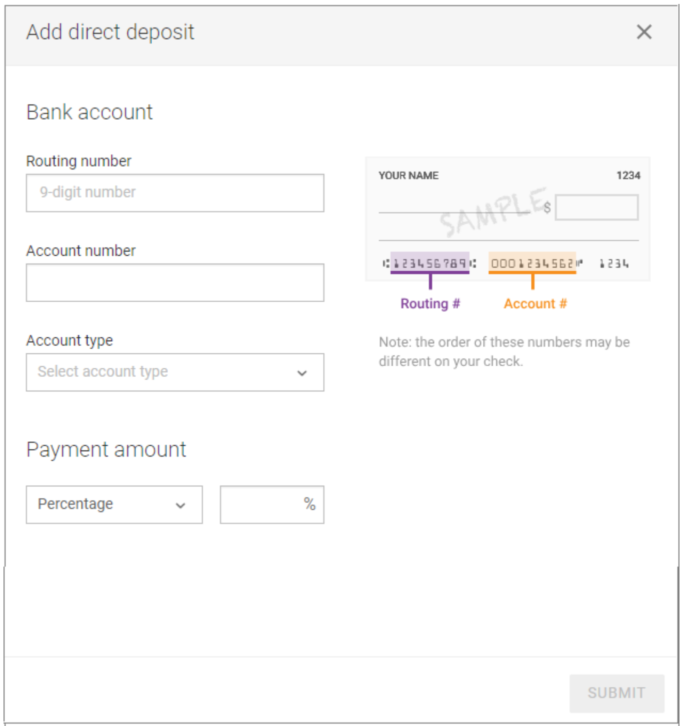
2. The system displays the **Direct Deposit** screen.



3. Click the **+ Add direct deposit** link 

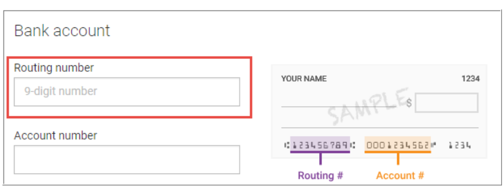
at the bottom left of the screen.

4. The **Add Direct Deposit** pop-out modal screen displays from the right side, appearing over the Direct Deposit screen.

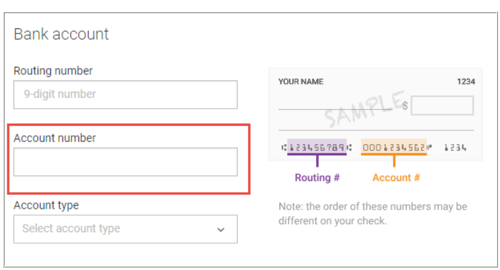


5. In the **Bank Account** section of the **Add Direct Deposit** screen, complete the following fields:

- Enter the **Routing number** of the bank into which the direct deposit will go.
  The bank routing number or routing transit number (RTN) is a nine-digit number used to identify the financial institution in a transaction.

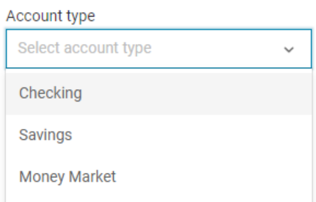


- Enter the **Account number** of the account into which the direct deposit will go.
  The Account number is the unique individual number given to the specific account for the employee.

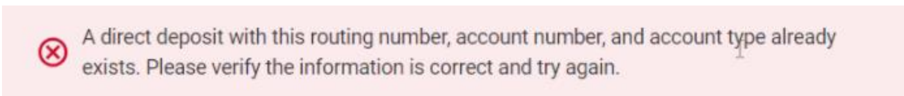


Refer to the sample check diagram on the right side of the screen and compare it to one of your physical checks to help you determine the routing and account numbers, if you don't know them. Note that the order placement of these numbers may be different on your check. Note the system displays only the last four digits of the account number.

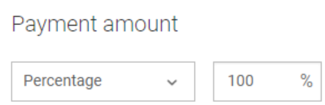
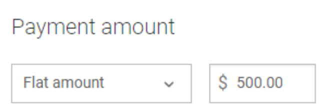
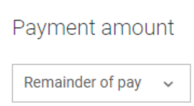
- Select the **Account type** (**Checking**, **Savings**, or **Money Market**) from the dropdown into which the direct deposit will go. **Note:** Do this step and the next step for each separate account into which you want to deposit funds, if you will be depositing them into multiple accounts.



Note that if you enter a direct deposit request with the same routing number, account number, and account type as one of you existing requests, the system will provide a warning similar to the sample below.



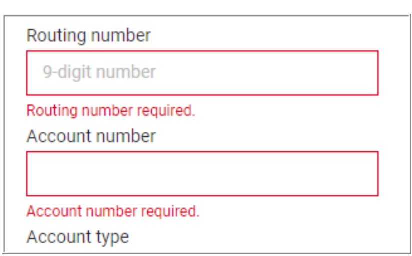
6. In the **Payment Amount** section of the screen, select the applicable payment type(s) as shown in the following table:

Payment Amount	Description	Example
Percentage	Select **Percentage** and enter the percentage (**%**) in the field to the right. **Note:** The **Payment Amount** field defaults to **Percentage**. If you enter a percentage of more than 100%, you will receive a warning: "Amount cannot exceed 100%".	
Flat Amount	Select **Flat amount** and enter the dollar amount (**$**) in the field to the right.	
Remainder of Pay	Use a method above and then select the **Remainder of pay** option to have the balance of the remaining amount deposited into another selected account.	

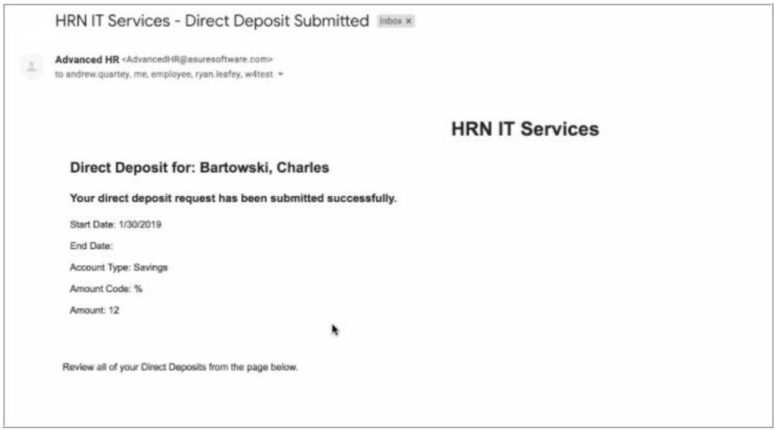
See the sample scenarios in the next section to help understand how to use the **Payment Amount** fields.

7. Once all the accounts and amounts are complete, click the **Submit** button  at the bottom of the screen.

If you forget to enter a required field, the system informs you that the field is required with a red warning message. You will not be able to click the **Submit** button until you complete all the required fields on the screen.



The direct deposit request you just submitted will create an email notification to the Supervisor / Manager to approve or reject the direct deposit request. As the employee, you also will receive an email confirmation that your direct deposit has been submitted for approval. A sample email submittal notification is shown below.

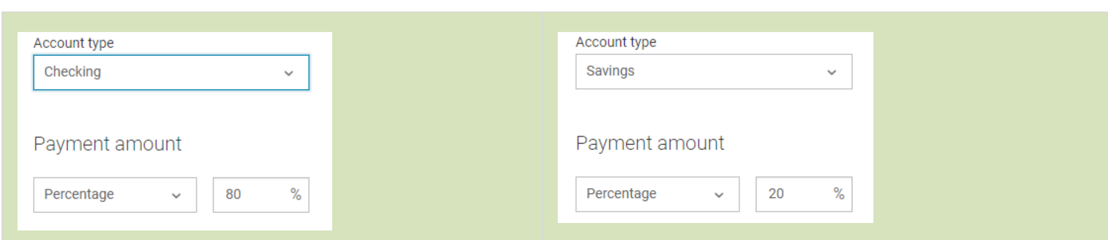


Direct deposit election sample scenarios

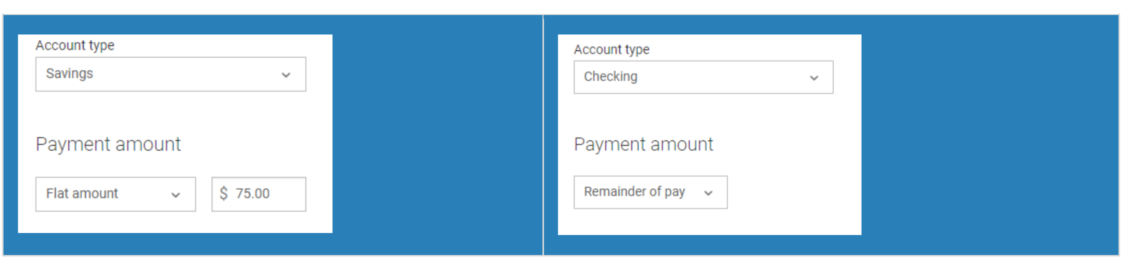
To help understand how to use the direct deposit fields described above, consider the following scenarios:

Scenario 1: To have all of your direct deposit go to your checking account, complete the fields as follows:

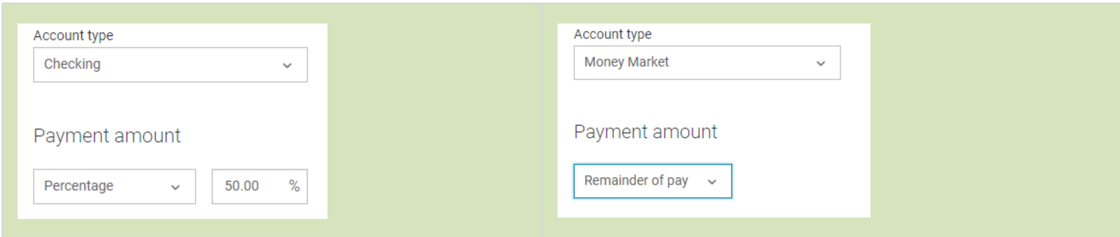
Scenario 2: To have 80% go to your checking account and 20% go to your savings account, complete the fields as follows:



Scenario 3: To have a specific dollar amount go into one account, select the **Account type**, then select a **Payment Amount** of **Flat Amount** and then enter the dollar amount in the field to the right. For example, to have $75 deposited to your Savings account, and the remainder go to your checking account, complete the fields as shown below:



Scenario 4: To have 50% go to one account and the remainder go to another account – for example – 50% to your checking account and the remainder go to your money market account, complete the fields as shown below:



Note that an employee can only set up as many Direct Deposits as are available at the company level.

The next section discusses how employees **make changes** to their Direct Deposit elections. To learn how Supervisors / Managers approve the employee's direct deposit request, refer to the section in this guide: *The Supervisor / Manager Approves the Employee's Direct Deposit Request*. Note that the approval process has not changed.

Changing your direct deposit elections

The employee uses the Edit Direct Deposit screen to change their direct deposit elections:

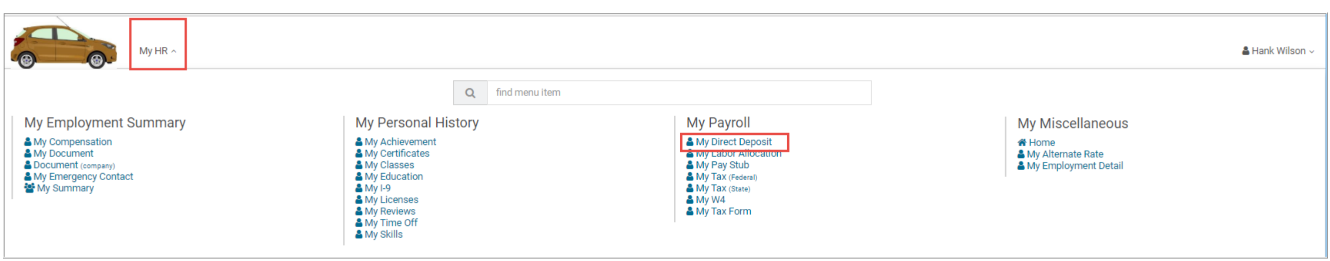
The employee can change their existing direct deposit elections. They can change the amount of an existing direct deposit record rather than having to submit a new direct deposit request.

Note: Once a direct deposit request has been approved by the Supervisor / Manager, employees can change the direct deposit account name, the account type, and the payment amount. Employees cannot change the bank / account number of an approved request. If a direct deposit request is still in Pending status, then the employee can make changes to all the fields. An employee can also delete a direct deposit account.

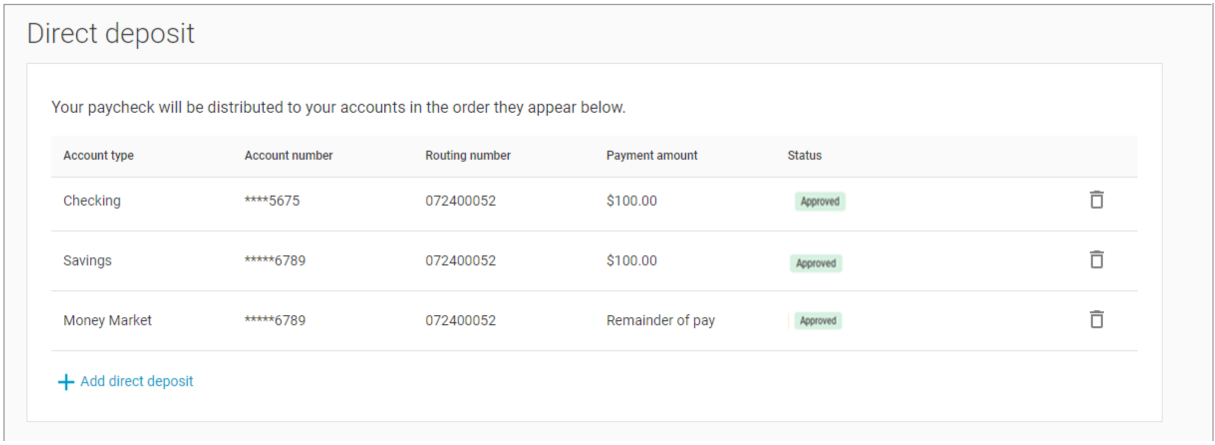
For example, an employee wants to change their direct deposit amount going to the their savings account from $100 per pay period to $150 per pay period as they just received a raise.

To make a change to an existing direct deposit election, do the following:

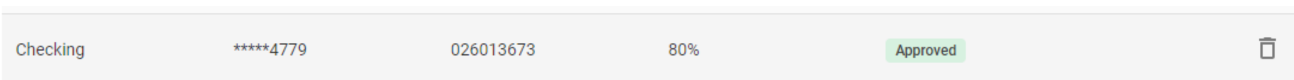
1. Go to **My HR – My Payroll – My Direct Deposit**.



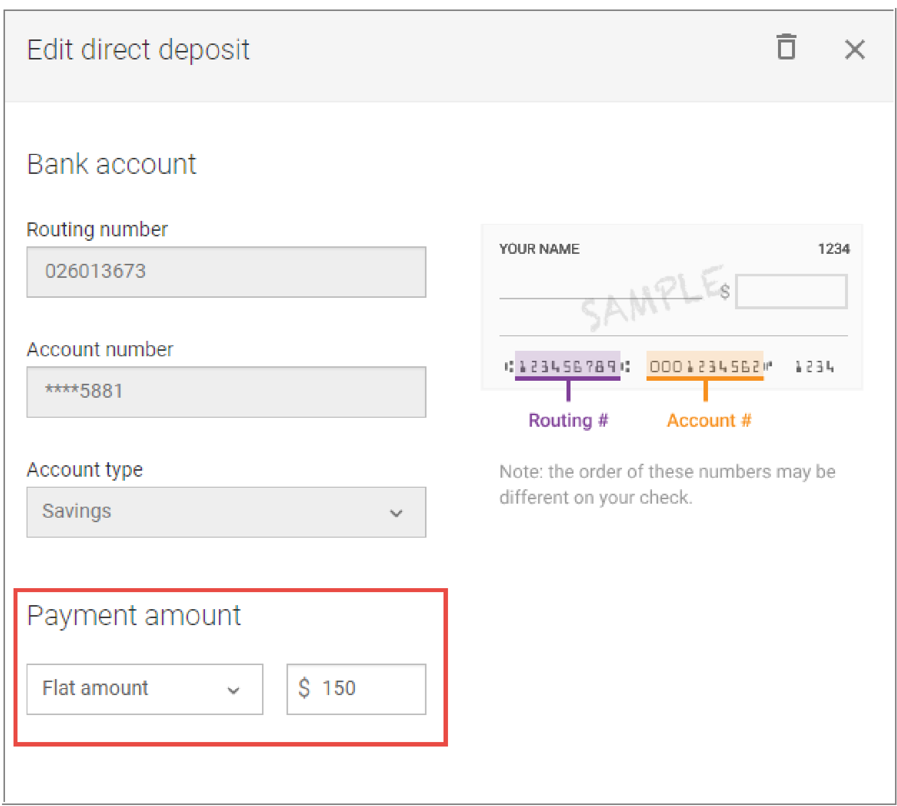
2. The system displays the **Direct Deposit** screen, showing, if applicable, any existing direct deposit elections.



3. Click on the row of the direct deposit account election for the account that you want to change.



4. The system displays the **Edit Direct Deposit** screen for that account election row. Make your changes to this account, and change any other direct deposit account elections as needed. For example, to change the dollar amount going to your savings account from $100 per pay period to $150.



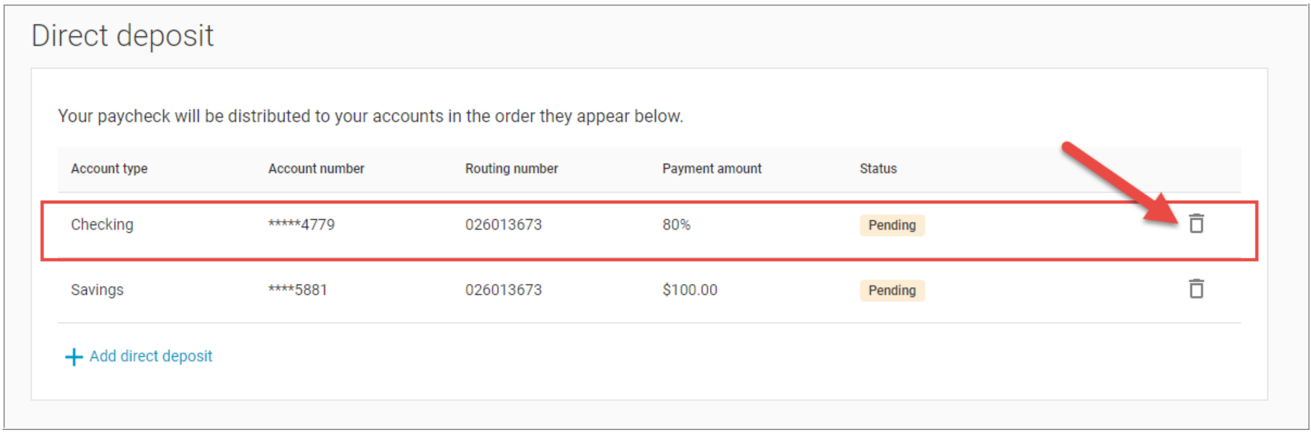
5. Once your changes are complete, click the **Submit** button SUBMIT.

Deleting a direct deposit account

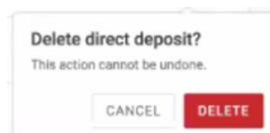
Employees can delete (deactivate) a direct deposit account if, for example, they no longer want to have money deposited in a specific account, or, if they need to change bank accounts. If the direct deposit request is still in Pending Status, it can be deleted. If the direct deposit request is in Approved Status, then the deleted account is not actually “deleted,” but rather, it is end-dated as no longer being in effect.

Admins have the ability to access any changes made to the direct deposit account records for audit purposes or for any other need.

To delete an account, display the Direct Deposit screen and click on the Trash Can icon on the right side of the Direct Deposit account item row for the account that you want to delete.



After you click on the Delete icon, the system displays a warning “Delete Direct Deposit? This action cannot be undone”. Click the **Delete** button.



The system will send the delete request to the supervisor/manager for approval. Once the supervisor/manager approves the account deletion, that action will flow over to payroll and that account item will no longer appear on the Direct Deposit screen for the employee. The system will update the priority of the remaining account elections accordingly.

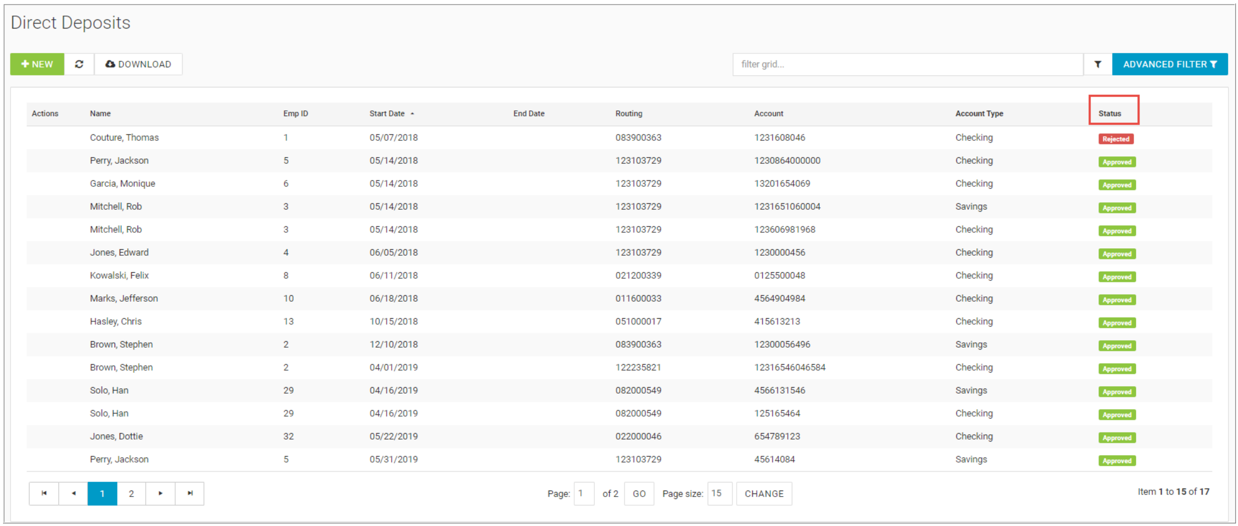
Approving the employee’s direct deposit request

This section describes how the Supervisor / Manager approves an employee’s **new** direct deposit request and how to approve an employee’s direct deposit **change** request.

Note: The direct deposit approval process, including entering the corresponding Scheduled E/D codes, has not changed nor does it involve the new user interface.

The Supervisor/ Manager approves the employee’s new direct deposit request:

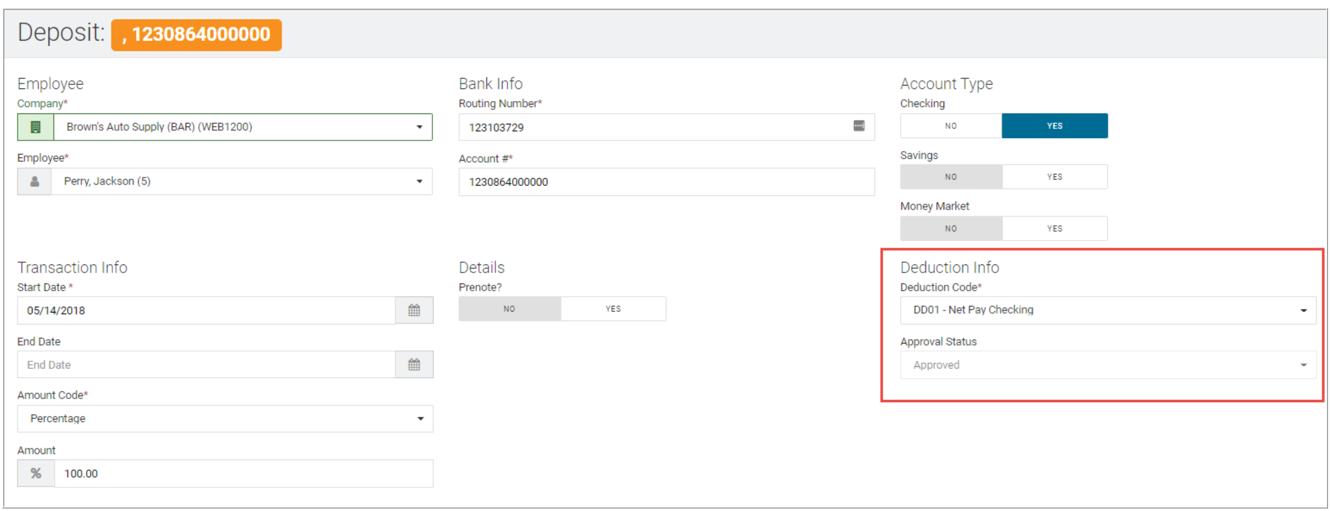
After receiving a notification that an employee has submitted a Direct Deposit request, the Supervisor goes to the **HR Admin - Employee Maintenance - Direct Deposit** screen, to enter the **Deduction Code** information and approve it.



Actions	Name	Emp ID	Start Date	End Date	Routing	Account	Account Type	Status
	Couture, Thomas	1	05/07/2018		083900363	1231608046	Checking	Rejected
	Perry, Jackson	5	05/14/2018		123103729	1230864000000	Checking	Approved
	Garcia, Monique	6	05/14/2018		123103729	13201654069	Checking	Approved
	Mitchell, Rob	3	05/14/2018		123103729	1231651060004	Savings	Approved
	Mitchell, Rob	3	05/14/2018		123103729	123606981968	Checking	Approved
	Jones, Edward	4	06/05/2018		123103729	1230000456	Checking	Approved
	Kowalski, Felix	8	06/11/2018		021200339	0125500048	Checking	Approved
	Marks, Jefferson	10	06/18/2018		011600033	4564904984	Checking	Approved
	Hasley, Chris	13	10/15/2018		051000017	415613213	Checking	Approved
	Brown, Stephen	2	12/10/2018		083900363	12300056496	Savings	Approved
	Brown, Stephen	2	04/01/2019		122235821	12316546046584	Checking	Approved
	Solo, Han	29	04/16/2019		082000549	4566131546	Savings	Approved
	Solo, Han	29	04/16/2019		082000549	125165464	Checking	Approved
	Jones, Dottie	32	05/22/2019		022000046	654789123	Checking	Approved
	Perry, Jackson	5	05/31/2019		123103729	45614084	Savings	Approved

The system displays the Direct Deposit dashboard. Any direct deposits that display **Pending** in the **Status** column indicate that the direct deposit has not yet been approved. The deposit will not be applied to the employee's payroll until it has been approved.

Click on the Direct Deposit row that has a Status of **Pending**. The system displays the Direct Deposit details screen for that employee. You have the ability to edit any information. You'll need to enter a **Deduction Code** and change the **Status** to **Approved**.



Most of the information has already been entered by the employee when they submitted their direct deposit request. As the Supervisor / Admin, the only information you should need to complete is the **Deduction Code**.

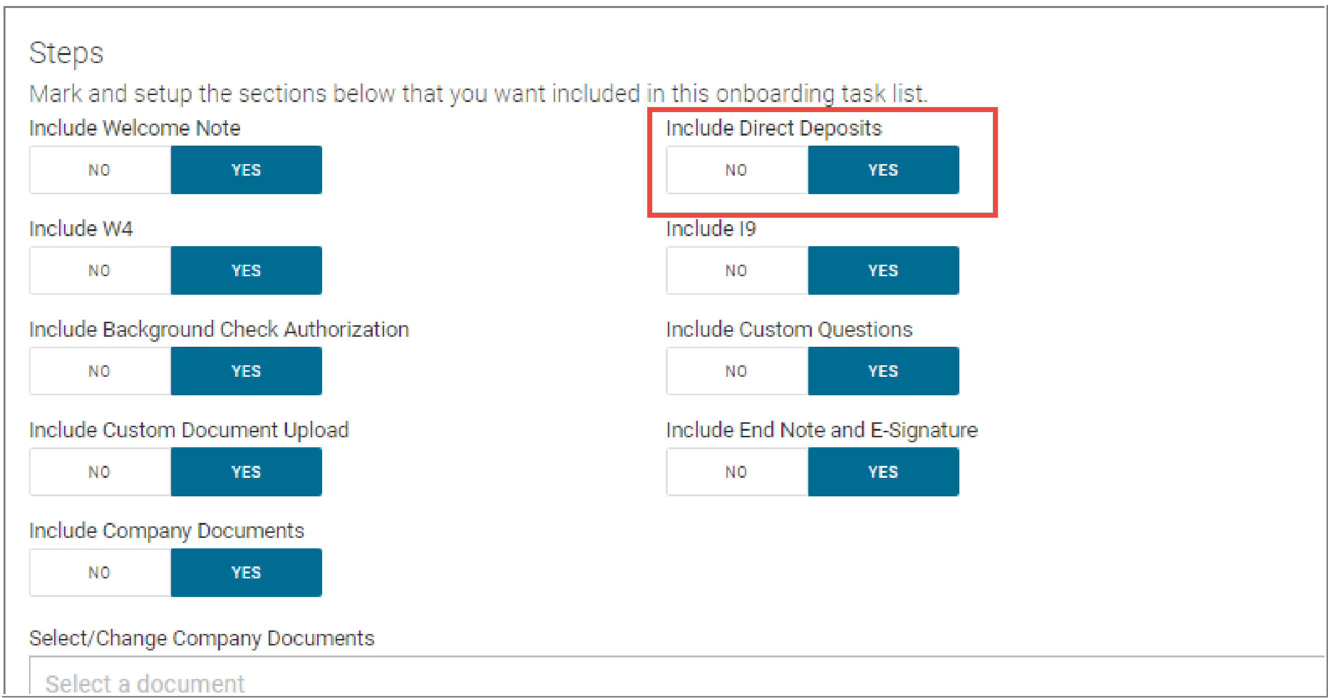
In the **Deduction Info** section, select the **Deduction Code** from the dropdown. Only Direct Deposit Deduction Codes specifically set up for Direct Deposit will display. Once you have selected the Deduction Code you can change the **Approval Status** to **Approved**. Click **Save Changes**.

Important: Do not forget to set the **Approval Status** field to **Approved,** otherwise the system will not create the corresponding Scheduled E/D code.

Once approved, the Direct Deposit will be active and will show **Approved** Status on the Direct Deposit dashboard.

Including direct deposit in an onboarding task list

When setting up a company's onboarding experience, you can select any number of company tasks and documents to be used for the onboarding process. You do this on the **HR Admin - Onboarding - Task List** screen. The example below shows how the Admin has specified that Direct Deposit tasks/documents will be presented to the employee during onboarding for download, review, and signature. You do this in the **Steps** section of the screen by setting the **Include Direct Deposits** toggle switch to **Yes**.



Direct deposit notifications

The following table lists the **Notifications** that employees and Supervisors/Managers may receive related to Direct Deposits, if these have been activated by the Administrator. The Notifications process is the same as it was with the old direct deposit interface.

Notification Name	Description
Request Submitted	Sent to the Employee to let them know their request is successfully submitted.
New Request	Sent to the people responsible to review and approve new direct deposit requests when they are submitted.
Request Rejected	Sent to the Employee to let them know their direct deposit request is rejected.
Request Approved	Sent to the Employee to let them know their direct deposit request is approved.

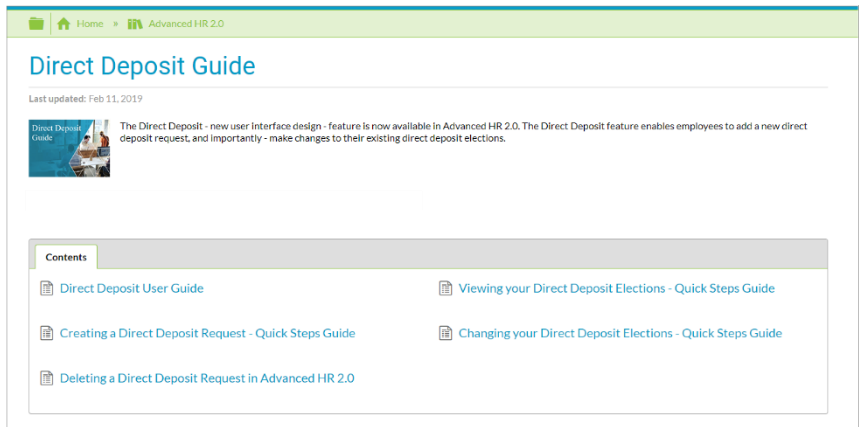
Admins set up the Direct Deposit Notifications on the **HR Admin – Communications – Notifications** screen. For more information about Notifications, see the *Advanced HR 2.0 Administrator Guide* or the *Advanced HR 2.0 – Notifications Job Aid*. Both of these are available for download on the Evolution Resource Center (https://support.evolutionhcm.com).

Direct deposit auditing

Currently, the system does not log to the **Email Record List** screen when Direct Deposits are created using the new interface. However, Admin actions (such as Approve, Reject, etc.) do get logged since those actions are performed using the old/existing Direct Deposit interface. For this phase of the Direct Deposit feature, we are logging all (Employee & Admin) actions to the Audit table (**HR Admin – Audit – Auditing** screen) so that there is an audit trail.

For more information – see these Quick Steps Guides on the ERC

For end user information about the Direct Deposit – new user interface feature, refer to the following Quick Steps Guides on the **Evolution Resource Center** (**ERC**), shown at right.



The following Quick Steps Guides are targeted to the **client end user** audience:

- *Viewing your Direct Deposit Request in Advanced HR 2.0 Quick Steps Guide*
- *Creating a Direct Deposit Request in Advanced HR 2.0 Quick Steps Guide*
- *Changing your Direct Deposit Request in Advanced HR 2.0 Quick Steps Guide*

The following Quick Steps Guide is targeted to **Supervisor / Manager / Admin** and the **Service Bureau** audience.

- *Direct Deposit – Approving an Employee's Direct Deposit Request in Advanced HR 2.0 Quick Steps Guide*

All the Quick Steps Guides mentioned above are available for viewing/downloading on the **Evolution Resource Center** at the following site:

https://support.evolutionhcm.com