

Changing your Direct Deposit Elections - Quick Steps Guide

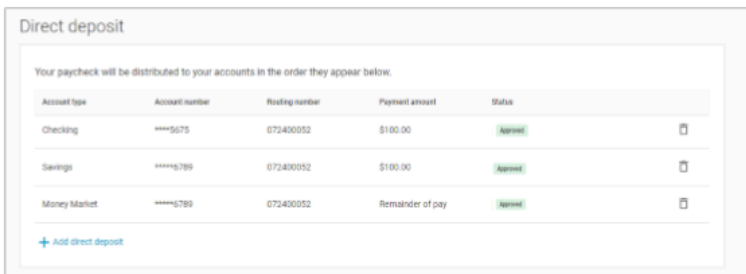
Changing your Direct Deposit Request in Advanced HR 2.0



Evolution[®] HCM
by ASURE SOFTWARE

To make changes to your direct deposit request:

1. Go to **My HR – My Payroll – My Direct Deposit**.
2. The system displays the **Direct Deposit** screen, showing, if applicable, any direct deposit elections.



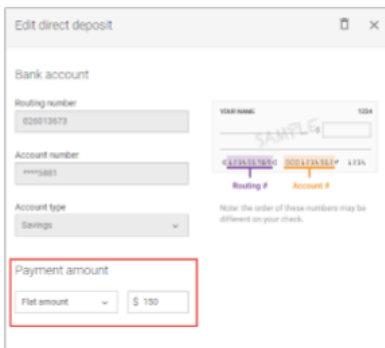
Direct deposit

Your paycheck will be distributed to your accounts in the order they appear below.

Account type	Account number	Routing number	Payment amount	Status
Checking	****5075	072400052	\$100.00	Approved
Savings	****9799	072400052	\$100.00	Approved
Money Market	****9790	072400052	Remainder of pay	Approved

[+ Add direct deposit](#)

3. Click on the row of the direct deposit account election for the account that you want to change. Or, to add another account, click on the **+ Add direct deposit** link at the bottom of the screen.
4. The system displays the **Edit Direct Deposit** screen for that account.



Edit direct deposit

Bank account

Routing number: 026013673

Account number: ****9881

Account type: Savings

Payment amount: Flat amount \$ 100

Submit

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

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This Quick Steps Guide describes how employees can make changes to their direct deposit requests using the new user interface.

Employees can now make changes to their existing direct deposit request rather than having to create a new request.

If a request is still in **Pending** status, then the employee can make changes to all fields. If the request has been **Approved**, the employee can change the direct deposit account name, the account type, and the payment amount.

For example, you might want to change your direct deposit amount going to your savings account from \$100 per pay period to \$150 per pay period (you got a raise!) as shown in Step 4 at the left.

The table below provides guidance concerning how to use the **Payment Amount** field on the Direct Deposit screen.

Payment Amount	Description	Example
Percentage	Select Percentage and enter the percentage (%) in the field to the right. The Payment Amount field defaults to Percentage .	Payment amount Percentage ▾ 100 %
Flat Amount	Select Flat amount and enter the dollar amount (\$) in the field to the right.	Payment amount Flat amount ▾ \$ 500.00
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.	Payment amount Remainder of pay ▾

Below are some sample direct deposit scenarios to help you better understand how to use these fields:

Scenario 1:	Scenario 2:
To have all of your direct deposit go to your checking account, complete the fields as follows:	To have 80% go to your checking account and 20% go to your savings account, complete the fields as follows:
<div style="border: 1px solid #ccc; padding: 5px;"> Account type Checking ▾ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Payment amount Percentage ▾ 100 % </div>	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block; width: 45%;"> Account type Checking ▾ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; display: inline-block; width: 45%;"> Payment amount Percentage ▾ 80 % </div>
	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block; width: 45%;"> Account type Savings ▾ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; display: inline-block; width: 45%;"> Payment amount Percentage ▾ 20 % </div>

Scenario 3:	Scenario 4:
<p>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:</p>	<p>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:</p>
<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p>Account type Savings</p> <p>Payment amount Flat amount \$ 75.00</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p>Account type Checking</p> <p>Payment amount Remainder of pay</p> </div> </div>	<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p>Account type Checking</p> <p>Payment amount Percentage 50.00 %</p> </div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> <p>Account type Money Market</p> <p>Payment amount Remainder of pay</p> </div> </div>

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 still have the ability to access the deleted direct deposit account record 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 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.

