

Direct Deposit Changes (Employee and Approver)



This guide provides step-by-step instructions on how to update and manage direct deposit information. It emphasizes the importance of ensuring paychecks go to the correct account. It explains how to access the change request form, make necessary changes, check submission status, and how approvers can take action. It also explains how employees can view approved changes. Following these steps will help users update and view approved direct deposit information effectively.

Updating Direct Deposit Information

1

Managing direct deposit information is important for ensuring paychecks go directly to the right account. Follow the steps below to request a change and view the approved updates.



To activate the Direct Deposit Workflow, simply refer to the instructions provided in the knowledge base article accessible [here](#).

2

Access the Direct Deposit Change Request Form:

- Navigate to "My Direct Deposit Change Request."
- Select "New" to start a new request.

My Employment Summary

- My Compensation
- My Custom Form
- My Dependent
- My Document
- Document (company)
- My Emergency Contact
- My Summary

My Payroll

- My Direct Deposit Alt
- My Direct Deposit Change Request
- My Pay History
- My W-2
- My W-4

My Personal History

- My Achievement
- My Certificates
- My Classes
- My Education
- My I-9
- My Licenses
- My Property
- My Reviews
- My Skills
- My Time Off

My Expenses

- My Expense Details
- My Expense Reports

No reviews in upcoming months

My HR

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Direct Deposit Workflow \$

+ New

Download

Actions	Status ▾	Submit Date Central	Account Info
	Cancelled	04/03/2024 05:50 PM	002 / 100.00
	Approved	11/28/2022 05:49 AM	001 / 100.00
	Approved	11/28/2022 06:27 AM	002 / 100.00

1

3 Make the Necessary Changes:

- Update the record with new direct deposit information.
- Once done, click "Submit Change Request" to submit the changes.

Routing Number 314074269 ✓	Routing Number 271183791	Routing Number 	Routing Number
Account # 002	Account # 00001	Account # 	Account #
Name on Account Kim Wagner	Name on Account Kim Wagner	Name on Account 	Name on Account
Checking ☐ No ☒ Yes	Checking ☐ No ☒ Yes	Checking ☐ No ☐ Yes	Checking ☐ No ☐ Yes
Savings ☐ No ☐ Yes	Savings ☐ No ☐ Yes	Savings ☐ No ☐ Yes	Savings ☐ No ☐ Yes
Amount Code Percentage	Amount Code Flat Amount	Amount Code Please Choose (represents BLANK)	Amount Code Please Choose (represents BLANK)
Amount \$ 100.00	Amount \$ 50.00	Amount \$ Amount	Amount \$ Amount

Workflow

Status

New

Workflow Actions

Submission

Approval/Rejection/Cancellation

Notes

Workflow Note

Workflow

Status

New

Workflow Actions

Submission

Approval

4 Check the Submission Status:

- After submitting the request, a new record with the status of "Submitted" will appear.

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+ New ↺ Download

Actions	Status ▾	Submit Date Central	Account Info
	Submitted	04/03/2024 05:59 PM	002 / 100.00
	Cancelled	04/03/2024 05:50 PM	002 / 100.00
	Approved	11/28/2022 05:49 AM	001 / 100.00
	Approved	11/28/2022 06:27 AM	002 / 100.00

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An approver will review the request.

5 Approver Actions:

- The approver will navigate to "Workflow Employee Compensation" and then select "Submitted."

Expense Report

Property/Asset Management

Property Category

Property Type

Workflow

Workflow Configuration

Workflow Employee Compensation

Workflow Employee Direct Deposit

Workflow Employee EPO

Workflow Employee Termination

company search

/orkflow  \$

filter grid...

Name	Employee ID	Status ▾	Submit Date Central	Account Info
wagner, kim	ACKE0004	Submitted	04/03/2024 05:59 PM	002 / 100.00(%) -
wagner, kim	ACKE0004	Cancelled	04/03/2024 05:50 PM	002 / 100.00(%) -
wagner, kim	ACKE0004	Approved	11/28/2022 05:49 AM	001 / 100.00(%) -
wagner, kim	ACKE0004	Approved	11/28/2022 06:27 AM	002 / 100.00(%) -
Clemenson, Mary	40	Approved		123321123123 / 1
Johnson, Steve	41	Approved		12345678901233
...	...	...	...	...

6

- The approver will take action on the request, such as choosing to "Approve Request."

The screenshot displays the 'Direct Deposit Workflow: CHANGE REQUEST' interface. At the top, there are four columns for inputting deposit details. Each column includes a 'Savings' section with 'No' and 'Yes' buttons, an 'Amount Code' dropdown menu, and an 'Amount' field. Below these columns is a 'Workflow' section. The 'Status' is 'Submitted'. The 'Workflow Actions' list includes 'Approve Request' (highlighted with an orange circle), 'Return Request To Submitter', 'Cancel Request', and 'Reject Request'. The 'Submission' section shows the date '04/03/2024 05:59 PM' and the user 'kim wagner' with email 'kimwagner_integritydata@hotmail.com'. The 'Notes' section is empty. The bottom bar contains buttons for 'Save Changes', 'Save & Next Record', 'Prev Record', 'Next Record', and 'Close'.

View Approved Changes

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- The employee can now view the accepted direct deposit information.

8

- Once the request is approved, navigate to "My Direct Deposit Alt" to view the approved direct deposit information.

- My Compensation
- My Custom Form
- My Dependent
- My Document
- Document (company)
- My Emergency Contact
- My Summary

- My Achievement
- My Certificates
- My Classes
- My Education
- My I-9
- My Licenses
- My Property
- My Reviews
- My Skills
- My Time Off

My Payroll

- My Direct Deposit Alt
- My Direct Deposit Change Request
- My Pay History
- My W-2
- My W-4



STEP 2 - Fill out up to 4 Direct Deposit accounts
 If using accounts with 'FLAT' amounts, you will need exactly 1 account (in first slot) with '%' that equals 100% (for possible remainder/balance). Examples:
 100%, FLAT \$100, FLAT \$200
 100%, 50%, FLAT \$100
 100%, 25%, 25%

Direct Deposit Accounts

Direct Deposit #1	Direct Deposit #2	Direct Deposit #3	Direct Deposit #4
Clear Account	Clear Account	Clear Account	Clear Account
Routing Number 314074269	Routing Number 271183701	Routing Number Routing Number	Routing Number Routing Number
Account # 002	Account # 00001	Account # Account	Account # Account
Name on Account Kim Wagner	Name on Account Kim Wagner	Name on Account Name	Name on Account Name
Checking ☐ No ☒ Yes	Checking ☐ No ☒ Yes	Checking ☒ No ☐ Yes	Checking ☒ No ☐ Yes
Savings ☒ No ☐ Yes	Savings ☒ No ☐ Yes	Savings ☒ No ☐ Yes	Savings ☒ No ☐ Yes
Amount Code Percentage	Amount Code Flat Amount	Amount Code Please Choose (represents BLANK)	Amount Code Please Choose (represents BLANK)
Amount \$ 100.00	Amount \$ 100.00	Amount \$ 100.00	Amount \$ 100.00

9

By following these steps, direct deposit information can be updated and changes viewed once they have been approved.

Payroll Integrations

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For more information on how these changes are implemented in your payroll system, please check the following knowledge base articles related to your specific payroll system:

To understand how these changes affect your GP payroll system, click [here](#).

To understand how these changes affect your Payroll Now payroll system, click [here](#).