

Direct Deposit

The **Direct Deposit** webpage in SMART eR allows an employee to view their current direct deposit setup for distribution of net pay. If allowed by the employer, the employee can change the direct deposit amounts allocated to their bank account(s) online. An electronic signature is required to verify employee identity. The change will not be active until it is signed by the employee and moved into payroll, which could take a few payroll cycles depending on the date the change is processed in payroll.

1. The **Current Setup** tab displays the direct deposit account(s) that are currently active for the employee in SMART HR payroll.
 - a. **Bank.** The last four digits of the bank routing number display.
 - b. **Acct #.** The last four digits of the bank account number display.
 - c. **Acct Type.** Checking or Savings.
 - d. **Amt/Pct.** The default row is blank and assumes 100% of remaining net pay. If additional accounts are setup, the current amount or percent displays.
 - e. **Bank Priority.** Every record requires a default bank account setup for 100%. Default and bank name display. If additional bank accounts are setup, they will display the priority number of 2, 3, 4 and bank name. The number of direct deposit accounts allowed per employee is controlled by the employer policy regarding direct deposit of payroll.

Bank	Acct #	Acct Type	Amt/Pct	Bank Priority	Change Priority
XXXXX9247	XX3110	Checking		Default Bank - BankName-For-091209247	

1. Click on the **Change Direct Deposit** tab to update or verify unprocessed direct deposit account setup. If you currently have more than one direct deposit account active, you must re-enter the information for each account.
2. Click on the **+ Add New** button to enter the routing number, bank account number and account type for your direct deposit of payroll. If a change is requested all account information must be re-entered. The default bank account is the first account entered. If multiple bank accounts are setup for the direct deposit of payroll, the default bank account will be used to deposit 100% of remaining Net Pay.

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Current Setup **Change Direct Deposit**

If you currently have more than one direct deposit account active, you must re-enter the information for each account. Click Add New, enter info, and sign. Repeat for each account you want active for your direct deposit of payroll.

You are allowed to have up to 3 account(s) at a time. This change may take a few pay periods to become effective. Payoffs are paid June - August. If you are requesting bank account changes during that time frame, it may not become effective until after August.

11/19/2020

Your Bank Information

Routing Number

Distribution Instructions

Acct #

Acct type

Electronic Signature

☐ I authorize and request my employer to automatically deposit and/or cancel direct deposit for my regular paycheck to the above listed account(s). I understand that my employer or I may terminate this agreement at any time by written notification. Any such notification requires a reasonable time to act upon it. I authorize my employer to debit and/or cancel my account(s) for the purpose of correcting an erroneous credit previously initiated to my account provided that prior to the debit and/or cancel my employer has notified me in writing of such debit and the reason therefore. Please check the box to authorize the transaction.

3.

- a. **View Check Example.** Click on the button to see an example of where to find the routing number and account number on a check.

Your Name
Your Address

1001

DATE: _____

PAY TO THE ORDER OF _____ \$ _____

_____ DOLLARS

Your Bank Name

MEMO: _____


⑆ 123456789 ⑆ 0000987654321 ⑆ 1001

9 Digit Routing Number Your Account Number Check Number

- b. **Hide Check Example.** Click on the button to close the check example window.
- c. **Routing Number.** Enter the 9-digit routing number that defines the bank name. This is required for direct deposit.
- d. **Account #.** Enter your bank account number. Do not enter dashes.
- e. **Acct Type.** Select the account type of Checking or Savings.
- f. **Amount/Percent.** Enter the amount or percent to be deposited to this account. This is not available for the default direct deposit account. The default assumes 100% of remaining Net Pay will be deposited to the account. It is a required field in you have more than one direct deposit account.

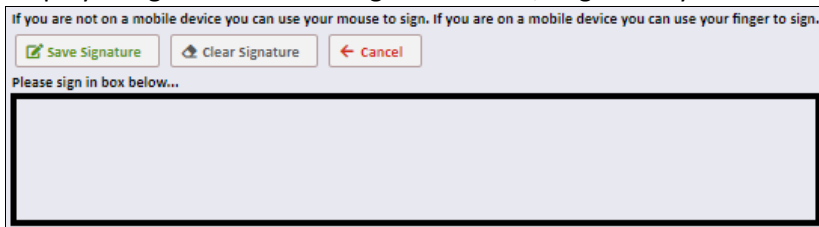
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
- i. **Dollar Amount.** Click the Amount radio button and enter the dollar amount.
Example: 25.00 will distribute \$25.00 of the net pay to the designated account.
 - ii. **Percentage.** Click the Percent radio button and enter the percent.
Example: 5 with will distribute 5% (percent) of the net pay to the designated account.
4. **Save Changes.** To save changes the employee will read the Electronic Signature consent message, click on the checkbox, and click on the  button.

Note: The change will not be active until it is signed by the employee and imported into payroll, which could take a few payroll cycles depending on the date the direct deposit change was made in SMART eR.

5. **Save Signature.** This window opens after the employee consents and clicks the sign button. Employee signs in the box using their mouse, finger or stylus.

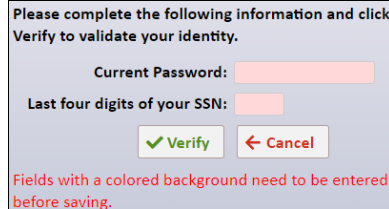


If you are not on a mobile device you can use your mouse to sign. If you are on a mobile device you can use your finger to sign.

Please sign in box below...



- a. **Password and SSN.** User is prompted to complete the verify identity page to sign and complete the direct deposit change. Enter the Current Password and Last four digits of their SSN before proceeding for security purposes.





Please complete the following information and click Verify to validate your identity.

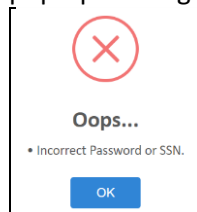
Current Password:


Last four digits of your SSN:

Fields with a colored background need to be entered before saving.


- i. **Current Password.** Enter the password used to log into SMART eR.
 - i. **Last four digits of your SSN.** Enter the last four digits of your social security number.
 - ii. Click on the  button to view or print the form.
 - iii. Click on the  to return to SMART eR webpage.
 - iv. If the wrong password or SSN is entered the user is prompted with the following pop-up message:






Oops...

• Incorrect Password or SSN.

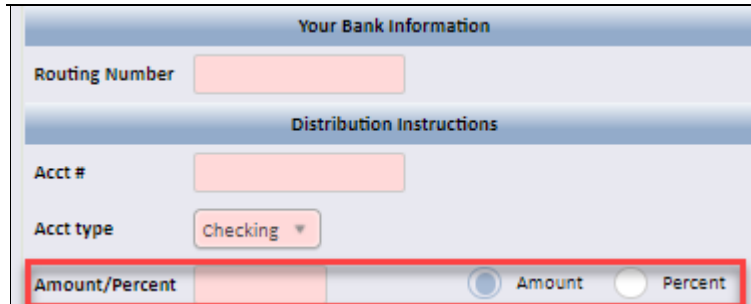


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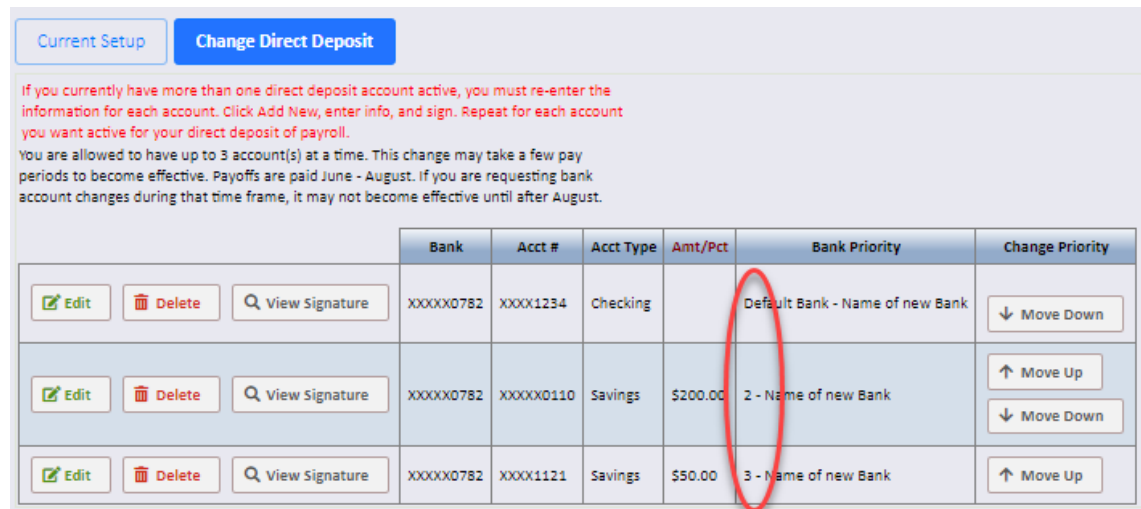
6. If you have more than one direct deposit account, click on the  button to enter the next account. Notice this time the Amount/Percent field with radio buttons is displayed to allow the user to define how Net Pay should be deposited to additional accounts.

Note: If multiple accounts are entered, the electronic signature is only required one time if all accounts are entered within 10 minutes.



The screenshot shows a form titled "Your Bank Information". It has two main sections: "Your Bank Information" and "Distribution Instructions". Under "Your Bank Information", there is a "Routing Number" field. Under "Distribution Instructions", there is an "Acct #" field, an "Acct type" dropdown menu (set to "Checking"), and an "Amount/Percent" field. The "Amount/Percent" field is highlighted with a red box and contains two radio buttons: "Amount" (selected) and "Percent".

Example: This is an example of how the screen displays direct deposit changes after three accounts have been added. Direct Deposit priority is assigned in the order displayed.



The screenshot shows the "Change Direct Deposit" screen. It has a header with "Current Setup" and "Change Direct Deposit" buttons. Below the header is a red warning message: "If you currently have more than one direct deposit account active, you must re-enter the information for each account. Click Add New, enter info, and sign. Repeat for each account you want active for your direct deposit of payroll." Below the warning is a note: "You are allowed to have up to 3 account(s) at a time. This change may take a few pay periods to become effective. Payoffs are paid June - August. If you are requesting bank account changes during that time frame, it may not become effective until after August." Below the note is a table with the following columns: "Bank", "Acct #", "Acct Type", "Amt/Pct", "Bank Priority", and "Change Priority". The table contains three rows of data, each with "Edit", "Delete", and "View Signature" buttons to its left. The "Bank Priority" column is circled in red.

	Bank	Acct #	Acct Type	Amt/Pct	Bank Priority	Change Priority
	XXXXX0782	XXXX1234	Checking		Default Bank - Name of new Bank	
	XXXXX0782	XXXXX0110	Savings	\$200.00	2 - Name of new Bank	
	XXXXX0782	XXXX1121	Savings	\$50.00	3 - Name of new Bank	

Multiple bank accounts will be processed from the highest priority first, assuming there is enough money in the paycheck to cover them all. Multiple accounts can only be entered if the employer allows it and has it setup in payroll.

Example of how Net Pay of \$1000.27 is distributed for direct deposit of payroll:

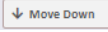

- 1) **Bank Priority 3:** In the example above, \$50.00 will be deposited to priority 3.
- 2) **Bank Priority 2:** In the example above, \$200.00 will be deposited to priority 2.
- 3) **Bank Priority 1 (default bank):** In the example above, \$750.27 will be deposited to the default bank. This represents 100% of the employee's remaining net pay.


Example of how Net Pay of \$150.29 is distributed for direct deposit of payroll:

- 1) **Bank Priority 3:** In the example above, \$50.00 will be deposited to priority 3.


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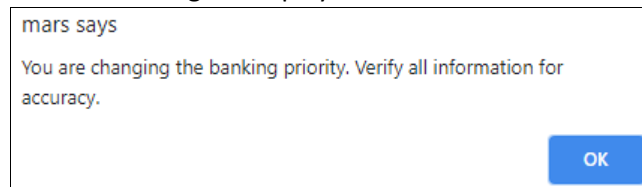
- 2) **Bank Priority 2:** In the example above, there is not enough net pay to distribute \$200.00 to priority 2 so Bank Priority 2 is skipped and it deposit the balance to the default bank account.
In this case there is not enough money to transfer, so this bank account is skipped.
- 3) **Bank Priority 1 (default bank):** In the example above, \$100.29 will be deposited to the default bank. This represents 100% of the employee's remaining net pay.
7. **Direct Deposit in Wrong Order.** If a mistake is made entering the default bank account, which has first priority, click on the  or the  button.

Example: Bank Priority 3 should have been setup as Bank Priority 2. Click on the  button. The Bank Priority 3 line, including Bank Routing Number, Bank Account Number, Account Type and Amt/Pct of \$20, are moved up to replace the Bank Priority 2 information.

Example: Bank Priority 2 should have been setup as Bank Priority Default Bank.

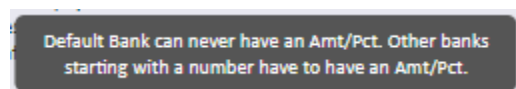
- a. Click on the  button.
- The Bank Priority 2 line, including Bank Routing Number, Bank Account Number, Account Type are moved up to replace the Bank Priority Default Bank information.
 - The Priority Bank Default Bank will automatically set to 100% of remaining net pay.
 - The Bank Priority Default Bank line, including Bank Routing Number, Bank Account Number, Account Type are moved down to replace the Bank Priority 2 information.
 - The original amount or percent set for Bank Priority 2 remains.



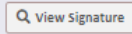



b. This message is displayed:



c. Click OK to move the account selected up or down one priority.

8. **Hover Text.** Place your cursor over the Amt/Pct column heading for more information.





9. If rows display with the    buttons it means a change was made but the direct deposit change has not been brought into the payroll software for processing. User can edit an account, delete an account or view signature.
- Edit.** Click on the  button to open up the **Direct Deposit** page. An employee can view or make changes because the first change has not been processed in payroll yet. If no further changes are required, click on the  button to return to the Direct Deposit page.
 - Delete.** Click on the  button to delete the pending direct deposit change. Clicking on delete prompts the employee with a pop-up box that says, "You are about to

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delete the current row. OK or Cancel”. If they click OK the row is deleted, Cancel returns them to the Direct Deposit tab.

Note: *If the default row is deleted, the bank 2 row is automatically moved up to be the default banking row for direct deposit. If there are no additional direct deposit rows, it allows the default direct deposit row to be deleted resulting in no change to current direct deposit information recorded in SMART HR for payroll processing.*

- c. **View Signature.** Click on the  button allows the employee to view their electronic signature for this pending change. Click on the  button to return to the Direct Deposit tab.

10. The employee will receive an email verification of the change. This is a security notification.

<p>From: Sent: To: Employee's Email Subject: SMART eR Security Notification</p> <p>A change has been made in SMART eR that could potentially affect your paycheck. If you did not make this change, please contact the Business office or login to SMART eR to see/alter the information. If a change was truly made, but not by you, we also recommend you change your password/security questions.</p> <p>This is a non-monitored email account. Please do not reply to this account.</p>

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