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Direct Deposit

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Creating Direct Deposit Bank Accounts

Direct Deposit instructions are established as Scheduled E/Ds.

1. Go to the [Employee - Scheduled E/Ds screen](#).
2. Select and open the company from the list on the left-hand side of the screen
3. Select the employee from the list on the right-hand side of the screen
4. Click the **Direct Deposits** tab.
5. Click the **plus**  sign in the toolbar to create a new record.

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The screenshot shows a web form titled "Direct Deposit Detail". At the top, there are two tabs: "EE BANK ACCOUNT NUMBER" (highlighted in yellow) and "PSDA NUMBER". Below the tabs is a table with one row and two columns. The main form area contains several input fields and checkboxes:

- ABA Number ***: A text input field.
- Bank Account Number ***: A text input field.
- Account Type ***: A dropdown menu.
- Branch Identifier**: A text input field.
- Addenda**: A text input field.
- Allow Hyphens**: A checked checkbox.
- In Prenote ***: Radio buttons for Yes and No.
- Form on File ***: Radio buttons for Yes and No.
- Show in EE Portal ***: Radio buttons for Yes and No.

At the bottom of the form, there are two buttons: a green "+ Create" button and a grey "- Delete" button.

Field / Button

Description

ABA number

Bank Routing / Transit number

Bank Account Number

If hyphens or spaces are required as part of the bank account number, a field is available on the [Bureau - Banks - Account Info tab](#).

Bank Account Type

select from checking, savings, and money market

Branch Identifier

branch identifier for the direct deposit bank account (if applicable)

Addenda

additional payment-related information for the entry detail record, the characters entered populate positions 40-54 on the 6 record for the employee direct deposit, replacing the Employee Code. This field accepts up to 15 characters and is only available when ACH is run through the [Operations - Cash Management screen](#)

Allow Hyphens

when selected, hyphens are acceptable characters in the bank account number

In Pre-note

If on the [SB Admin - Service Bureau - Flags and Settings tab](#), the **Use Pre-note** field is No, pre-notes for Employee Direct Deposit are ignored when determining the checks and direct deposits on the *Cover Letter Report (S193)*.

Form on File

informational only; tracks whether a direct deposit authorization form was received from an employee. When an existing direct deposit bank account number is changed, a reminder alerts the user to obtain a new form from the employee.

Additionally, the *Form on File Report (S1974)* queries this field to show which employee bank accounts are set to No as of the run date, and time of the report. The *Form on File Report* is run from the [S/B Report - Multiclient Reports \(Old\)](#) screen.

Note: If the system identifies Child Support Cases on the [Employee - Scheduled E/Ds - Child Support Cases](#) tab, and none of the employees' Scheduled E/Ds is for a Child Support Case, or, if Direct Deposit accounts are identified on the [Employee - Employee - Direct Deposits](#) tab and none of the employees' scheduled E/Ds has a Direct Deposit set up, the following warning displays: "Either a Child Support Case or a Direct Deposit account has been set up but not linked to a Scheduled E/D. Do you want to fix this now?"

- [Yes](#) - The user's previous action, to either leave the screen or switch to another employee, is ignored and they will be left on the scheduled E/D screen for the employee that they are currently working on.
 - [No](#) - The user's previous action, to either leave the screen or switch to another employee, is carried out.
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