

Direct Deposit Online Instructions – Job Aid

Purpose:

The purpose of this job aid is to provide you with the steps to add, edit or inactivate your direct deposit information.



STEP	ACTION	RESULT
STEP To Add Direct Deposit Information	ACTION 1. Click the "Add Account" box to add your bank information. Direct Deposit Babs Bunny Review, add or update your direct deposit information. Direct Deposit Detail Account Number Add Account	RESULT
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STEP	ACTION	RESULT
	2. Enter the routing number of your bank . The bank's routing number is at the bottom of your check.	
	 If you are depositing into a savings account, please contact your bank for its routing number. 	
	Routing Number: View check example	
	Check Example	
	9999 9999 9999 9999 1 1 2 1 2 1 Routing Number 2 Account Number OK Cancel	
	3 Enter your Account Number twice	
	Distribution Instructions	
	Account Number: Confirm Account	
	4. Select the Account Type (type of bank account) from the drop down box.	
	*Account Type:	
	*Deposit Type: Checking	

 5. Select the Deposit Type. a. Use a deposit type of "Percent" when indicating a percent to deposit. b. Use a deposit type of "Balance" only if depositing into two accounts where an "amount" is used for the 1st account and the "balance" is used for the 2nd account. *Deposit Type: Amount or Percent: Balance Percent 6. Enter the amount or percent of your deposit. 7. Enter the Deposit Order. a. If depositing into two accounts, designate one of the accounts as the first account to 	
*Deposit Type: Amount Amount or Percent: Balance Percent Deposit Order: Percent 6. Enter the amount or percent of your deposit. Amount/Percent:	
 6. Enter the amount or percent of your deposit. Amount/Percent: 7. Enter the Deposit Order. a. If depositing into two accounts, designate one of the accounts as the first account to 	
 7. Enter the Deposit Order. a. If depositing into two accounts, designate one of the accounts as the first account to 	
 have money deposited into, and the other account as the second account to have money deposited into. 8. Review your information and click OK when entry is complete. 	
Babs Bunny Your Bank Information Routing Number: 021000089 View check example Distribution Instructions Account Number: 123456789 Confirm Account 123456789 *Account Type: Checking *Deposit Type: Percent Amount or Percent: 100.00 Deposit Order: 1 (example: 1 = first account processed)	
	8. Review your information and click OK when entry is complete. Deposit Order: (example: 1 = first account processed) OK OK Babs Bunny Your Bank Information Routing Number: 021000089 View check example Distribution Instructions Account Number: 123456789 Confirm Account 123456789 *Account Type: Percent Amount or Percent: 100.00 Deposit Order: 1

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STEP		RESULT
	ou will then be at the confirmation page.	You
	. Click "Save". The system will confirm that your information has been saved successfully.	successfully entered your direct
	Direct Deposit	deposit information
	Babs Bunny	information.
	Review, add or update your direct deposit information.	
	Account Routing Number Account Number Deposit Type Amt/Pct Deposit	
	<u>Type</u> <u>Order</u> 021000089 123456789 Percent 100% 1	
	 Click the yellow OK box. A message will also be sent to your Columbia email verifying that you have added 	
	edited or deleted bank information to your direct deposit record.	
	Direct Deposit	
	Save Confirmation	
	Save Commination	
	✓ The Save was successful	
	However, due to timing, your change may not be reflected on the next navcheck	
	 Review your information and if a correction is needed, click the "Edit" box. To add a second direct deposit account, click "Add Account" and enter the information for the 	
	2 nd account.	
	Direct Deposit	
	Babs Bunny	
	Review, add or update your direct deposit information. Direct Deposit Detail	
	Account <u>Routing Number</u> <u>Account Number</u> <u>Deposit Type</u> <u>Amt/Pct</u> <u>Order</u>	
	Checking 021000089 123456789 Percent 100% 1 Edit Delete	
	Save Add Account	
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STEP	ACTION	RESULT
View Your	1. To view your direct deposit information, click on "Direct Deposit" within the "Payroll and	You viewed
Direct	Compensation" menu.	your direct
Deposit	2. To sign out of Self Service, click "Sign Out" in the upper right hand corner.	deposit
Information		information
/ Sign Out	BIL 2004	and signed
	Menu E	Service.
	Search: Main Menu >	
	Nu Feverine Soft Service	
	Personal Information Payroll and Compensation Personal Information Payroll and Compensation Payroll and Compensation Payroll and Compensation	
	Manager Self Service Personal information Summary Personal information Summary	
	Phone Numbers Enall Addresses Enall Addresses Compensation History	
	Emergency Contacts Ethnic Groups	
To Change	1 Navigate to myColumbia portal @ https://my.columbia.edu	
Existing	2 Click "Log in Now"	
Direct	3. Log in with your UNI and Password.	
Deposit	4. Click on the "Faculty & Staff " tab.	
Information	5. Click "View Your Direct Deposit Information" within the Self-Service section.	
- Access	a. Once you click on "View Your Direct Deposit Information" link, your Direct Deposit	
Deposit	data record in PAC appears.	
Dopoon		
	6 Click the " Edit " how to edit your deposit and/or bank information	
	7. Click the " Delete " box to remove your deposit and/or bank information.	
	Direct Deposit	
	Babs Bunny	
	Review, add or update your direct deposit information.	
	Direct Deposit Detail	
	Account Type Routing Number Account Number Deposit Type Amt/Pct Deposit	
	Charling 031000000 172456700 Devent 1009/ 1 Edit Delete	
	Save Add Account	
	8. Make any necessary changes to the information.	
	10 Click " OK "	
	Direct Deposit	
	Add Direct Deposit	
	Babs Bunny	
	Your Bank Information	
	Departing Numbers 001070702	
	Note: View Check example	
	Account Number: 999999999 Confirm Account 999999999	
	*Account Type: Savings	
	*Denosit Tune: Balance	
	Amount or Percent	
	Amount or Fercency	
	ОК	
L		
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STEP	ACTION	RESULT
Confirm the Change(s)	You are now at the confirmation page. 11. Review your information and if you need to make a correction, click " Edit ". 12. If all information is correct, are you are not making additional changes, click " Save ".	
	Direct Deposit Babs Bunny	
	Review, add or update your direct deposit information. Direct Deposit Detail Account Deposit	
	Type Routing Number Account Number Deposit Type Amt/Pct Order Checking 021000089 123456789 Amount \$500 1 Edit Delete	
	Savings 021272723 9999999999 Balance 2 Edit Delete Save Add Account	
	You must hit the SAVE button in order for any changes to take effect	
Confirm the Change(s)	 The system will confirm that your information has been saved successfully. 13. Click the OK box. a. A message will also be sent to your Columbia email verifying that you have added, edited or deleted bank information to your direct deposit record. 	You successfully changed your direct deposit
	Direct Deposit Save Confirmation The Save was successful. However, due to timing, your change may not be reflected on the next paycheck. OK	
View Your Direct Deposit Information	 To view your direct deposit information, click on "Direct Deposit" within the "Payroll and Compensation" menu. To sign out of Self Service, click "Sign Out" in the upper right hand corner. 	You viewed your direct deposit information
/ Sign Out	Wenu Sign out Search: Image: Service Personal Information Navigate to your self service information and activities. Personal Information Personal Information Personal Information Review and update your personal information. Personal Information Review and update your personal information. Personal Information Personal Information. Personal Information Review your pay and compensation inistory. Update your or ect deposit and others. Proce Numbers Proce Numbers Phone Numbers Proce Numbers Proce Numbers Pro	and signed out of Self Service.
	For assistance or if you have any questions, please submit the question through the HRPC Helpdesk via the inquiry form (<u>http://hr.columbia.edu/hrpc-inquiry-form</u>) or contact the HRPC Help Desk at 212-851-2888 Monday – Friday from 9 am – 4 pm.	