

**TOPICS Covered:**

**View Direct Deposit (page 1)**

**Add Direct Deposit (page 3)**

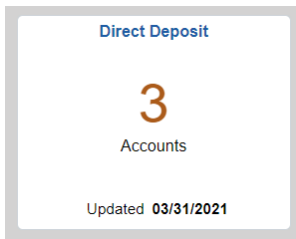
**Edit Direct Deposit (page 6)**

## View Direct Deposit

Note: By saving these changes, you agree that if funds to which you are not entitled are deposited to your account(s), you are authorizing the University to direct the financial institution(s) to return said funds.

**Navigation: Home page > My Self Service tile > My Pay tile > Direct Deposit tile**

The Direct Deposit tile will display how many active accounts are on file and when the last update date was:



- You cannot withdraw from direct deposit through Self Service. Contact University Financial Services for assistance at (617) 495-8500, option 4.
- You can voluntarily elect to no longer receive a paper copy of your pay advice. This will save the University money on paper, printing, and delivery costs. Harvard policy does not allow both a pay advice and a physical check

### Direct Deposit

**Accounts**

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
2	HUECU Savings	Direct Deposit	211381738	XXX7900	Savings	\$500.00
5	Xmas Club	Direct Deposit	211381738	X2369	Savings	1.00%
Last	HUECU Checking	Direct Deposit	211381738	XXX7940	Checking	Remaining Balance

**E** [Reorder](#)


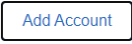

**Print Option**

Send a paper copy of the direct deposit pay statement to my home.  No **D**


**Important Information - Please Read**

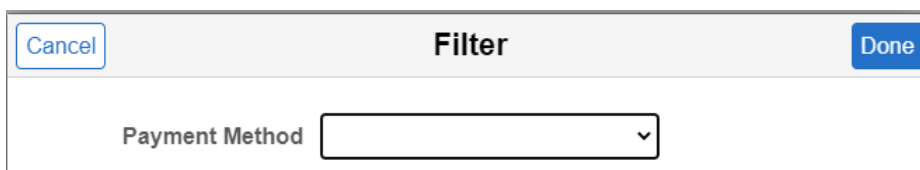
By saving these changes, I agree that if funds to which I am not entitled are deposited to my account(s), I am authorizing the University to direct the financial institution(s) to return said funds.

# Viewing/Editing Direct Deposit Information

Section	Field	Description/Additional Information
<b>A</b>	Direct Deposit Detail	<p>Displays basic information/links about your direct deposit:</p> <ul style="list-style-type: none"> <li>• Order – The order in which deposits will be made.</li> <li>• Nickname – Nickname you assign to an account</li> <li>• Payment Method – Direct Deposit</li> <li>• Routing Number - Transit Number/Bank ID - Also referred to as a “routing number” or “ABA” number. This number indicates the identity of the bank or financial institution.</li> <li>• Account Number – This will be masked and only display the last four digits for security purposes.</li> <li>• Account Type – Savings or checking</li> <li>• Deposit Type - Amount, Percentage, or Remaining Balance.</li> <li>• Amount/Percent – Displays either an amount, percentage or Remaining Balance</li> </ul>
<b>B</b>	View/Edit an Account	Click > to view and/or edit an existing direct deposit account.
<b>C</b>	Add Account	<p>Click  to add a new account. If this is your first account, you will see an  button instead. You can have up to 9 accounts.</p> <p><b>Note:</b> If you only have one direct deposit account and want to change it to another account, click the &gt; icon. Do not add a new account.</p> <p><b>Note:</b> You must have one balance account. This is the account where you want the balance of your pay to be deposited, after any other deposits you elect.</p>
<b>D</b>	Advice Print Option	<p>Use the slide bar to indicate whether you wish your advice of deposit to be printed.</p> <p>No = advice will not be printed.</p> <p>Yes = advice will be printed and mailed to you via US Mail.</p>
<b>E</b>	Reorder	Change the priority of the deposits
<b>F</b>	Filter	Click on the  icon to filter on Payment Method. This will allow you to filter on savings versus checking account types.

## Filtering on Existing Accounts

1. Click on the  icon. The Filter page will open.



2. Select the Payment Method of Direct Deposit from the dropdown. A new box for Account Type will appear.
3. Select Checking or Savings from the dropdown.
 

Payment Method Direct Deposit ▼

Account Type Savings ▼
4. Click on the Cancel button to exit or click on the Done button and only those account types selected will now appear.

5. To view all direct deposits, filter once again and select the blank row for Payment Method.
6. Click Done. All accounts will now appear.


## Add a Direct Deposit Account

If you have no active accounts, clicking the Add Account button on the Direct Deposit screen brings up the Add Account screen, where you can assign a new account for direct deposit.

### Accounts

Add Account

You have not added any direct deposit account information.

If you want to add a new account to your existing ones, clicking the  icon on the Direct Deposit screen brings up the Add Account screen, where you can assign a new account for direct deposit.

**Note:** Add an account **only** when you want to set up an additional one to receive a portion of your paycheck. If you want to change any of your existing accounts (including the “Remaining Balance” account), use the **Edit Account** functionality documented in the next section.

### Steps

1. In the Nickname field, enter an identifying name of your choice.


Cancel
**Edit Account**
Save

\*Nickname

Payment Method Direct Deposit

2. In the **Transit Number/Bank ID** field, enter the 9-digit transit number for your bank. The transit number is located on the bottom left portion of your personal checks.

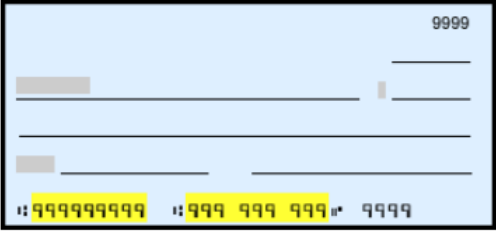
Transit Number/Bank ID  

- a. You can click the  icon to help you locate your bank's transit number.

**Check Example** ✕

The Routing Number and Account Number can be obtained from your check.

In the check there are three groups of numbers. The first group contains the nine digit routing number, the second provides the account number, and the third is the check number.



1                      2

1 - Routing Number  
2 - Account Number

**Note:** If you are unable to locate your transit number, contact your financial institution to verify its transit number (“routing” or “ABA” number).

3. Enter your account number and retype your account number in the corresponding fields.

**Note:** Do not include non-numerical characters such as hyphens or periods. Example: if the account number reads 123-45-678, simply enter 12345678.

**Account Number**

**Retype Account Number**

4. Enter the information about this account:

- a. In the **Account Type** field, select **Checking** or **Savings** from the dropdown.
- b. In the **Deposit Type** field, select either **Amount** or **Percent** from the dropdown.
  - **Note:** Harvard requires one account to be designated as **“Remaining Balance”**. The “Remaining Balance” account will be last in priority and will be where the remainder of your net pay will be deposited once all other deposits have been made. If this is the first direct deposit entry being made, a warning message will be issued stating this and will designate this first entry as the “Remaining Balance” account. If you are entering more than one account and this is not the one you want designated this way, click on the Cancel button and enter the account you want as “Remaining Balance” first. Then add additional accounts.
- c. In the **Amount or Percent** field, enter either the exact dollar amount or the percentage of your paycheck that you want to be deposited into this account.

# Viewing/Editing Direct Deposit Information

Primary account ("Remaining Balance"):

**Pay Distribution**

\*Account Type

\*Deposit Type

Amount or Percent

Secondary accounts (Amount or Percent):

**Pay Distribution**

\*Account Type

\*Deposit Type

Amount

Or

**Pay Distribution**

\*Account Type

\*Deposit Type

Percent

5. Click on the Save button when you are done. By clicking on Save, you are submitting these entries to the database and will need to use the edit functionality to subsequently change any of the information.
6. If you wish to change the "Remaining Balance" account, you will need to contact University Financial Services for assistance at (617) 495-8500, option 4.
7. Once you have saved, the deposit order will be assigned according to the order in which the accounts were entered. All but the "Remaining Balance" account can be reordered by clicking on the Reorder button. The Reorder Accounts page will open and you can update all accounts except "Remaining Balance", which will always be last.

Reorder Accounts				
<a href="#">Cancel</a>				<a href="#">Save</a>
<b>Accounts</b> ⓘ				
Current Order	*New Order	Nickname	Account Number	Amount/ Percent
1	<input type="text" value="2"/>	Xmas Club	XXXXX4321	\$100.00
2	<input type="text" value="1"/>	College Fund	XXXXX8369	1.00%
Last		Remaining	XXXX5678	Remaining Balance

- **Note:** The lower the number, the higher the priority. Entering “1” indicates that funds will be deposited in that account before any others.

8. Click **Save**.

**Note:** When you add or change direct deposit account, a “test transfer” or pre-note will be made to the financial institution to ensure that all direct deposit information is correct. Pre-notes may cause a delay in your direct deposit by one or two pay periods. During this time, you will receive a physical check.

## Edit Direct Deposit

Clicking the **Edit** button ( > ) on the Direct Deposit screen brings up the Edit Account screen, where you can update your information where necessary.

### Steps

1. In the Nickname field, change the name if desired.

2. In the **Transit Number/Bank ID** field, update the 9-digit transit number for your bank. The transit number is located on the bottom left portion of your personal checks.

a. You can click the **i** icon to help you locate your bank's transit number.

**Note:** If you are unable to locate your transit number, contact your financial institution to verify its transit number (“routing” or “ABA” number).

**Check Example** ✕


The Routing Number and Account Number can be obtained from your check.

In the check there are three groups of numbers. The first group contains the nine digit routing number, the second provides the account number, and the third is the check number.


1                      2

1 - Routing Number  
2 - Account Number

3. To edit your account number:

- a. Select the  icon next to the account number
- b. Enter your new account number and retype the new number in the corresponding fields.

**Note:** Do not include non-numerical characters such as hyphens or periods. Example: if the account number reads 123-45-678, simply enter 12345678.

Account Number	12345678	
Retype Account Number	12345678	

4. Modify any additional the information that is changing about this account:

- a. In the **Account Type** field, change by selecting either **Checking** or **Savings** from the dropdown.
- b. In the **Deposit Type** field, change by selecting either **Amount** or **Percent** from the dropdown.
- c. In the **Amount or Percent** field, change either the exact dollar amount or the percentage of your paycheck that you want to be deposited into this account.

**Pay Distribution**

*Account Type	Savings	▼
*Deposit Type	Amount	▼
Amount	100.00	

Or

**Pay Distribution**

*Account Type	Savings	▼
*Deposit Type	Percent	▼
Percent	5.00	

- Note: If you only have one direct deposit account, the Deposit Type is set to “Remaining Balance” and cannot be changed. You will need to contact University Financial Services for assistance at (617) 495-8500, option 4.

5. Click on the Save button when you are done. By clicking on Save, you are submitting these entries to the database and will need to edit again to make further changes to any of the information.
6. You may also edit your accounts by reordering them. Clicking on the Reorder button will open the Reorder Accounts page where you can change the priority on all accounts except Remaining Balance, which will always be last.

# Viewing/Editing Direct Deposit Information

Cancel
**Reorder Accounts**
Save

**Accounts** i

Current Order	*New Order	Nickname	Account Number	Amount/ Percent
1	<input type="text" value="2"/>	Xmas Club	XXXXX4321	\$100.00
2	<input type="text" value="1"/>	College Fund	XXXXX8369	1.00%
Last		Remaining	XXXX5678	Remaining Balance

**Note:** The lower the number, the higher the priority. Entering “1” indicates that funds will be deposited in that account before any others.

7. Click **Save**.

**Note:** When you add or change a direct deposit account, a “test transfer,” or pre-note, will be made to the financial institution to ensure that all direct deposit information is correct. Pre-notes may cause a delay in your direct deposit by one or two pay periods. During this time, you will receive a physical check.