



UNIVERSITY OF  
**South Carolina**

**Office of the Controller  
Direct Deposits Job Aid**

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## I. Objectives

By the end of this procedure, you should be able to:

- Initially add an account to direct deposit
- Edit an account
- Add multiple accounts to direct deposits
- Remove an account

## II. Tips and Tricks

Here are a few tips and tricks for direct deposits:

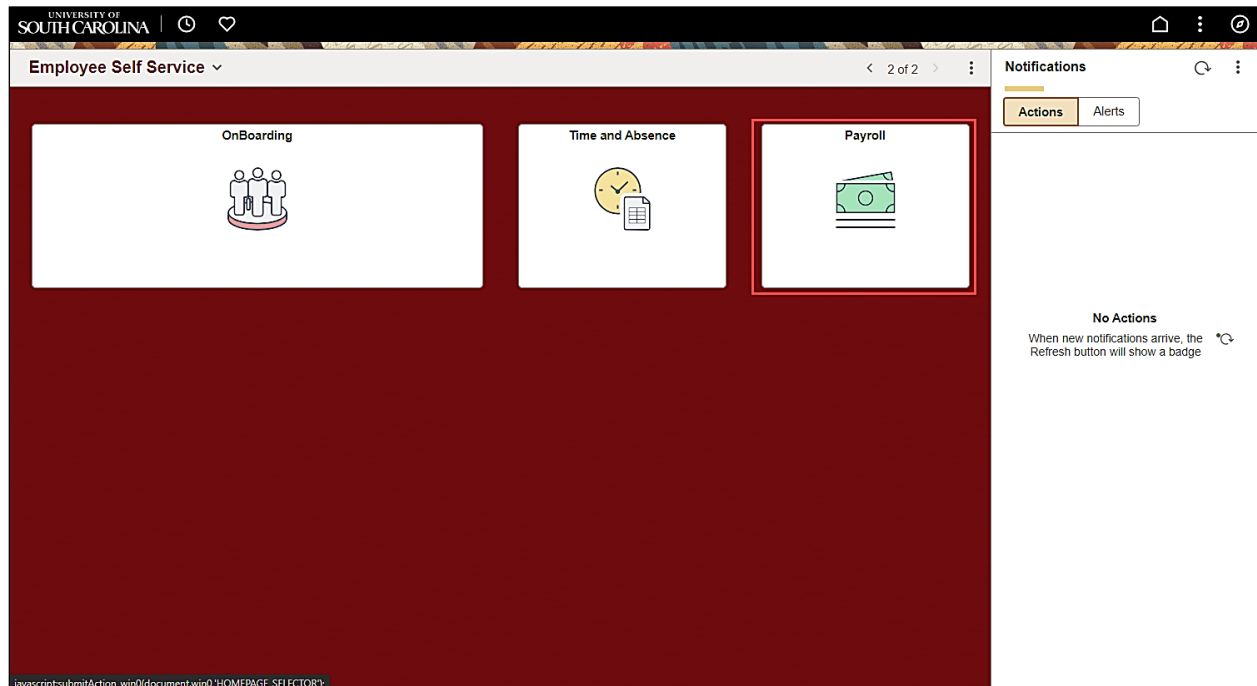
- Make sure the correct banking information is readily available. Always ensure that the bank account numbers and routing numbers provided are accurate. A simple mistake can delay deposits or send funds to the wrong account.
- There can be up to five bank or credit union accounts added.
- Keep an eye on bank statements or account notifications. This will help catch any discrepancies early and ensure that deposits are made correctly.
- For newly hired employees (faculty, staff and students), on the Employee Self Service page, click the **Onboarding** tile. Complete the steps to **First Day Tasks – Direct Deposits**.
- It is recommended that any direct deposit changes are entered at least seven days before payday to be effective with the upcoming payroll. Changes are subject to validation by the bank to guarantee the direct deposit change will be successful.
- The first account you add will be defaulted to a deposit type of Full Balance and your entire net pay will be deposited to this account.
- For multiple accounts, two deposit types will appear.
  - **Amount:** This refers to a specific, fixed dollar amount designated to be deposited into a particular bank or credit union account.
  - **Percent:** This refers to a portion of the total paycheck to be allocated to a bank or credit union account, expressed as a percentage.

### III. Initially Adding an Account to Direct Deposit

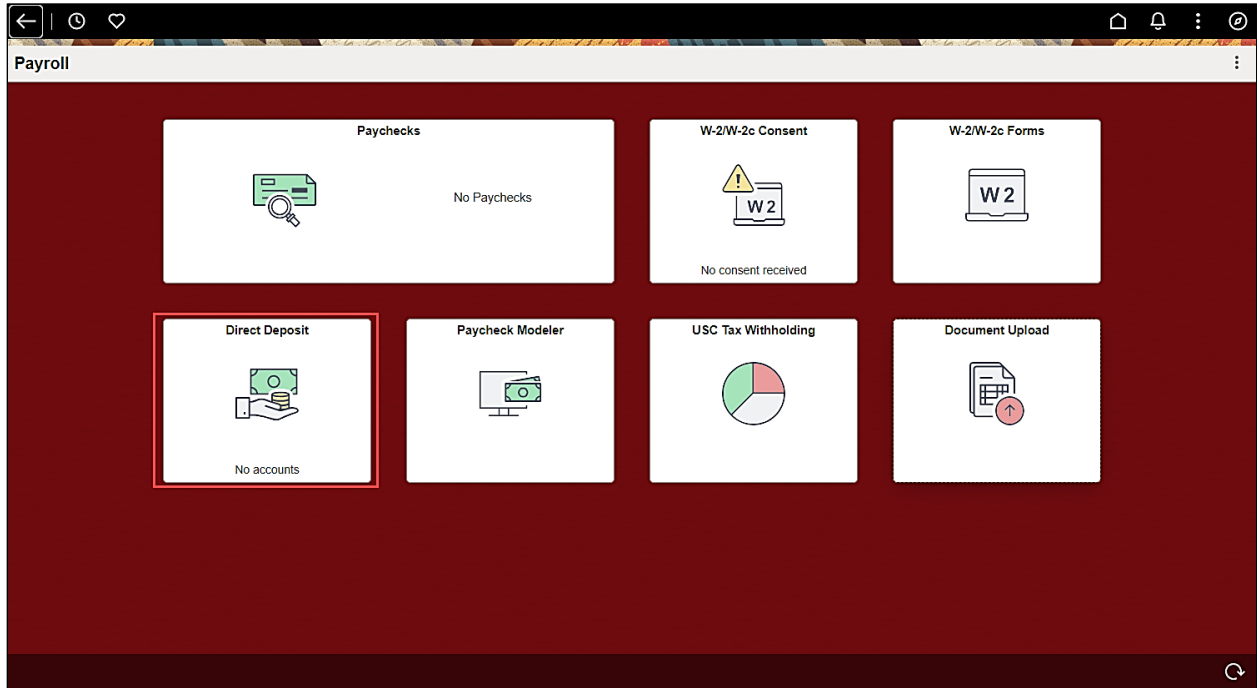
To access direct deposit information, navigate to [PeopleSoft HCM](#).

**Step 1:** For newly hired employees (faculty, staff and students), on the Employee Self Service page, click the **Onboarding** tile. Complete the steps to **First Day Tasks – Direct Deposits**. For current employees, click the **Payroll** tile on the Employee Self Service page.

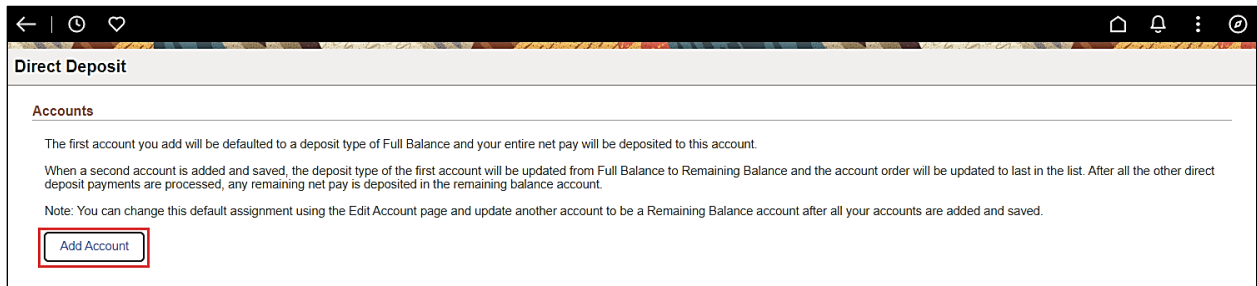
**Note:** Newly hired employees can find more a more detailed guide on the onboarding process in the [New Employee Onboarding in Employee Self Service \[pdf\]](#).



**Step 2:** Click the **Direct Deposit** tile.



**Step 3:** Click the **Add Account** button.



**Step 4: Enter a Nickname for the account.**

The screenshot shows the 'Add Account' dialog box in the 'Direct Deposit' section. The 'Nickname' field is highlighted with a red box. The dialog includes the following fields and sections:

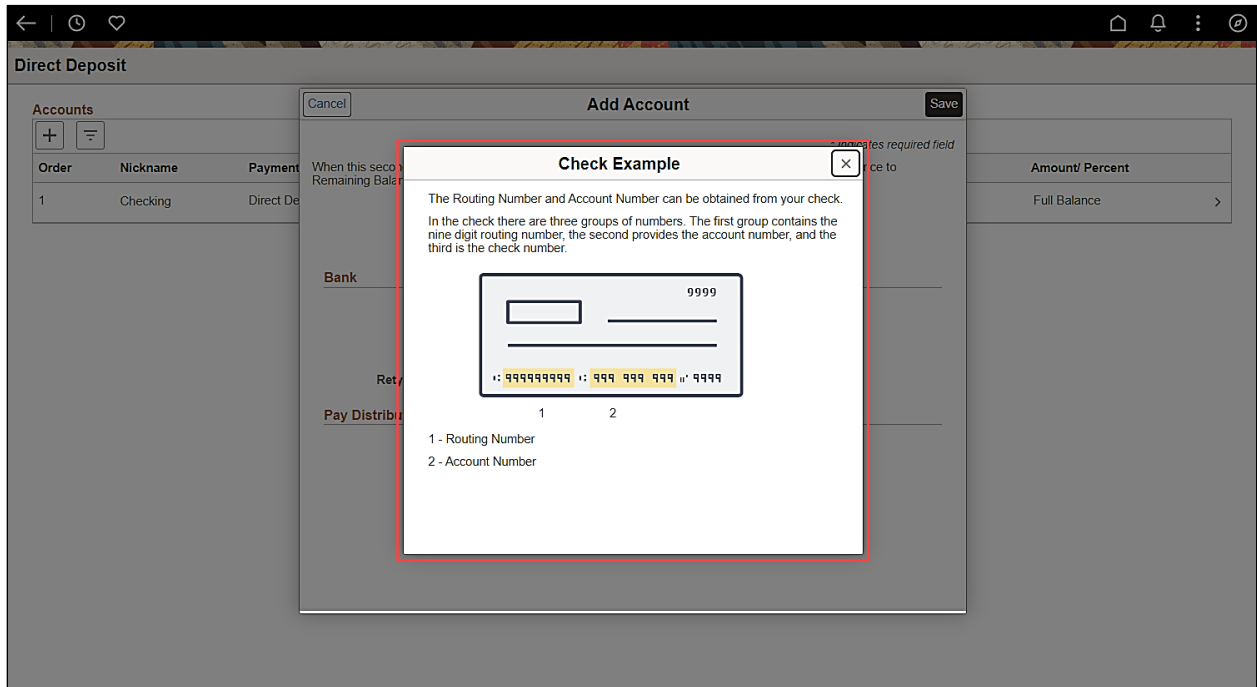
- Cancel** (button) and **Save** (button)
- \* Indicates required field** (text)
- Nickname** (text input field, highlighted with a red box)
- Payment Method** Direct Deposit
- Bank** (section header)
- Routing Number** (text input field with an information icon)
- Account Number** (text input field)
- Retype Account Number** (text input field)
- Pay Distribution** (section header)
- \*Account Type** (dropdown menu)

**Step 5: Enter the Routing Number for the bank or credit union account. Click the information icon to the right for more details.**

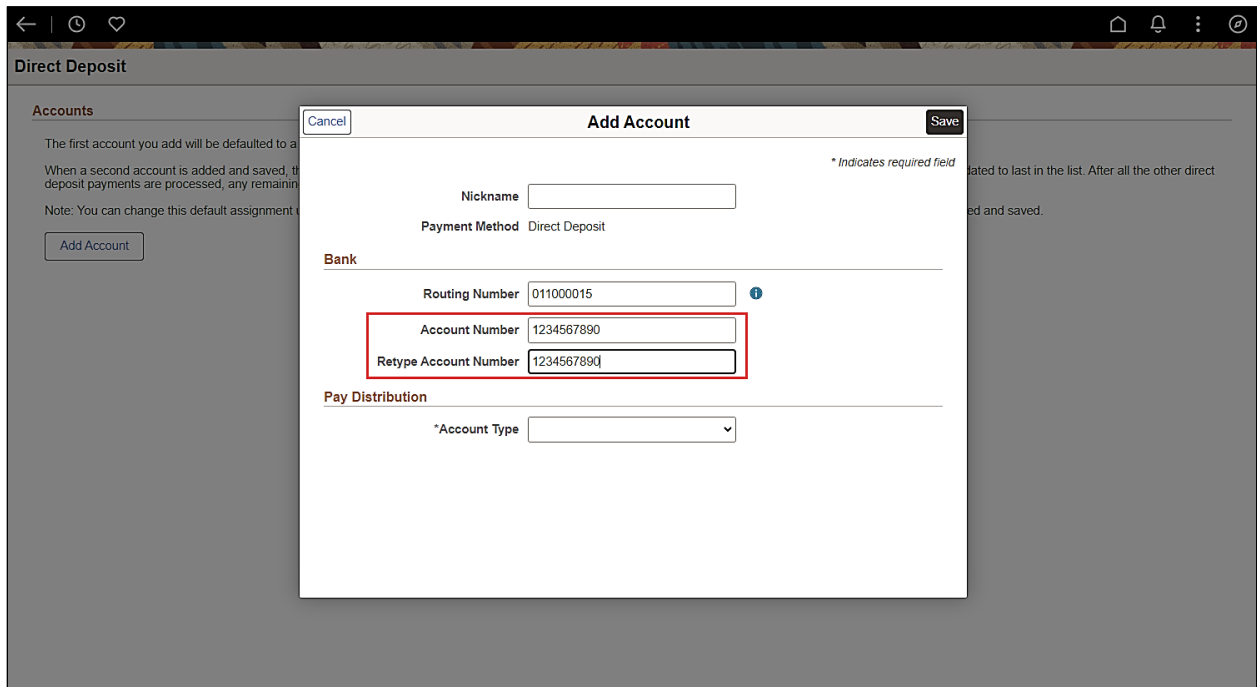
The screenshot shows the 'Add Account' dialog box in the 'Direct Deposit' section. The 'Routing Number' field is highlighted with a red box and contains the value '011000015'. The information icon next to it is also highlighted. The dialog includes the following fields and sections:

- Cancel** (button) and **Save** (button)
- \* Indicates required field** (text)
- Nickname** (text input field)
- Payment Method** Direct Deposit
- Bank** (section header)
- Routing Number** (text input field with value '011000015' and an information icon, highlighted with a red box)
- Account Number** (text input field)
- Retype Account Number** (text input field)
- Pay Distribution** (section header)
- \*Account Type** (dropdown menu)

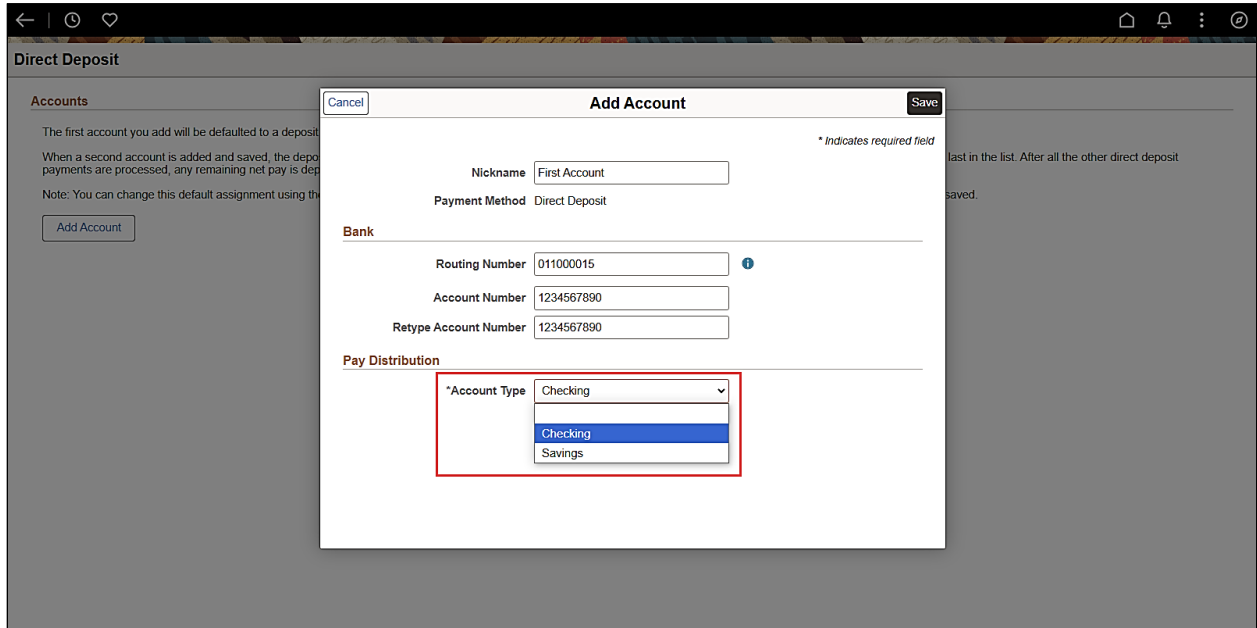
**Step 6:** The information icon will open a **Check Example** demonstrating where to find the Routing Number and Account Number on a check.



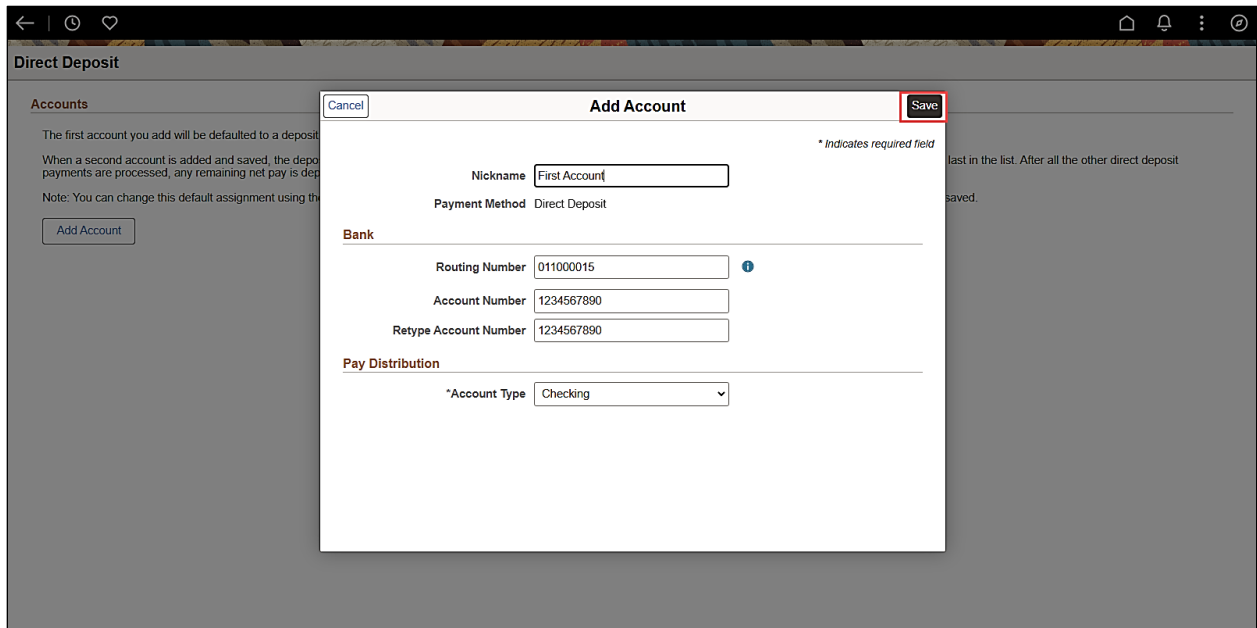
**Step 7:** Enter the **Account Number** of the bank or credit union account in the first field. Re-enter the **same Account Number** in the second field.



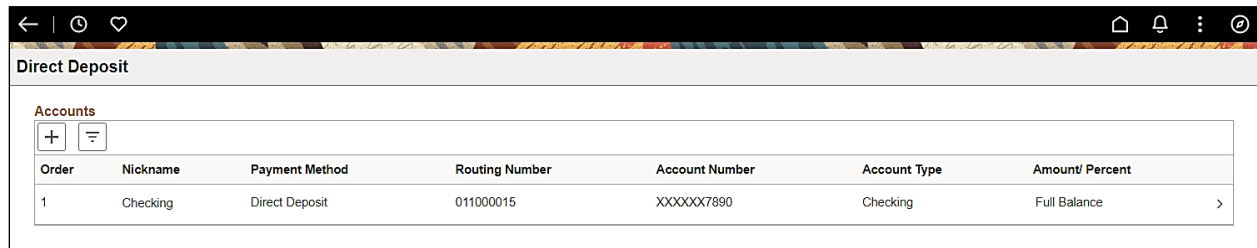
**Step 8:** Select the appropriate **Account Type** from the drop-down menu.



**Step 9:** Click the **Save** button.



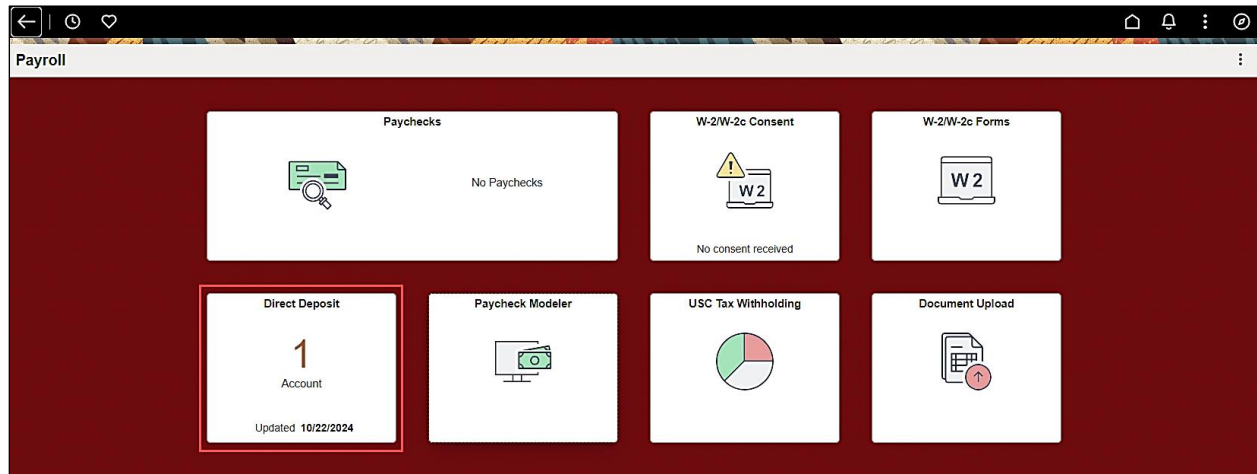
**Step 10:** The account will be added to the Direct Deposit screen.



The screenshot shows the 'Direct Deposit' screen with a table of accounts. The table has the following data:

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	Checking	Direct Deposit	011000015	XXXXXX7890	Checking	Full Balance

**Step 11:** The Direct Deposit tile will also update to indicate the number of accounts added.



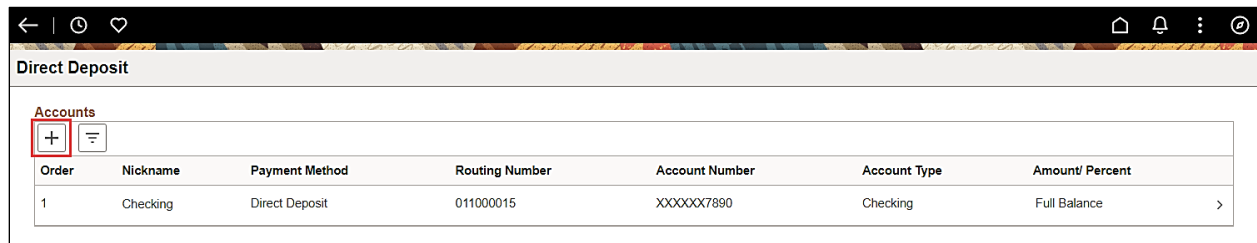
The screenshot shows the 'Payroll' dashboard with several tiles. The 'Direct Deposit' tile is highlighted with a red box and shows '1 Account' and 'Updated 10/22/2024'. Other tiles include 'Paychecks' (No Paychecks), 'W-2/W-2c Consent' (No consent received), 'W-2/W-2c Forms' (W 2), 'Paycheck Modeler', 'USC Tax Withholding', and 'Document Upload'.

## IV. Adding Multiple Accounts to Direct Deposit

PeopleSoft HCM provides the option to have the entire Net amount deposited into one account: 100% or a percentage of the Net amount divided into multiple accounts.

When a second account is added and saved, the deposit type of the first account will be updated from Full Balance to Remaining Balance and the account order will be updated to last in the list. After all the other direct deposit payments are processed, any remaining net pay is deposited in the remaining balance account.

**Step 1:** On the Direct Deposit page, click the **plus** button to add another account.

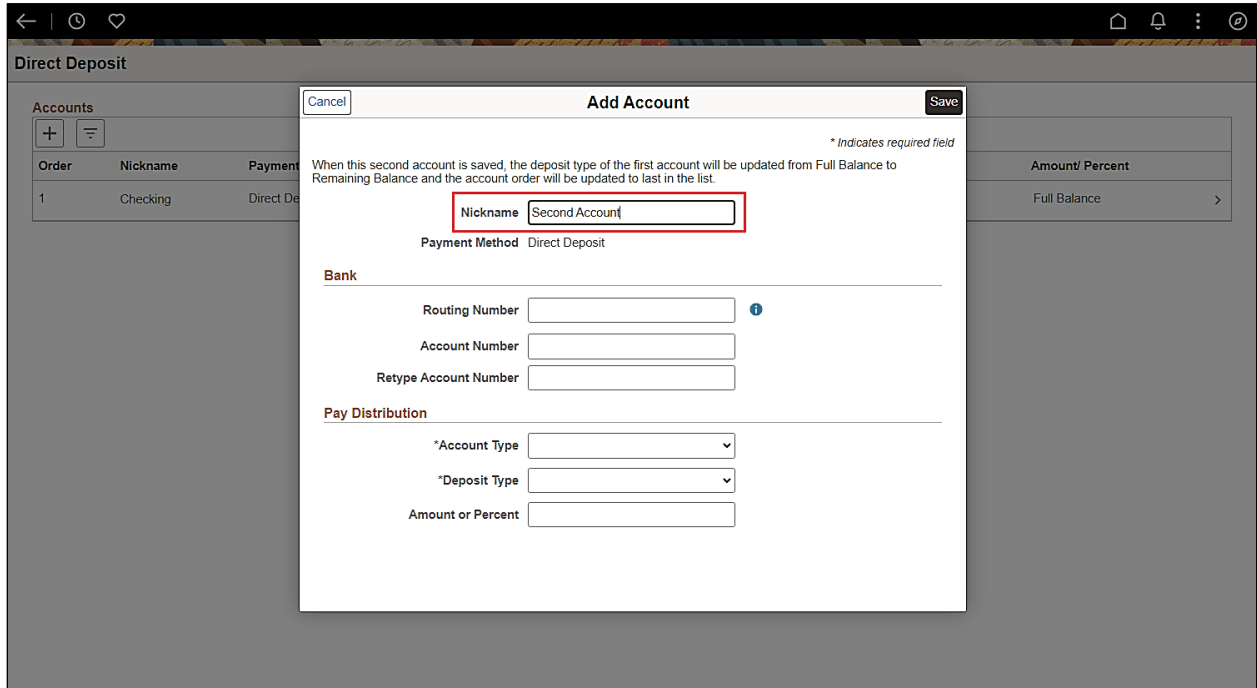


The screenshot shows the 'Direct Deposit' screen with a table of accounts. The plus button (+) in the 'Accounts' section is highlighted with a red box. The table has the following data:

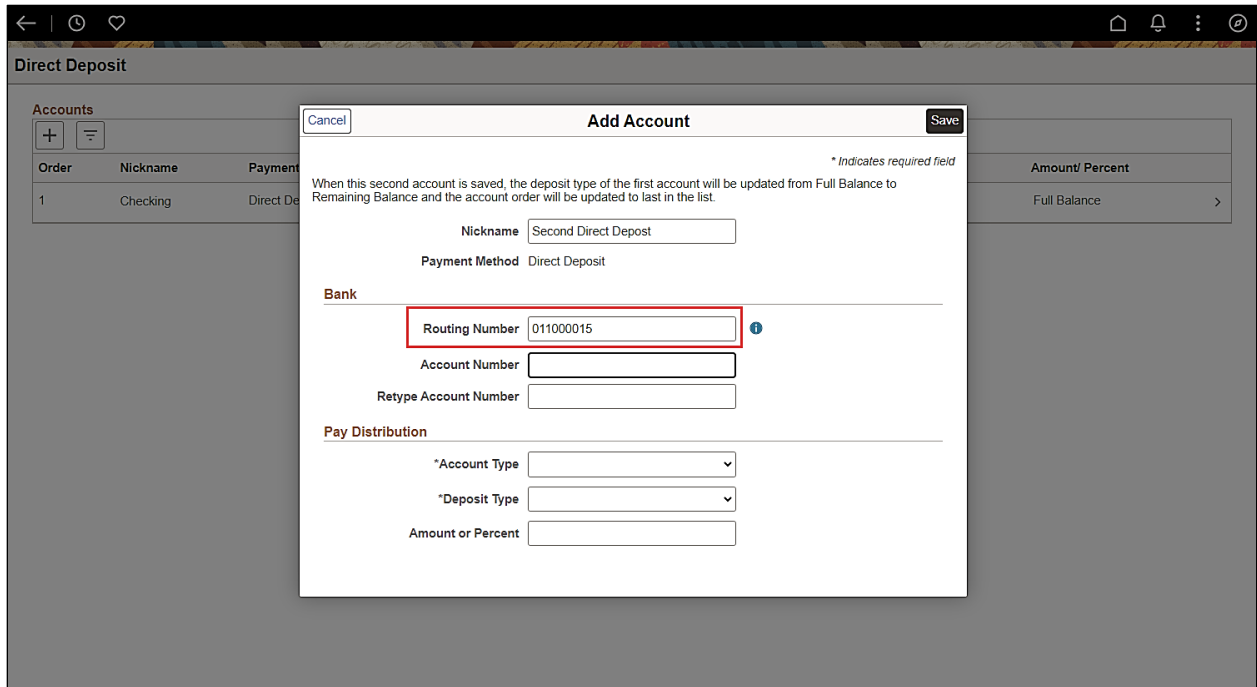
Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	Checking	Direct Deposit	011000015	XXXXXX7890	Checking	Full Balance



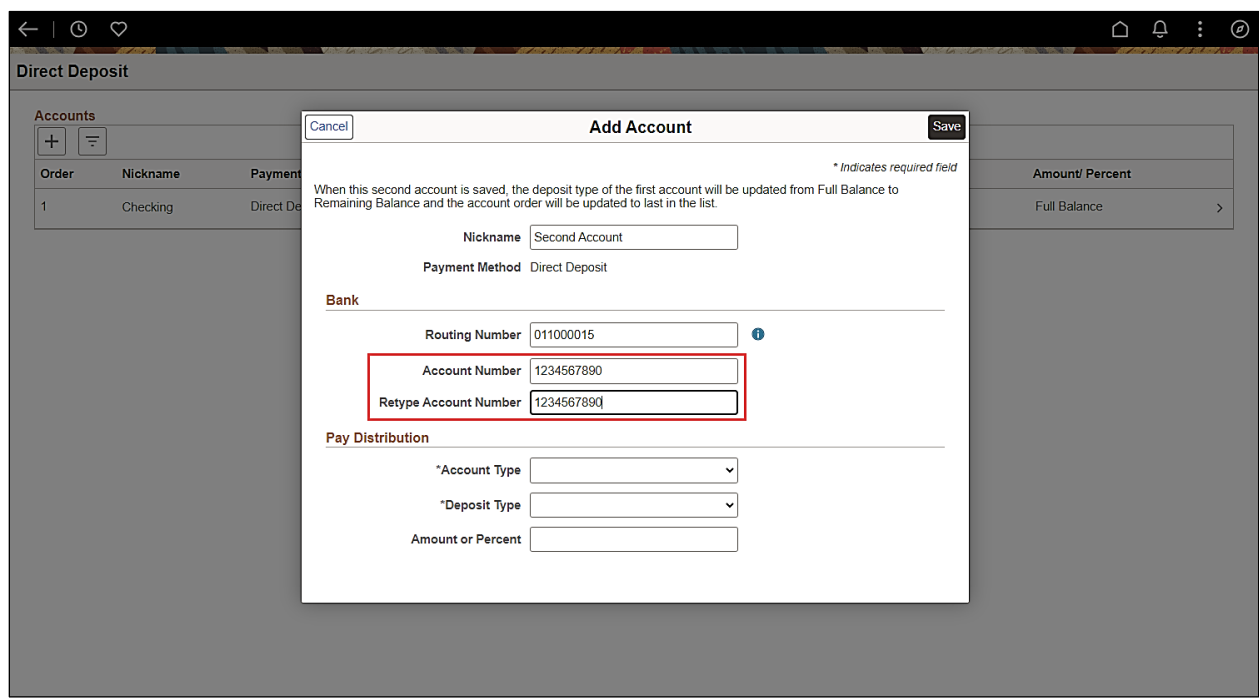
**Step 2:** Enter a **Nickname** for the account to differentiate between multiple accounts.



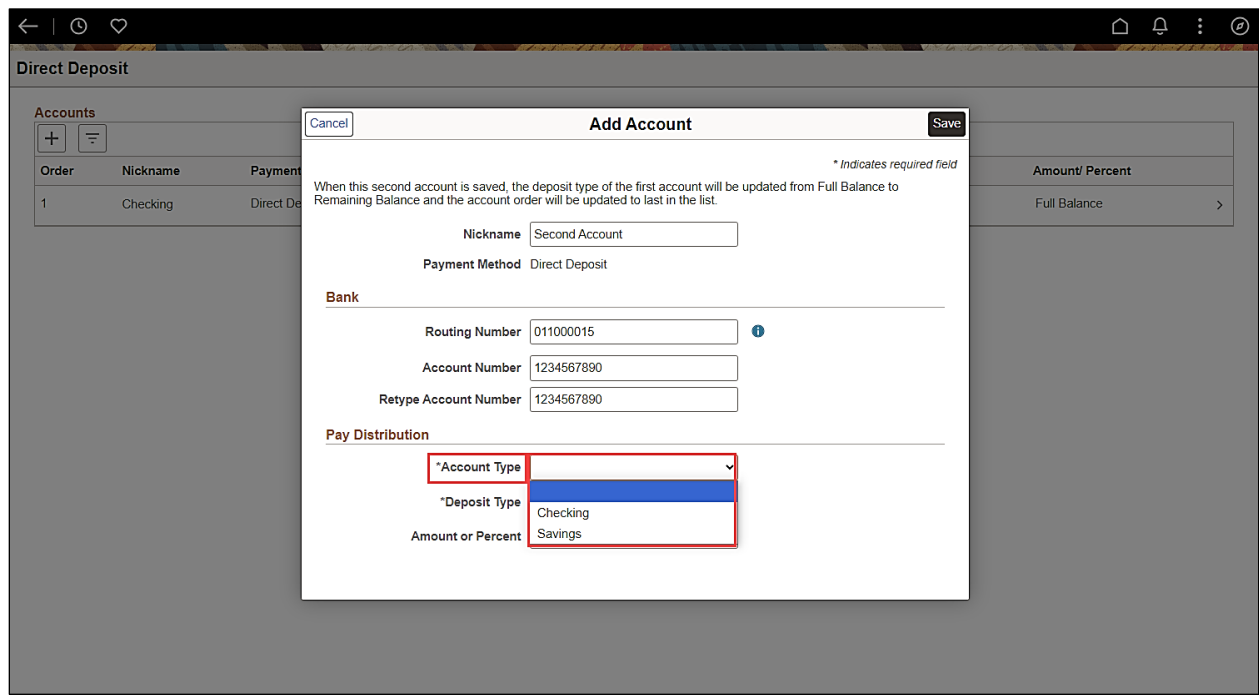
**Step 3:** Enter the **Routing Number** for the bank or credit union account.



**Step 4:** Enter the **Account Number** of the bank or credit union account in the first field. Re-enter the **same Account Number** in the second field.



**Step 5:** Select the appropriate **Account Type** from the drop-down menu.



**Step 6:** Select the appropriate **Deposit Type** from the drop-down menu.

Direct Deposit

Accounts

Order	Nickname	Payment
1	Checking	Direct De

When this second account is saved, the deposit type of the first account will be updated from Full Balance to Remaining Balance and the account order will be updated to last in the list.

\* Indicates required field

Nickname: Second Account

Payment Method: Direct Deposit

**Bank**

Routing Number: 011000015

Account Number: 1234567890

Retype Account Number: 1234567890

**Pay Distribution**

\*Account Type: Savings

\*Deposit Type: Amount

Amount or Percent: Amount

**Step 7:** Enter the **dollar amount** desired if Amount is chosen as the Deposit Type.

Direct Deposit

Accounts

Order	Nickname	Payment
1	Checking	Direct De

When this second account is saved, the deposit type of the first account will be updated from Full Balance to Remaining Balance and the account order will be updated to last in the list.

\* Indicates required field

Nickname: Second Account

Payment Method: Direct Deposit

**Bank**

Routing Number: 011000015

Account Number: 1234567890

Retype Account Number: 1234567890

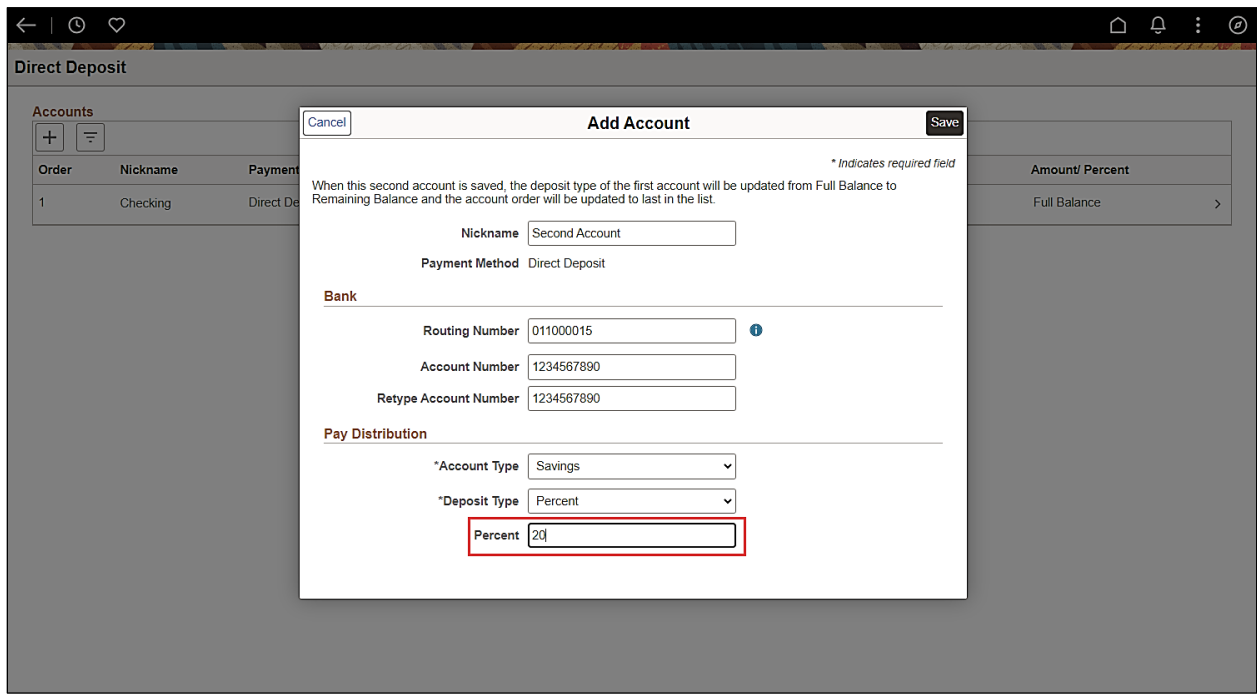
**Pay Distribution**

\*Account Type: Savings

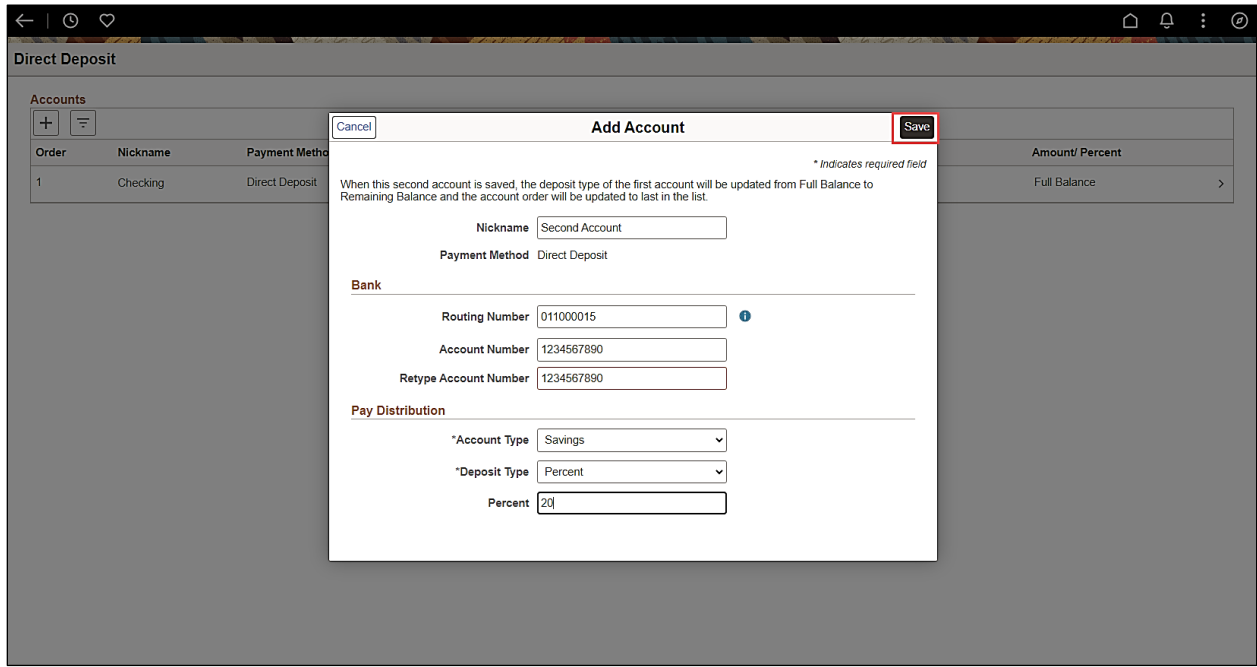
\*Deposit Type: Amount

Amount: 300.00

**Step 8:** Enter a desired **percentage** if Percentage is chosen as the Deposit Type.

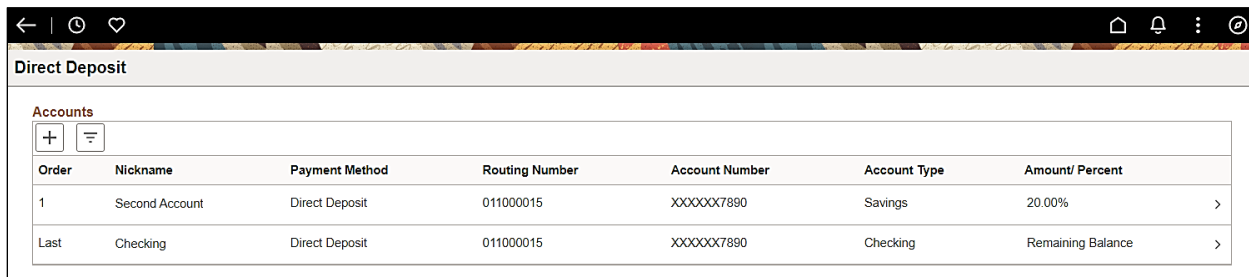


**Step 9:** Click the **Save** button.



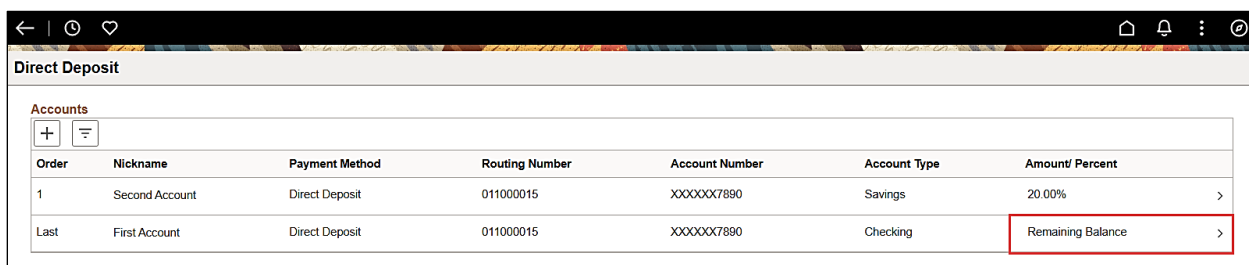
**Step 10:** The Direct Deposit page will update with the new account.

**Note:** If the employee has multiple accounts, the primary account will not have an amount or percent. It will say remaining balance; the other accounts can be a combination of percentages or flat amounts.



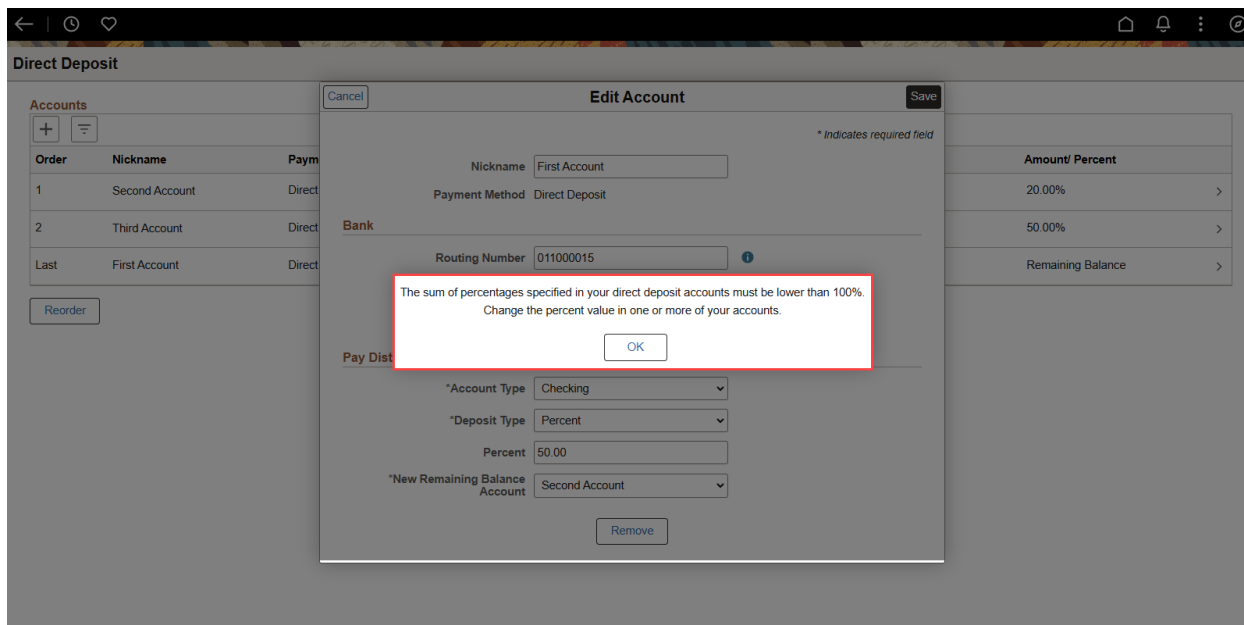
Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	Second Account	Direct Deposit	011000015	XXXXXX7890	Savings	20.00%
Last	Checking	Direct Deposit	011000015	XXXXXX7890	Checking	Remaining Balance

**Step 11:** The original account added will automatically have a Deposit Type of **Remaining Balance**.



Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	Second Account	Direct Deposit	011000015	XXXXXX7890	Savings	20.00%
Last	First Account	Direct Deposit	011000015	XXXXXX7890	Checking	Remaining Balance

**Step 12:** If the accounts do not equal 100%, this error message will occur. Edit the percentage and click the **Save** button.



**Direct Deposit**

**Accounts**

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	Second Account	Direct				20.00%
2	Third Account	Direct				50.00%
Last	First Account	Direct				Remaining Balance

**Edit Account**

\* Indicates required field

Nickname: First Account

Payment Method: Direct Deposit

Bank

Routing Number: 011000015

**The sum of percentages specified in your direct deposit accounts must be lower than 100%. Change the percent value in one or more of your accounts.**

Pay Dist

\*Account Type: Checking

\*Deposit Type: Percent

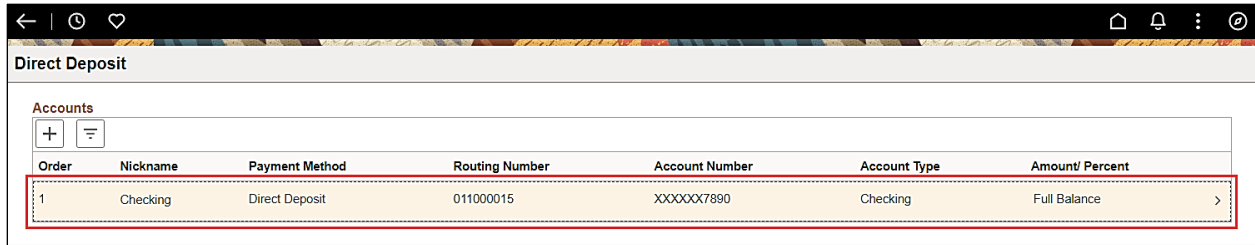
Percent: 50.00

\*New Remaining Balance Account: Second Account

Buttons: Cancel, Save, OK, Remove

## V. Editing an Account

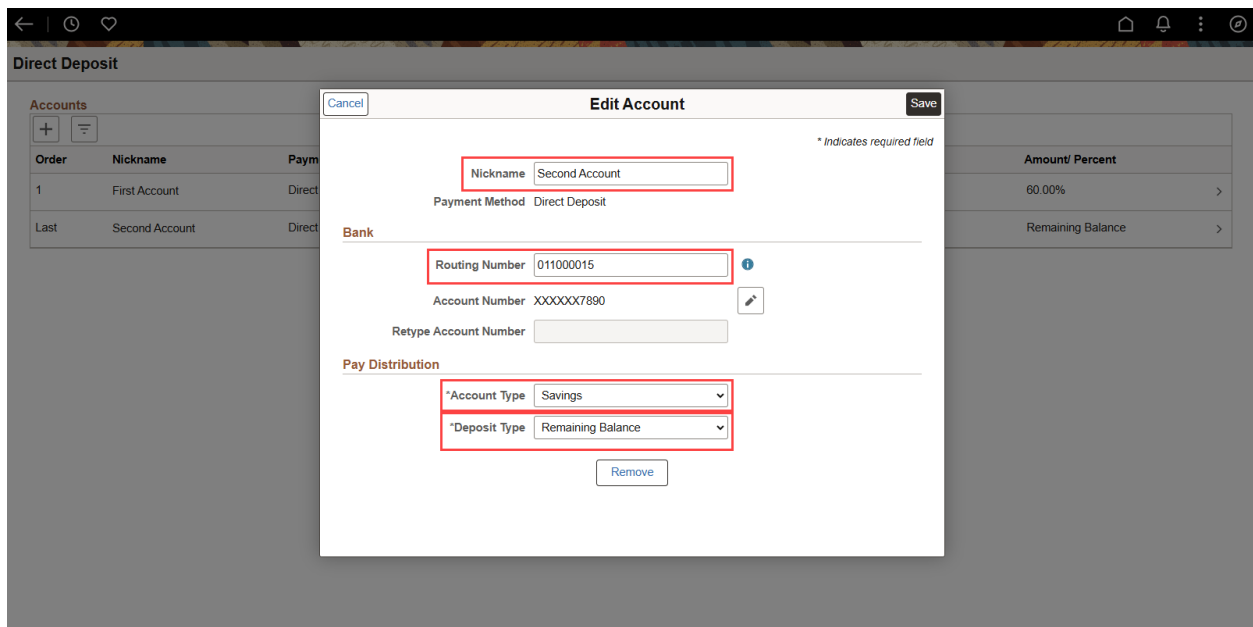
**Step 1:** On the Direct Deposit page, click the **row** for the account you would like to change.



The screenshot shows a mobile application interface for Direct Deposit. At the top, there's a navigation bar with a back arrow, a home icon, a bell icon, and a profile icon. Below the navigation bar, the title "Direct Deposit" is displayed. Underneath, there's a section titled "Accounts" with a plus sign and a minus sign icon. A table lists the accounts with the following columns: Order, Nickname, Payment Method, Routing Number, Account Number, Account Type, and Amount/ Percent. The first row is highlighted with a red border, indicating it is selected for editing.

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	Checking	Direct Deposit	011000015	XXXXXX7890	Checking	Full Balance

**Step 2:** Edit any necessary information in the **Nickname, Routing Number, Account Type, or Deposit Type** fields.

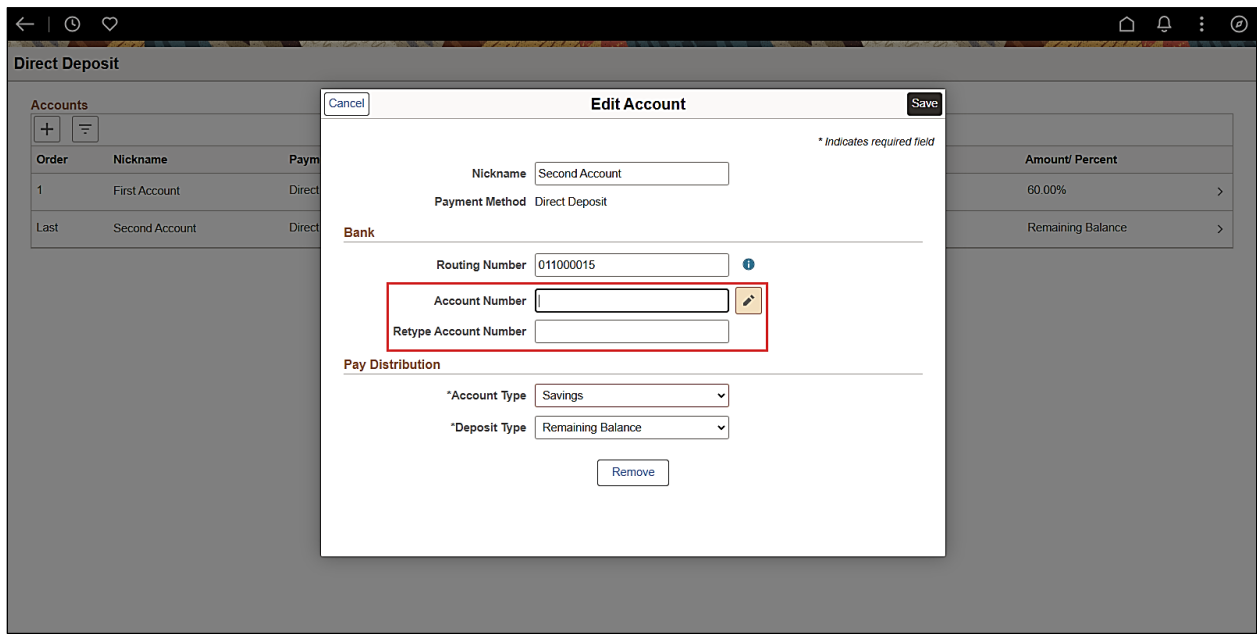


The screenshot shows the "Edit Account" dialog box overlaid on the Direct Deposit Accounts table. The dialog box has a "Cancel" button on the top left and a "Save" button on the top right. It contains the following fields:

- Nickname:** A text input field containing "Second Account".
- Payment Method:** A dropdown menu set to "Direct Deposit".
- Bank:**
  - Routing Number:** A text input field containing "011000015".
  - Account Number:** A text input field containing "XXXXXX7890".
  - Retype Account Number:** An empty text input field.
- Pay Distribution:**
  - \*Account Type:** A dropdown menu set to "Savings".
  - \*Deposit Type:** A dropdown menu set to "Remaining Balance".

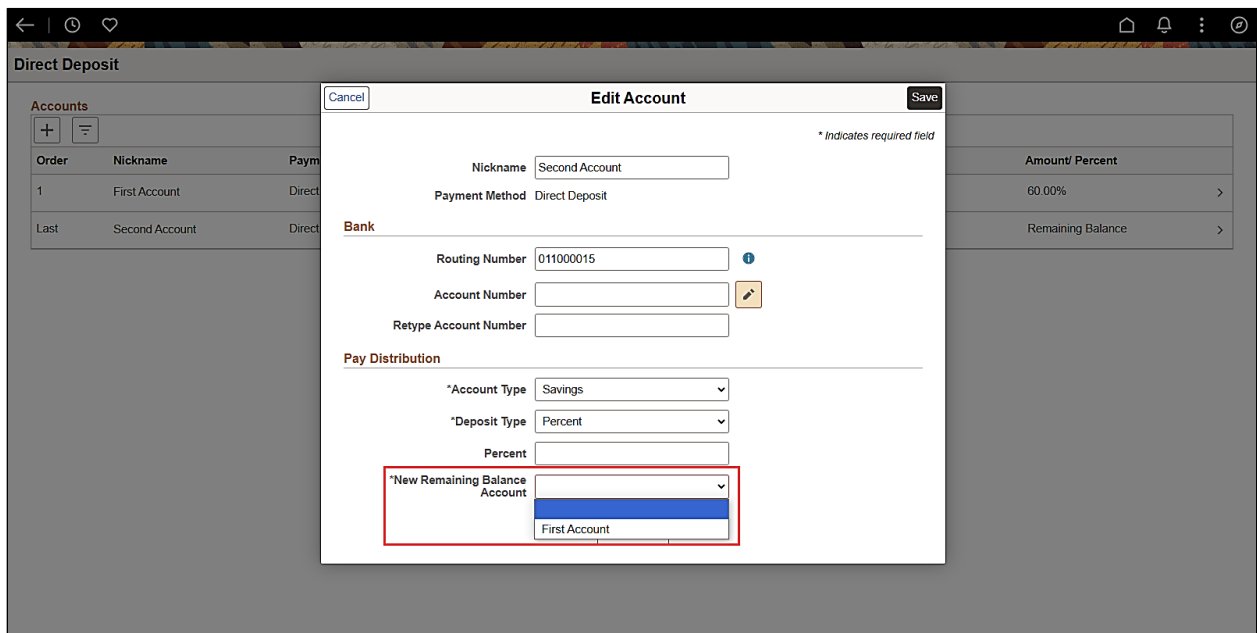
A "Remove" button is located at the bottom of the dialog box. A note at the top right of the dialog box states "\* Indicates required field".

**Step 3:** Click the pencil button to edit the **Account Number**.

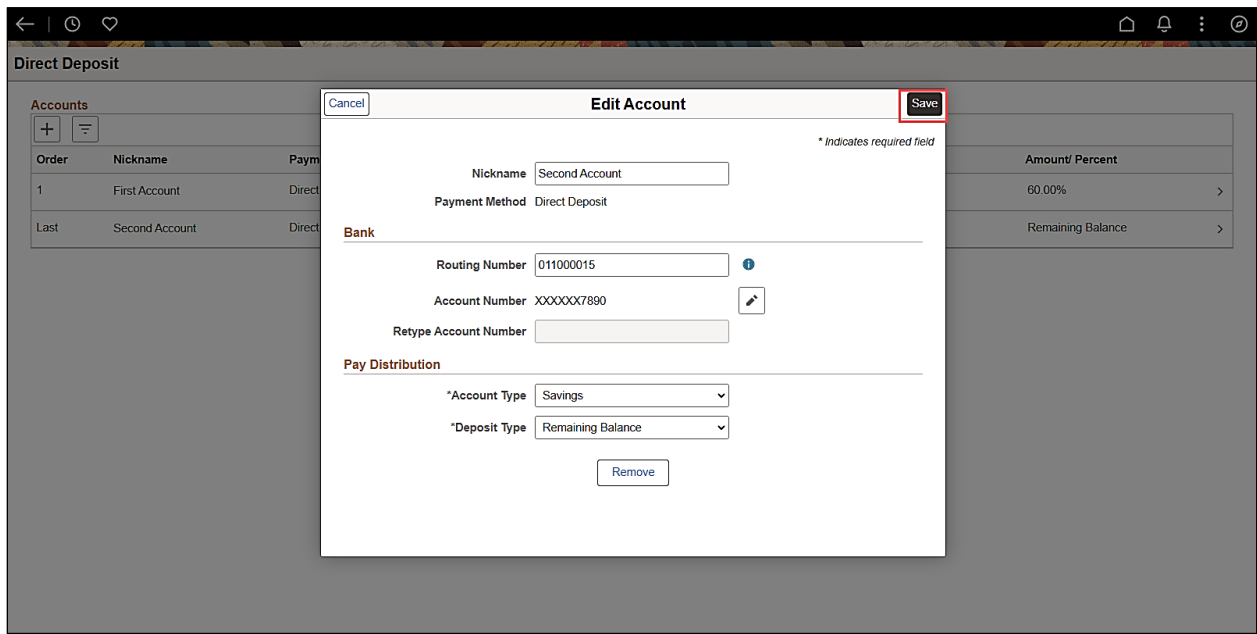


**Step 4:** If the Deposit Type is changed on the account set to Remaining Balance, the **New Remaining Balance Account** field will appear. Select the new account to set as **Remaining Balance**.

**Note:** The system will require one account to be set as Remaining Balance.

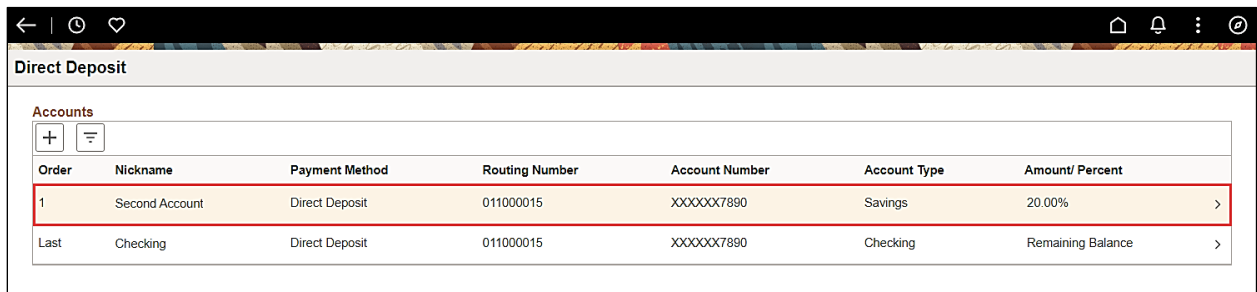


Step 5: Click the Save button.



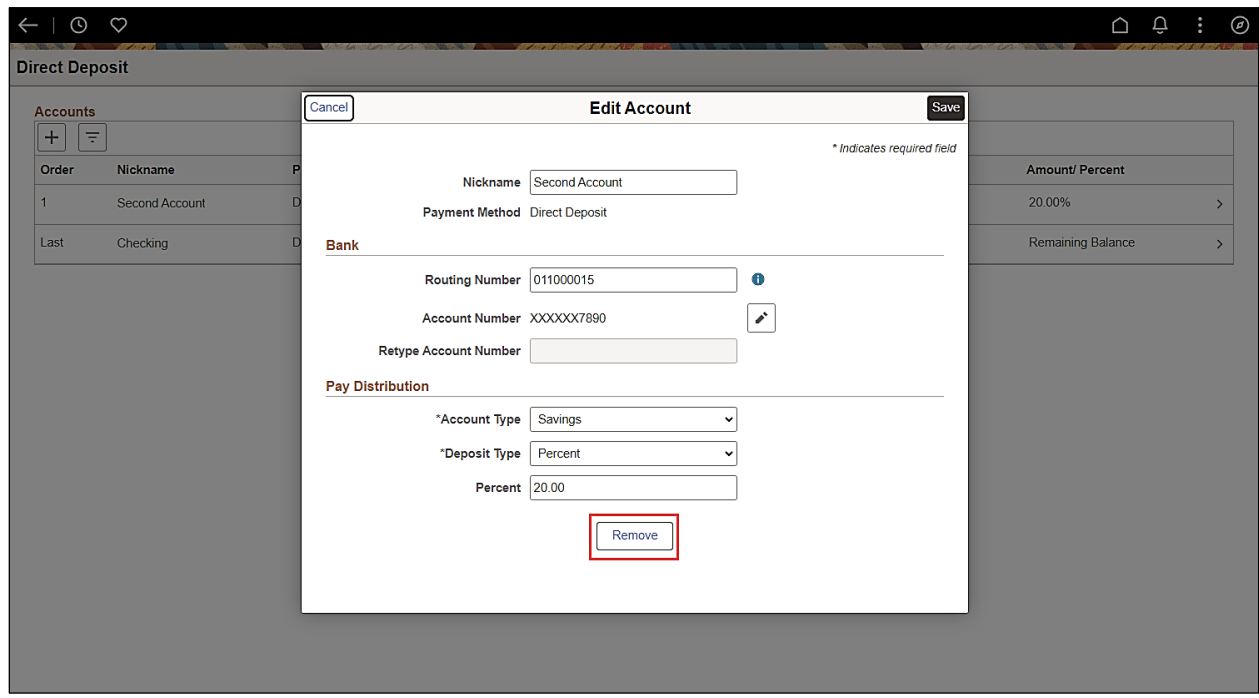
## VI. Removing an Account

Step 1: On the Direct Deposit page, click the row of the account to remove.

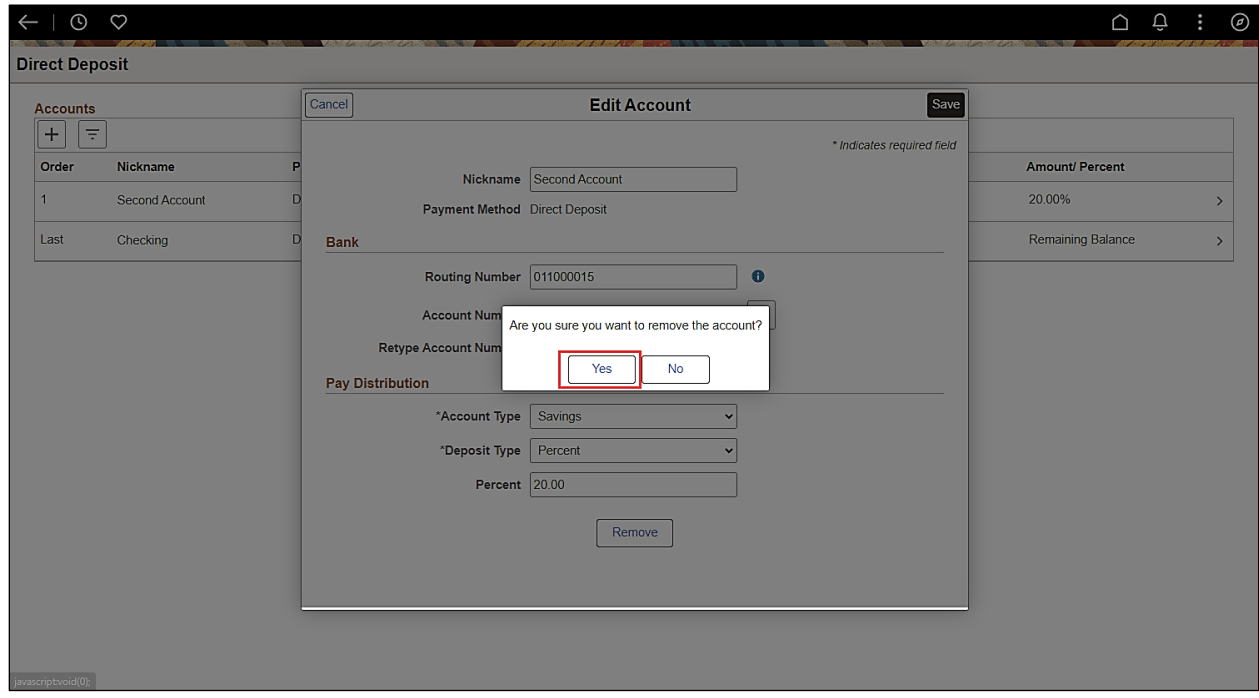




Step 2: Click the **Remove** button.



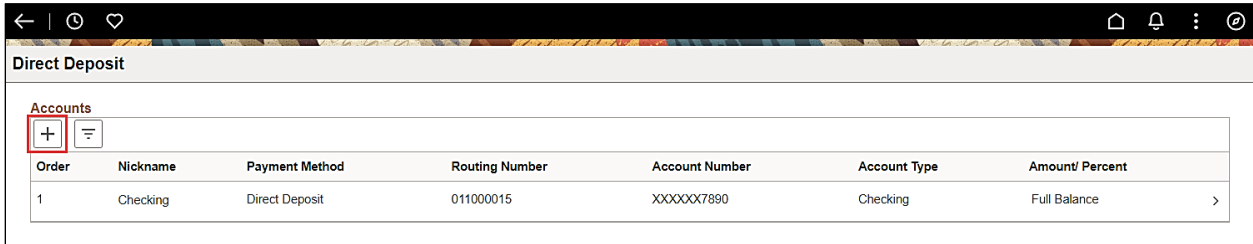
Step 3: Click the **Yes** button to remove the account.



## VII. Adding a New Account as Remaining Balance

To add a new account as the Remaining Balance, the account needs to be first added as a percentage or amount. The current Remaining Balance account can then be edited to reflect the desired changes.

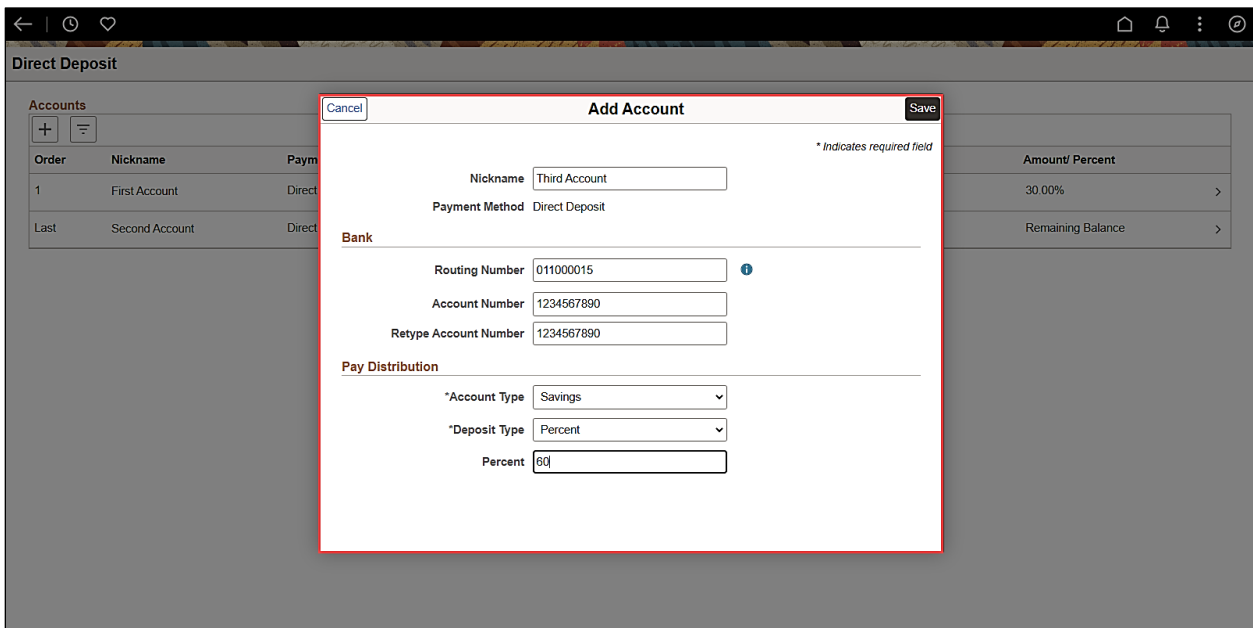
**Step 1:** On the Direct Deposit screen, click the **plus** button to add a new account.



The screenshot shows the 'Direct Deposit' screen. At the top, there is a navigation bar with a back arrow, a home icon, a notification bell, and a profile icon. Below the navigation bar, the title 'Direct Deposit' is displayed. Underneath, there is a section titled 'Accounts' with a plus sign button highlighted in a red box and a minus sign button. Below this is a table with the following columns: Order, Nickname, Payment Method, Routing Number, Account Number, Account Type, and Amount/ Percent. The table contains one row with the following data: Order 1, Nickname Checking, Payment Method Direct Deposit, Routing Number 011000015, Account Number XXXXXX7890, Account Type Checking, and Amount/ Percent Full Balance. A right arrow is visible at the end of the row.

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	Checking	Direct Deposit	011000015	XXXXXX7890	Checking	Full Balance

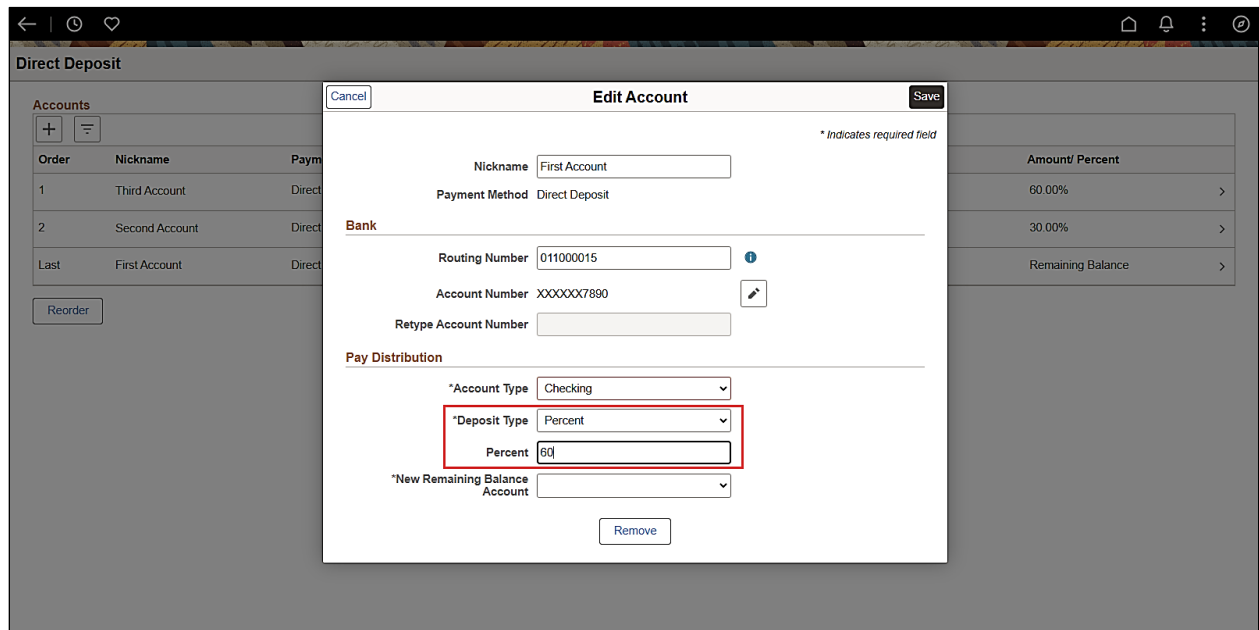
**Step 2:** Enter the information for the account. The Percentage across all accounts must equal less than 100%. The Amount across all accounts must equal less than the net pay.



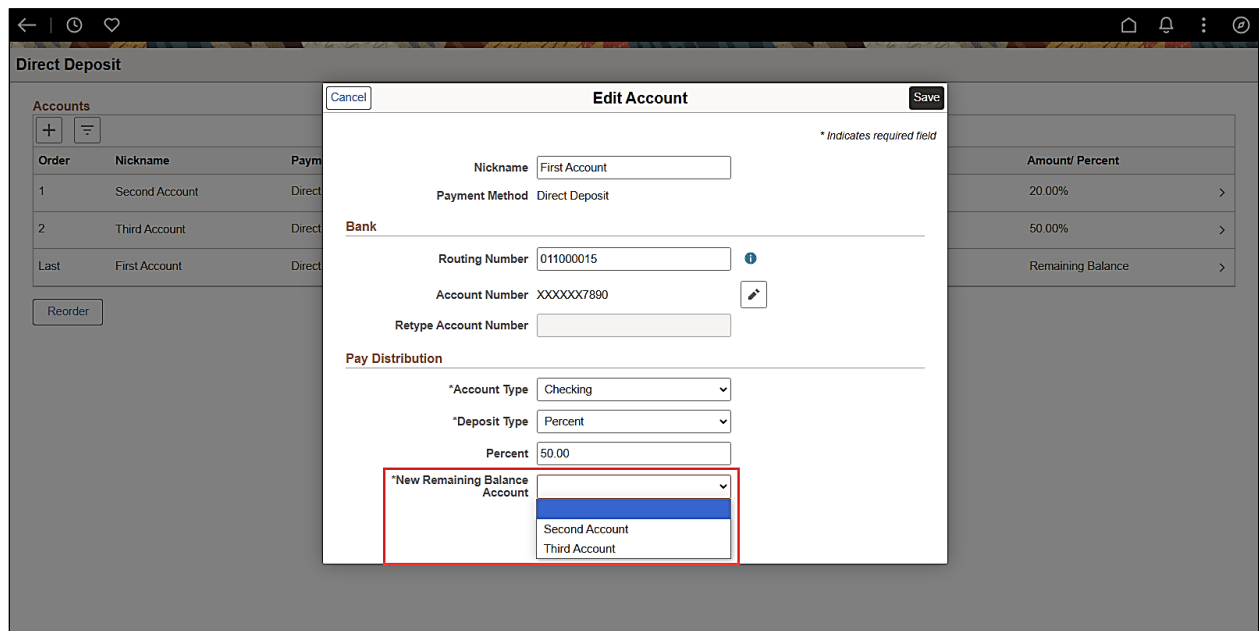
The screenshot shows the 'Direct Deposit' screen with the 'Add Account' modal open. The modal has a 'Cancel' button on the top left and a 'Save' button on the top right. The modal contains the following fields: Nickname (Third Account), Payment Method (Direct Deposit), Bank section with Routing Number (011000015), Account Number (1234567890), and Retype Account Number (1234567890). The Pay Distribution section includes Account Type (Savings), Deposit Type (Percent), and Percent (60). A note '\* Indicates required field' is present. The background shows the 'Accounts' table with three rows: Order 1, Nickname First Account, Payment Method Direct, Amount/ Percent 30.00%; Order Last, Nickname Second Account, Payment Method Direct, Amount/ Percent Remaining Balance.

Order	Nickname	Payment Method	Amount/ Percent
1	First Account	Direct	30.00%
Last	Second Account	Direct	Remaining Balance

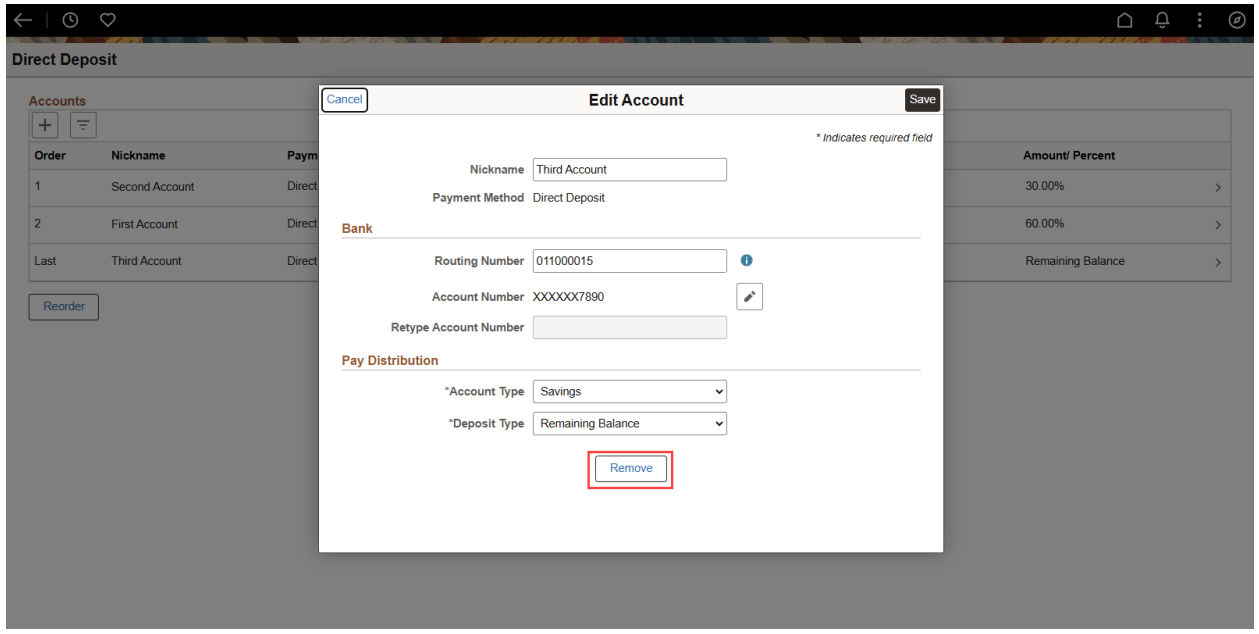
**Step 3:** Click on the row of the current account set to Remaining Balance. Edit the Deposit Type to the desired percentage or amount.



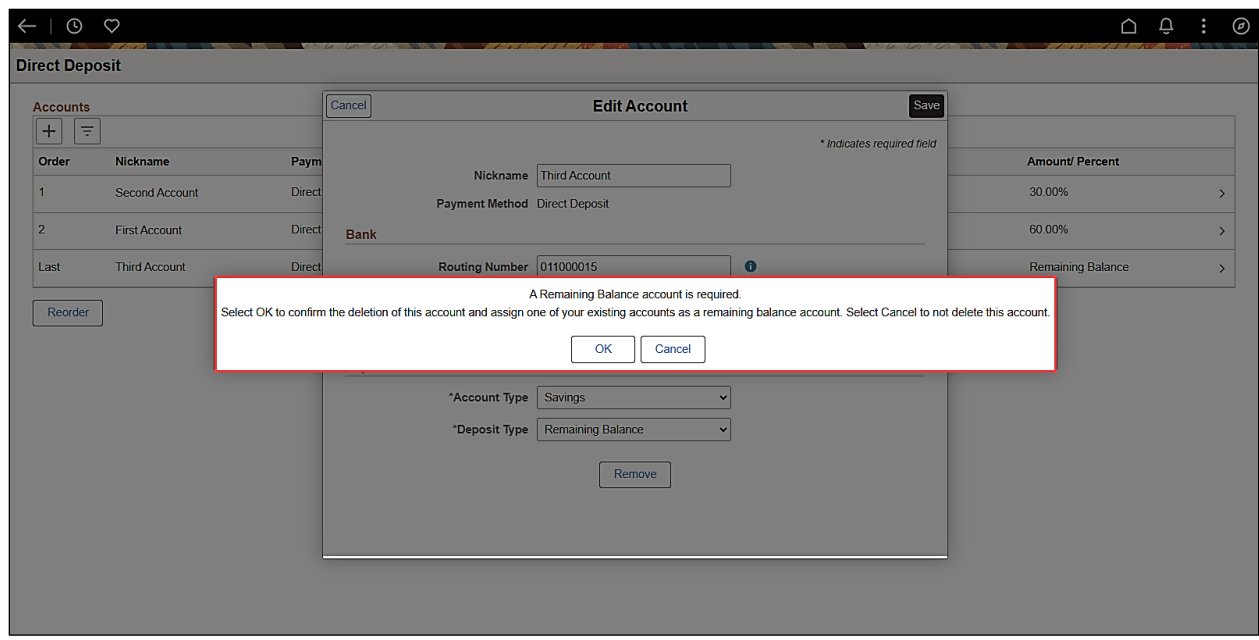
**Step 4:** This will require a New Remaining Balance Account. Choose a new account that will become the New Remaining Balance Account. Click the **Save** button.



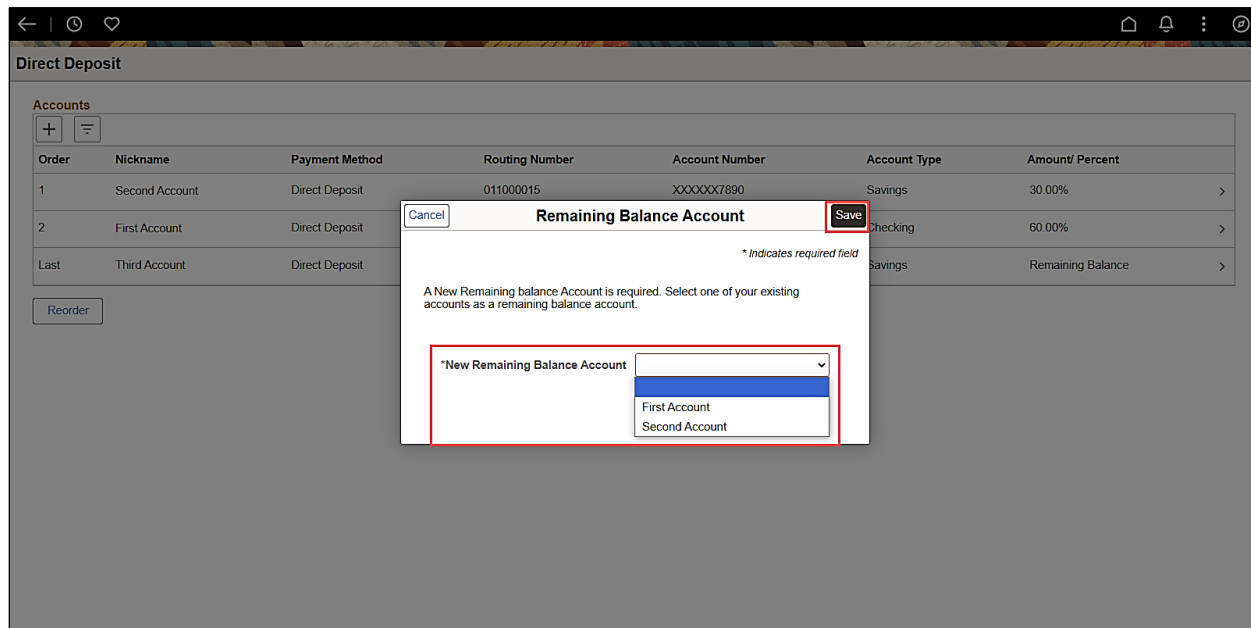
**Step 5:** Click the **Remove** button to delete the current Remaining Balance Account.



**Step 6:** This message will appear to warn that one account must be set to Remaining Balance. Click the **OK** button.



**Step 7:** Select the New Remaining Balance Account desired. Click the **Save** button.



**Step 8:** The Direct Deposit screen will reflect the new account set to Remaining Balance.

