



Direct Deposit Online Instructions – Job Aid

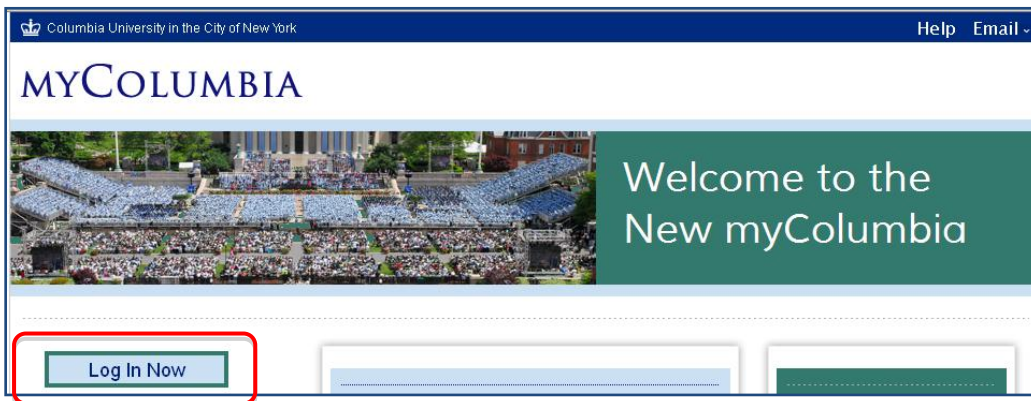
To access PAC training information, go to <http://managers.hr.columbia.edu/tig/PAC>

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 . . .
Access Direct Deposit	<ol style="list-style-type: none"> 1. Navigate to myColumbia portal @ https://my.columbia.edu. 2. Click “Log in Now”. 3. Log in with your UNI and Password. 4. Click on the “Faculty & Staff” tab. 5. Click “View Your Direct Deposit Information” within the Self-Service section. 	You accessed Direct Deposit within Self Service in PAC.

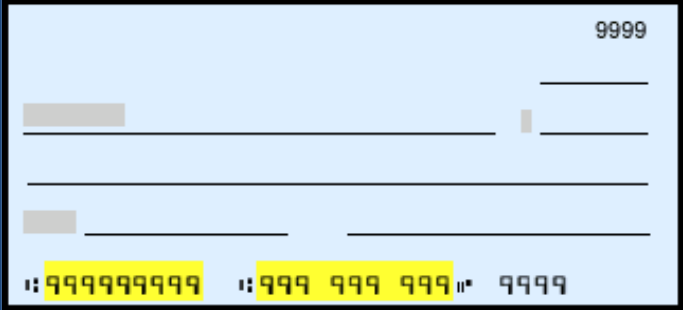
myColumbia Portal PAC Links





STEP ...	ACTION ...	RESULT ...												
<p>To Add Direct Deposit Information</p>	<p>1. Click the "Add Account" box to add your bank information.</p> <div data-bbox="360 338 1258 688" style="border: 1px solid black; padding: 10px; margin-bottom: 20px;"> <p>Direct Deposit</p> <p>Babs Bunny</p> <p>Review, add or update your direct deposit information.</p> <p>Direct Deposit Detail</p> <table border="1"> <thead> <tr> <th>Account Type</th> <th>Routing Number</th> <th>Account Number</th> <th>Deposit Type</th> <th>Amt/Pct</th> <th>Deposit Order</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p> <input type="button" value="Save"/> <input style="border: 2px solid red;" type="button" value="Add Account"/> </p> </div> <div data-bbox="412 743 1206 1377" style="border: 1px solid black; padding: 10px;"> <p>Direct Deposit Add Direct Deposit</p> <p>Babs Bunny</p> <p>Your Bank Information</p> <p>Routing Number: <input type="text"/> View check example</p> <p>Distribution Instructions</p> <p>Account Number: <input type="text"/> Confirm Account <input type="text"/></p> <p>*Account Type: <input type="text"/></p> <p>*Deposit Type: <input type="text"/></p> <p>Amount or Percent: <input type="text"/></p> <p>Deposit Order: <input type="checkbox"/> (example: 1 = first account processed)</p> <p><input type="button" value="OK"/></p> <p>Return to Direct Deposit</p> <p>* Required Field</p> </div>	Account Type	Routing Number	Account Number	Deposit Type	Amt/Pct	Deposit Order							
Account Type	Routing Number	Account Number	Deposit Type	Amt/Pct	Deposit Order									



STEP ...	ACTION ...	RESULT ...
	<p>2. Enter the routing number of your bank. The bank's routing number is at the bottom of your check.</p> <p>a. If you are depositing into a savings account, please contact your bank for its routing number.</p> <div data-bbox="456 394 1166 451" style="border: 1px solid black; padding: 5px;"><p>Routing Number: <input type="text"/> View check example</p></div> <div data-bbox="456 485 1159 1180" style="border: 1px solid black; padding: 10px;"><p>Check Example</p><p>1 2</p><p>1 - Routing Number 2 - Account Number</p><p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p></div>	
	<p>3. Enter your Account Number twice.</p> <div data-bbox="380 1270 1240 1371" style="border: 1px solid black; padding: 5px;"><p>Distribution Instructions</p><p>Account Number: <input type="text"/> Confirm Account <input type="text"/></p></div>	
	<p>4. Select the Account Type (type of bank account) from the drop down box.</p> <div data-bbox="360 1522 1260 1701" style="border: 1px solid black; padding: 10px;"><p>*Account Type: <input type="text"/></p><p>*Deposit Type: <input type="text" value="Checking"/> Savings</p></div>	



STEP ...	ACTION ...	RESULT ...
	<p>5. Select the Deposit Type.</p> <ol style="list-style-type: none"> Use a deposit type of "Percent" when indicating a percent to deposit. 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. <div data-bbox="542 359 1078 556" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>*Deposit Type: <input type="text" value="Percent"/></p> <p>Amount or Percent: <input type="text" value="Percent"/></p> <p>Deposit Order: <input type="text" value="1"/></p> </div>	
	<p>6. Enter the amount or percent of your deposit.</p> <div data-bbox="591 705 1029 764" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>Amount/Percent: <input type="text"/></p> </div>	
	<p>7. Enter the Deposit Order.</p> <ol style="list-style-type: none"> 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. <p>8. Review your information and click OK when entry is complete.</p> <div data-bbox="316 968 1305 1125" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Deposit Order: <input type="text" value="1"/> (example: 1 = first account processed)</p> <p><input type="button" value="OK"/></p> </div> <div data-bbox="375 1157 1245 1671" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Babs Bunny</p> <p>Your Bank Information</p> <p>Routing Number: <input type="text" value="021000089"/> View check example</p> <p>Distribution Instructions</p> <p>Account Number: <input type="text" value="123456789"/> Confirm Account <input type="text" value="123456789"/></p> <p>*Account Type: <input type="text" value="Checking"/></p> <p>*Deposit Type: <input type="text" value="Percent"/></p> <p>Amount or Percent: <input type="text" value="100.00"/></p> <p>Deposit Order: <input type="text" value="1"/> (example: 1 = first account processed)</p> <p><input type="button" value="OK"/></p> </div>	



STEP ... ACTION ... RESULT ...

You will then be at the confirmation page.

- 9. Click "Save". The system will confirm that your information has been saved successfully.

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 Order
	021000089	123456789	Percent	100%	1

Save Add Account

You successfully entered your direct deposit information.

- 10. Click the yellow 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.

Direct Deposit

Save Confirmation

The Save was successful.

However, due to timing, your change may not be reflected on the next paycheck.

OK

- 11. Review your information and if a correction is needed, click the "Edit" box.
12. To add a second direct deposit account, click "Add Account" and enter the information for the 2nd account.

Direct Deposit

Babs Bunny

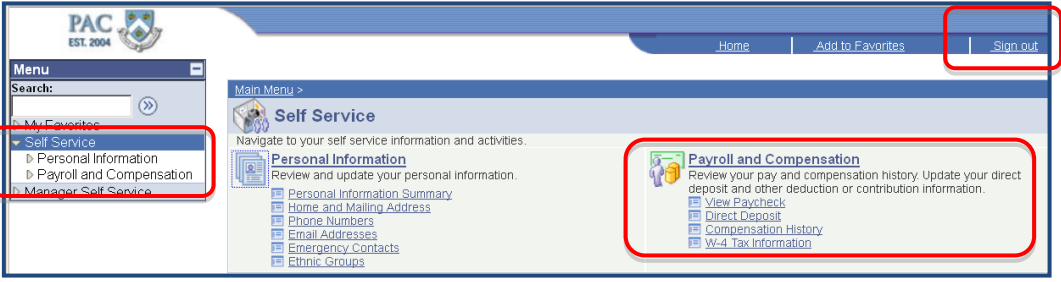
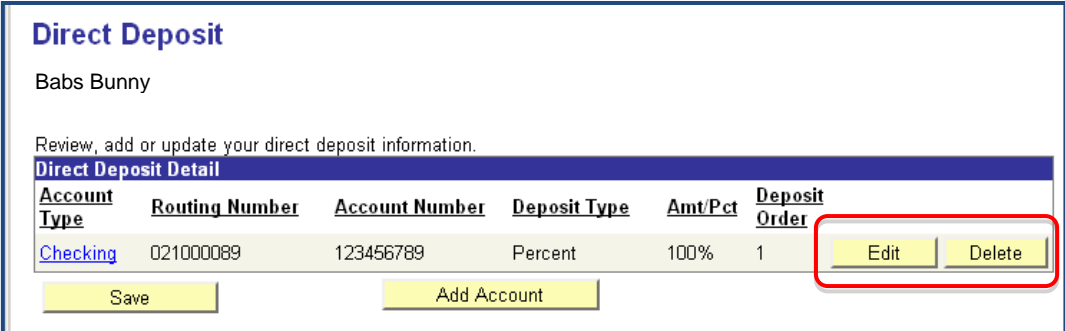
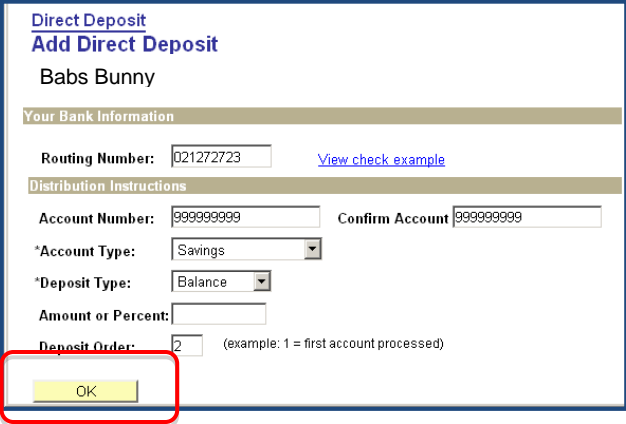
Review, add or update your direct deposit information.

Direct Deposit Detail

Account Type	Routing Number	Account Number	Deposit Type	Amt/Pct	Deposit Order
Checking	021000089	123456789	Percent	100%	1

Save Add Account Edit Delete



STEP ...	ACTION ...	RESULT ...
<p>View Your Direct Deposit Information / Sign Out</p>	<ol style="list-style-type: none"> 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. 	<p>You viewed your direct deposit information and signed out of Self Service.</p>
<p>To Change Existing Direct Deposit Information – Access Direct Deposit</p>	<ol style="list-style-type: none"> Navigate to myColumbia portal @ https://my.columbia.edu. Click “Log in Now”. Log in with your UNI and Password. Click on the “Faculty & Staff” tab. Click “View Your Direct Deposit Information” within the Self-Service section. <ol style="list-style-type: none"> Once you click on “View Your Direct Deposit Information” link, your Direct Deposit data record in PAC appears. 	
	<ol style="list-style-type: none"> Click the “Edit” box to edit your deposit and/or bank information. Click the “Delete” box to remove your deposit and/or bank information. 	
	<ol style="list-style-type: none"> Make any necessary changes to the information. Review your changes. Click “OK”. 	



STEP ...	ACTION ...	RESULT ...																							
<p>Confirm the Change(s)</p>	<p>You are now at the confirmation page.</p> <p>11. Review your information and if you need to make a correction, click “Edit”.</p> <p>12. If all information is correct, are you are not making additional changes, click “Save”.</p> <div data-bbox="350 394 1268 821" data-label="Image"> <p>Direct Deposit</p> <p>Babs Bunny</p> <p>Review, add or update your direct deposit information.</p> <table border="1"> <thead> <tr> <th>Account Type</th> <th>Routing Number</th> <th>Account Number</th> <th>Deposit Type</th> <th>Amt/Pct</th> <th>Deposit Order</th> <th>Edit</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>Checking</td> <td>021000089</td> <td>123456789</td> <td>Amount</td> <td>\$500</td> <td>1</td> <td>Edit</td> <td>Delete</td> </tr> <tr> <td>Savings</td> <td>021272723</td> <td>999999999</td> <td>Balance</td> <td></td> <td>2</td> <td>Edit</td> <td>Delete</td> </tr> </tbody> </table> <p>Buttons: Save, Add Account</p> <p>You must hit the SAVE button in order for any changes to take effect</p> </div>	Account Type	Routing Number	Account Number	Deposit Type	Amt/Pct	Deposit Order	Edit	Delete	Checking	021000089	123456789	Amount	\$500	1	Edit	Delete	Savings	021272723	999999999	Balance		2	Edit	Delete
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