Self Service: Direct Deposit

Self Service> Payroll and Compensation> Direct Deposit

Topics Covered:
- View Direct Deposit (pg.1)
- Edit Direct Deposit (pg.2)
- Add Direct Deposit (pg. 4)

View Direct Deposit

- Direct Deposit Detail
  - Account Type – Click the link for more detailed information about your account.
  - 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.
  - Account Number
  - Deposit Type (Amount, Percentage, or Balance).
  - Amount or Percent – Displays either an amount, percentage, or is blank if the deposit type = “Balance.”
  - Priority – The order in which deposits will be made.
  - Edit – Click to edit an existing direct deposit account.
  - Delete – Click to delete a direct deposit account, if you have more than one.

Note: You cannot withdraw from direct deposit through Self Service. Contact University Financial Services for assistance at (617) 495-8500, option 4.

Note: 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.

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<th>Section</th>
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<th>Description/Additional Information</th>
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| A       | Direct Deposit Detail | Displays basic information/links about your direct deposit:  
  - Account Type – Click the link for more detailed information about your account.  
  - 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.  
  - Account Number  
  - Deposit Type (Amount, Percentage, or Balance).  
  - Amount or Percent – Displays either an amount, percentage, or is blank if the deposit type = “Balance.”  
  - Priority – The order in which deposits will be made.  
  - Edit – Click to edit an existing direct deposit account.  
  - Delete – Click to delete a direct deposit account, if you have more than one. |
| B       | Edit Account | Click  
  Note: If you only have one direct deposit account and want to change it to another account, click Edit. Do not add a new account. |
| C       | Add Account | Click  
  Note: 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. |
| D       | Advice Print Option | Click the box, and then click Save to start or stop the printing of your pay statements. |
Edit Direct Deposit

### Data Requirement

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| A       | Your Bank Information  | Yes      | - Transit Number/Bank ID – Enter the 9-digit transit number for your bank or click the search icon to select. The transit number is located on the bottom portion of your personal checks (see above).  
  **Note:** If you are unable to locate your transit number, contact your financial institution to verify its transit number (“routing” or “ABA” number). |
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| B       | Distribution Instructions | Yes, all fields | - Account Number – enter your account number (see above). 
  **Note:** If the account number printed on your check contains non-numerical characters such as hyphens or periods, do not include these characters when entering your account number. For example, if the printed account number reads 123-45-6789, simply enter 123456789. Otherwise, the bank will reject your account number.  
- Account Type – select either Checking or Savings  
- Deposit Type – select either “Amount,” “Balance,” or “Percent.”  
  o If this is your first time adding a direct deposit account, the Deposit Type must be set to “Balance.”  
  o If you are adding an additional account, select either “Amount” or “Percent” type.  
- Amount/Percent – enter either the percentage amount or amount that you want to be deposited into your account.  
  o If you only have one account (your “Balance” account), leave this field blank.  
  o If this is an additional account, enter the percent amount (if you selected a deposit type of “Percentage) or a dollar amount (if you selected a deposit type of “Amount”).  
- Deposit order – enter a number to correspond with the order in which the account will be deposited. The lower the number, the higher the priority. |
| C       | Submit                 | n/a              | Click Submit and then “OK” to save. |
| D       | Sample Check Image     | n/a              | See the image on the preceding page to view a sample of where a transit number and account number appear on a personal check. |

**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.
Add Direct Deposit

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| A       | Your Bank Information | Yes             | • Transit Number/Bank ID – enter the 9-digit transit number for your bank or click the search icon to select. The transit number is located on the bottom portion of your personal checks (see above).

⚠️ Note: If you are unable to locate your transit number, contact your financial institution to verify their transit number, otherwise known as a “routing” or “ABA” number. |
| B       | Distribution Instructions | No              | • Account Number – enter your account number (see above).

⚠️ Note: If the account number printed on your check contains non-numerical characters such as hyphens or periods, do not include these characters when entering your account number. For example, if the printed account number reads 123-45-6789, simply enter 123456789. Otherwise, the bank will reject your account number.

• Account Type – select either Checking or Savings

• Deposit Type – select either “Amount,” “Balance,” or “Percent.”
  o If this is your first time adding a direct deposit account, the Deposit Type must be set to “Balance.”
  o If you are adding an additional account, select either “Amount” or “Percent” type.

• Amount/Percent – enter either the percentage amount or amount that you want to be deposited into your account.
  o If you only have one account (your “Balance” account), leave this field blank.
  o If this is an additional account, enter the percent amount (if you selected a deposit type of “Percentage”) or a dollar amount (if you selected a deposit type of “Amount”).

• Deposit order – enter a number to correspond with the order in which the account will be deposited. The lower the number, the higher the priority. |
| C       | Submit            | n/a              | Click Submit and then “OK” to 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.