

## View Direct Deposit

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

- The Direct Deposit tile displays how many active accounts are on file and when the last update date was.

**IMPORTANT:** By adding or saving changes to a direct deposit account, 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.

**Notes:**

- 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**

C
+
▼
F

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
A	HUECU Savings	Direct Deposit	211381738	XXX7900	Savings	\$500.00 <span style="border: 1px solid black; padding: 2px 5px; float: right;">B</span> >
5	Xmas Club	Direct Deposit	211381738	X2369	Savings	1.00% >
Last	HUECU Checking	Direct Deposit	211381738	XXX7940	Checking	Remaining Balance >

E
Reorder

**Print Option**


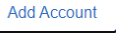


Send a paper copy of the direct deposit pay statement to my home. D

**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.  
Please note when adding or changing direct deposit accounts, it may take one to two pay cycles to take effect, during that time you may receive a paper check for some or all of your pay.

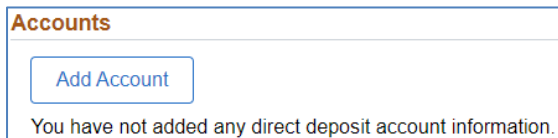
Section	Field	Description/Additional Information
<b>A</b>	Direct Deposit Detail	Displays basic information/links about your direct deposit: <ul style="list-style-type: none"> <li>Order – The order in which deposits will be made.</li> <li>Nickname – Nickname you assign to an account</li> <li>Payment Method – 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.


# PeopleSoft: Viewing/Editing Direct Deposit Information

Section	Field	Description/Additional Information
C	Add Account	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.  <b>Note:</b> If you only have one direct deposit account and want to change it to another account, click the  icon. Do not add a new account.  <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.
D	Advice Print Option	Not Checked = advice will not be printed. Checked = advice will be printed and mailed to you via US Mail.
E	Reorder	Change the priority of the deposits
F	Filter	Click on the  icon to filter on Payment Method. This will allow you to filter on savings versus checking account types.

## Add / Edit 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.



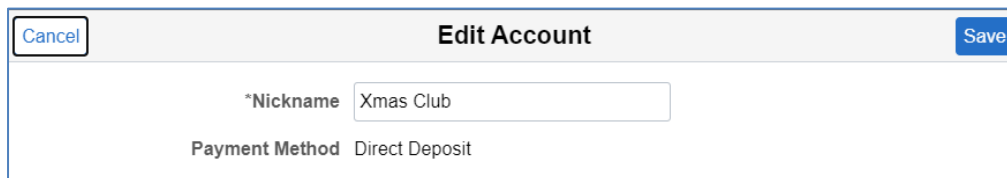
- If you want to add a new account to your existing ones, clicking the  icon on the Direct Deposit screen brings up the Add Account screen, where you can assign a new account for direct deposit.

**Note:** Add an account **only** when you want to set up an additional one to receive a portion of your paycheck.

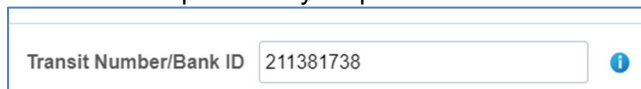
- If you want to change any of your existing accounts (including the “Remaining Balance” account), click the chevron on the direct deposit row you want to edit (see item B in the image above).


### Steps

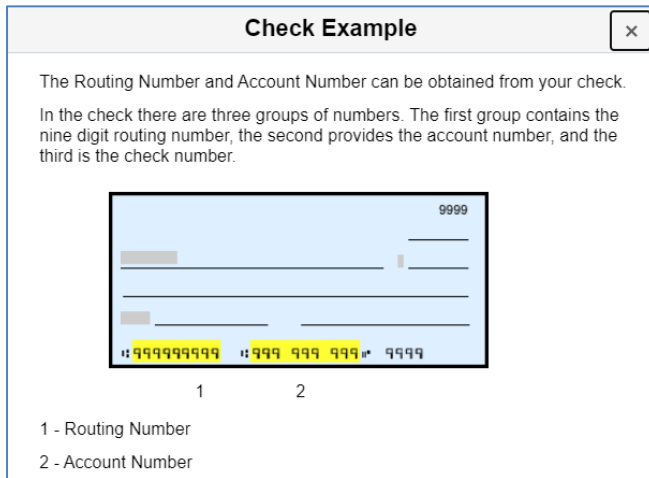
1. In the Nickname field, enter/update an identifying name of your choice.



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.




- a. You can click the  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).

3. Enter your account number and retype your account number in the corresponding fields (if editing and existing account, click the pencil).

**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	<input type="text" value="12345678"/>	
Retype Account Number	<input type="text" value="12345678"/>	

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.
  - **Primary account (“Remaining Balance”):**

- c. If adding an additional account, you can designate an **Amount or Percent** in the field provided. Enter either the exact dollar amount or the percentage of your paycheck that you want to be deposited into this account.

Secondary accounts (Amount or Percent):

**Pay Distribution**

\*Account Type: Savings

\*Deposit Type: Amount

Amount: 100.00

Or

**Pay Distribution**

\*Account Type: Savings

\*Deposit Type: Percent

Percent: 5.00

- 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. If you decide not to make any changes or are just reviewing your data, do not select Save. Instead select Cancel. If you select Save, a new row will be added to your direct deposit data and you may receive an email stating you made a change that day.
- If you wish to change which of your account is the “Remaining Balance” account, you will need to contact University Financial Services for assistance at (617) 495-8500, option 4.
- 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**

Update the processing order of your accounts by dragging and dropping the row with the = icon on the Reorder column to the desired position. The account on row 1 will be processed first.

When a Remaining Balance account exists, it will be the last account processed to pay out any remaining funds and cannot be reordered. To reassign the remaining balance account, use the Edit Account page to update the distribution details.

Reorder	Nick Name	Account Number	Amount or Percent
=	Xmas Club	XXXXX4321	\$100.00
=	College Fund	XXX	1.00%
=	Remaining	XXXX5678	Remaining Balance

- Note:** The lower the number, the higher the priority. Dragging and dropping a lower account to the top indicates that funds will be deposited in that account before any others that are listed below.

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.

## Questions

For any questions or issues, please log a ticket with the Central Payroll team by emailing [ufs\\_crt@harvard.edu](mailto:ufs_crt@harvard.edu).