

## UAB Self Service Applications Manage Direct Deposit Account (Add Deposit)

Employees may set up multiple deposit accounts within the Administrative Systems' **SELF SERVICE APPLICATIONS**.

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**UAB Self Service Applications** → Manage Direct Deposit Account

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The **MANAGE PAYROLL PAYMENTS: DEFINE PAYMENTS** page indicates the direct deposit information currently on file in Payroll.

### Manage Payroll Payments: Define Payments



Employee Name **Linda Smith** Employee Number **1015971**  
Organization Email Address [workflow@uab.edu](mailto:workflow@uab.edu) Business Group **11111111A UAB**

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To setup or add a direct deposit account, "Click" ADD DEPOSIT PAYMENT. To change your current direct deposit information, "Click" the UPDATE icon. To delete an account, "Click" on the DELETE icon. Please note you must always have a remaining pay account. This account is used as the default account for the remaining pay after it is distributed to other direct deposit accounts. If you have updated your account details, "Click" CONTINUE.

\* Indicates required field

#### Employee Payments

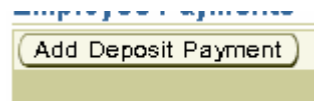
Priority	Payment Type	Account Type	Account Number	Amount Type	Amount	Currency	Update	Delete
1	Deposit	Checking Account	00009875431		Remaining Pay	US Dollar		

Confirmation page **MUST BE RECEIVED** for add/change/delete to update your record. Do **NOT** exit the system without receiving a confirmation page or the system will abandon the change.

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Click on the **Add Deposit Payment** button.



## UAB Self Service Applications Manage Direct Deposit Account (Add Deposit)

The **ADD DEPOSIT PAYMENT** page will load. The employee may make changes including adding new accounts (different banks are permissible), changing the allocation of pay, etc. To set up a new account, please [click here](#) for instructions.

### Add Deposit Payment

Employee Name <b>Linda Smith</b> Organization Email Address <a href="mailto:workflow@uab.edu">workflow@uab.edu</a>	Employee Number <b>1015971</b> Business Group <b>11111111A UAB</b>
Confirmation page MUST BE RECEIVED for add/change/delete to update your record. Do NOT exit the system without receiving a confirmation page or the system will abandon the change.	
* Indicates required field	
Currency US Dollar Amount Type <input type="text" value="Percentage"/> * Amount <input type="text" value="0.0"/> * Account Name <input type="text"/>	* Account Type <input type="text"/> * Account Number <input type="text"/> * Transit Code <input type="text"/> * Bank Name <input type="text"/> * Bank Branch <input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Add Another"/> <input type="button" value="Apply"/>	

The field, **AMOUNT TYPE**, enables an employee to allocate money into different accounts. The two options are Percentage and Monetary. Percentage allocation typically refers to allocating a specific percentage of pay each pay period into a specific account. Monetary allocation enables an employee to select a specific dollar amount and allocate it to a specific account.

#### Scenario:

Linda currently has 100% of her pay allocated to her checking account. She would like to allocate 10% of her paycheck each pay period to her savings account.

Complete the required fields, indicated by an asterisk (\*), to allocate the percentage of money that should be directed into another account.

### Add Deposit Payment

Employee Name <b>Linda Smith</b> Organization Email Address <a href="mailto:workflow@uab.edu">workflow@uab.edu</a>	Employee Number <b>1015971</b> Business Group <b>11111111A UAB</b>
Confirmation page MUST BE RECEIVED for add/change/delete to update your record. Do NOT exit the system without receiving a confirmation page or the system will abandon the change.	
* Indicates required field	
Currency US Dollar Amount Type <input type="text" value="Percentage"/> * Amount <input type="text" value="10.0"/> * Account Name <input type="text" value="Smith, Linda"/>	* Account Type <input type="text" value="Savings Account"/> * Account Number <input type="text" value="135792"/> * Transit Code <input type="text" value="123456789"/> * Bank Name <input type="text" value="Compass Bank"/> * Bank Branch <input type="text" value="Birmingham, AL"/>
<input type="button" value="Cancel"/> <input type="button" value="Add Another"/> <input type="button" value="Apply"/>	


## UAB Self Service Applications Manage Direct Deposit Account (Add Deposit)

### **Scenario Continued:**

Linda has indicated that she would like for 10% of her biweekly pay to be deposited in her savings account at the same bank where she has her checking account. Upon further thinking, Linda has opted to have \$50.00 per pay period go to her savings club account as well.

Select **Add Another** to set up another account for deposit. In the **AMOUNT TYPE** field, select **Monetary** and enter the amount. Include dollars and cents (i.e. 50.00.) Complete the remaining required fields which are indicated by an asterisk (\*).

**NOTE: When clicking the Add Another button, a new page will load and a confirmation statement will appear indicating that the previous change has been validated.**

 **Confirmation**

The system verified that the new payment is valid.

**Add Deposit Payment**

Employee Name	<b>Linda Smith</b>	Employee Number	<b>1015971</b>
Organization Email Address	<a href="mailto:workflow@uab.edu">workflow@uab.edu</a>	Business Group	<b>11111111A UAB</b>

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\* Indicates required field

Currency	US Dollar	* Account Type	Savings Account
Amount Type	Monetary	* Account Number	246810
* Amount	50.00	* Transit Code	987654321
* Account Name	Smith, Linda	* Bank Name	AmSouth Bank
		* Bank Branch	Birmingham, AL

Once all accounts have been added, select **Apply**.

## UAB Self Service Applications Manage Direct Deposit Account (Add Deposit)

The **MANAGE PAYROLL PAYMENTS: DEFINE PAYMENTS** page will load and the employee should review the data and ensure that the information is correct.

### Manage Payroll Payments: Define Payments

Employee Name <b>Linda Smith</b>	Employee Number <b>1015971</b>	<input type="button" value="Cancel"/>	<input type="button" value="Continue"/>
Organization Email Address <a href="mailto:workflow@uab.edu">workflow@uab.edu</a>	Business Group <b>11111111A UAB</b>		

To setup or add a direct deposit account, "Click" ADD DEPOSIT PAYMENT. To change your current direct deposit information, "Click" the UPDATE icon. To delete an account, "Click" on the DELETE icon. Please note you must always have a remaining pay account. This account is used as the default account for the remaining pay after it is distributed to other direct deposit accounts. If you have updated your account details, "Click" CONTINUE.

- Indicates required field

#### Employee Payments

Sort By Priority		Add Deposit Payment							
*Priority	Payment Type	Account Type	Account Number	Amount Type	Amount	Currency	Update	Delete	
1	Deposit	Savings Account	246810	Monetary	50.00	US Dollar			
2	Deposit	Savings Account	135792	Percentage	10.0	US Dollar			
3	Deposit	Checking Account	00009875431		Remaining Pay	US Dollar			

Confirmation page **MUST BE RECEIVED** for add/change/delete to update your record. Do **NOT** exit the system without receiving a confirmation page or the system will abandon the change.

Changes to the **PRIORITY** order, **AMOUNT TYPE** or **AMOUNT** can be adjusted on this screen. Any changes to the account information must be changed using the **UPDATE** icon.

If the information is correct, select **Continue**.

**NOTE: Pay special attention to the information below the EMPLOYEE PAYMENTS box.**

Confirmation page **MUST BE RECEIVED** for add/change/delete to update your record. Do **NOT** exit the system without receiving a confirmation page or the system will abandon the change.

## UAB Self Service Applications Manage Direct Deposit Account (Add Deposit)

The **MANAGE DIRECT DEPOSIT ACCOUNT: REVIEW** screen shows all changes indicated by a blue dot.

Manage Direct Deposit Account: Review

Employee Name <b>Linda Smith</b>	Employee Number <b>1015971</b>
Organization Email Address <a href="mailto:workflow@uab.edu">workflow@uab.edu</a>	Business Group <b>11111111A UAB</b>

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Review your changes and, if needed, attach supporting documents.  
● Indicates Changed Items.

	Current	Proposed
Priority		1 <span style="color: blue;">●</span>
Payment Type		Deposit <span style="color: blue;">●</span>
Currency		US Dollar <span style="color: blue;">●</span>
Amount Type		Monetary <span style="color: blue;">●</span>
Amount		50 <span style="color: blue;">●</span>
Account Name		Smith, Linda <span style="color: blue;">●</span>
Account Type		Savings Account <span style="color: blue;">●</span>
Account Number		246810 <span style="color: blue;">●</span>
Transit Code		987654321 <span style="color: blue;">●</span>
Bank Name		AmSouth Bank <span style="color: blue;">●</span>
Bank Branch		Birmingham, AL <span style="color: blue;">●</span>

	Current	Proposed
Priority		2 <span style="color: blue;">●</span>
Payment Type		Deposit <span style="color: blue;">●</span>
Currency		US Dollar <span style="color: blue;">●</span>
Amount Type		Percentage <span style="color: blue;">●</span>
Amount		10 <span style="color: blue;">●</span>
Account Name		Smith, Linda <span style="color: blue;">●</span>
Account Type		Savings Account <span style="color: blue;">●</span>
Account Number		135792 <span style="color: blue;">●</span>
Transit Code		123456789 <span style="color: blue;">●</span>
Bank Name		Compass Bank <span style="color: blue;">●</span>
Bank Branch		Birmingham, AL <span style="color: blue;">●</span>

If the information is correct, select **Submit**.

The final page is **CONFIRMATION**. **NOTE: Until the confirmation notice is received, no changes have been saved.**

**Confirmation**

Your changes have been applied.

## UAB Self Service Applications Manage Direct Deposit Account (Add Deposit)

The system will automatically generate an email notification as well.

