Your Payroll Direct Deposit Information in *my*.SMU

To view/enter/update your direct deposit information, navigate in my.SMU to Employee Self Service home page > Payroll tile > Direct Deposit.

Your current banking information for payroll deposits will be displayed on the screen.

It is essential that you have accurate banking information to establish or update your direct deposit account record. Typically this information can be obtained by

a. Viewing your account information online within your bank's Web portal,
b. Contacting a customer service number for your financial institution, or
c. Visiting a local bank branch or office.

Direct deposit changes will be reflected on your next paycheck processed by SMU, as feasible – so, update your account information as soon as you know a change is needed.

- A general guideline (to ensure your changes are reflected on your next paycheck) is to have your direct deposit information updated in my.SMU by the "TIMEaccess & Elec.Extra Comp Approval Date" indicated on the Payroll Processing Schedule for the specific pay date.
- If a paycheck for you is being processed at the time you submit your changes, your changes may not be reflected until the following paycheck.

To **add** account information:

- Click the "**+**" (Add Account) button.
- Complete all required fields of data on the page (indicated with a * next to the field name).
  - Click the blue View check example icon to understand the essential bank account information used for direct deposit transactions (Routing Number and Account Number).
    - ➔ **Do not enter your debit card number as your deposit account number!**
- For **Account Type**, choose "Checking" or "Savings."
- For **Deposit Type**, designate one account to be the "**Remaining Balance**" type of account.
  - If you are only using one account for your Payroll direct deposit, it should be designated as your "Remaining Balance" account.
- Use the Amount or Percent field to allocate a *portion* of your net pay into an account with a Deposit Type of "Amount" or "Percent."
  - If you are also allocating part of your net pay to another checking or savings account, the "Remaining Balance" account is the one to which the rest of your paycheck is deposited after you send a specified amount of money to a savings account, etc.
- The Order value assigned to each account determines the order in which your net pay is allocated between multiple deposit accounts.
  - If you set up multiple accounts to distribute your net pay between more than one account, you can manage the order of how you want the accounts used for your deposit.
    - The Order #1 account will be the first to receive the designated amount or percentage.
    - The Order #2 account will be the second to receive the designated amount or percentage, etc.
  - The Remaining Balance account is "Last" since all other deposit allocations are met before that one.
  - Use the "Reorder" button on the summary page to change the priority of the Amount/Percent accounts.
- Click "Save" in the upper right corner of the pop-out window to save the new account information. (A message will briefly display at the top of the page, confirming you have successfully saved your direct deposit changes.)

To **change** existing account information:

- Click the row to be updated. A new window will pop open to display the fields populated with your current information.
- Update the field(s) as needed. Refer to account details provided by your financial institution to ensure the information you submit is valid.
  - Use the blue View check example icon on the page to understand the essential bank account information used for direct deposit transactions (Routing Number and Account Number).
- Click “Save” in the upper right corner of the pop-out window to save the new account information. (A message will briefly display at the top of the page, confirming you have successfully saved your direct deposit changes.)
- To abandon the changes you’ve made on the page, click “Cancel” in the upper left corner of the page *before clicking **Save***.
  ** Be sure to review all of your updated information before you close the Direct Deposit page in Self Service. **

To **delete** existing account information:

- Click the row to be deleted. A new window will pop open to display the fields populated with your current information.
- Click “Remove” to delete all of this account information.
- Click "Yes" to confirm the deletion, or "No" to return to the account details window.
- Review your updated direct deposit information to ensure that the correct account was deleted.

Caution about deleting accounts:

The order in which you make changes matters! Be sure to *add a new account* before *deleting the last row of existing account information*. If you delete all of your accounts with the intention of then adding new account information, you must wait until the next calendar day to make further changes to your direct deposit record. (See additional information below in *Submitting multiple changes*.)

Submitting multiple changes:

As long as you do not delete all of your accounts at once, you can add or edit your direct deposit account information in separate transactions on the same day. If you attempt to make additional changes, a message appears from the Direct Deposit page saying that multiple direct deposit changes are not allowed on the same day.

If you submit direct deposit information and realize that you need to make additional changes *after* you leave the Direct Deposit page in Self Service, you should be able to do so. However, during the final hours of every payroll processing window, the direct deposit pages are "locked" and you will need to return to my.SMU later/on the following day to submit the new or changed information--which will probably not be reflected on the paycheck we just processed for you.

For additional assistance, please contact the Payroll Help Desk (payroll@smu.edu or 214-768-2073).