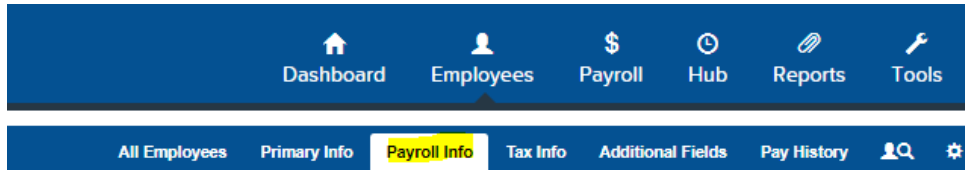


## Creating or Changing a Direct Deposit Account in PPX

On your PPX Dashboard, choose the Employees tab and then select the employee you need to update. Once you are on the employee's page, click the Payroll Info tab:



Scroll down to the bottom and you will see the Direct Deposit box. Click the Pencil icon to start editing:

A screenshot of the 'DIRECT DEPOSIT' form in edit mode. The title bar is dark blue with a pencil icon. The form is divided into two columns: 'First Account' and 'Second Account'. Fields include 'Account Type' (set to 'None'), 'Bank Routing #', 'Employee Acct. #', 'Split Method', 'Amount', and 'DD Status'. All input fields are currently empty or show placeholder text.

It should look like this:

A screenshot of the 'DIRECT DEPOSIT' form in view mode. The title bar is dark blue with checkmark and close icons. The form is divided into two columns: 'First Account' and 'Second Account'. Fields include 'Account Type' (set to 'None'), 'Bank Routing #' (set to 'Bank Routing #1' and 'Bank Routing #2'), 'Employee Acct. #', 'Split Method', 'Amount' (set to '\$0.00'), and 'DD Status'. All input fields are populated with data.

To start, you will want to make sure to choose Checking or Savings next to Account Type.

Next, you can enter in the bank routing number and the account number below it.

For the Split Method, there are two options you can choose:

The screenshot shows a 'DIRECT DEPOSIT' window with two columns: 'First Account' and 'Second Account'. The 'Split Method' dropdown menu is open, showing 'Percent Split' and 'Flat Split' options. The 'Amount' field for the first account is empty, and for the second account, it is '\$0.00'. Other fields include 'Account Type' (None), 'Bank Routing #' (123456789), and 'Employee Acct. #' (123456789000).

|                   | First Account | Second Account  |
|-------------------|---------------|-----------------|
| Account Type:     | None          | None            |
| Bank Routing #:   | 123456789     | Bank Routing #2 |
| Employee Acct. #: | 123456789000  |                 |
| Split Method:     | Percent Split |                 |
| Amount:           |               | \$0.00          |
| DD Status:        |               |                 |



- 1) Percent Split – Choose this option if the employee wants a percentage of their check or the entire check to go into that direct deposit account.
- 2) Flat Split – Choose this option if the employee wants a specific dollar amount to go into that direct deposit account.

Next, you can choose the amount for either the Percent Split or Flat Split. If the employee would like the entire check deposited to that account, you can enter 100 into the box and it will update to 100%:


The screenshot shows the same 'DIRECT DEPOSIT' window. The 'Split Method' is now 'Percent Split' and the 'Amount' field for the first account is updated to '100.00%'. The 'Amount' field for the second account remains '\$0.00'. Other fields are the same as in the previous screenshot.

|                   | First Account | Second Account  |
|-------------------|---------------|-----------------|
| Account Type:     | None          | None            |
| Bank Routing #:   | 123456789     | Bank Routing #2 |
| Employee Acct. #: | 123456789000  |                 |
| Split Method:     | Percent Split |                 |
| Amount:           | 100.00%       | \$0.00          |
| DD Status:        |               |                 |

The last step is to click the check mark to save the changes:

| DIRECT DEPOSIT   |               |                 |
|--|---------------|-----------------|
|  | First Account | Second Account  |
| Account Type:  | None          | None            |
| Bank Routing #:  | 123456789     | Bank Routing #2 |
| Employee Acct. #:  | 123456789000  |                 |
| Split Method:  | Percent Split |                 |
| Amount:  | 100.00%       | \$0.00          |
| DD Status:   |               |                 |

Please call or email your PPX Team to activate the new direct deposit and the Pre-Note will then change to Active. If this is left on Pre-Note, the employee will not receive the direct deposit and a printed check will be sent instead:

| DIRECT DEPOSIT  |               |                |
|--|---------------|----------------|
|  | First Account | Second Account |
| Account Type:  | Checking      | None           |
| Bank Routing #:  | 000000000     |                |
| Employee Acct. #:  | 123456789000  |                |
| Split Method:  | Percent Split |                |
| Amount:  | 100.00%       | \$0.00         |
| DD Status:   | Pre-Note      |                |

If you have more than one account to set up, follow the same directions. You will need to place the lowest amount account under the First Account and then the next highest in the Second Account, etc, up to four accounts:

On the last account, you will want to choose Percent Split, 100%, as you will want all remaining funds to go into that account:

| DIRECT DEPOSIT    |   | First Account                              | Second Account |
|-------------------|---|--|----------------|
| Account Type:     | <input type="text" value="Checking"/>     | <input type="text" value="Savings"/>       |                |
| Bank Routing #:   | <input type="text" value="000000000"/>    | <input type="text" value="000000000"/>     |                |
| Employee Acct. #: | <input type="text" value="123456789000"/> | <input type="text" value="321654987000"/>  |                |
| Split Method:     | <input type="text" value="Flat Split"/>   | <input type="text" value="Percent Split"/> |                |
| Amount:           | <input type="text" value="\$250.00"/>     | <input type="text" value="100.00%"/>       |                |
| DD Status:        | <input type="text" value="Pre-Note"/>     |  |                |

Note: Please make sure to set up the accounts in order. **If you set up a single direct deposit account in the Fourth Account column, it will not work.** If there is one direct deposit account it should go under First Account, two accounts should go under First Account then Second Account, etc.