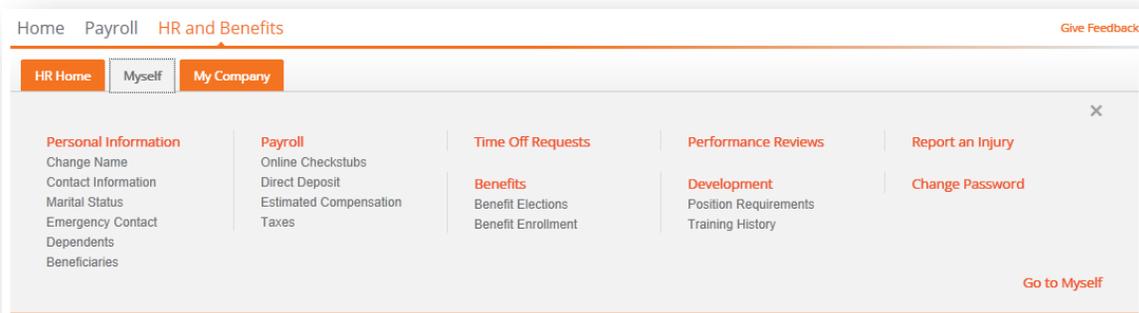


Updating Your Payroll Information

The “Myself” menu has various options to help you verify that your payroll information is current: Online Checkstubs, Direct Deposit, Estimated Compensation, and Taxes.

Most changes initiate a workflow, which is an automated process that notifies managers and HR Department staff of changes and that may require them to approve the change. You can check on the status of the changes you make at any time.

Instructions for each option that allows you to add or update information, as well as check on the status of the changes you make follow.



*** Your options may differ from the image above based on your menu access.**

This job aid covers the following topics:

- Adding a new Direct Deposit account
- Editing an existing Direct Deposit account
- Setting up a new Net Direct Deposit account
- Editing your Tax Withholding Information

Adding a new Direct Deposit account

Employee users will be able to add direct deposit accounts if the configuration option is enabled.

Prerequisites

You will need menu access to the following pages:

- Myself > Payroll > Direct Deposits

- 1 Navigate to **Myself > Payroll > Direct Deposits**.
- 2 Click **Add Account**.
- 3 Select whether the account will contain some of your pay (i.e. a “partial” direct deposit) or all remaining pay following any other direct deposits (i.e. a “net” direct deposit). Then click **Continue**.

Note: If this is the first Direct Deposit account being added to the employee, you will want to select “All remaining pay” to ensure all funds get distributed.

- 4 Select whether the account is a checking or a savings account. Then click **Continue**.
- 5 Update all fields on the page.

Fields you can update	Definition
Routing Number / Confirm Routing Number	9-digit routing/transit number for the financial institution to which Paycor will send the direct deposit; these fields must match <hr/> <p>After entering the routing number, the bank name will automatically populate in the Bank Name field. If this information is incorrect, contact your consultant.</p>
Account Number / Confirm Account Number	Multiple digit account number; these fields must match
Deposit Type	Based on how the account was added (“some of my pay” versus “all remaining pay”); if “some of my pay” was selected, this can be set to a flat dollar amount or a percentage of pay

- 6 Check the authorization checkbox.
- 7 Click **Save** to save your changes and initiate a workflow or click **Cancel** to discard your changes and return direct deposit accounts page.
- 8 You can review or cancel any add or edit account requests you’ve initiated by clicking on the row to open that direct deposit account change.

Note: The HR application will choose the next available direct deposit deduction code to use for the account you add based on your specific payroll client setup and configuration rules (explained on pages 1-4 above).

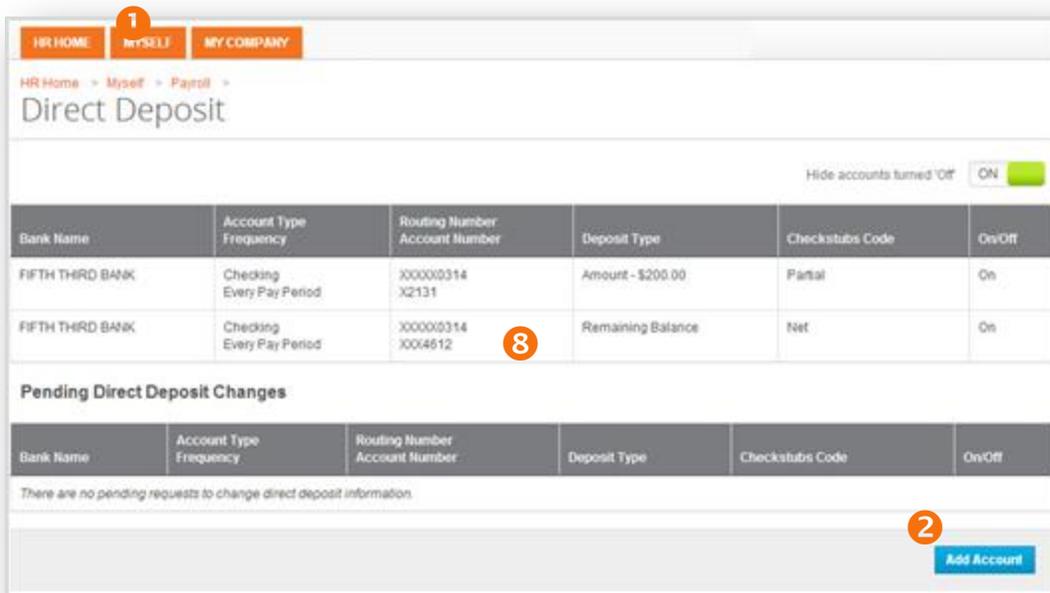


Figure 1. Adding a new direct deposit account

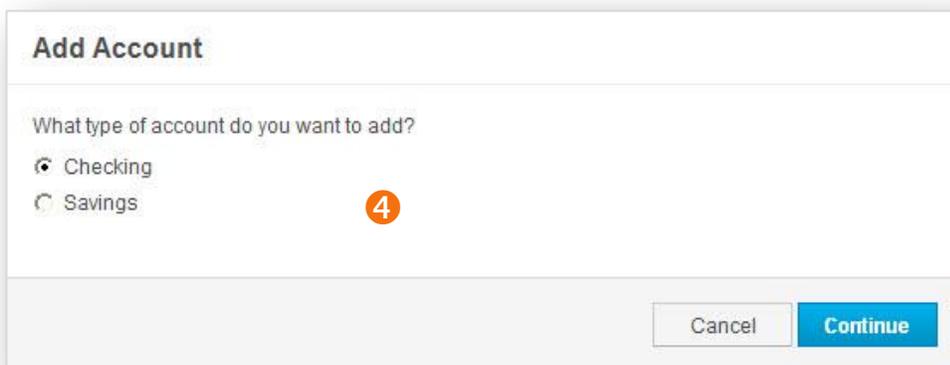
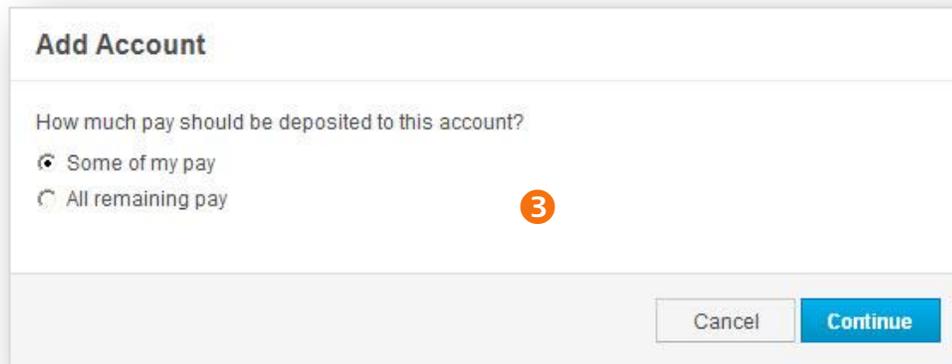


Figure 2. Selecting the amount of pay and type of account

The screenshot shows the 'Direct Deposit' form in the Paycor system. At the top, there are navigation tabs for 'HR HOME', 'MYSELF', and 'MY COMPANY'. Below these, the breadcrumb trail reads 'HR Home > Myself > Payroll > Direct Deposit'. A warning message states: 'Carefully enter your Routing and Account numbers to ensure the account is funded correctly. If approved, your changes may take up to two pay periods to become effective.'

The form contains the following fields and options:

- On/Off***: A dropdown menu set to 'On'.
- Account Type***: A dropdown menu set to 'Checking'.
- Routing Number***: A text input field containing '051504665'.
- Confirm Routing Number***: A text input field containing '051504665'.
- Bank Name***: A text input field containing 'FIFTH THIRD BANK'.
- Account Number***: A text input field containing '99999787801'.
- Confirm Account Number***: A text input field containing '99999787801'.
- Deposit Type***: Radio buttons for 'Remaining Balance', 'Amount' (selected), and 'Percent'. The 'Amount' option has a text input field containing '\$ 150.00'.
- Authorization**: A checkbox (checked) with the text: 'I authorize Paycor, Inc., acting on behalf of my employer, to initiate electronic credit entries and, if necessary, debit entries to reverse erroneous credit entries to my account (s). It is agreed that these deposits will be made in accordance with the rules of the National Automated Clearing House Association (NACHA).'.

On the right side of the form, there is a preview of a check. The check includes fields for 'Your Name', 'Your Address', 'DATE', 'PAY TO THE ORDER OF', 'DOLLARS', 'Your Bank Name', and 'MEMO'. The check number is '1001'. Below the check preview, the routing and account numbers are shown: '132456789' (labeled '9 Digit Routing Number') and '0000987654321' (labeled 'Account Number'), with '1001' as the check number.

Callouts are present: a '5' in a blue circle is positioned near the routing and account number fields; a '6' in a blue circle is positioned near the authorization checkbox; and a '7' in a blue circle is positioned near the 'Save' button.

At the bottom right, there are 'Cancel' and 'Save' buttons.

Figure 3. Details to complete before adding a direct deposit account

Editing an existing Direct Deposit account

Employee users will be able to update direct deposit account details if the configuration option is enabled.

Prerequisites

You will need menu access to the following pages:

- Myself > Payroll > Direct Deposits

- 1 Navigate to **Myself > Payroll > Direct Deposits**.
- 2 Click on a row to open that direct deposit account.
- 3 Update any fields on the page.

Fields you can update	Definition
On/Off	Starts (if turned “On”) or stops (if turned “Off”) this direct deposit from occurring.
Routing Number / Confirm Routing Number	9-digit routing/transit number for the financial institution to which Paycor will send the direct deposit; these fields must match After entering the routing number, the bank name will automatically populate in the Bank Name field. If this information is incorrect, contact your consultant.
Account Number / Confirm Account Number	Multiple digit account number; these fields must match
Deposit Type	Based on how the account was added (“some of my pay” versus “all remaining pay”); if “some of my pay” was selected, this can be set to a flat dollar amount or a percentage of pay

Note: You cannot change the percentage on a partial direct deposit to 100%.
Following the instructions for setting up a new Net Direct Deposit.

- 4 Check the authorization checkbox.
- 5 Click **Save** to save your changes and initiate a workflow or click **Cancel** to discard your changes and return direct deposit accounts page.
- 6 You can review or cancel any add or edit account requests you’ve initiated by clicking on the row to open that direct deposit account change.

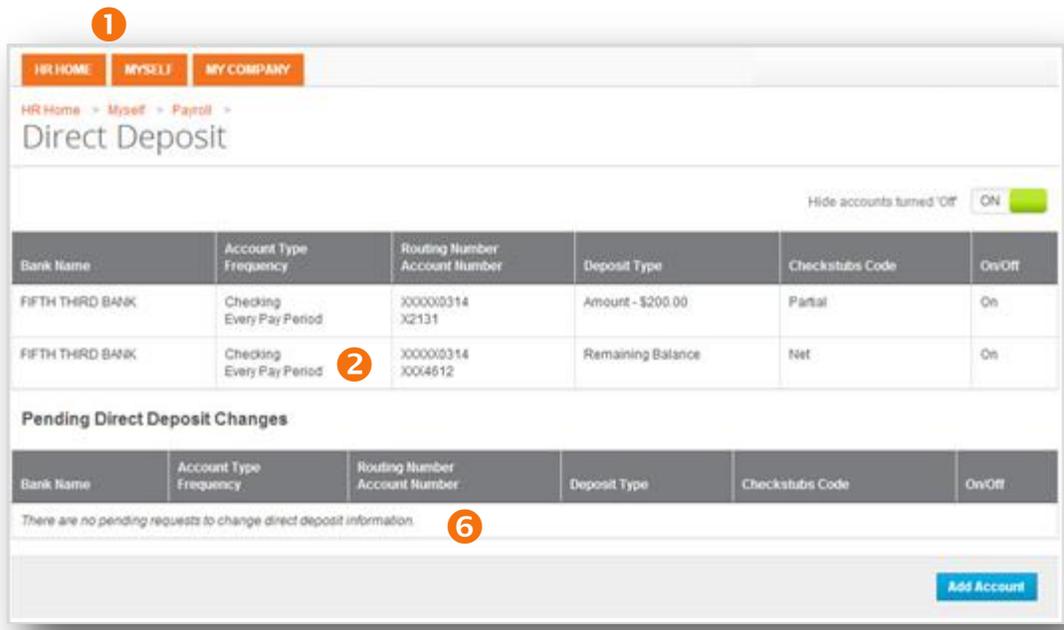


Figure 1. Editing an existing direct deposit account

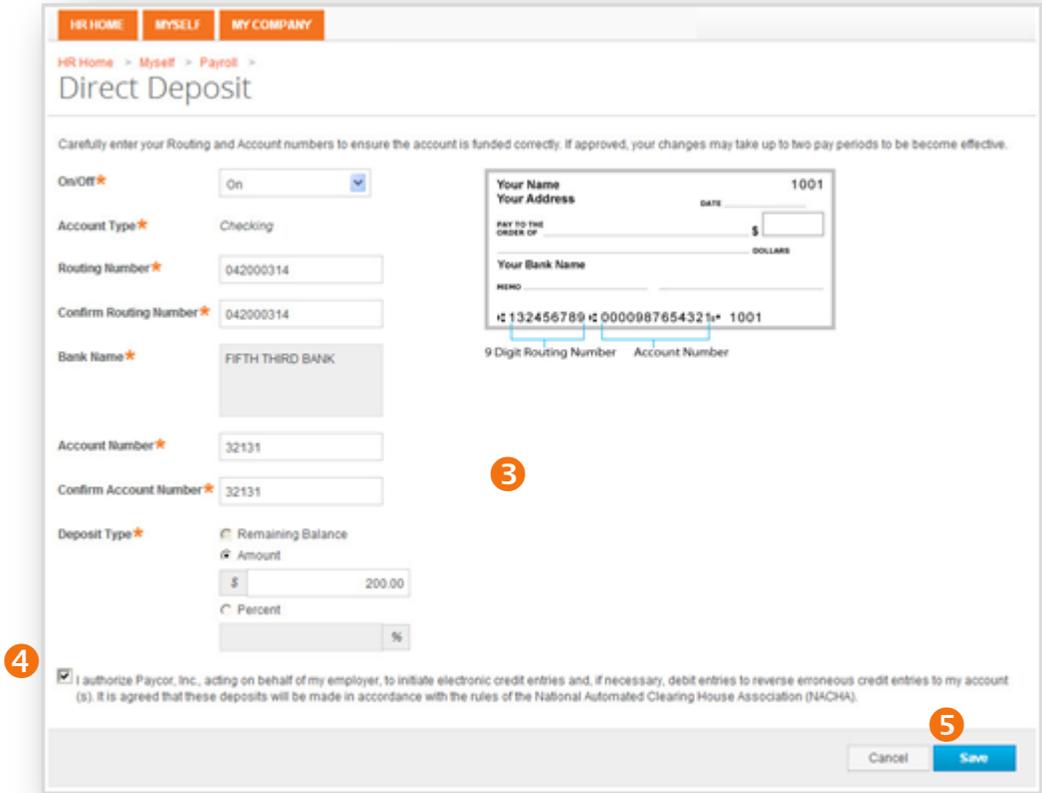


Figure 2. Ready to edit the direct deposit account

Setting up a new Net Direct Deposit account

Employee users will be able to add direct deposit accounts if the configuration option is enabled.

You may only have 1 Direct Deposit account set to receive “all remaining pay”. If you have already set up a Net Direct Deposit account, and would like to change it, then you must do the following.

Prerequisites

You will need menu access to the following pages:

- Myself > Payroll > Direct Deposits

- 1 Navigate to **Myself > Payroll > Direct Deposits**.
- 2 Click on the existing (now old) Net direct deposit account to open it.
- 3 Change the **On/Off** dropdown to “Off”. Then click **Save**.
- 4 Now click **Add Account**, because a new account must be set up in order to have a Net direct deposit account.
- 5 On the **Add Account** screen, select “All remaining pay” (i.e. a “net” direct deposit). Then click **Continue**.
- 6 Select whether the account is a checking or a savings account. Then click **Continue**.
- 7 Update all fields on the page.

Fields you can update	Definition
Routing Number / Confirm Routing Number	9-digit routing/transit number for the financial institution to which Paycor will send the direct deposit; these fields must match <hr/> After entering the routing number, the bank name will automatically populate in the Bank Name field. If this information is incorrect, contact your consultant.
Account Number / Confirm Account Number	Multiple digit account number; these fields must match
Deposit Type	Keep this set at Remaining Balance .

- 8 Check the authorization checkbox.
- 9 Click **Save** to save your changes and initiate a workflow or click **Cancel** to discard your changes and return direct deposit accounts page.
- 10 You can review or cancel any add or edit account requests you’ve initiated by clicking on the row to open that direct deposit account change.

Editing your Tax Withholding Information

Employee users will be able to update their tax withholding information details if the configuration option is enabled.

Prerequisites

You will need menu access to the following pages:

- Myself > Payroll > Taxes

1 Navigate to **Myself > Payroll > Taxes**.

2 Click on a row to open that Tax Type.

3 Update any necessary fields on the page.

Fields you can update	Definition
Filing Status	Options include "Married" or "Single".
Exemptions	Insert a numeric value. Withholding allowances reduce the amount of taxes that are withheld.
Adjust WH	Options include "No" or "Add to withholding".
Add Amount	Is activated if Adjust WH is set at "Add to withholding": you may add a dollar value of any extra that you would like to be taken out of your paycheck.
Add Percent	Is activated if Adjust WH is set at "Add to withholding": you may add a percentage of any extra that you would like to be taken out of your paycheck.

4 Check the authorization checkbox.

5 Click **Save** to save your changes and initiate a workflow or click **Cancel** to discard your changes and return Taxes page.

6 You can review or cancel any account requests you've initiated by clicking on the row to open that tax type change.

HR Home | Myself | My Company

HR Home > Myself > Payroll >

Taxes

Tax Withholding Information

Calculate?	Tax Type	Tax Code	Reciprocity	Filing Status	Exemptions	Amount	Percent
On	Federal	FITWH	Live In	Married	0		
On	State	IN	Live In	Married	0		

Pending Tax Withholding Information

Calculate?	Tax Type	Tax Code	Reciprocity	Filing Status	Exemptions	Amount	Percent
There are no pending requests to change tax withholding information.							

Figure 1. Editing a tax type

HR Home | Myself | My Company

HR Home > Myself > Payroll >

Taxes

Whether you are entitled to claim your tax withholding below or exemption from withholding is subject to review by your employer and the IRS.

Calculate Tax On *If the Last Name below differs from that shown on your social security card, check here:*

Tax Type Federal Patterson (Box 4 on Form W4)

Tax Code FITWH *I claim exemption from withholding, and I certify that I meet both of the following conditions for exemption:*

- Last year I had a right to a refund of all federal income tax withheld because I had no tax liability and
- This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.

Reciprocity Live In *To claim exemption from withholding, check here:*

Filing Status Married Claiming 'Exempt' (Box 7 on Form W4)

Exemptions* 0 (Box 5 on Form W4)

Adjust WH Add to withholding

Add Amount 25.00 (Calculates Box 6 on Form W4)

Add Percent

I affirm I am truly Michele Patterson

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Cancel Save

Figure 2. Ready to edit the tax type