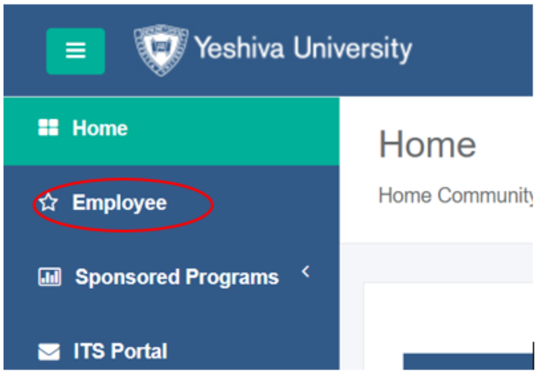
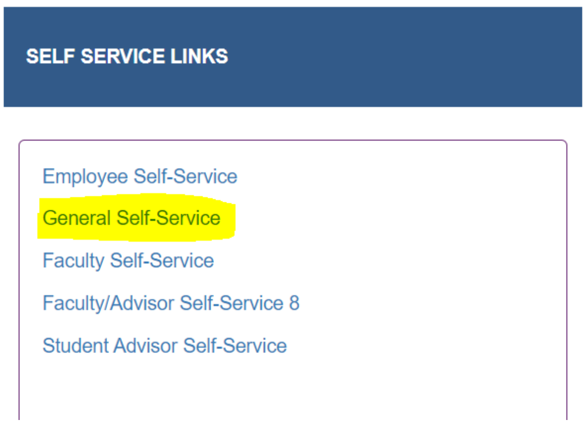
Direct Deposit Self-Service Instructions for Payroll

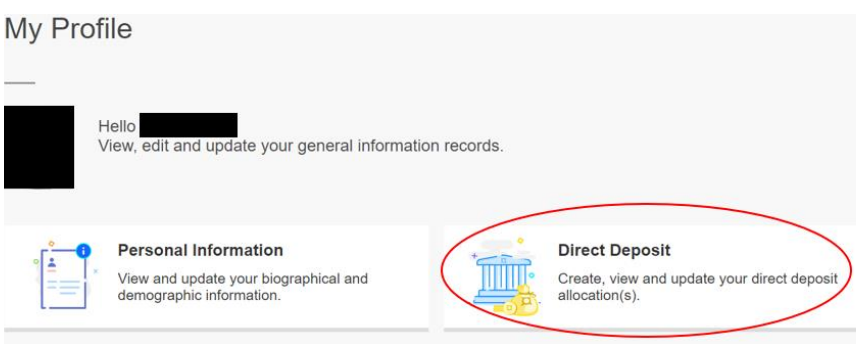
STEP 1: Log into InsideTrack https://insidetrack.oci.yu.edu and then click on the **Employee (tab)** on the top left menu.



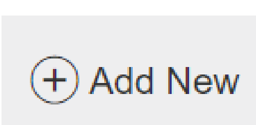
STEP 2: Scroll to **Self-Service Links (Banner)** (top right of page) and then click on the "**General Self-Service**" hyperlink.

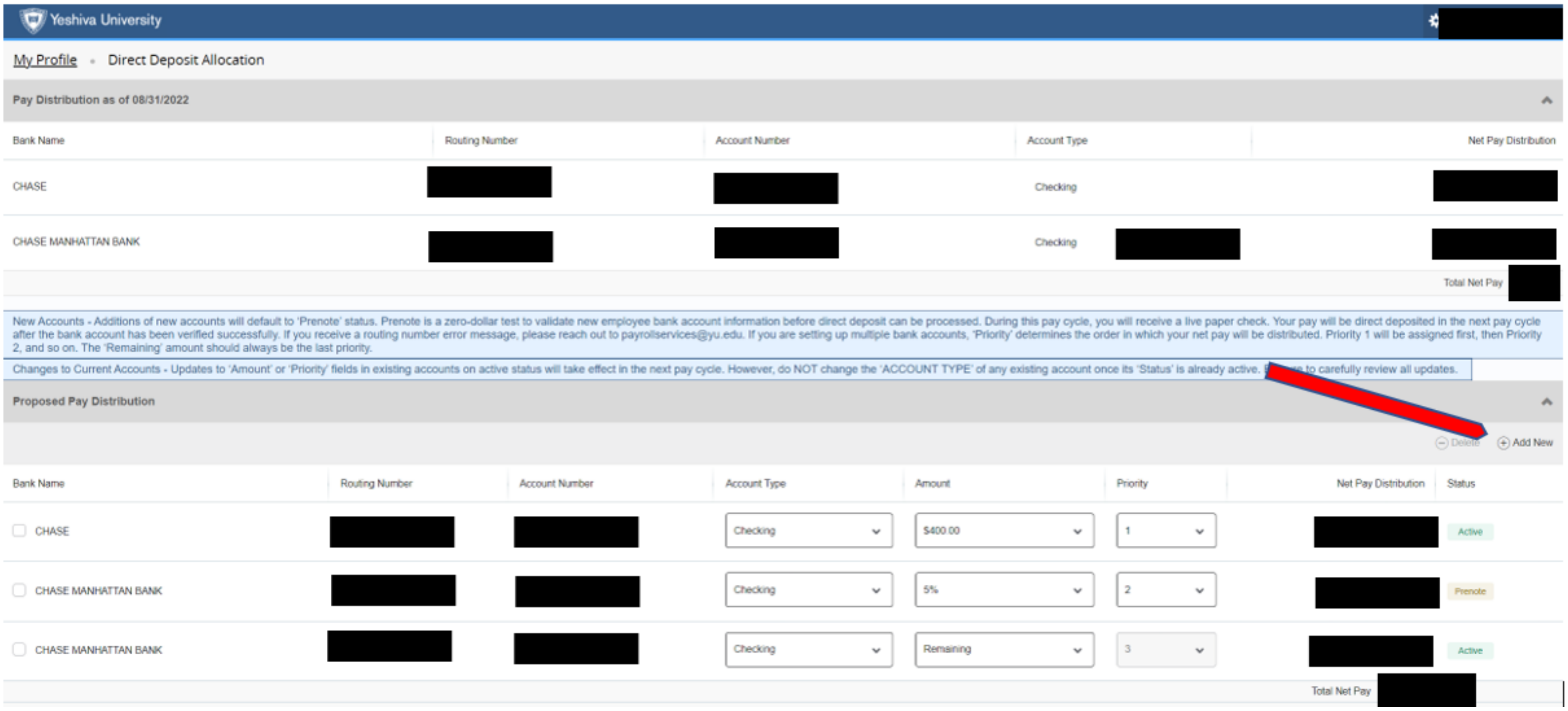


STEP 3: Select **Direct Deposit**.

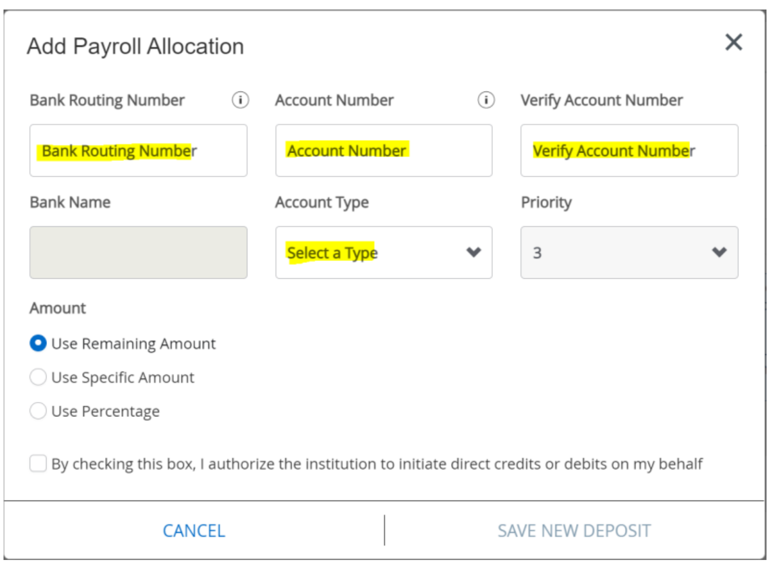


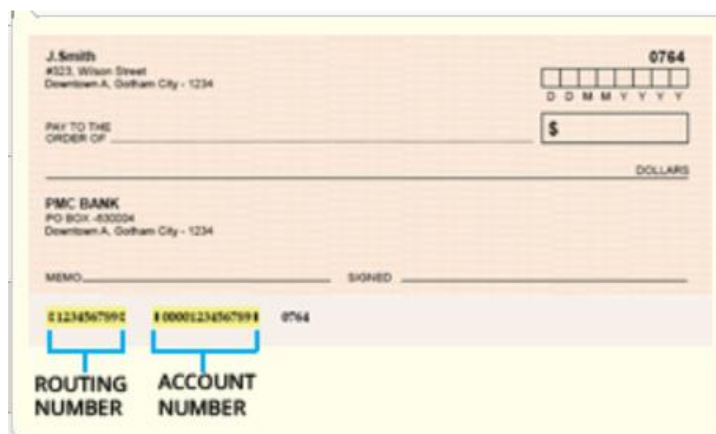
STEP 4: On the upper part of the Direct Deposit Allocation page is the current **Pay Distribution** set-up. This section would have your existing bank account(s), if any. Right under that section is the **Proposed Pay Distribution** section. Click "Add New".





STEP 5: Input the requested information *carefully*. The **Bank Routing Number** is always 9 digits and is typically on the bottom-left of your check. The **Account Number** is usually right after the routing number (see check sample). Do NOT include the check number (which matches the number on the top-right of the check).



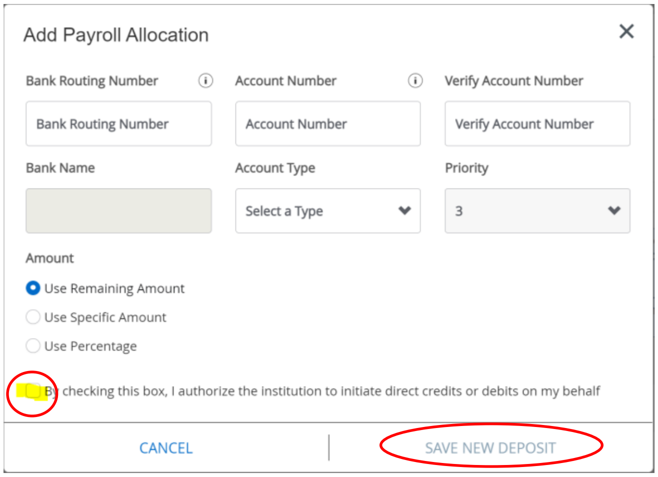


Set-up Notes:

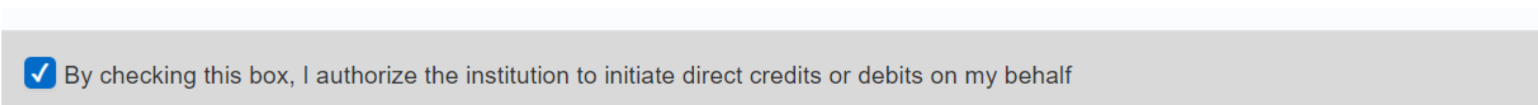
1. If enrolling multiple accounts for direct deposit:
   a. **Priority** determines which accounts will go first. Priority 1 will take first priority, Priority 2 will get 2nd priority, and so on. For example, if Priority 1 is 100%, then the other accounts will not receive anything. The **Remaining** amount should always be the last priority and will receive the remainder of the net pay after all other preceding accounts have been satisfied.
   b. If using percentages that do NOT add up to 100%, or if using specific dollar $ amounts without an accompanying **Remaining** bank account, you will receive a live check for the remainder. *Please ensure you always have a* ***Remaining*** *account in place.*

2. If you get an error message when inputting your **Routing Number**, reach out to payrollservices@yu.edu so that the routing number can be established in the system's bank validation table.
3. You must give your account the proper **Account Type** of "Checking" or "Savings." Failure to do so may result in your direct deposit enrollment being rejected or delayed.

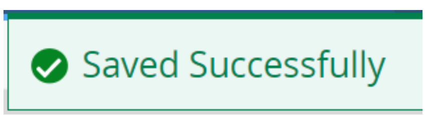
STEP 6: Once you are done, check the Authorization box and then click on **Save New Deposit** to finish adding your account.



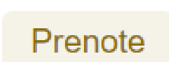
STEP 6: If you are making changes to existing accounts, be sure to check off the authorization box in the bottom of the page and select **Save Changes**.



A "Saved Successfully" message will pop on the upper right section of the page.



Once you have saved all entries, double-check and confirm that the bank account set-ups are accurate and the net pay allocations are as desired.



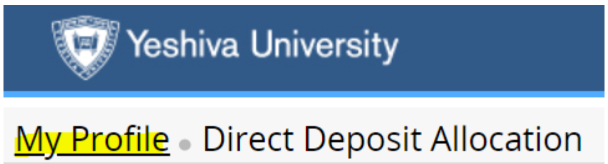
- **Prenote:** Additions of new accounts will default to "Prenote" status. Prenote is a zero-dollar test to validate new employee bank account information before direct deposit can be processed. During this pay cycle, you will receive a live paper check. Your pay will be direct deposited in the next pay cycle after the bank account has been verified successfully.

- **Active:** Changes to existing accounts with Active status will take effect in the next pay cycle.

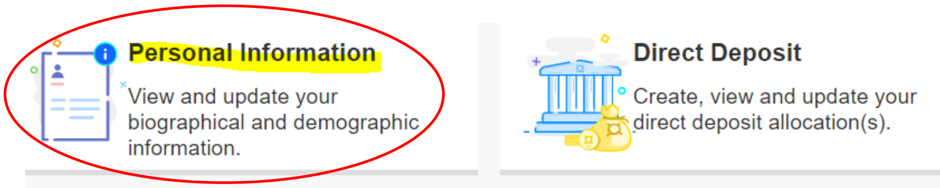
- Updates to **<u>Amount</u>** or **<u>Priority</u>** fields in existing accounts on Active status will take effect in the next pay cycle.
- DO NOT change the **<u>Account Type</u>** of any existing account once its “Status” is already Active.

Check Mailing Address

To ensure that you receive your check while your direct deposit is still on prenote status, confirm that your W2/Payroll mailing address on record is fully accurate, includes an apartment or room # (if applicable), and is within the U.S. To check your W2/Payroll address, click on “My Profile” on the upper left corner of the Direct Deposit Allocation page.



This will bring you back to the home page of **General Self-Service**. Click on **Personal Information**.



Go down to the **Address** section and update the **W2/Payroll Address**, if necessary. *This is the address where your paycheck will be delivered.*