## Purpose:
The purpose of this job aid is to provide you with the steps to add, edit or inactivate your direct deposit information.

<table>
<thead>
<tr>
<th>STEP</th>
<th>ACTION</th>
<th>RESULT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Direct Deposit</td>
<td>1. Navigate to myColumbia portal @ <a href="https://my.columbia.edu">https://my.columbia.edu</a>. &lt;br&gt;2. Click &quot;Log in Now&quot;. &lt;br&gt;3. Log in with your UNI and Password. &lt;br&gt;4. Click on the &quot;Faculty &amp; Staff&quot; tab. &lt;br&gt;5. Click &quot;View Your Direct Deposit Information&quot; within the Self-Service section.</td>
<td>You accessed Direct Deposit within Self Service in PAC.</td>
</tr>
</tbody>
</table>

**myColumbia Portal PAC Links**
1. Click the "Add Account" box to add your bank information.

**Direct Deposit**

**Add Direct Deposit**

Your Bank Information

Routing Number: [EditText]

[View check example]

Distribution Instructions

Account Number: [EditText] Confirm Account: [EditText]

*Account Type: [EditText]

Deposit Type: [EditText]

Amount or Percent: [EditText]

Deposit Order: [EditText] (example: 1 = first account processed)

OK

Return to Direct Deposit

* Required Field
<table>
<thead>
<tr>
<th>STEP . . .</th>
<th>ACTION . . .</th>
<th>RESULT . . .</th>
</tr>
</thead>
</table>
| 2.        | Enter the **routing number of your bank**. The bank’s routing number is at the bottom of your check.  
  a. If you are depositing into a savings account, please contact your bank for its routing number. | ![Check Example](image)  
**Routing Number:** [Input Field]  
[View check example] |
| 3.        | Enter your **Account Number** twice. | ![Distribution Instructions](image)  
**Account Number:** [Input Field]  
**Confirm Account:** [Input Field] |
| 4.        | Select the **Account Type** (type of bank account) from the drop down box. | ![Select Account Type](image)  
**Account Type:** [Dropdown]  
**Deposit Type:** [Dropdown]  
[Checking, Savings] |
### Direct Deposit Job Aid March 2012

#### Step 5

Select the **Deposit Type**.
- Use a deposit type of **“Percent”** when indicating a percent to deposit.
- Use a deposit type of **“Balance” only** if depositing into two accounts where an “amount” is used for the 1st account and the “balance” is used for the 2nd account.

<table>
<thead>
<tr>
<th>Deposit Type:</th>
<th>Amount or Percent:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Balance</td>
</tr>
<tr>
<td></td>
<td>Percent</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Deposit Order:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(example: 1 = first account processed)</td>
</tr>
</tbody>
</table>

#### Step 6

Enter the **amount or percent** of your deposit.

| Amount/Percent: |
|----------------|-----------------|

#### Step 7

Enter the **Deposit Order**.
- If depositing into two accounts, designate one of the accounts as the first account to have money deposited into, and the other account as the second account to have money deposited into.

#### Step 8

Review your information and click **OK** when entry is complete.

---

**Your Bank Information**

**Routing Number:** 241000088

**Account Number:** 123456789

**Deposit Order:** 1 (example: 1 = first account processed)
You will then be at the confirmation page.

9. Click “Save”. The system will confirm that your information has been saved successfully.

10. Click the yellow OK box.
    a. A message will also be sent to your Columbia email verifying that you have added, edited or deleted bank information to your direct deposit record.

11. Review your information and if a correction is needed, click the “Edit” box.
12. To add a second direct deposit account, click “Add Account” and enter the information for the 2nd account.

You successfully entered your direct deposit information.
Direct Deposit

**View Your Direct Deposit Information / Sign Out**

1. To view your direct deposit information, click on “Direct Deposit” within the “Payroll and Compensation” menu.
2. To sign out of Self Service, click “Sign Out” in the upper right hand corner.

**Result:** You viewed your direct deposit information and signed out of Self Service.

**To Change Existing Direct Deposit Information – Access Direct Deposit**

1. Navigate to myColumbia portal @ [https://my.columbia.edu](https://my.columbia.edu).
2. Click “Log in Now”.
3. Log in with your UNI and Password.
4. Click on the “Faculty & Staff” tab.
5. Click “View Your Direct Deposit Information” within the Self-Service section.
   a. Once you click on “View Your Direct Deposit Information” link, your Direct Deposit data record in PAC appears.
6. Click the “Edit” box to edit your deposit and/or bank information.
7. Click the “Delete” box to remove your deposit and/or bank information.
8. Make any necessary changes to the information.
9. Review your changes.
10. Click “OK”.

**Direct Deposit**

Babs Bunny

**Direct Deposit Detail**

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Routing Number</th>
<th>Account Number</th>
<th>Deposit Type</th>
<th>Amount/Pct</th>
<th>Deposit Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking</td>
<td>021000008</td>
<td>123456789</td>
<td>Percent</td>
<td>100%</td>
<td>1</td>
</tr>
</tbody>
</table>

**Add Direct Deposit**

Babs Bunny

**Your Bank Information**

Routing Number: 021027723

**Distribution Information**

Account Number: 9999999999

Amount or Percent:

Deposit Order: 1

**Result:** You viewed your direct deposit information and signed out of Self Service.

**To Change Existing Direct Deposit Information – Access Direct Deposit**

1. Navigate to myColumbia portal @ [https://my.columbia.edu](https://my.columbia.edu).
2. Click “Log in Now”.
3. Log in with your UNI and Password.
4. Click on the “Faculty & Staff” tab.
5. Click “View Your Direct Deposit Information” within the Self-Service section.
   a. Once you click on “View Your Direct Deposit Information” link, your Direct Deposit data record in PAC appears.
6. Click the “Edit” box to edit your deposit and/or bank information.
7. Click the “Delete” box to remove your deposit and/or bank information.
8. Make any necessary changes to the information.
9. Review your changes.
10. Click “OK”.

**Direct Deposit**

Babs Bunny

**Direct Deposit Detail**

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Routing Number</th>
<th>Account Number</th>
<th>Deposit Type</th>
<th>Amount/Pct</th>
<th>Deposit Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking</td>
<td>021000008</td>
<td>123456789</td>
<td>Percent</td>
<td>100%</td>
<td>1</td>
</tr>
</tbody>
</table>

**Add Direct Deposit**

Babs Bunny

**Your Bank Information**

Routing Number: 021027723

**Distribution Information**

Account Number: 9999999999

Amount or Percent:

Deposit Order: 1

**Result:** You viewed your direct deposit information and signed out of Self Service.
<table>
<thead>
<tr>
<th>STEP . . . Confirm the Change(s)</th>
<th>ACTION . . . You are now at the confirmation page. 11. Review your information and if you need to make a correction, click &quot;Edit&quot;. 12. If all information is correct, are you not making additional changes, click “Save”.</th>
<th>RESULT . . . The system will confirm that your information has been saved successfully. 13. Click the OK box.  a. A message will also be sent to your Columbia email verifying that you have added, edited or deleted bank information to your direct deposit record.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>You successfully changed your direct deposit information.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You viewed your direct deposit information and signed out of Self Service.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For assistance or if you have any questions, please submit the question through the HRPC Helpdesk via the inquiry form (<a href="http://hr.columbia.edu/hrpc-inquiry-form">http://hr.columbia.edu/hrpc-inquiry-form</a>) or contact the HRPC Help Desk at 212-851-2888 Monday – Friday from 9 am – 4 pm.</td>
</tr>
</tbody>
</table>

### Direct Deposit

**Babs Bunny**

Review, add or update your direct deposit information.

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Routing Number</th>
<th>Account Number</th>
<th>Deposit Type</th>
<th>Amount</th>
<th>#</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking</td>
<td>021000000</td>
<td>123456789</td>
<td>Amount</td>
<td>$500</td>
<td>1</td>
<td>Edit</td>
<td>Delete</td>
</tr>
<tr>
<td>Savings</td>
<td>9999999999</td>
<td>123456789</td>
<td>Balance</td>
<td></td>
<td>2</td>
<td>Edit</td>
<td>Delete</td>
</tr>
</tbody>
</table>

You must hit the SAVE button in order for any changes to take effect.

### View Your Direct Deposit Information / Sign Out

1. To view your direct deposit information, click on “Direct Deposit” within the “Payroll and Compensation” menu.
2. To sign out of Self Service, click “Sign Out” in the upper right hand corner.

---

**PAC EST 6/4**

**Self Service**

- **Payroll and Compensation**: Review your pay and compensation record. Update your direct deposit and other deduction or contribution information.
- **Personal Information**: Update your personal information.
- **Loan and Housing**: Access loan and housing information.
- **Continuing Education**: Access continuing education information.
- **Travel and Expenses**: Access travel and expense information.
- **Other Information**: Access other information.

---

**For assistance or if you have any questions, please submit the question through the HRPC Helpdesk via the inquiry form ([http://hr.columbia.edu/hrpc-inquiry-form](http://hr.columbia.edu/hrpc-inquiry-form)) or contact the HRPC Help Desk at 212-851-2888 Monday – Friday from 9 am – 4 pm.**