


Manage Direct Deposit in Mobile App

On the Paylocity Mobile App, users can add bank accounts for direct deposit allocation, set direct deposit allocation rules, and remove bank accounts.



Add Bank Account

To add a bank account for Direct Deposit:

1. Log In to the Paylocity Mobile App.
2. Navigate to My Profile.
3. Select **Direct Deposit** within the **Private** section.
4. Select .
5. Authenticate.
6. Select **Add Bank Account** if no account is already set up, or select **Add Account** if an account is already set up.
7. Complete the following fields for the first account:
 - **Account Nickname**
 - **Name on Account**
 - **Account Type**
 - **Routing Number**
 - **Account Number**
 - **Retype Account Number**
8. Complete the following fields for any additional accounts:
 - **Account Nickname**
 - **Name on Account**
 - **Account Type**
 - **Routing Number**
 - **Account Number**
 - **Retype Account Number**
 - **Allocation Type**
 - **Amount (\$)**
9. Select **Next**.
10. **Edit the Direct Deposit Setup** to make allocation changes.
11. Select **Save**.

Edit Direct Deposit Account Setup

to edit the account allocation rules for Direct Deposit:

1. Log In to the Paylocity Mobile App.
2. Navigate to My Profile.
3. Select **Direct Deposit** within the **Private** section.
4. Select .
5. Authenticate.
6. Select  **Edit Setup** for **Direct Deposit**.
7. Review the Accounts to ensure all expected accounts can receive direct deposit funds.
 - If an expected **Account** is missing, add it using the **Add From Account List** option.
 - If the expected **Account** is missing from the **Add From Account List** option, add it using the **Add Bank Account** steps above.
8. For each account:
 - A. Select the **Type**:
 - **Flat Amount**: This type deposits the defined **Amount** into the account.

- **Percentage:** This type allocates the designated percentage in the **Amount** field to the account.
- **Remaining Balance:** This type designates that the account should receive any remaining funds after all other accounts are funded.



B. Enter the **Amount** if applicable.

- For the **Flat** type, enter the dollar amount.
- For the **Percentage** type, enter the percentage as a number between 0.01 and 100.

9. Select **Save**.

Remove Bank Account

To delete a bank account:

1. Log In to the Paylocity Mobile App.
2. Navigate to My Profile.
3. Select **Direct Deposit** within the **Private** section.
4. Select .
5. Authenticate.
6. Under **Bank Accounts**, select the  for the account to delete.
7. Select **Delete** to confirm that the account should be removed.

You can view this article at:

<https://paylocity.egain.cloud/system/templates/selfservice/pctycss/help/customer/locale/en-US/portal/30860000001009/content-version/PCTY-105754/PCTY-148859/Manage-Direct-Deposit-in-Mobile-App?query=direct%20deposit%20edit>