



Adding Direct Deposit Information in Paylocity

GrapeTree Payroll

Paylocity is the application you will use to manage your GrapeTree pay stubs and tax forms. You will be paid weekly via direct deposit into the account(s) you have set up in Paylocity. In this document, we will walk you through the steps to add one or multiple direct deposit accounts.

Use a Web Browser, Not the App

To add direct deposit information, you will need to use the website version of Paylocity, not the mobile app. This can be done from your mobile device, or on a computer. We will walk through the steps from a mobile device view in this document.



Paylocity App



Safari

CAUTION: To avoid issues, please note the special instructions on step 12 of this guide for Safari users.



Chrome



Firefox



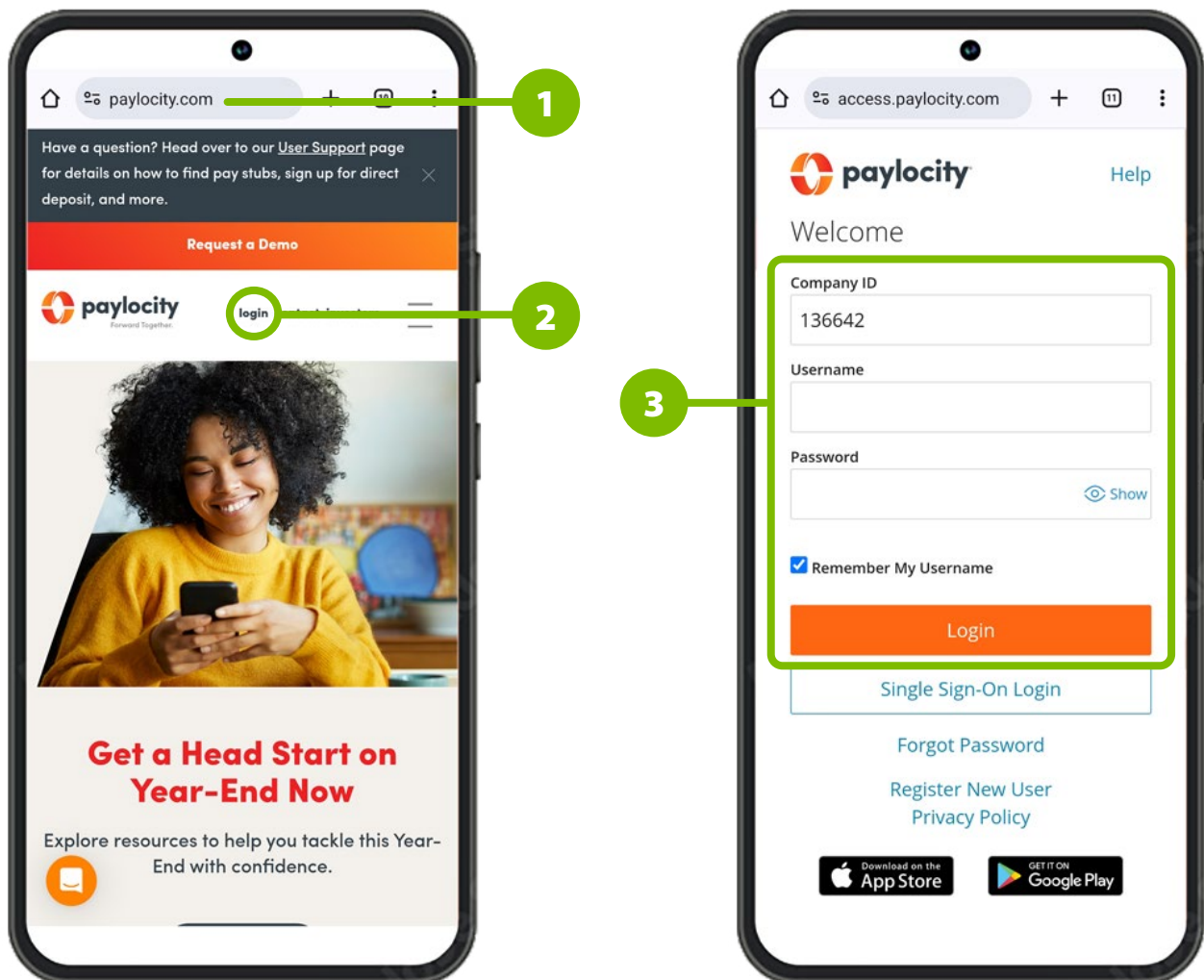
Samsung Internet



Microsoft Edge

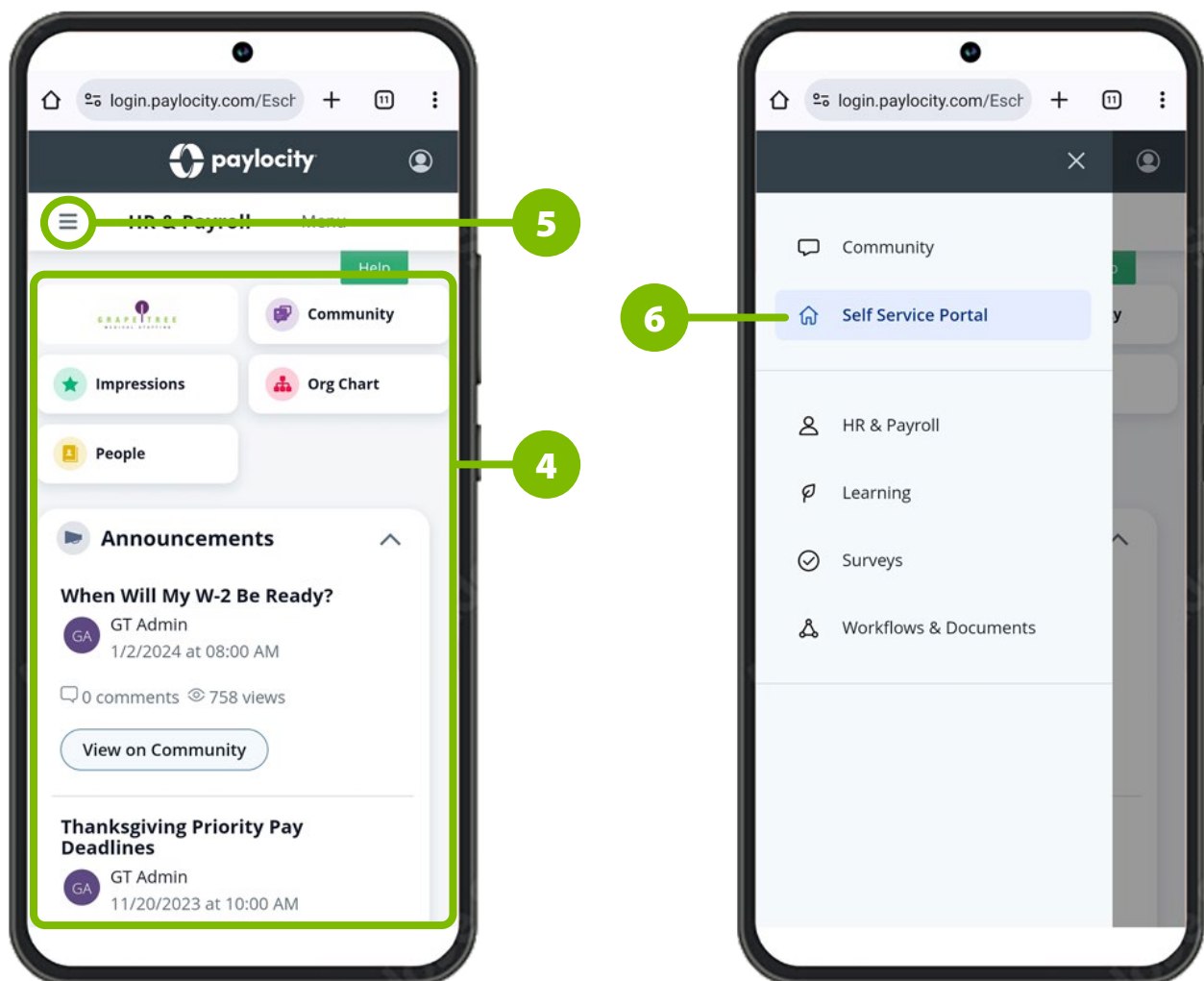
Add Direct Deposit Information in Paylocity

1. Open a web browser, type “paylocity.com” in the search bar, and navigate to the website.
2. Tap “login” on the Paylocity home screen.
3. Log in to Paylocity with your credentials. The Company ID is 136642.



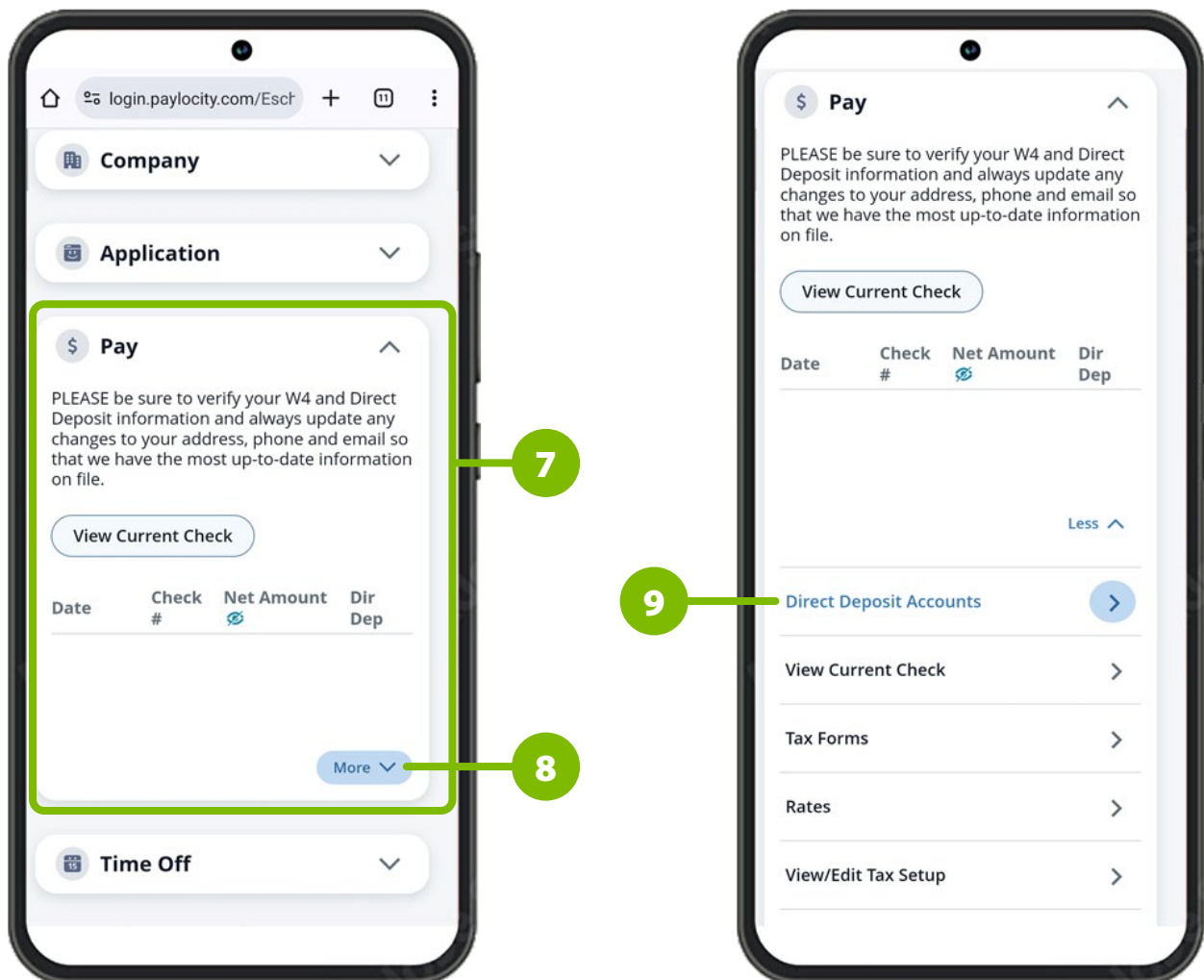
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4. Once you are logged in, you should see the Self Service Portal home screen.
5. If you do not see this screen, tap the menu icon.
6. Select "Self Service Portal" in the menu.



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7. Scroll down on the Self Service Portal screen until you see the “Pay” box.
8. Tap “More” to expand the “Pay” box.
9. Tap “Direct Deposit Accounts.”



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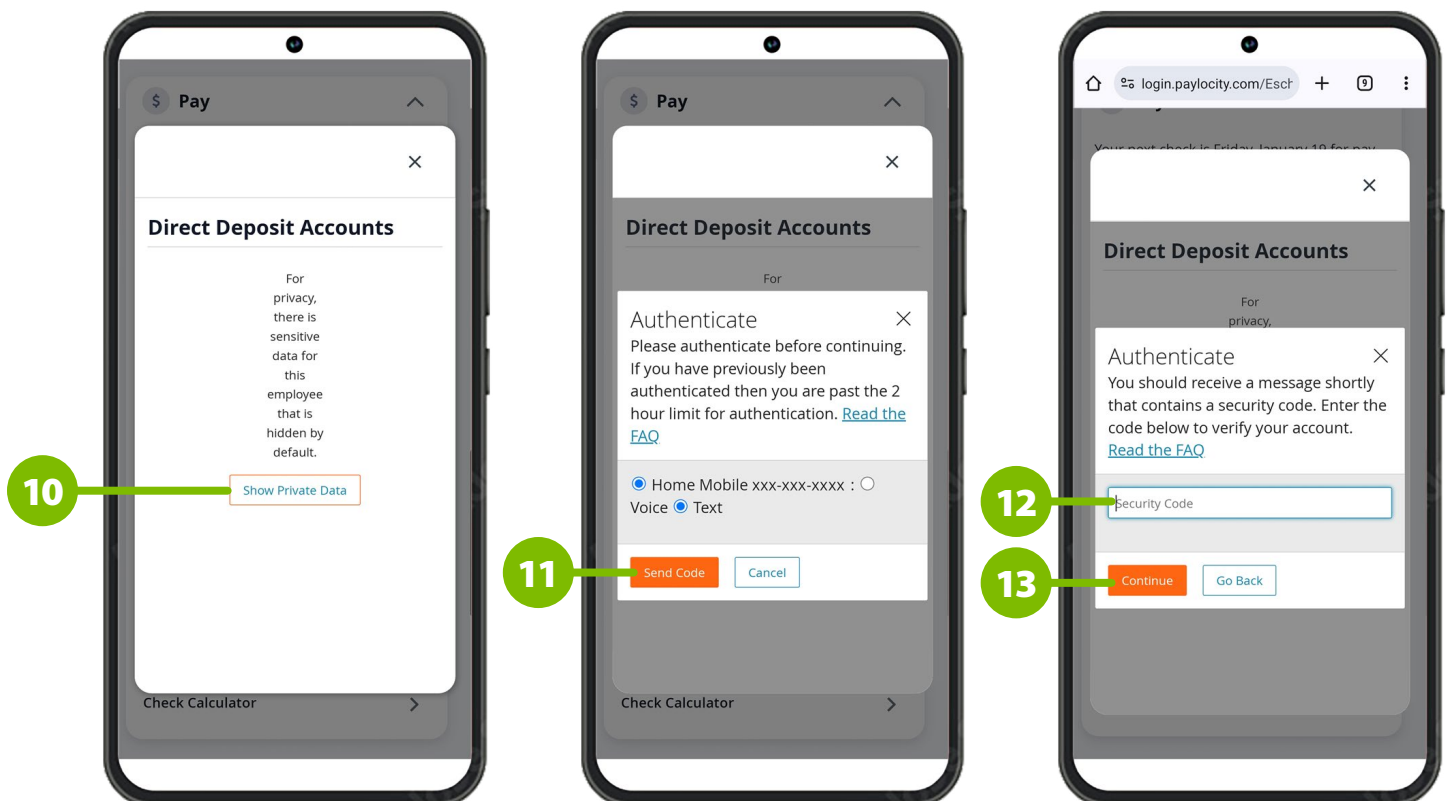
10. Press the “Show Private Data” button.

11. Tap the “Send Code” button to send a text message with a code.

12. Enter the authentication code that was sent to you.

Safari browser users: Do not use your phone’s autofill feature to enter the code. You must manually type in the code or copy and paste it in to avoid an error that prohibits you from proceeding.

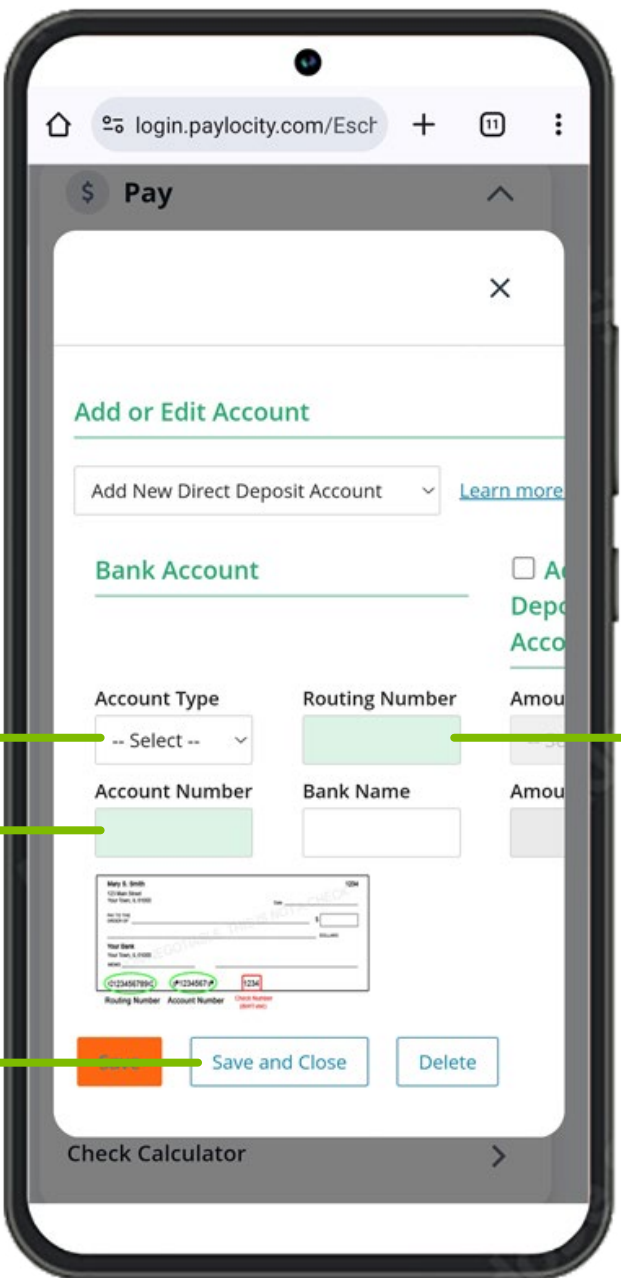
13. Press the “Continue” button.



Add Direct Deposit Information in Paylocity

Adding a Single Account

- 14.** In the popup, select whether your account is a checking account, savings account, or a pay card.
- 15.** Enter your bank's routing number. Your bank's name will autopopulate after entering the routing number.
- 16.** Enter your account number.
- 17.** Tap "Save and Close."
- 18.** Your direct deposit account has been added.



The screenshot shows the 'Add or Edit Account' form in the Paylocity mobile app. The form is titled 'Add or Edit Account' and has a dropdown menu for 'Add New Direct Deposit Account'. Below this, there are fields for 'Bank Account', 'Account Type', 'Routing Number', 'Account Number', and 'Bank Name'. A sample check image is shown below the form fields. At the bottom, there are buttons for 'Save and Close' and 'Delete'. Numbered callouts 14 through 17 point to specific elements: 14 points to the 'Account Type' dropdown, 15 points to the 'Routing Number' field, 16 points to the 'Account Number' field, and 17 points to the 'Save and Close' button.

If you receive an error message after entering your information, please contact your financial institution to obtain the correct information before proceeding.



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Adding Multiple Direct Deposit Accounts

If you have more than one account that you would like to have your paychecks deposited into, you can set up a custom plan to split your direct deposit into multiple accounts.

Scenario 1: Flat Amount Type

Account 1: You would like \$100 from every GrapeTree paycheck deposited into this account.

Account 2: You would like the remainder of your paycheck to be deposited into this account. If your paycheck is under \$100, no money will be deposited into this account.

In this scenario, you would need to begin by entering your account information for **Account 2**.

Scenario 2: Percent Amount Type

Account 1: You would like 25% of every GrapeTree paycheck deposited into this account.

Account 2: You would like the remaining 75% of your paycheck to be deposited into this account.

In this scenario, you can enter either of the accounts first. You will only add the percentage to the second account you enter, not the first.

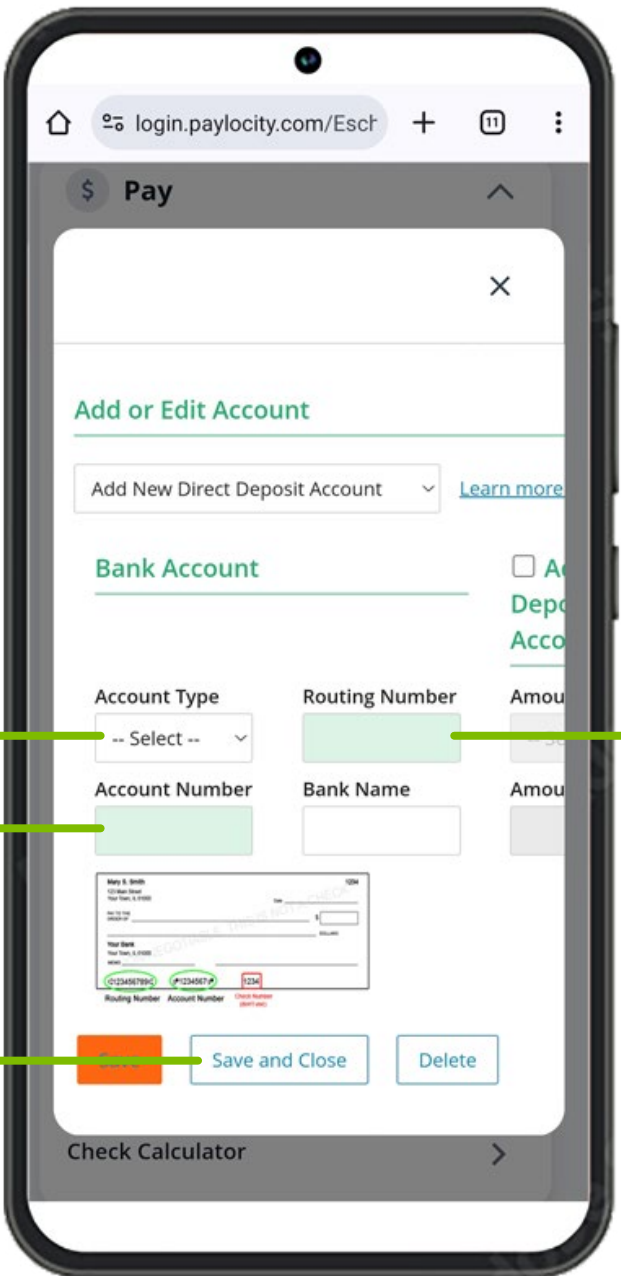
Add Direct Deposit Information in Paylocity

Adding Multiple Accounts

Read and understand the scenarios on the previous page before moving on.

- 19.** In the popup, select whether your account is a checking account, savings account, or a pay card.
- 20.** Enter your bank's routing number. Your bank's name will autopopulate after entering the routing number.
- 21.** Enter your account number.
- 22.** Tap "Save and Close."
- 23.** Your first direct deposit account has been added.

If you receive an error message after entering your information, please contact your financial institution to obtain the correct information before proceeding.



The screenshot shows the 'Add or Edit Account' form in the Paylocity mobile app. The form is titled 'Add or Edit Account' and has a dropdown menu for 'Add New Direct Deposit Account'. Below this, there are fields for 'Bank Account', 'Account Type', 'Routing Number', 'Account Number', and 'Bank Name'. A sample check image is shown with the routing number 0134567890, account number 1234567890, and check number 1234. At the bottom, there are buttons for 'Save and Close' and 'Delete'.

Annotations on the image:

- 19** points to the 'Account Type' dropdown menu.
- 20** points to the 'Routing Number' field.
- 21** points to the 'Account Number' field.
- 22** points to the 'Save and Close' button.

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Adding Multiple Accounts

- 24.** Re-open the popup by tapping “Direct Deposit Accounts” on the Self Service Portal screen.
- 25.** Enter your second account’s information, following steps 19-21 from the previous page.

login.paylocity.com/Escf

Pay

Add or Edit Account

Add New Direct Deposit Account [Learn more](#)

Bank Account

☐ Add New Direct Deposit Account

Account Type: -- Select --

Routing Number: [Field]

Account Number: [Field]

Bank Name: [Field]

Amount: [Field]

Amount: [Field]

Save Save and Close Delete

Check Calculator

19 20 21

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Adding Multiple Accounts

26. Scroll the inside of the popup so that you can see the right side of the screen.

27. Check the box next to "Additional Deposit Account."

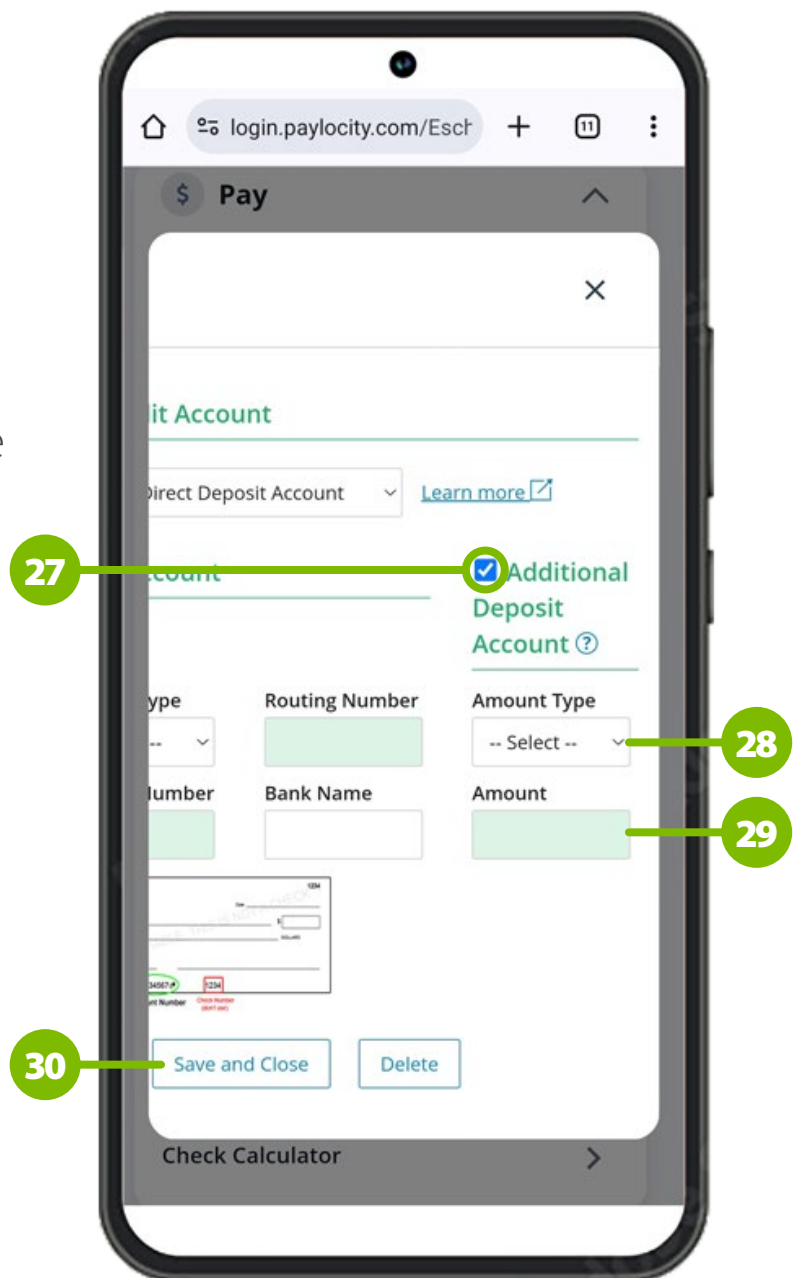
28. Select whether you would like this account to receive a "Flat" dollar amount per check, or a "Percent" of each check.

29. Enter the dollar amount or percentage that you want this account to receive per paycheck.

30. Tap the "Save and Close" button.

31. Your direct deposit accounts have been added.

If you receive an error message after entering your information, please contact your financial institution to obtain the correct information before proceeding.





Adding Direct Deposit Information in Paylocity

Additional Assistance

If you need further assistance or have any questions about your direct deposit, please contact GrapeTree's Payroll Department at (712) 336-0800 and select option 6 from the menu.

