

# NEOGOV

## **Update Direct Deposit and Tax Information on the Employee Record**

Last revised: 04/18/2023

# Table of Contents

<b>Preface</b>	<b>2</b>
<b>Overview</b>	<b>3</b>
<b>Updating Direct Deposit Information</b>	<b>3</b>
<b>Updating Tax Information</b>	<b>6</b>
Federal Withholdings	7
State Withholding	9
<b>Appendix</b>	<b>12</b>
Version History	12

## Preface

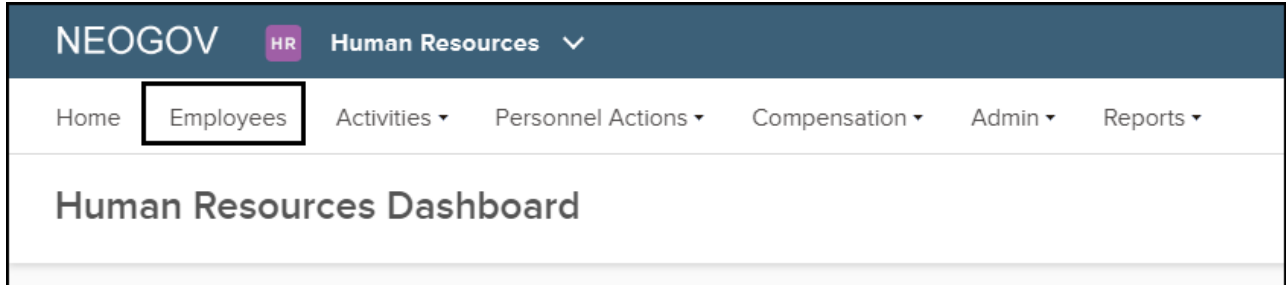
By making any change to this document, you agree that modifications and unchanged portions of the document are your sole responsibility, comply with legal and regulatory requirements, comply with the terms of the Service Agreement between you and NEOGOV, and you further agree to update the document as product changes are released reflecting the author of the changes.

## Overview

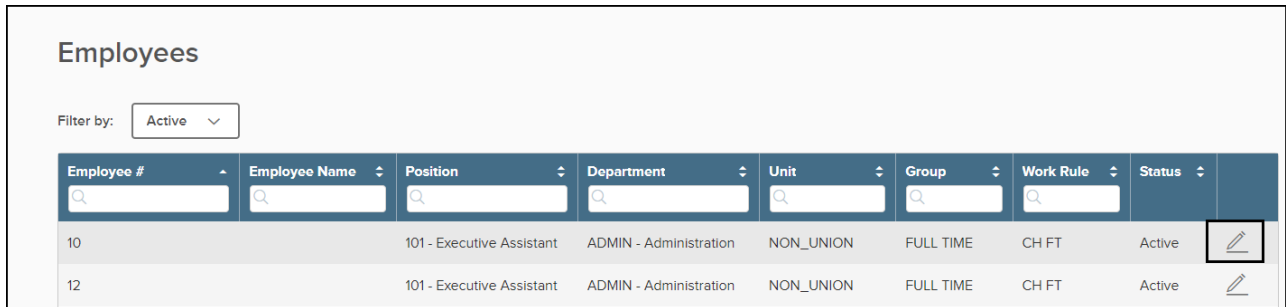
This document describes how admins and employees can update direct deposit and tax information.

## Updating Direct Deposit Information

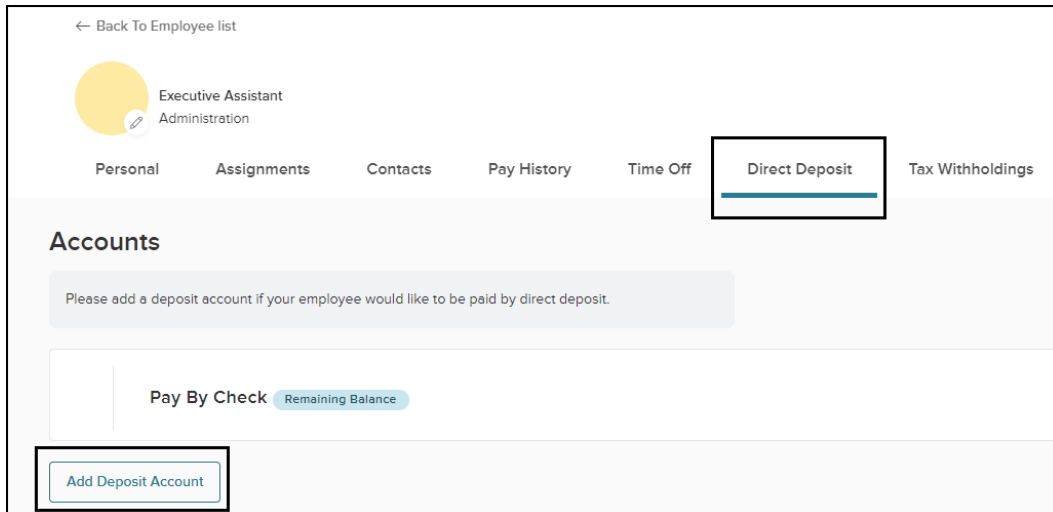
1. From the **Human Resources Dashboard**, click **Employees**.



2. Locate the desired employee and click the pencil icon (**Edit record**).



3. Under **Direct Deposit**, click **Add Deposit Account**. The **Add Direct Deposit** modal appears.



4. Enter these fields, then click **Save**.

Field	Description
<b>Bank Nickname</b>	(Optional) Enter a descriptive name for the bank account.
<b>Routing Number</b>	Enter the bank routing number. NEOGOV will automatically enter the <b>Bank Name</b> .
<b>Account Number</b>	Enter the account number that will receive the funds.
<b>Account Type</b>	Select the type of account that receives the funds.
<b>Prenote Required</b>	(Optional) If the bank requires a prenote for the account, select the checkbox.



NEOGOV automatically sets the first account as the **Primary Account**. If you create another account, you can manually set the next account as the primary account.

**Add Direct Deposit**

Changes may take up to 24 hours to be processed and may not be applied to your next paycheck.

COMPANY NAME 856-89/125 0301  
 123 Neogov Ave  
 El Segundo, CA 90245 DATE \_\_\_\_\_

PAY TO THE ORDER OF \_\_\_\_\_    
 \_\_\_\_\_ DOLLARS

FOR \_\_\_\_\_  
 \_\_\_\_\_

123456789 12345678901 0301 SIGNATURE \_\_\_\_\_

Routing Number
Account Number

Bank Nickname

Enable as Primary Account

\* Routing Number

\* Account Number

Bank Name

\* Account Type


NEOGOV displays the account as a tile on the screen. Additional accounts will appear here after you add them.

### Accounts

Accounts will be paid in this order. If this is incorrect, drag and drop them into the correct order.

<b>General Checking</b>	Remaining Balance				
Checking	XXXXX6789	XXXXX0138	Edit	Amount	<input type="text"/>
ACCOUNT TYPE	ACCOUNT NUMBER	ROUTING NUMBER		\$	%

[Add Deposit Account](#)

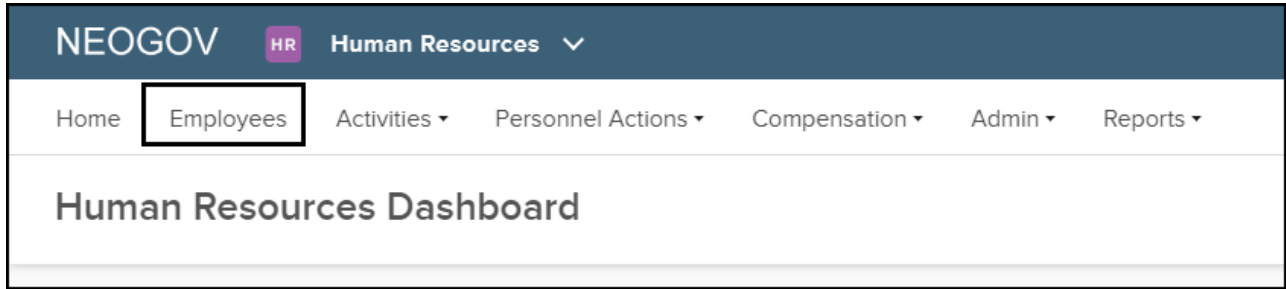


For more detailed information about direct deposits, see the **Unified Self Service Guide for Managers and Admins.**

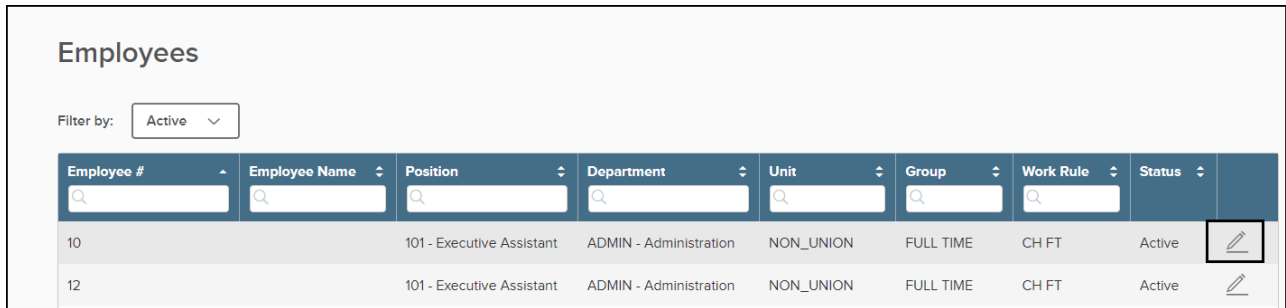
## Updating Tax Information

The employee record contains the federal and state tax information for employees. To access the tax information, do the following.

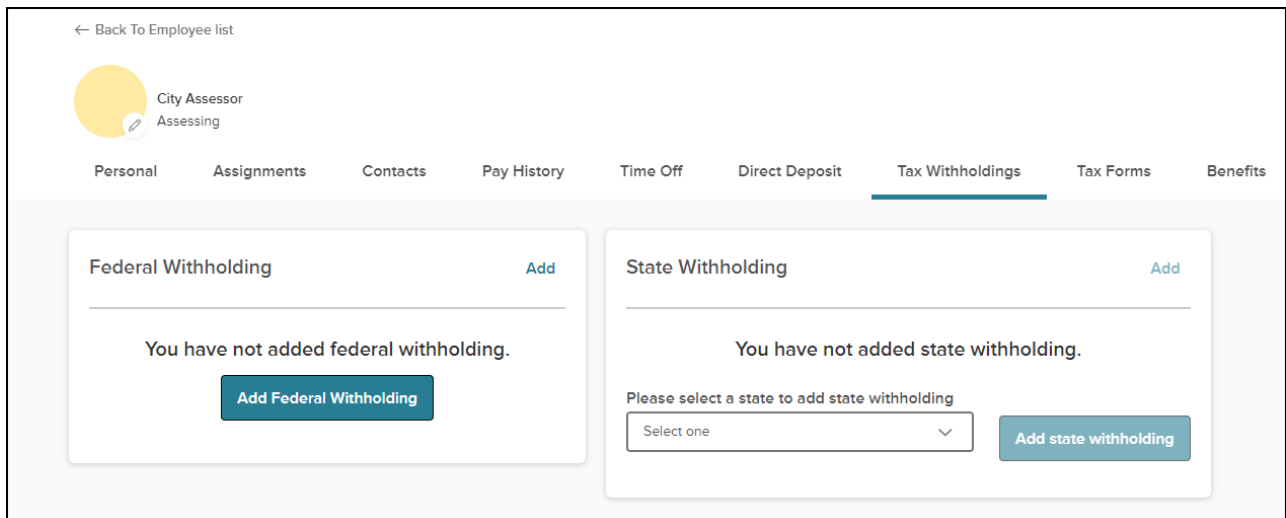
1. From the **Human Resources Dashboard**, click **Employees**.



2. Locate the desired employee and click the pencil icon (**Edit record**).



3. Select the **Tax Withholdings** tab to access the information.



## Federal Withholdings

1. Click **Add Federal Withholding**. The **Federal Withholding** modal appears.

← Back To Employee list

City Assessor  
Assessing

Personal Assignments Contacts Pay History Time Off Direct Deposit **Tax Withholdings** Tax Forms Benefits

Federal Withholding Add

You have not added federal withholding.

Add Federal Withholding

State Withholding Add

You have not added state withholding.

Please select a state to add state withholding

Select one ▼ Add state withholding

2. Complete the **FILING STATUS** fields.

Federal Withholding Close

Effective as of 04/18/2023 📅

**FILING STATUS**

'S'-single or married filing separately ▼

'H'-head of household

'M'-married filing jointly or Qualifying surviving spouse

'NRA'-nonresident alien

'S'-single or married filing separately

**USE**

and your spouse also works FALSE ▼



3. Complete any remaining fields that are relevant to the employee, then click **Save**.

**DEPENDENTS**

Dependent Amount

---

**OTHER ADJUSTMENTS**

Other Income

Deductions

Extra Withholdings

FICA Method  Exempt

Medicare Method  Exempt

FUTA Method  Exempt

NEOGOV displays the **Federal Withholding** card. At any time, click **Edit** to change any desired information.

Personal
Assignments
Contacts
Pay History
Time Off
Direct Deposit
Tax Withholdings
Tax Forms
Benefits
Property

**Federal Withholding** Edit

---

**FILING STATUS**

'S'-single or married filing separately

I am exempt

---

**MULTIPLE JOBS OR WORKING SPOUSE**

Multiple jobs or are married filing jointly and your spouse also works FALSE

**State Withholding** Add

---

You have not added state withholding.

Please select a state to add state withholding

Select one

▼

## State Withholding

1. Select the state of the employee then click Add state withholding. The state **Withholding** modal appears.

2. Complete the **ELECTIONS** fields.

3. Complete any **ADDITIONAL PARAMETERS** that are relevant to the employee.

ADDITIONAL PARAMETERS	
State Reciprocity Agreement	<input type="text" value="Select one"/>
Additional Tax for Residents	<input type="text" value="Select one"/>
Additional Tax for Work	<input type="text" value="Select one"/>
Regular Allowances	<input type="text" value="0"/>
Additional Allowances	<input type="text" value="0"/>
Supplemental Type	<input type="text" value="Select one"/>
Total Allowances	<input type="text" value="0"/>

4. Complete any **LOCAL PARAMETERS** that are relevant to the employee, then click **Save**.

LOCAL PARAMETERS	
City Tax Method	<input type="text" value="Select one"/>
County Tax Method	<input type="text" value="Select one"/>
Head Tax Method	<input type="text" value="Select one"/>
School Tax Method	<input type="text" value="Select one"/>
Local Reciprocity	<input type="text" value="Select one"/>

NEOGOV displays the state **Withholding** card. At any time, click **Edit** to change any desired information.

The screenshot shows the 'Tax Withholdings' section of the NEOGOV user interface. At the top, a navigation bar includes links for Personal, Assignments, Contacts, Pay History, Time Off, Direct Deposit, Tax Withholdings (which is the active tab), Tax Forms, Benefits, Property, IPEDS, and Deductions. Below the navigation bar, there are two main cards: 'Federal Withholding' and 'California Withholding'. Each card has an 'Edit' link in the top right corner. The 'Federal Withholding' card displays 'FILING STATUS' with a note '\*S'-single or married filing separately' and a checkbox for 'I am exempt'. The 'California Withholding' card displays 'ELECTIONS' with a 'Filing Status' section, a note '\*S'-single or married spouse works or married separate', a field for 'Additional amount, if any, you want withheld from each paycheck' with a value of '\$ 0', and a checkbox for 'I am exempt'. A partially visible label 'MULTIPLE JOBS OR WORKING SPOUSE' is at the bottom left of the California card.

## Appendix

### Version History

Version	Description	Date
1	Initial release.	04/18/23