NEOGOV

Update Direct Deposit and Tax Information on the Employee Record

Last revised: 04/18/2023

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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 if 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.
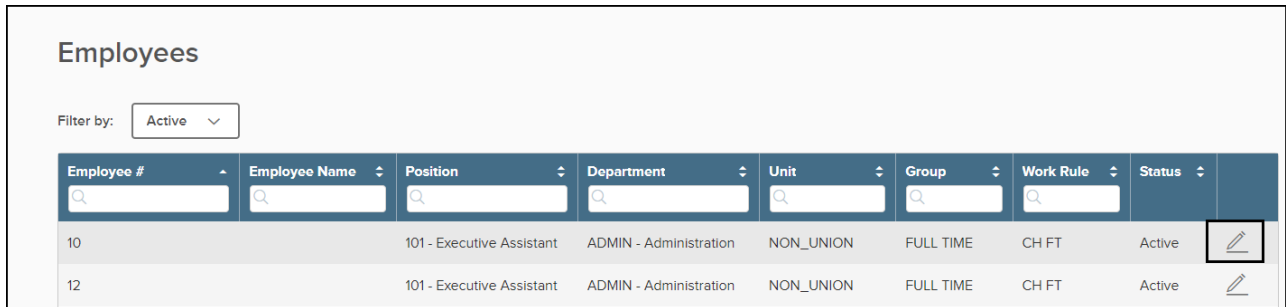
Overview

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

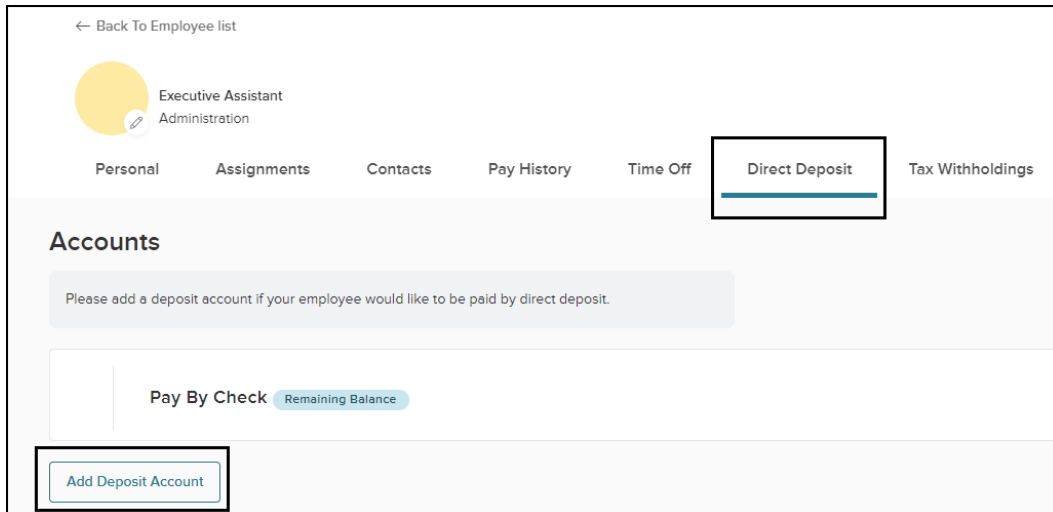# Updating Direct Deposit Information

1. From the **Human Resources Dashboard**, click **Employees**.
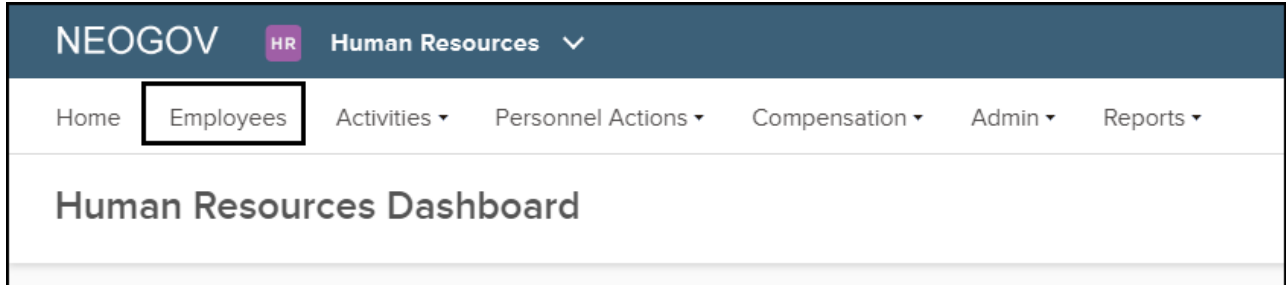
2. Locate the desired employee and click the pencil icon (**Edit record**).

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

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

Field	Description
Bank Nickname	(Optional) Enter a descriptive name for the bank account.
Routing Number	Enter the bank routing number. NEOGOV will automatically enter the **Bank Name**.
Account Number	Enter the account number that will receive the funds.
Account Type	Select the type of account that receives the funds.
Prenote Required	(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.

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

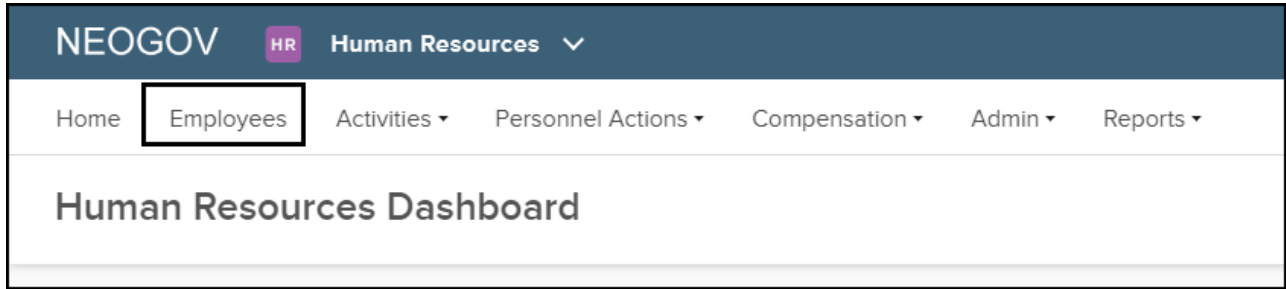

For more detailed information about direct deposits, see the **Unified Self Service Guide for Managers and Admins**.
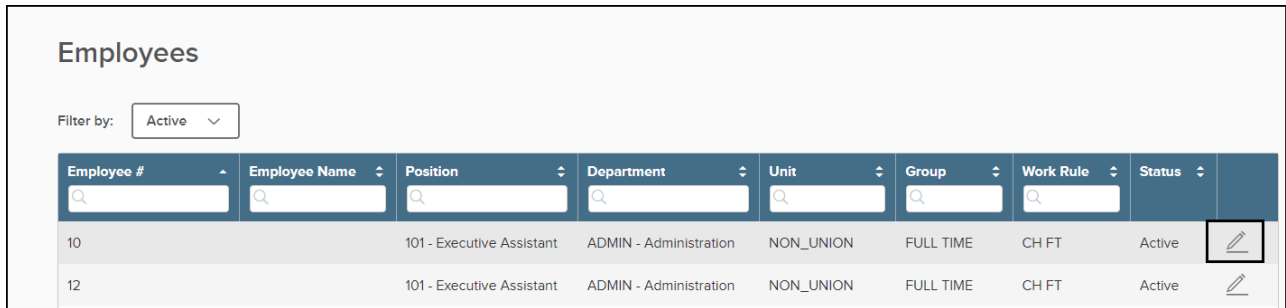
Updating Tax Information

The employee record contains the federal and state tax information for employees. To access the tax information, do the following.
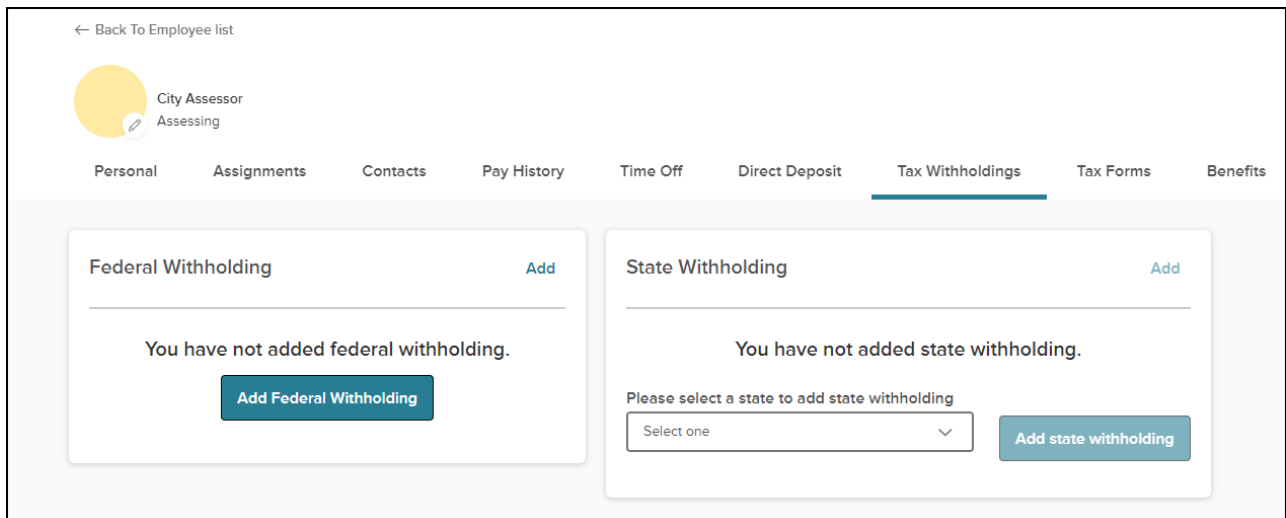
1. From the **Human Resources Dashboard**, click **Employees**.

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.

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

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

DEPENDENTS

Dependent Amount $0

OTHER ADJUSTMENTS

Other Income $0

Deductions $0

Extra Withholdings $0

FICA Method   ☐ Exempt

Medicare Method   ☐ Exempt

FUTA Method   ☐ Exempt

Save

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

State Withholding   Add

FILING STATUS

'S'-single or married filing separately

☐ I am exempt

You have not added state withholding.

Please select a state to add state withholding

Select one ⌄   Add state withholding

MULTIPLE JOBS OR WORKING SPOUSE

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

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	Select one ⌄
Additional Tax for Residents	Select one ⌄
Additional Tax for Work	Select one ⌄
Regular Allowances	0
Additional Allowances	0
Supplemental Type	Select one ⌄
Total Allowances	0

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

LOCAL PARAMETERS

City Tax Method	Select one ⌄
County Tax Method	Select one ⌄
Head Tax Method	Select one ⌄
School Tax Method	Select one ⌄
Local Reciprocity	Select one ⌄

Save

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

Appendix

Version History

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

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