

## Direct Deposit Sign-up Instructions

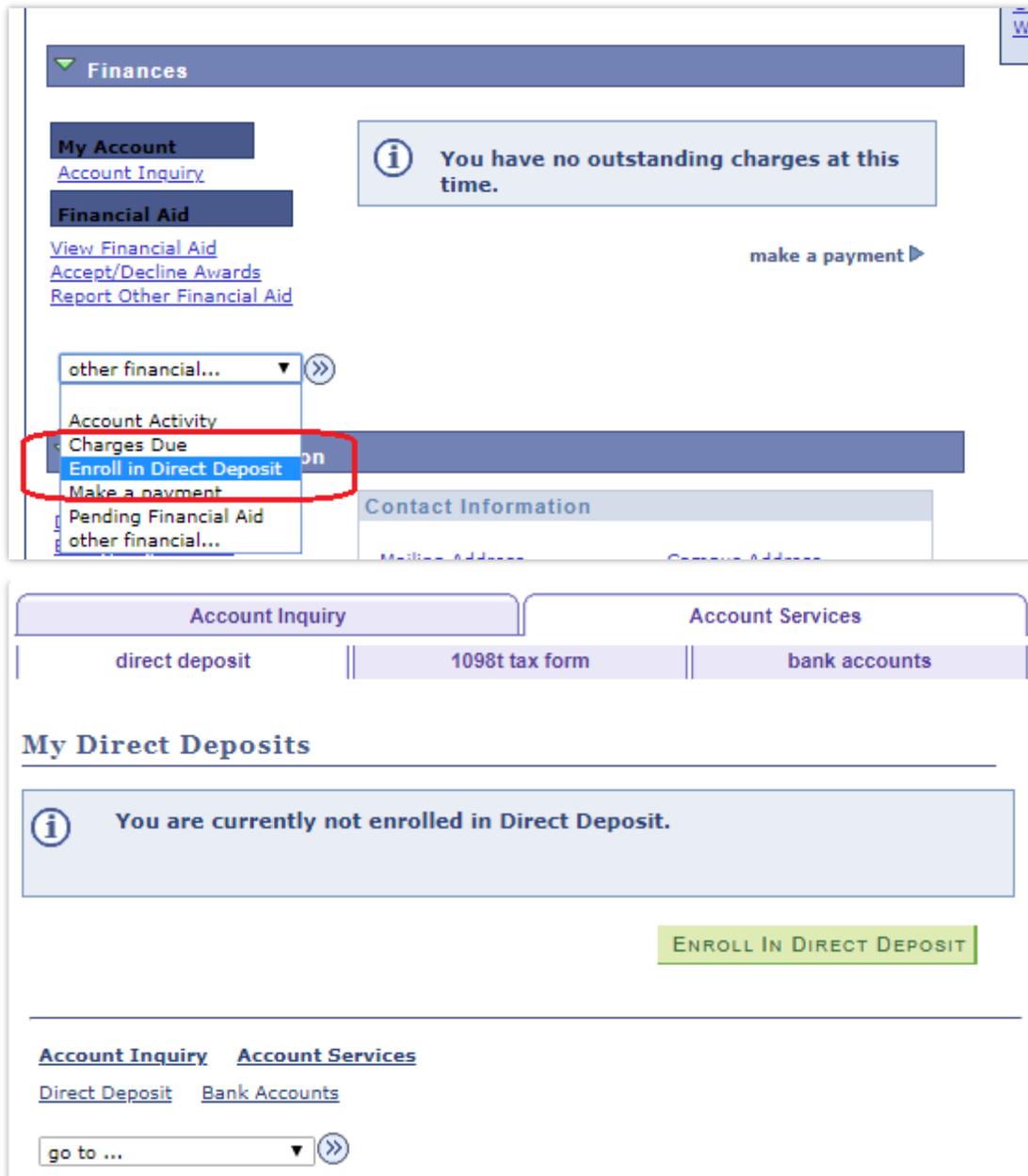
Signing up to a direct deposit will allow SUA to send refunds directly to your designated bank account.

Log into learn at: <http://learn.soka.edu>.

There are **2 steps** you will need to complete. You will need to:

- 1) Add a bank account
- 2) Enroll (authorize) in Direct Deposit

At the self-service screen, under finances, drop down and select **Enroll in Direct Deposit**.



Click on **ENROLL IN DIRECT DEPOSIT** to enroll for direct deposit and add bank account.

### Manage My Bank Accounts

#### Add Bank Account Details

Enter the bank and account details below and click next to proceed. If your bank is not listed, please contact the Bursar's Office.

Bank Details	
Nickname	<input type="text" value="My Checking"/>
Account Type	<input type="text" value="Checking"/> <a href="#">View Sample Check</a>
Routing Number	<input type="text" value="122000496"/> Union Bank of California
Branch	<input type="text"/>
Account Number	<input type="text" value="123456789"/> <b>not ATM/Debit Card number</b>
Confirm Account Number	<input type="text" value="123456789"/>
Account Holder	<input type="text" value="Student Student"/>

Bank Location is United States  
Currency used is US Dollar

Enter your bank information. Account **MUST BE YOUR ACCOUNT** no anyone else's bank account.

*If your bank does not exist, please notify Student Accounts with your bank name and their routing number.*

### Manage My Bank Accounts

#### Result

You have successfully added the bank account My Checking.

Bank Details	
Nickname	My Checking
Account Type	Checking
Bank Code	122000496 Union Bank of California
Branch	
Account Number	XXXXX6789
Account Holder	Student Student

Click on

Account Inquiry

direct deposit

Account Services

bank accounts

### My Direct Deposits

### Bank Account Summary

You have the following bank accounts set up.

If you intend to use other bank account not listed below, click on Add Another Bank Account. Otherwise, click on Proceed to Enroll in Direct Deposit.

Bank Account Summary as of 02/10/2020		
Bank Account Nickname	Bank Account Type	Bank Account Number
My Checking-6789	Checking	XXXXX6789

ADD ANOTHER BANK ACCOUNT
PROCEED TO ENROLL IN DIRECT DEPOSIT

Click on PROCEED TO ENROLL IN DIRECT DEPOSIT again.

Account Inquiry

direct deposit

Account Services

bank accounts

### Enroll in Direct Deposit

### Add Direct Deposit

Only a single distribution is allowed. Select a bank to designate as remaining balance.

Direct Deposit Distribution			
Bank Account Nickname	Distribution Type	Amt./Pct.	Priority
<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #d9e1f2; padding: 2px;">my checking-6789 ▼</div> <div style="background-color: #d9e1f2; padding: 2px;">Select Bank Account</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">my checking-6789</div> </div>	Balance		

Currency used is US Dollar

CANCEL
NEXT

Select the bank account you want to direct deposit to, then click NEXT

<a href="#">Account Inquiry</a>	<a href="#">Account Services</a>
<a href="#">direct deposit</a>	<a href="#">bank accounts</a>

### Enroll in Direct Deposit

#### Agreement

Review the bank information and agreement. Click Submit to complete the Direct Deposit enrollment.

Bank Name	Distribution Type	Amt./Pct.	Priority
my checking-6789	Balance		

Currency used is US Dollar

You are about to enroll in Direct Deposit of your refund checks. Signing up for direct deposit will allow excess proceeds from financial aid and over payments applied to your student account to be deposited directly into your checking or savings account. You will receive your funds faster with direct deposit instead of a check mailed to you.

I hereby authorize in accordance with the rules and regulations of the National Automated Clearinghouse Association ("NACHA") my institution to credit any reimbursements due to me via automated clearinghouse electronic fund transfer ("ACH") to the bank(s) referenced above.

You may change your account information as necessary. Funds will be available depending on timing of this submission.

Should you wish to cancel your direct deposit enrollment, please come to the Bursar's Office.

**The agreement is dated:** 02/10/2020

**Yes, I agree to the terms and conditions of this agreement.**

[CANCEL](#)
[BACK](#)
[SUBMIT](#)

Click on [SUBMIT](#) once you read and agree to the condition.

### Enroll in Direct Deposit

#### Result

 **Congratulations! You are now enrolled in direct deposit.**

**View the summary below.**

Bank Name	Distribution Type	Amt./Pct.	Priority
my checking-6789	Balance		

Currency used is US Dollar

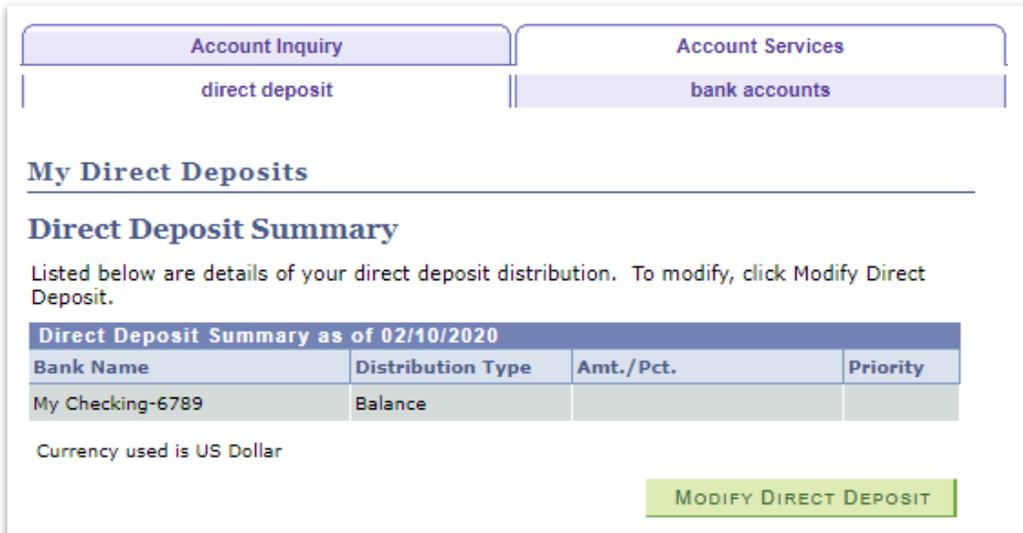
[GO TO DIRECT DEPOSIT SUMMARY](#)

You have completed your direct deposit enrollment.

## MODIFY BANK INFORMATION

Updating your direct deposit with new bank information requires a 2 step process:

- 1) Enter new bank information
- 2) Select bank for direct deposit authorization



**My Direct Deposits**

**Direct Deposit Summary**

Listed below are details of your direct deposit distribution. To modify, click Modify Direct Deposit.

Direct Deposit Summary as of 02/10/2020			
Bank Name	Distribution Type	Amt./Pct.	Priority
My Checking-6789	Balance		

Currency used is US Dollar

[MODIFY DIRECT DEPOSIT](#)

Once you have signed up to a direct deposit, you can click on [MODIFY DIRECT DEPOSIT](#) to edit your bank information. You can add a new bank account and/or delete an existing bank account information.

After adding a new bank account, click on [PROCEED TO MODIFY DIRECT DEPOSIT](#)



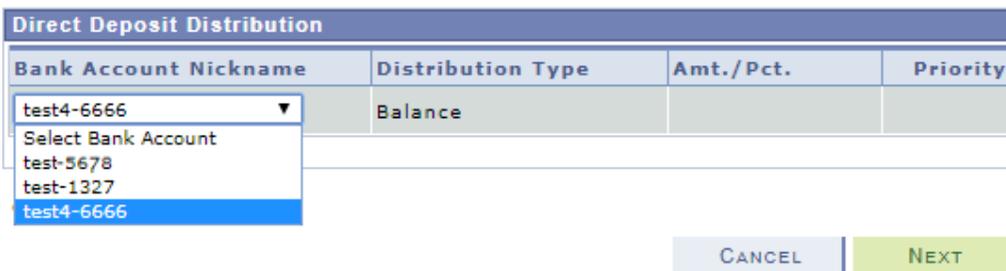
Account Inquiry | Account Services

direct deposit | bank accounts

### Enroll in Direct Deposit

#### Modify Direct Deposit

Only a single distribution is allowed. Select a bank to designate as remaining balance.



Bank Account Nickname	Distribution Type	Amt./Pct.	Priority
test4-6666	Balance		

[CANCEL](#) [NEXT](#)

Click [NEXT](#), and you have selected a new bank account for direct deposit. Click on [GO TO DIRECT DEPOSIT SUMMARY](#) to view your account setting.

*If you need to revoke your direct deposit authorization completely, please contact the Office of Student Accounts.*