ClickSWITCH
Direct Deposit Switch Scenarios

Scenario 1: Known target with no split

1. Select a Verified result from the company search and click Continue.

So, who pays you?

Search for depositors like your employer, social security benefit or other recurring deposits below to get started.

Select ⊘ Verified results to make your switch go even faster.

University of Minnesota Payroll Services 170 D

PREVIOUS   CONTINUE

Target

- a company that is in the ClickSWITCH database for purposes of sending switches to

- a direct deposit provider

- a company that provides a paid service to your client involving a recurring payment

2. Select an account and click Continue.

Where would you like your deposit to go?

Select from the options below to continue making the switch.

SELECT ACCOUNT

DEMO Checking · 123456789 (Checking)   ▼

CONTINUE

PREVIOUS   SAVE & CONTINUE LATER

3. Answer form questions and click Continue.

Great! Lets get some info about your switch for University of Minnesota

You might want to have an old paystub handy to help you answer.

SSN*

6789123123

Employee ID Number

123

*Indicates required field.

CONTINUE

PREVIOUS   SAVE & CONTINUE LATER

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4. Confirm the Switch and Deposit Information and click Submit.

So, just to confirm.

So, who pays you? ✏ Edit Switch

DEPOSITOR	University of Minnesota
SSN	6789123123
EMPLOYEE ID NUMBER	123

Deposit Information ✏ Edit Deposit Information

DEPOSIT TO:	DEMO Checking - x6789 (Checking)
DEPOSIT DESCRIPTION:	Remainder

SUBMIT

PREVIOUS   SAVE & CONTINUE LATER

5. Your direct deposit is on its way!

Your direct deposit is on its way!

ADD ANOTHER DIRECT DEPOSIT   I'M DONE FOR NOW

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Direct Deposit Switch Scenarios

Scenario 2: Unknown Target – Google Result

1. Select a Google result (non-verified) from the company search and click Continue. You will see a Google result after clicking "See More Results" at the bottom of a Verified company list if companies in your area match what's been typed in.

So, who pays you?

Search for depositors like your employer, social security benefit or other recurring deposits below to get started.

Select ⊘ Verified results to make your switch go even faster.

> Minnesota Zoo Gift Shop, Zoo Boulevard, Appl

[PREVIOUS]   [CONTINUE]

2. Provide the type of deposit you are receiving and click Continue.

So, who pays you?

The depositor you have selected is not yet in our database. Please add as much of the following information as you can to help us identify this depositor in the Notes section below.

DEPOSITOR:

MINNESOTA ZOO GIFT SHOP

ADDRESS:
13000 Zoo Boulevard
Apple Valley, MN 55124-4621
US

(651) 431-3090

WEBSITE:
https://shop.mnzoo.org/en_US/

> Payroll

[PREVIOUS]   [CONTINUE]

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ClickSWITCH
Direct Deposit Switch Scenarios

3. Select an account and either select "Remainder" for the full amount to be deposited or choose to deposit a certain amount or percentage into that account. Click Continue.

Where would you like your deposit to go?

Select from the options below to continue making the switch.

SELECT ACCOUNT

DEMO Checking - 123456789 (Checking) ▾

SELECT SPLIT TYPE ❶

| AMOUNT | PERCENTAGE | REMAINDER |

Remainder

CONTINUE

PREVIOUS   SAVE & CONTINUE LATER

4. Answer form questions and click Continue.

Great! Lets get some info about your switch for Minnesota Zoo Gift Shop

You might want to have an old paystub handy to help you answer.

SSN - Last 4*

6789

ID Number

123

*Indicates required field.

CONTINUE

PREVIOUS   SAVE & CONTINUE LATER

First Federal
Lakewood

5. Confirm the Switch and Deposit Information and click Submit.

So, just to confirm.

So, who pays you?   ✏ Edit Switch

DEPOSITOR	Minnesota Zoo Gift Shop
SSN - LAST 4	6789
ID NUMBER	123

Deposit Information   ✏ Edit Deposit Information

DEPOSIT TO:	DEMO Checking - x6789 (Checking)
DEPOSIT DESCRIPTION:	Remainder

SUBMIT

PREVIOUS   SAVE & CONTINUE LATER

6. Your direct deposit is on its way!

Your direct deposit is on its way!

ADD ANOTHER DIRECT DEPOSIT   I'M DONE FOR NOW

First Federal Lakewood

ClickSWITCH
Direct Deposit Switch Scenarios

Scenario 3: Unknown Target – Create a New Depositor

1. Select "Not here? Create a new depositor" at the bottom of the company search field. If your depositor is neither verified nor a Google result, you will select this final option. After clicking this option, you'll be taken to the below page where the company information needs to be filled in. Click Continue.

2. The remaining steps are the same as steps 2-5 in Scenario 1.

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Scenario 4: Depositor that allows a split

1. Select a verified company and click Continue.

So, who pays you?

Search for depositors like your employer, social security benefit or other recurring deposits below to get started.

Select ⊘ Verified results to make your switch go even faster.

Wendy's

PREVIOUS   CONTINUE

2. If the company allows a split, you will see the "Add Another Account" verbiage. Select an Account. Select Amount, Percentage or Remainder. If you select Amount or Percentage, you will select another account and determine how much of your DD you want in each account. Select Continue.

Where would you like your deposit to go?

Select from the options below to continue making the switch.

SELECT ACCOUNT

DEMO Checking - 123456789 (Checking)

SELECT SPLIT TYPE ❶

AMOUNT PERCENTAGE REMAINDER

10

REMOVE ACCOUNT ✖
SELECT ACCOUNT

DEMO Savings - 654321654 (Savings)

SELECT SPLIT TYPE ❶

AMOUNT PERCENTAGE REMAINDER

Remainder

CONTINUE

PREVIOUS   SAVE & CONTINUE LATER

3. The remaining steps are the same as steps 3-5 in Scenario 1.

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Direct Deposit Switch Scenarios

Scenario 5: Online or Print only target

1. Select a Verified result from the company search and click Continue.

So, who pays you?

Search for depositors like your employer, social security benefit or other recurring deposits below to get started.

Select ⊘ Verified results to make your switch go even faster.

Kroger ✕

PREVIOUS   CONTINUE

2. Select an account and click Continue.

Where would you like your deposit to go?

Select from the options below to continue making the switch.

SELECT ACCOUNT

DEMO Checking - 123456789 (Checking) ▾

CONTINUE

PREVIOUS   SAVE & CONTINUE LATER

3. If the company requires the customer to go online or follow some other special instructions to submit their switch, the specific and unique instructions will display. Once the customer follows the steps on the page, they will click Complete. If they don't follow the steps now, they will click Save & Continue.

Great! Here's the information to complete your switch.

The **KROGER** Company requires you to access your online account to switch your direct deposit. Please log in to your account to complete your switch.

CLICK HERE TO LOG INTO YOUR KROGER ACCOUNT.

To update your information over the phone, please dial **800 952 8889**.
When you are done switching this account you can mark it as completed by clicking the Completed button below

COMPLETE

PREVIOUS   SAVE & CONTINUE LATER

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Direct Deposit Switch Scenarios

Scenario 6: Instant Switch

1. Select a Verified result from the company search and click Continue.

So, who pays you?

Search for depositors like your employer, social security benefit or other recurring deposits below to get started.

Select ⊘ Verified results to make your switch go even faster.

| Uber Technologies Inc. / UBER | × |

PREVIOUS   CONTINUE

2. If this is an Instant target, the customer will follow specific instructions on the screen, starting with selecting where they want their deposit to go.

× Exit

Select your account

Please select where you would like your deposit to go by clicking "Add an account" below.

Uber   Uber Technologies Inc. / UBER

+   Add an account

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ClickSWITCH
Direct Deposit Switch Scenarios

3. Customer will select the account(s) and click Add.

4. Customer selects Continue.

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5. Customer sees a Switch Summary.

6. If customer wants to switch instantly, they login to their Uber account and click Continue.
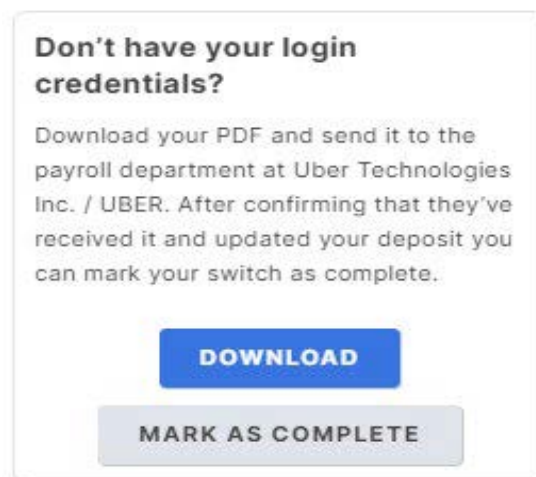
7. We got it from here displays and automation kicks in to complete the switch in real time.

Complete your switch

connected to
Uber

✓

We got it from here!
We are working to set up your direct deposit and will be done soon.

EXIT
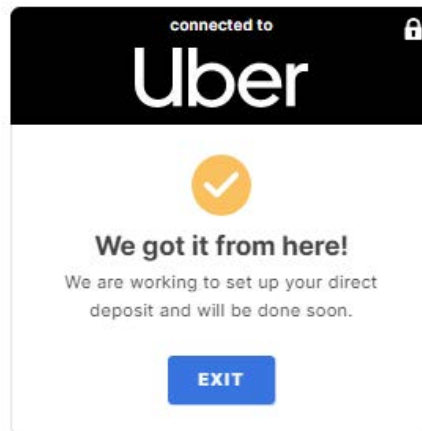
8. If the customer doesn't have their credentials, they can download the form and send it to their payroll.

Don't have your login credentials?

Download your PDF and send it to the payroll department at Uber Technologies Inc. / UBER. After confirming that they've received it and updated your deposit you can mark your switch as complete.

DOWNLOAD

MARK AS COMPLETE

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9. If the customer clicks Mark As Complete, they'll get an Are you sure? Message.
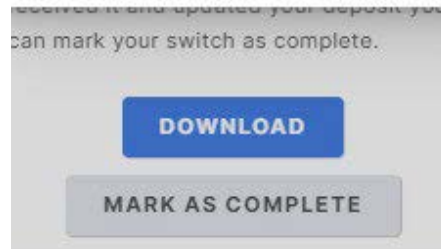
9. After clicking Yes, they'll see the "Your switch was successful" Message.