

How to get signed up with P&H Direct Deposit

P&H direct deposit has an easy-to-use, secure sign-up process. All you need is some standard banking information to complete the application. There are two methods to set up direct deposit: **1)** Online with DocuSign, a secure a secure online platform that we already use for P&H contracts, GPOs and other sensitive data and protected information. **2)** By email or fax. Please continue to page 3 for email/fax instructions.

Documents Required

Before proceeding with filling out the forms online, please ensure you have the required banking information. You will require:

• A copy of a VOID Cheque or a letter from your bank confirming your banking details must be electronically attached. Banking information can be found on the bottom of your cheque.



Online Application Process

STEP 1: Click <u>here</u> - this link will take you to the *DocuSign* platform. Fill out your: **First and Last name** and **email**. Then click, **Submit**. You will receive an email indicating your application process has started.

STEP 2: Fill in the required information in the form – please note the following:

A. **Mandatory fields**: The form will not submit if any of the required fields are left blank *with exception to* the Signing Date at the bottom as it automatically generates the date once signed.

B. **Company Name**: This is your P&H Account Name. If you do not have a Company Name, this will be your First and Last Name.

NOTE: If the company name on your bank account differs than how the company name appears in your P&H account, please email <u>directdeposit@pandh.ca</u>.

C. **P&H Account #:** If you are unsure of your P&H Account # refer to a prior settlement document or cheque stub:



NOTE: If you cannot find your P&H Account #, please contact your local P&H location.

D. Contact Name: Who to contact if P&H has questions about this form.

E. **Phone Number**: Enter the phone number which you would like to be reached at if there are any questions regarding your application

- F. Email for settlements: this should match the email on your P&H Account.
- g. GST/HST #: Include the farm GST/HST # on form.

h. **Upload void cheque:** A void cheque must be uploaded to verify your banking details. Click on the 'Paper Clip' to open the upload attachment.

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	A copy of a VOID Cheque or a letter	Bank # (3 digits):	Transit # (5 digits)	

STEP

3: Once you have filled out and verified your information and uploaded

your void cheque, press the **Click to Sign** button located in the yellow box at the bottom of the form. The date will automatically appear.

Click on the box to	
sign the document	The date will automatically fill itself out once you click
	to sign
	and assument to the best of my knowledge
By signing below, I certify all information is true	and current to the best of my knowledge.
Account holder signature:	Date: 12/14/2022 11:54:27 PST
For more information visit: PARRISHAND	HEIMBECKER.COM/DIRECTDEPOSIT

STEP 4: Once you clicked to sign, you can review the completed form and your void cheque. Then scroll to the bottom of the page and click FINISH.



STEP 5: Once you've selected Finish, you can chose to save a copy of your document by Downloading or Printing. To skip this step, select **CLOSE**.

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<u>*</u>	
Your document has b	een signed
If you would like a copy for your records, s save.	elect Download or Print and
DOWNLOAD PRINT	CLOSE

STEP 6: The sign up process is complete. You will receive an emailed copy of the document.



STEP 7: If you are having trouble completing this form, please email us at <u>directdeposit@pandh.ca</u> or contact your local P&H location.

Email/Fax Application Process

You have the option for securely fax your application form and void cheque. If you do not have access to a fax machine, please email your form to: <u>directdeposit@pandh.ca.</u>



STEP 1: Click the above icon to download the deposit form.

STEP 2: Complete the form and attach a void cheque prior to sending the form in. The documents required are listed on page 1 of this document.

STEP 3: email completed for to <u>directdeposit@pandh.ca</u> or fax completed form to 1-877-987-2788.