

# Direct Deposit Change Checklist

DullyPDF original blank HR and workplace template for repeatable PDF workflows.

This first-party direct deposit change checklist is designed for teams that need a reusable blank PDF they can map, fill, sign, or route without relying on a copyrighted third-party packet.

## Record and Contact Details

Employee / role

Reference / ID number

Date

Manager / HR

Employee

Best contact

Describe the employee request, acknowledgement, incident, or HR workflow.

## Checklist and Line Items

Common items to review

Employee signature needed

Manager signature needed

Witness included

Policy reviewed

Payroll affected

Equipment affected

Follow-up meeting needed

Copy sent to HR file



## Approval and Follow-Up

Workflow status

Approved

Denied

Needs more information

Needs attachment

Needs signature

Needs manager review

Needs customer or client copy

Ready to file

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Policy references, dates, witnesses, requested action, equipment, and follow-up plan

Prepared by signature

Printed name

Date