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Introduction

This job aid describes the steps necessary to review/update your direct deposit information in OneUSG Connect.
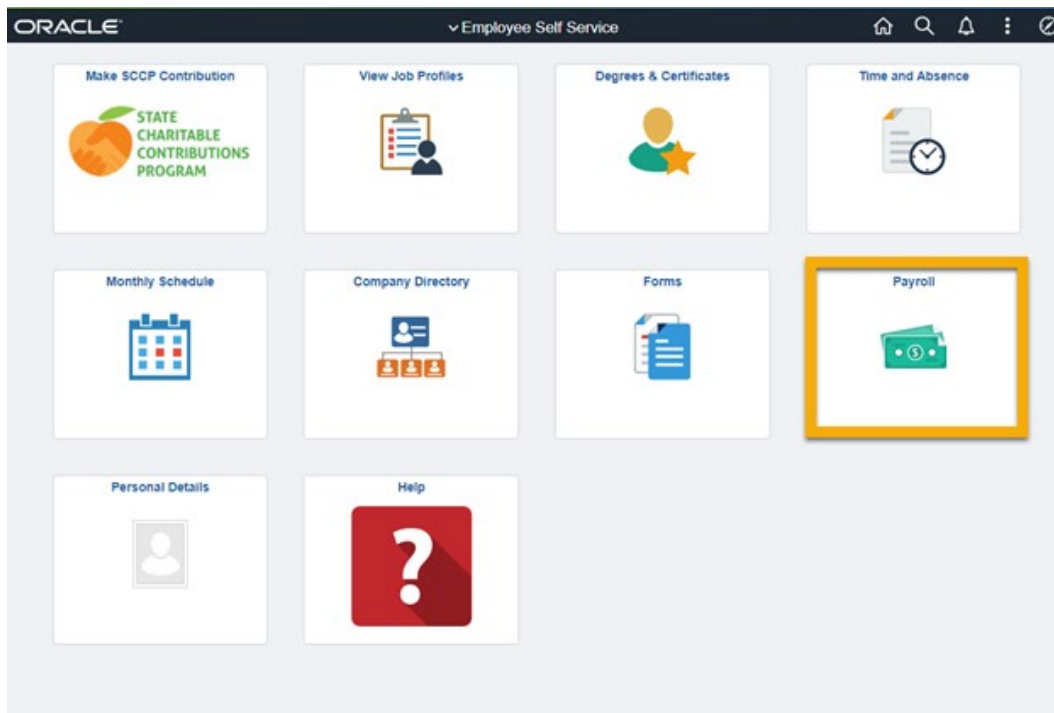
Instructions

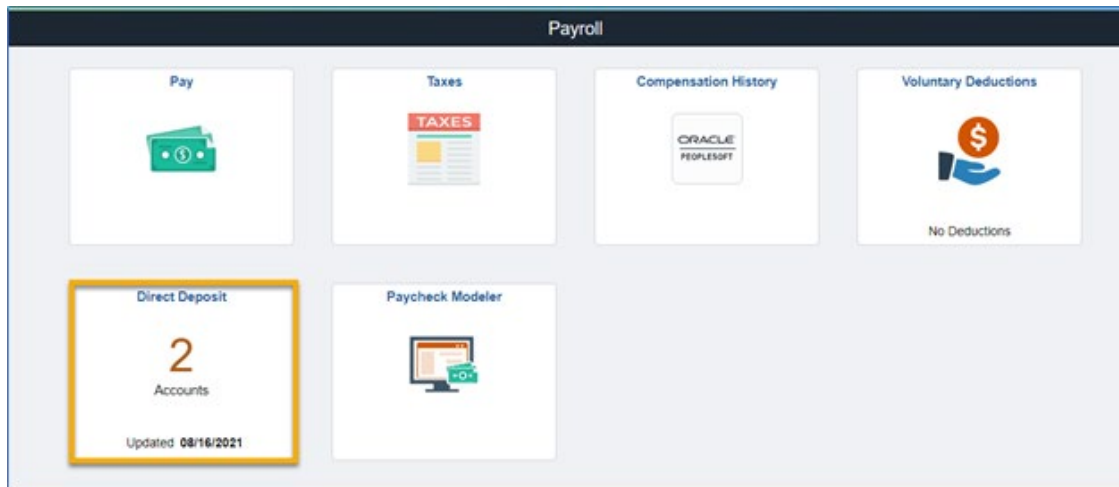1. Log into **OneUSG Connect.**

   Navigation:
   Employee Self Service > Payroll > Direct Deposit

2. Click on the **Payroll** tile.

   Note: Employee Self Service tile options may vary depending on your employee type.

3. On the **Payroll** Dashboard click the **Direct Deposit** tile**.**

4. Review your existing Direct Deposit information.

Notes:

a. **Remaining Balance:** The account that will be sent to PeopleSoft Financials for Travel & Expense reimbursements.

- All employees must have at least one (1) **Remaining Balance** deposit type.

- If the Remaining Balance account has a **Payment Method** of "Check", no banking information will be sent to PeopleSoft Financials for Travel & Expense reimbursements.

b. **Deposit Order**: During direct deposit processing, distributions are made to accounts in order of priority.

- Funds are deposited into the account with the **lowest** deposit order first.

- The **Remaining Balance** account should always have the **last** priority because all remaining funds will be deposited into this account.

    Example: you have three accounts you wish to set up for direct deposit:

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- There is a limit of 10 direct deposit accounts for OneUSG Connect.

5. Change the Remaining Balance account.

   ! Important: The Remaining Balance account cannot be deleted; only edited or updated to issue a "Check". Please use the instructions, Edit the Remaining Balance Account, listed in section 6 of this document to edit your remaining balance account.

   a. If the remaining balance account is your only account and the account is closed, and you have no other bank account, you will have to opt for "Check" using the following instructions.
      - Select your remaining balance row.
      - For Payment Method, use the drop-down arrow to select "Check".
      - Click **Yes** to confirm that the payment method will be changed and you would like to continue.
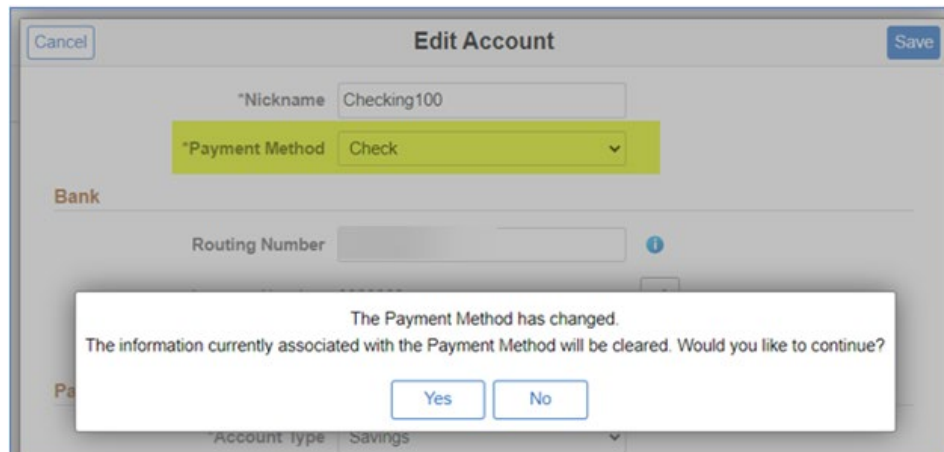
   b. Once you answer the question, use the drop down arrow to select "Remaining Balance" for the **Deposit Type**.

   c. Click **Save** and the remaining balance row will update.

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d. When you open a new bank account you will need to change the **Payment Method** back to "Direct Deposit" and add the new bank account information.
   - Select the Remaining Balance account row.
   - For **Payment Method**, use the drop down arrow to select "Direct Deposit".
   - Click **Yes** to confirm that the payment method will be changed, and you would like to continue.
   - Enter the **Routing Number**.
   - Enter the **Account number** and retype it to confirm.
   - Select the appropriate **Account Type**.
   - The **Deposit Type** must be set as "Remaining Balance".
   - Click **Save** and the remaining balance account row will update.

6. Edit the Remaining Balance account.

   ! Important: The Remaining Balance account cannot be deleted; only edited or updated to issue a "Check". If you try to remove the remaining balance account, you will receive the following error message. You will need to refresh the page to clear the error message and may then proceed with editing the account.

a. Refresh the page. Select the remaining balance row so the Edit Account option opens.

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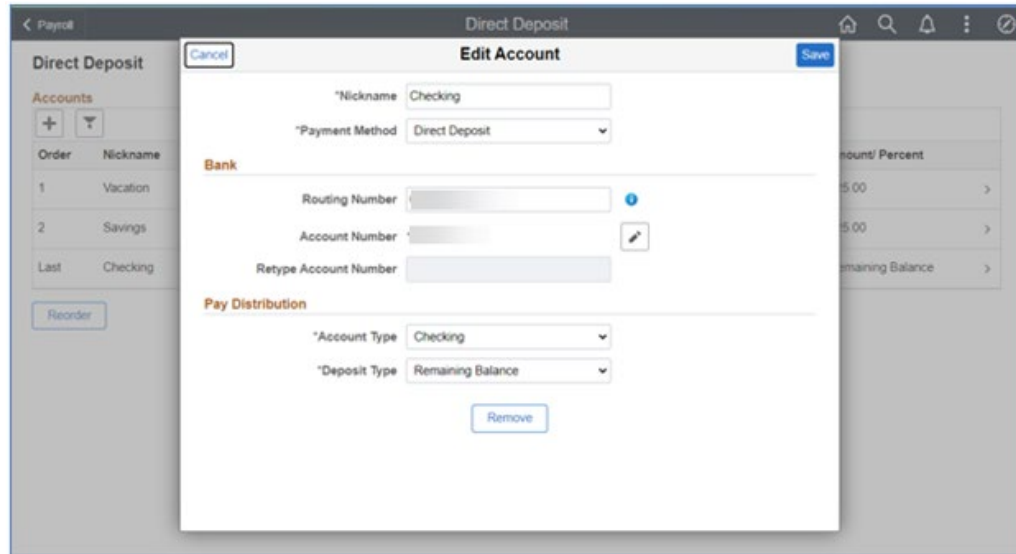
b. Update the following direct deposit information, as needed.
- **Nickname.**
- **Routing Number**.
- **Account Number**.
- **Account Type**.
- **Deposit Type** must remain as "Remaining Balance".

c. Click **Save** and the remaining balance row will automatically update.

7. Update the remaining balance account with new bank information and re-add the previous remaining balance account information to a new or existing account.
   a. Duplicate account types and routing/account numbers should not be used. If you wish to keep a bank account that is established as your remaining balance account but no longer use it as the remaining balance account, you must edit the remaining balance account first, then use the previous remaining balance bank information to add a new account or edit an existing account to avoid the duplicate account type warning.

b. To edit the remaining balance account, click on the remaining balance row.

    c. Once the **Edit Account** window opens, add the new bank account information.

    d. Click **Save**.

    e. Next, click the add **[+]** option to add a new account or select an existing deposit row.

    f. Add the previous remaining balance account information to the new account.

    g. Click **Save**.

8. Edit an existing Direct Deposit Account.

    a. Select the existing account row.

    b. The **Edit Account** window will then open for you to make changes.

    c. Update the following direct deposit information, as needed.

- **Nickname.**
- **Routing Number**.

- **Account Number**.

- **Account Type**.

- **Deposit Type** - select whether the deposit is based on a set "Amount" or a "Percent" of your net pay and enter the corresponding value.

   d. Click **Save** when finished editing and the account will automatically update.

9. Add a Direct Deposit Account.

   a. On the **Direct Deposit Accounts** page, click the plus sign **[+]** to add a new direct deposit account.

   b. The **Add Account** window will open for you to add the bank account information.

   c. Add the following direct deposit account information:
- **Nickname.**
- **Routing Number**.
- **Account Number**.
- **Account Type**.
- **Deposit Type** - select whether the deposit is based on a set "Amount" or a "Percent" of your net pay and enter the corresponding value.

    d.   Click **Save** when the new account information has been added.

    e.   The new account will automatically display in your **Accounts** list and will be assigned an order number.

- When three or more accounts exist, the priority of the account numbers can be reordered by selecting the reorder option on the page.

Direct Deposit

Accounts

Order	Nickname	Payment Method	Routing Number
2	Checking100	Direct Deposit	
3	Party	Direct Deposit	
Last	Checking200	Direct Deposit	

Reorder

10. Delete an existing account.

    ! Important: These instructions do not apply to the Remaining Balance account, which cannot be deleted, only edited.

    a.   Click on the Checking or Savings account row that you want to remove.

    b.   The **Edit Account** window will then open for you.

    c.   Click on **Remove** shown on the bottom of the page.

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d. Click **Yes** to confirm you are sure you want to remove the account.

e. The account will automatically be removed from your **Direct Deposit Accounts** list.