Training Guide

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UMass HR Direct: Employee Self Service

UMass Employee Self Service

Employee self service transactions interface with the HR Direct system. Employees can use self service to review, add, and update human resources information.

Upon completion of this module, you will be able to

- View and update personal information
- View and update payroll and compensation data, and
- Review learning and development data.

Training Guide
(http://upk.umassp.edu/HCM_90/HCM_Campus_Training/Training_Guides/Umass_Employee_Self_Service_TRAIN.doc)

Viewing and Updating Payroll and Compensation Data

The HR Direct ePay collaborative application provides employees convenient access to their personal payroll and compensation information.

Upon completion of this lesson, you will be able to:

- View paycheck information
- Enroll in direct deposit
- Maintain direct deposit information
- Update W-4 information
- Update M-4 information, and
- View and print W2/W2C forms.

Enrolling in Direct Deposit

Upon completion of this topic you will be able to use the Direct Deposit page to enroll in direct deposit.

Procedure

Consider this scenario:

Your goal is to enroll in direct deposit.

Key Information:

Routing Number: 012345678
Account Number: 98765432
1. Begin by navigating to the **Direct Deposit** page.

   Click the **Self Service** link.

   ![Self Service Link](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Click the <strong>Payroll and Compensation</strong> link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Direct Deposit</strong> link.</td>
</tr>
</tbody>
</table>
4. The Direct Deposit page can be used to view current direct deposit information or to add, edit, or delete an associated account.

5. The text on this page provides important information regarding enrollment instructions, the required balance account, data accuracy importance, overpayment authorization, and security.

Please read these instructions.

6. In this example, no accounts currently exist for direct deposit.

Therefore we will add a checking account to enroll in direct deposit.

Click the Add Account button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>The <strong>Add Direct Deposit</strong> page opens allowing the user to add direct deposit information.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>8.</td>
<td>Use the <strong>Account Type</strong> field to select the type of bank account being added.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Account Type</strong> list.</td>
</tr>
<tr>
<td>9.</td>
<td>Select the type of account being added, such as checking or savings.</td>
</tr>
<tr>
<td></td>
<td>For this example, click the <strong>Checking</strong> option.</td>
</tr>
</tbody>
</table>
10. **Deposit Type** field is used to specify whether you would like to deposit a flat amount, a percentage, or the final remaining balance of your pay to the bank account.

   Click the **Deposit Type** list.
### Step 11

In this example, we are enrolling in direct deposit for the first time and the **Deposit Type** must be set to **Balance** as explained on the **Direct Deposit** page.

For this example, click the **Balance** option.
12. The **Amount or Percent** field is used to specify a flat amount or a percentage of your pay in order to manage multiple checking accounts.

   In this example, we are enrolling in direct deposit with an account set to **Balance** which does not utilize this field. Therefore we will keep the **Amount or Percent** field blank.

13. The **Deposit Order** field defaults to **999** once the **Balance** option is chosen from the **Deposit Type** list.

   This directs the entirety of the paycheck or any remaining paycheck balance to deposit in the associated account.

   In this example, as we are enrolling in direct deposit, **999** must be listed as the value for the **Deposit Order**.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td>In order to enroll into direct deposit, your bank routing and account numbers are required. &lt;br&gt;&lt;br&gt;This information can be obtained using your personal checks and the information available on the View check example link.</td>
</tr>
<tr>
<td></td>
<td>Click the View check example link.</td>
</tr>
</tbody>
</table>

**View check example**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 15.  | The **Check Example** page contains information on how to read the routing and account numbers on your personal checks.  
The highlighted sections show which part of the check contains the **Routing Number** and the **Account Number**. |
| 16.  | Click the **OK** button. |
**Step** | **Action**
--- | ---
17. | Enter the routing number information into the **Routing Number** field.  
For this example, enter **012345678**.
18. | Enter the account number information into the **Account Number** field.  
For this example, enter **98765432**.
19. | Click the **Save** button.
20. A confirmation appears on the page stating the changes have been saved, but may not be reflected on the next paycheck.

A confirmation email will also be sent to all email addresses that you have provided to the university within the next 24-48 hours regarding recent changes to your direct deposit enrollment.

Click the **OK** button.
21. The account information for direct deposit is now displayed on the Direct Deposit page.

*Note:* Further instructions on how to manage your direct deposit is available in the help lesson titled, *Maintaining Direct Deposit Information.*

22. Congratulations! You have successfully enrolled in direct deposit. 

**End of Procedure.**