How to Set Up Payroll Direct Deposit from Sandia to The Education Plan

Setting up direct deposit with The Education Plan and Sandia National Laboratories is a simple **two-step process**. It’s important to complete both steps outlined in this guide to ensure your contributions are deposited correctly.

- Recurring contributions can be set to as little as $1.
- You can update contributions at any time by repeating both steps outlined below.

**STEP 1 : Submit to The Education Plan**

This process walks you through logging into your account with The Education Plan and submitting the direct deposit amount. **Please note: The amount you submit to The Education Plan must match the amount you set up with Sandia in Step 2.** See pages 2–6 for instructions.

**STEP 2 : Set up with Sandia**

This process walks you through logging into Inside, formerly TechWeb, to add direct deposit as an option to your account. See pages 7-10 of this guide for instructions.

When adding or updating your direct deposit from Sandia to The Education Plan, you must complete both Steps 1 and 2.
Step 1: Submit the payroll direct deposit instruction to The Education Plan.

1. Login and go to the Payroll Direct Deposit section of the website to start, edit, or stop your Payroll Direct Deposit Instructions. You will notice in the screenshot below, this person does not currently have Payroll Direct Deposit instructions so the column shows $0.00 per pay check. To change your instructions, click on the “Change payroll instruction” button.
2. Once you click on that button, you will be brought to the following screen. Here you can enter how much you would like to allocate to your beneficiary.

3. In this example, we selected $50 for the account.
4. After clicking “Next” on the previous screen, you will be asked to review your new instructions. If you want to make any changes, select “Previous” otherwise, click Submit.

5. Once you select “Submit” you will be presented with the following confirmation screen, along with direction to PRINT the Payroll Instruction form that you can use to set up your direct deposit from Sandia’s HR Self Service Homepage.
Step 1: Submit the payroll direct deposit instruction to The Education Plan.

6. When you select “Get Form” the prefilled form will generate for you to print and use to set up your direct deposit from Sandia’s Self Service Homepage. This has the routing number, 529 account number, and instructions to use as “Checking” account.

7. The following pop-up will show up when “Done” is selected in the previous screen, as a final reminder to print the payroll form.
Step 1: Submit the payroll direct deposit instruction to The Education Plan.

8. The following screenshot shows you what it looks like in your account when the instructions are submitted.
Step 2: Set up direct deposit with Sandia.

1. Go to Inside (Formerly Techweb)

2. Select HR Self Service
Step 2: Set up direct deposit with Sandia.

3. On the HR Self Service page select “Pay & Taxes”

4. Select “Direct Deposit”
Step 2: Set up direct deposit with Sandia.

5. Select the plus (+) sign to add a direct deposit
Step 2: Set up direct deposit with Sandia.

6. Enter the following information:
   - **Nickname:** Education Plan
   - **Routing Number:** 011001234
   - **Account Number:** Enter your account number from the Education Plan.
   - **Account Type:** Checking
   - **Deposit Type:** Amount
   - **Amount:** How much you would like deposited to your Education Plan. This must match your direct deposit election you entered with the Education Plan.
   - **NOTE:** You will have to change the primary direct deposit amount to “Remaining Balance”, or make sure the % elected for each Direct Deposit adds up to 100%

Click **Save** and now your Education Plan Direct Deposit is all set up to be sent from Sandia each pay period.