

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.

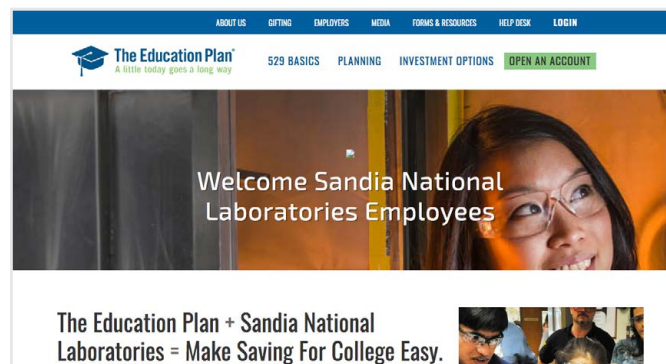
- Recurring contributions can be set to as little as \$1.
- You can update contributions at any time by repeating both steps outlined below.

STEP 1 : Submit to The Education Plan

STEP 2 : Set up with Sandia

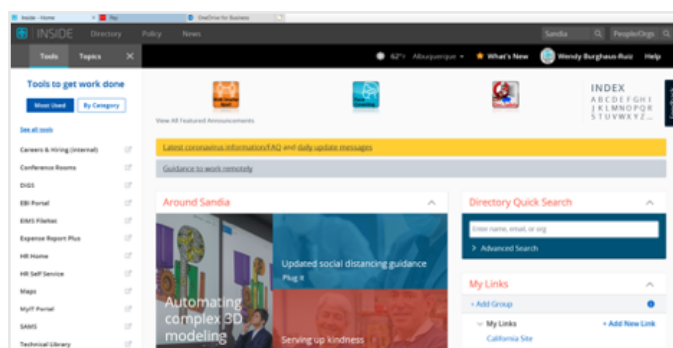
Step 1: Submit the payroll direct deposit instruction to The Education Plan.

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 direct deposit 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.




Sandia National Laboratories




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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.

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Log off

Payroll Direct Deposit

[Profile](#)
[Bank Information](#)
[Payroll Direct Deposit](#)
[Delivery Preferences](#)
[Password & Security Features](#)
[Statements, Confirms & Tax Forms](#)
[Beneficiaries](#)
[Successors](#)
[Rep/Advisors](#)
[Authorized Agents](#)
[Interested Parties](#)
[Trusted Contact](#)

Your payroll direct deposit instruction

Employer	No employer is associated	
Employee status	Not specified	
Employer ID	Not specified	
Employee ID		


Account number	Beneficiary	Amount per paycheck
XXXXXXXXXXXX	XXXXXXXXXXXX	\$0.00
Total		\$0.00

Change payroll instruction




Step 1: Submit the payroll direct deposit instruction to The Education Plan.

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.

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Log off

 Payroll Direct Deposit

Employer

Employee status

Employee ID

☒ Change instruction

☐ Review instruction

☐ Submit to employer

Choose amount

How much do you want to contribute from your paycheck each pay period?

Contributions must be at least \$1.00 per account for each beneficiary.

Enter \$0 for any account to request to stop allocating contributions to that account. Enter \$0 for all accounts for all beneficiaries to request to stop your payroll direct deposit entirely.

Account number	Beneficiary	Amount per paycheck
XXXXXXXXXXXX	XXXXXXXXXXXX	<input type="text" value="\$ 0"/>
Total		\$0.00

3. In this example, we selected \$50 for the account.

Account number	Beneficiary	Amount per paycheck
XXXXXXXXXXXX	XXXXXXXXXXXX	<input type="text" value="\$ 50"/>
Total		\$50.00



Step 1: Submit the payroll direct deposit instruction to The Education Plan.

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.

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Log off

Payroll Direct Deposit

Review your instruction

Employer: No employer is associated
Employee status: Not Specified
Employer ID: Not specified
Employee ID:

If this summary is correct, press "Submit". You will be able to print the form for your employer's payroll office on the next page.

Account number	Beneficiary	Amount per paycheck	Percent allocation
*****	*****	\$50.00	100.00%
Total		\$50.00	100%

Cancel Previous Submit

Change instruction
Review instruction
Submit to employer

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.

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Log off

Payroll Direct Deposit

Further action required

CSR: The form will be automatically mailed to the customer.

Please print the form now and provide it to your employer's payroll office so they can direct money (or stop directing money) from your paycheck to your 529 plan account.

Get Form

Follow your employer's procedures for communicating this information. Some employers may enable you to submit payroll requests electronically through their payroll system.

Employer: No employer is associated
Employee status: Not Specified
Employer ID: Not specified
Employee ID:

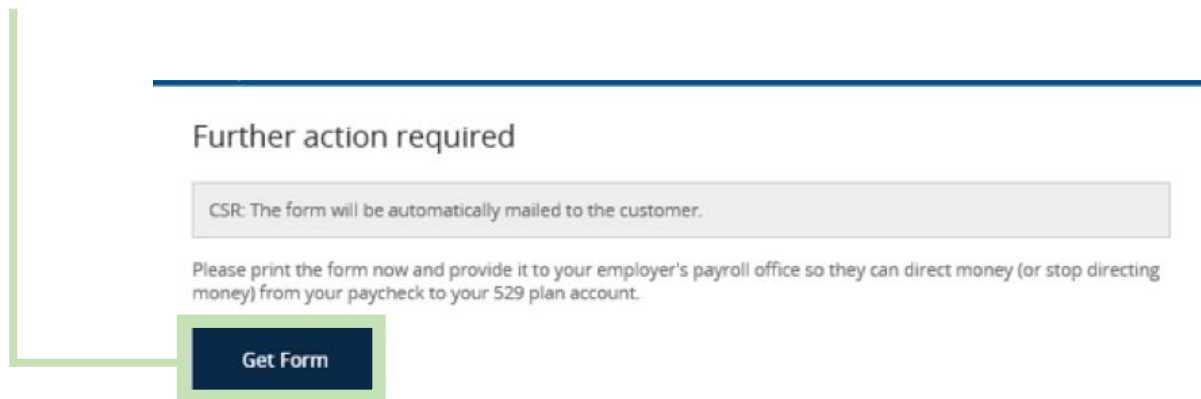
Account number	Beneficiary	Amount per paycheck	Percent allocation
*****	*****	\$50.00	100.00%
Total		\$50.00	100%

Change instruction
Review instruction
Submit to employer

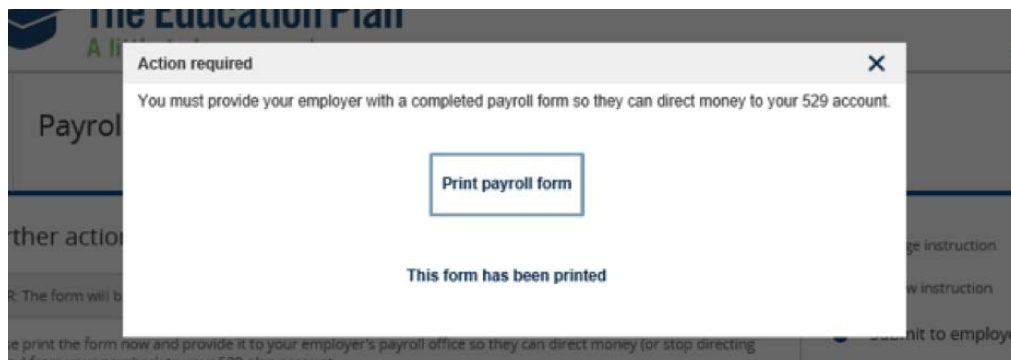


Step 1: Submit the payroll direct deposit instruction to The Education Plan.

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.

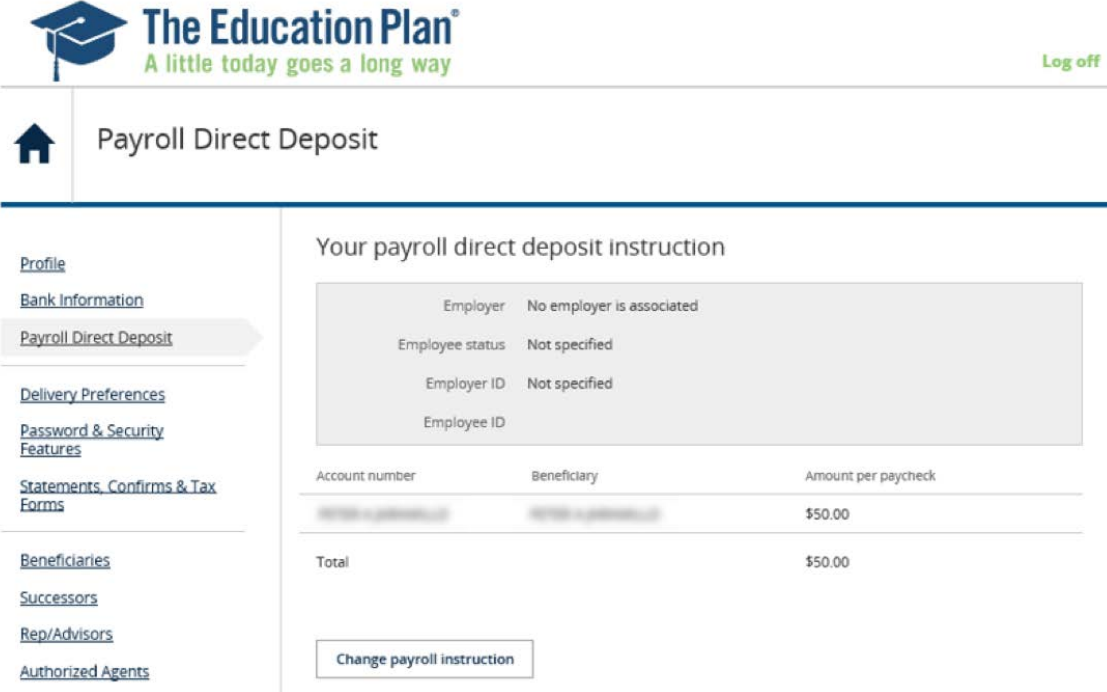


7. The following pop-up will show up when “Done” is selected in the previous screen, as a final reminder to print the payroll form.



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.



The screenshot shows the 'The Education Plan' website interface. At the top, the logo features a graduation cap and the text 'The Education Plan® A little today goes a long way'. A 'Log off' link is in the top right. Below the header, a navigation bar includes a home icon and the title 'Payroll Direct Deposit'. A left sidebar lists menu items: Profile, Bank Information, Payroll Direct Deposit (highlighted), Delivery Preferences, Password & Security Features, Statements, Confirms & Tax Forms, Beneficiaries, Successors, Rep/Advisors, and Authorized Agents. The main content area is titled 'Your payroll direct deposit instruction'. It contains a grey box with the following details: Employer (No employer is associated), Employee status (Not specified), Employer ID (Not specified), and Employee ID (Not specified). Below this is a table with three columns: Account number, Beneficiary, and Amount per paycheck. The table has one data row with masked account numbers and a value of \$50.00, followed by a 'Total' row also showing \$50.00. A 'Change payroll instruction' button is located at the bottom of the main content area.

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Log off

Payroll Direct Deposit

Profile
Bank Information
Payroll Direct Deposit
Delivery Preferences
Password & Security Features
Statements, Confirms & Tax Forms
Beneficiaries
Successors
Rep/Advisors
Authorized Agents

Your payroll direct deposit instruction

Employer	No employer is associated	
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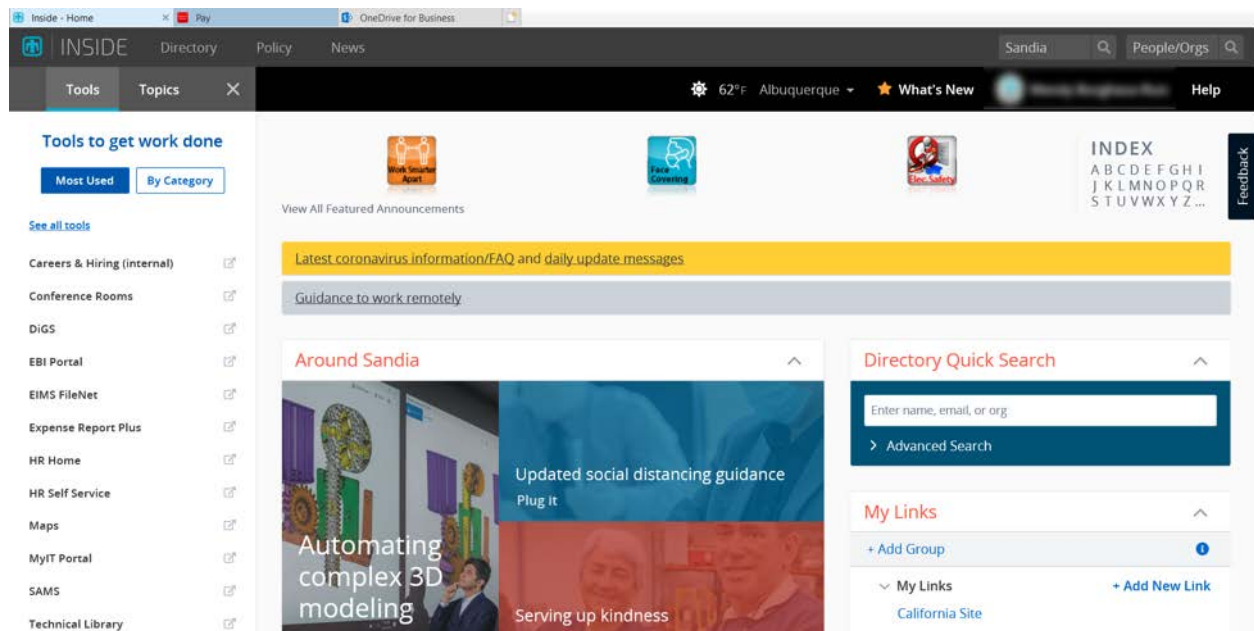
Account number	Beneficiary	Amount per paycheck
XXXXXXXXXXXX	XXXXXXXXXXXX	\$50.00
Total		\$50.00

Change payroll instruction

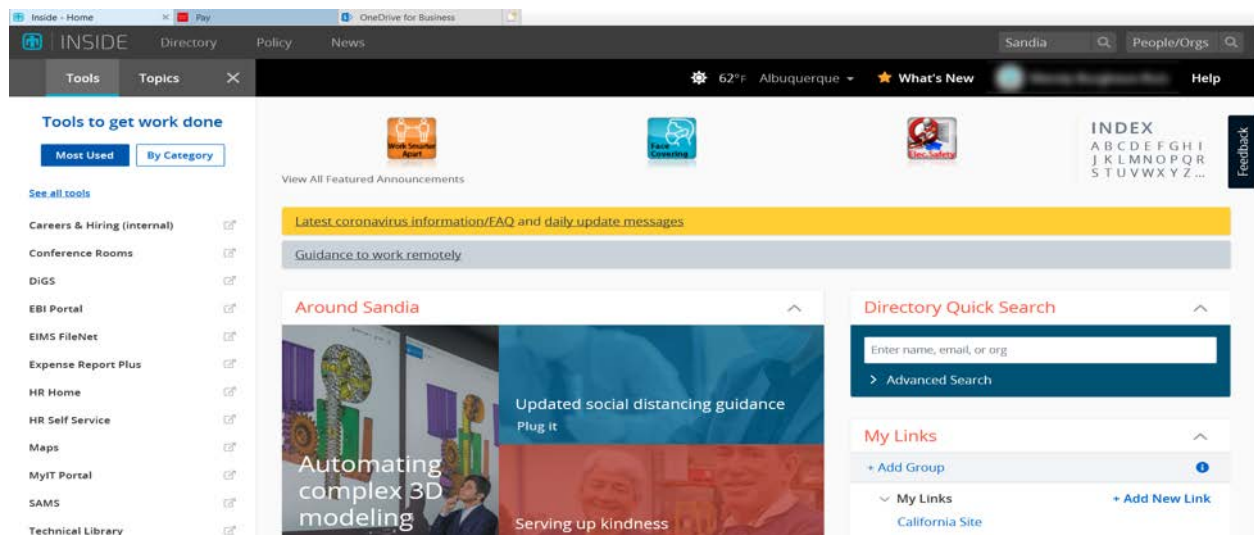


Step 2: Set up direct deposit with Sandia.

1. Go to Inside (Formerly Techweb)

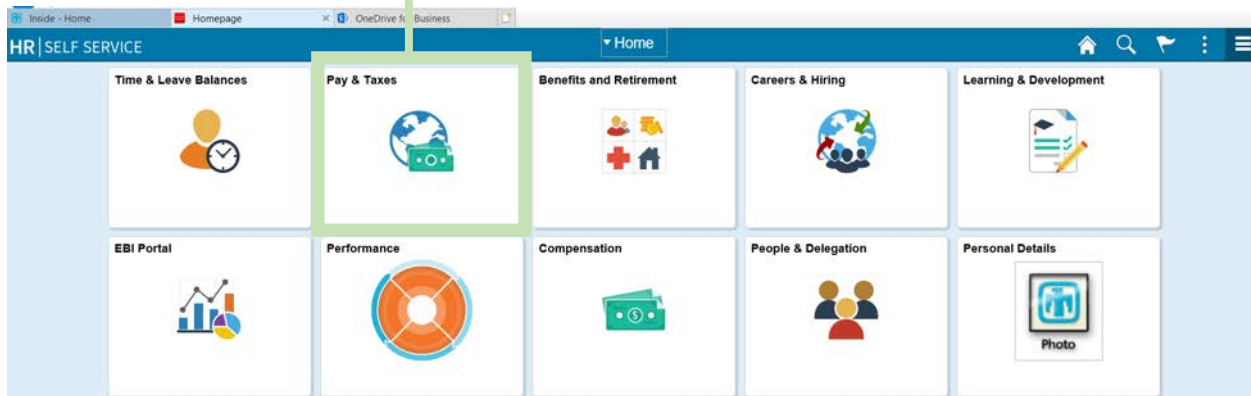


2. Select HR Self Service

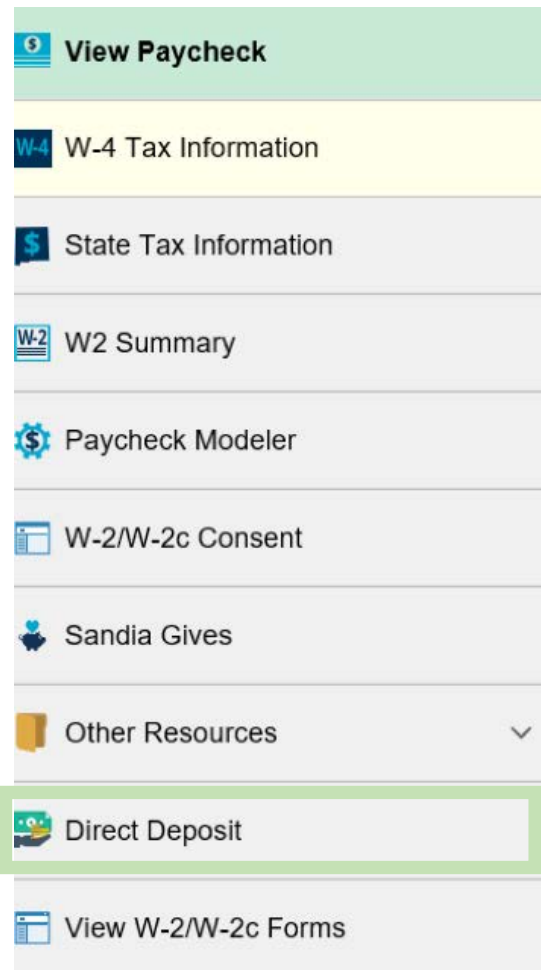


Step 2: Set up direct deposit with Sandia.

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

Pay and Taxes

Direct Deposit

Validate your bank routing number and account number with your bank prior to making any updates to your direct deposit. Incorrect data entry may be rejected by your bank and delay receipt of payment. Changes to your direct deposit will take effect on the next pay period. Only one change per day is allowed.

Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
1	Savings1	Direct Deposit	000000	000000	Savings	\$50.00

Direct Deposit

Add Account

Cancel **Save**

*Nickname

*Payment Method

Bank

Routing Number

Account Number

Retype Account Number

Pay Distribution

*Account Type

*Deposit Type

Amount or Percent

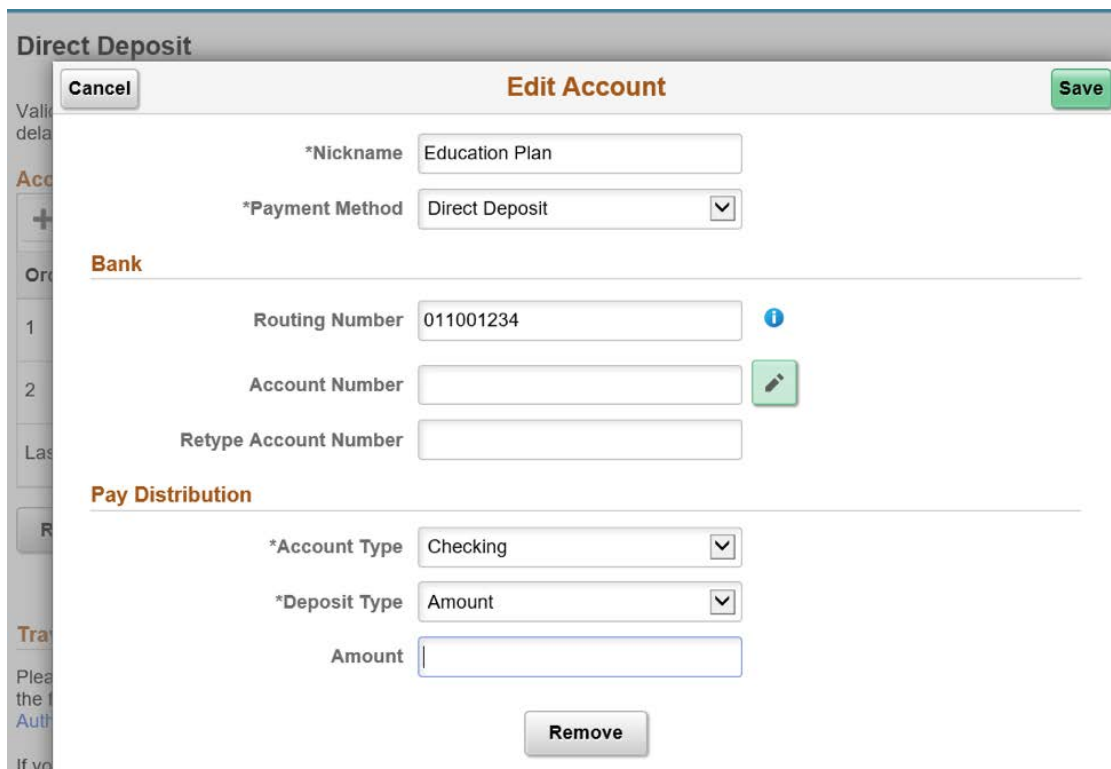


Step 2: Set up direct deposit with Sandia.

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.



The screenshot shows a web form titled "Direct Deposit" with a sidebar on the left containing navigation links like "Valid", "del", "Acc", "Or", "1", "2", "Las", "R", "Tra", "Plea", "the", "Auth", and "If vo". The form has three buttons at the top: "Cancel", "Edit Account", and "Save". The fields are organized as follows:

- *Nickname:** Text box containing "Education Plan".
- *Payment Method:** Dropdown menu showing "Direct Deposit".
- Bank Section:**
 - Routing Number:** Text box containing "011001234" with an information icon.
 - Account Number:** Text box with a green edit icon.
 - Retype Account Number:** Empty text box.
- Pay Distribution Section:**
 - *Account Type:** Dropdown menu showing "Checking".
 - *Deposit Type:** Dropdown menu showing "Amount".
 - Amount:** Empty text box.

A "Remove" button is located at the bottom of the form.

