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UTShare/PeopleSoft – Edit Direct Deposit

1. Log into UTShare/FLUID
   - Go to [www.utsa.edu](http://www.utsa.edu)
   - From the UTSA home page, click on myUTSA
   - Click on UTShare/PeopleSoft
UTShare/PeopleSoft – Edit Direct Deposit

- Select The University of Texas at San Antonio from the drop down list

![Select your home institution](image)

- Enter your login credentials with your network ID and passphrase

![Login to UTShare](image)
2. Edit Direct Deposit

Upon entering PeopleSoft/UTShare, the home page is your Employee Self Service page. There are three ways to edit your direct deposit: change financial institution, edit amount or percent, and edit deposit order.

- Select Payroll and Compensation Tile

You are taken by default to the Pay check section.

- Select Direct Deposit
2.1 Edit Your Financial Institution Information
Example of changing your direct deposit to a new financial institution requires the new bank’s routing number and your account number in the respective fields. Deposit.

- Select **Edit** icon

```
<table>
<thead>
<tr>
<th>Account Type</th>
<th>Routing Number</th>
<th>Account Number</th>
<th>Deposit Type</th>
<th>Amount or Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking</td>
<td>XXXXXXXX</td>
<td>XXXXXXXX</td>
<td>Balance</td>
<td>15.60% 2</td>
</tr>
<tr>
<td>Savings</td>
<td>XXXXXXXX</td>
<td>XXXXXXXX</td>
<td>Balance</td>
<td>90%</td>
</tr>
</tbody>
</table>
```

- **Your Bank Information**
  - **Edit Your Bank Information**
    - Enter your new routing number in the **Routing Number** field
- **Distribution Instructions**
  - **Edit your account number in the **Account Number** field**
    - Do not enter your debit or credit card number
  - **Re-enter your account number in the **Retype Account Number** field**
  - **Select your account type in the **Account Type** field: checking or saving**
UTShare/PeopleSoft – Edit Direct Deposit

- Select the “Acknowledge the terms of using Direct Deposit” button to navigate to the Direct Deposit Acknowledgement page.

- Read the acknowledgement and select **Accept** to continue.
UTShare/PeopleSoft – Edit Direct Deposit

- Select **Submit**

![Image of Direct Deposit screen]

You will receive a notice that submit was successful

- Select **OK** to return back to Payroll and Compensation page

![Image of Submit Confirmation]

However, due to timing, your change may not be reflected on the next paycheck.
2.2 Edit Amount or Percentage

Example of changing Amount or Percent by increasing the percentage in Direct Deposit. Then acknowledge the “Acknowledge the terms of using Direct Deposit.”

- Select Edit icon

- Edit the Amount or Percent by increasing the percentage
UTShare/PeopleSoft – Edit Direct Deposit

- Select the “Acknowledge the terms of using Direct Deposit” button to navigate to the Direct Deposit Acknowledgement page.

- Read the acknowledgement and select Accept to continue.
UTShare/PeopleSoft – Edit Direct Deposit

- Select the **Submit** button.

Direct Deposit Submit Confirmation

- Select **OK** to return back to Payroll and Compensation.
2.3 Edit Deposit Order

- Select **Edit** icon

- Edit the **Deposit Order** field
  - You can enter a number from 1 through 900
  - Each payday the system creates and sends deposits in the sequence of the Deposit Order of 1, then 2, and 999 is last.
  - If you only have one account, it will default to 999.
  - Note: Example: 1 = First Account to create and send deposit.
  - *required field
• Select the “Acknowledge the terms of using Direct Deposit” button to navigate to the Direct Deposit Acknowledgement page.

• Read the acknowledgement and select Accept to continue.
UTShare/PeopleSoft – Edit Direct Deposit

- Select the **Submit** button.

![Direct Deposit Submit Confirmation](image)

Direct Deposit Submit Confirmation

- Select **OK** to return back to Payroll and Compensation

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End of PR Editing Direct Deposit Job Aid