

## Step-by-Step Instructions

### Zachry Business Use Case

Use the Payment Method functionality of Oracle to add, edit, or deactivate a Bank Account and manage your Payment Methods.

- The direct deposit information is captured in the Bank Account section before being assigned as a Payment Method.
- Additional Payment Methods allow for a fixed percentage amount.
- There are a maximum of 3 Bank Accounts and 3 Payment Methods.
- If an employee chooses not to set up a direct deposit account, the default in Oracle will be a Pay Card deposit.

### Jump to:

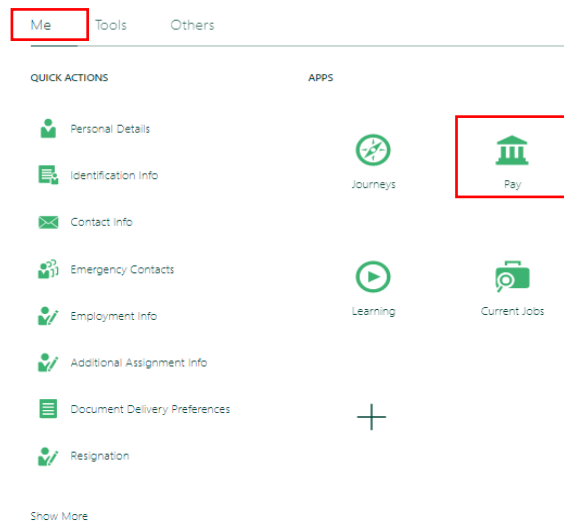
[Edit Bank Accounts & Payment Methods](#)

[Deactivate Banks Accounts & Delete Payment Methods](#)

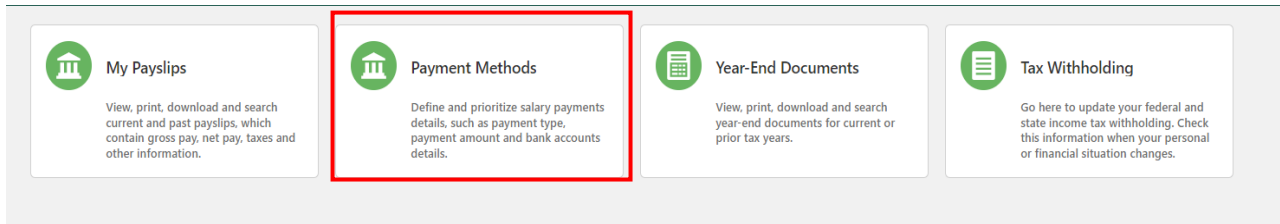
### Add Bank Accounts & Payment Methods

Performed by: Employee

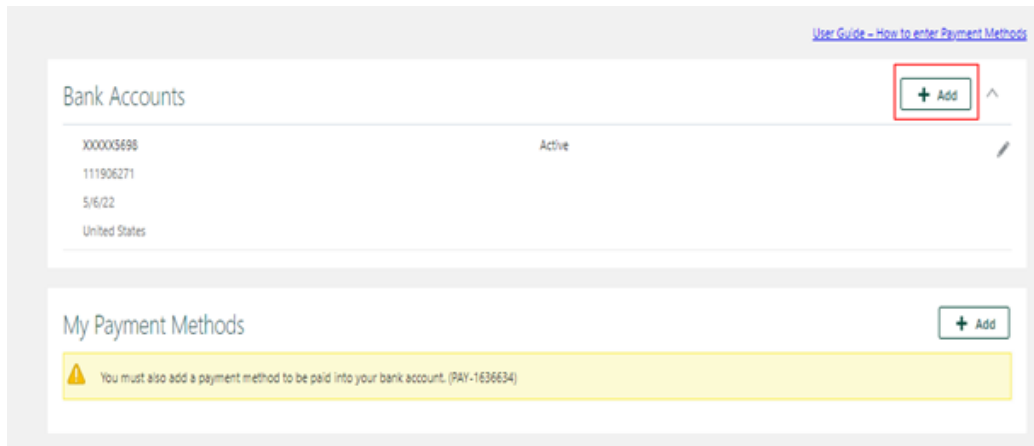
1. Navigate to **Homepage** and select the **Me** tab. Click the **Pay** icon in the App section.



2. The following options appears. Select **Payment Methods**.



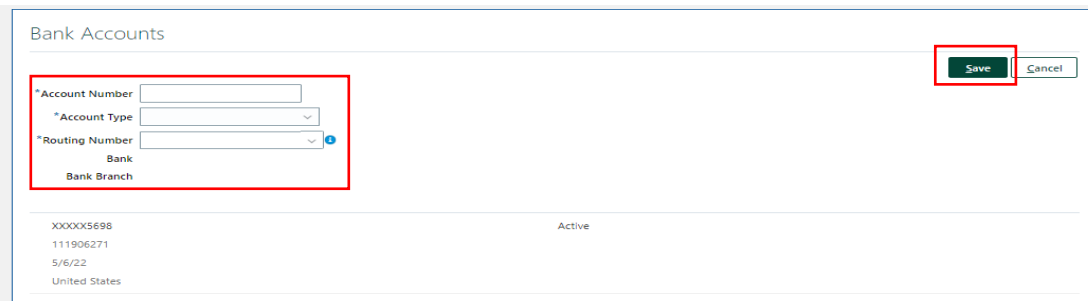
3. The page below appears. Select the **+Add** button to add a **Bank Account**.



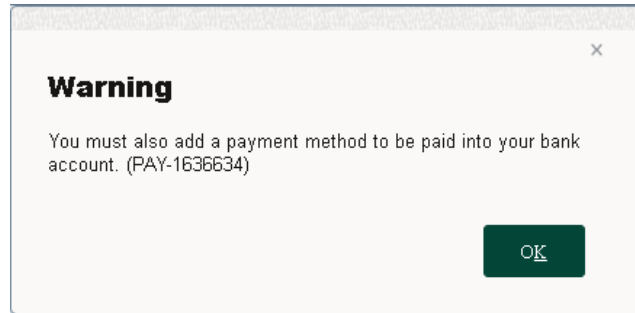
4. The page below appears. Fill out these required fields: *Account Number*, *Account Type*, and *Routing Number*. Once complete, select **Save**.

Note:

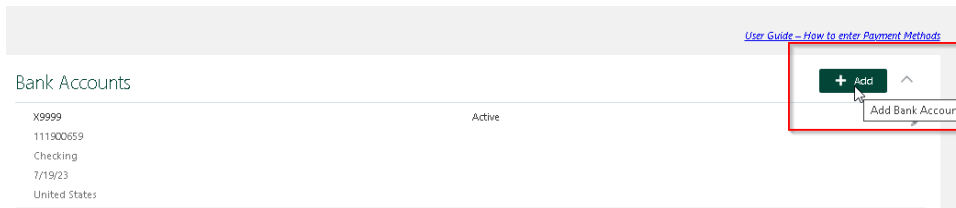
- The Bank and Bank Branch will autofill once you select the Routing Number.
- A maximum of 3 banks accounts can be added to the Bank Account section.



5. After selecting **Save**, the page below message appears. Select **OK**.



6. To add a payment method, select the **+Add** button.

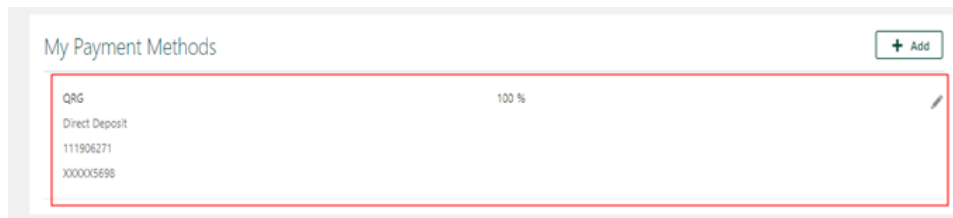


7. The page below appears. Fill out the required fields: *What do you want to call this Payment method, Payment Type, Payment Amount and Bank Account.* Once complete, select **Save**.

**Note:** If you don't have bank account information, you will be assigned a *Pay Card* where your money will be deposited until the bank account has been updated. You can go back and add a bank account at any time. If you have questions, contact payroll. Direct Deposit information, including changes, must be entered by noon on Tuesday to be guaranteed payment to the appropriate account.

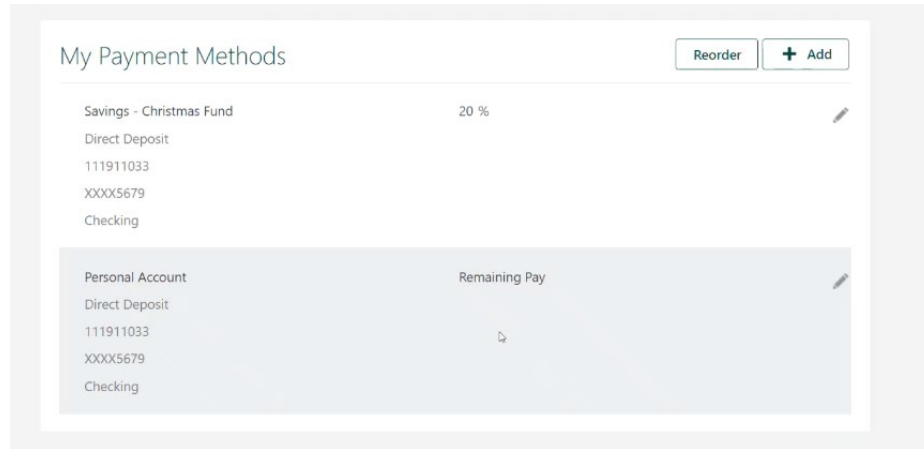
My Payment Methods		Save	Cancel
*What do you want to call this payment method?	*Payment Amount	Percentage	100 %
*Payment Type	*Bank Account	Direct Deposit	111900659 X2345 Checking

8. After selecting **Save**, the page below appears with the new payment method.



**Note:**

- If you have one account, it will not ask you for percentages. It will auto set to 100%.



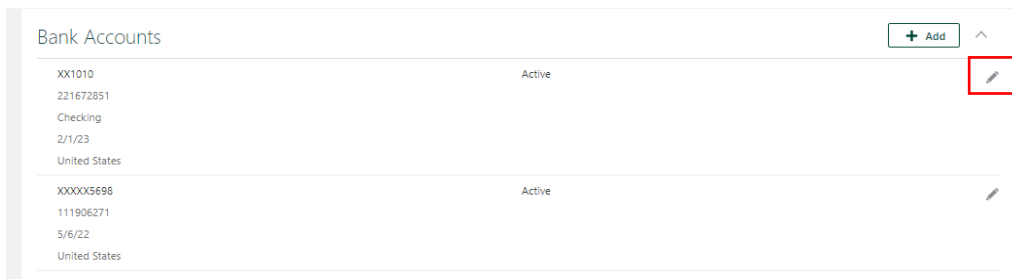
**Note:**

- If you have more than one payment method the percentage for all payment methods must add up to 100%.
- Example, if you enter 20% on the second payment method, the first will default to “Remaining Amount”.

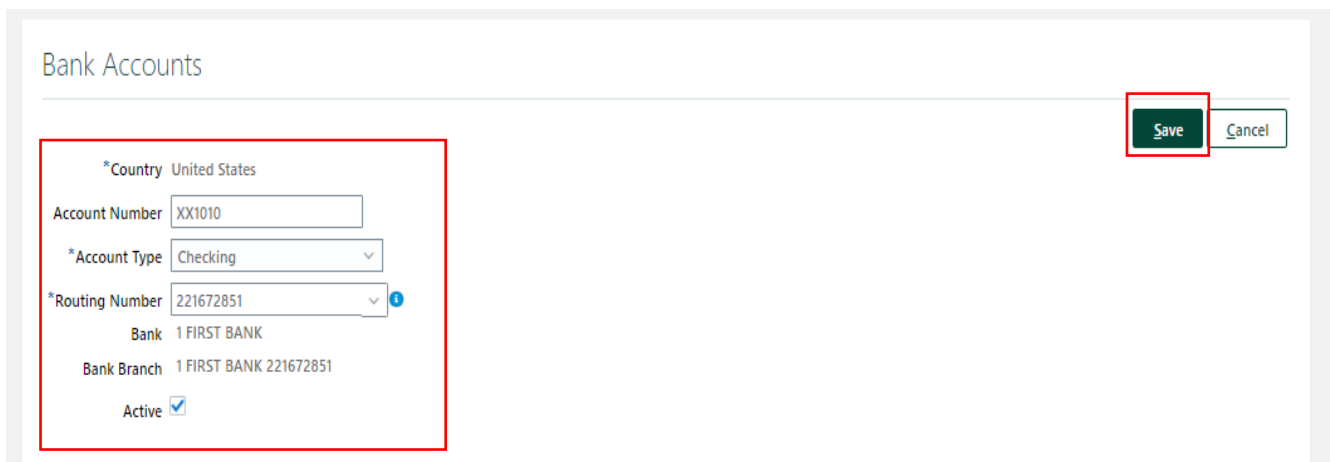
## Edit Bank Accounts & Payment Methods

Performed by: Employee

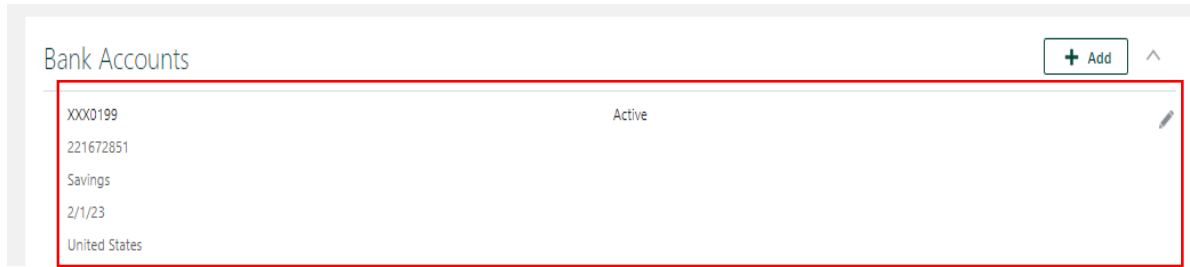
1. From the Payment Methods work area select the **Edit** button (pencil icon) on the **Bank Account** you wish to make changes to.



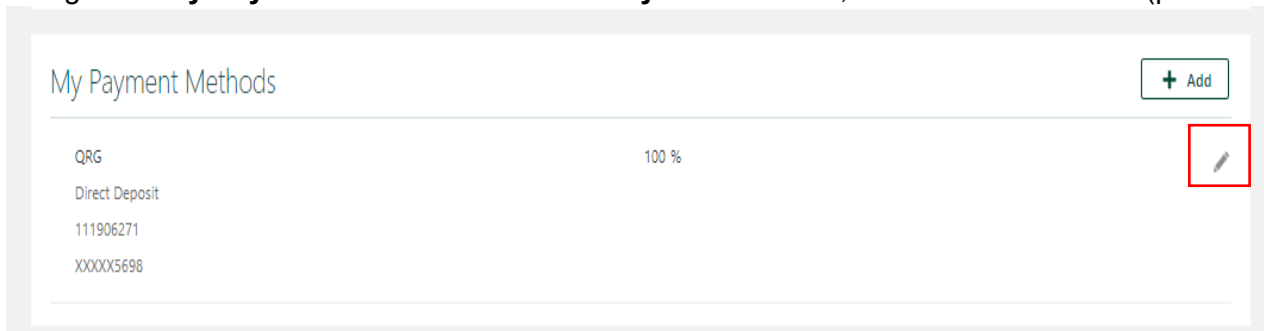
2. The page below appears. Make any necessary changes. Once complete, select **Save**.



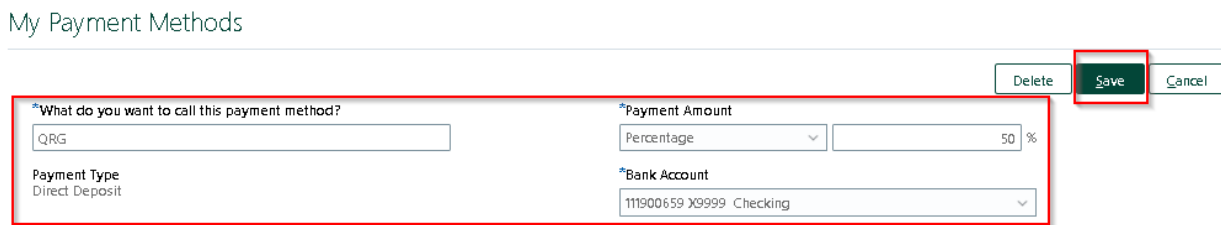
3. The page below appears and the changes reflected.



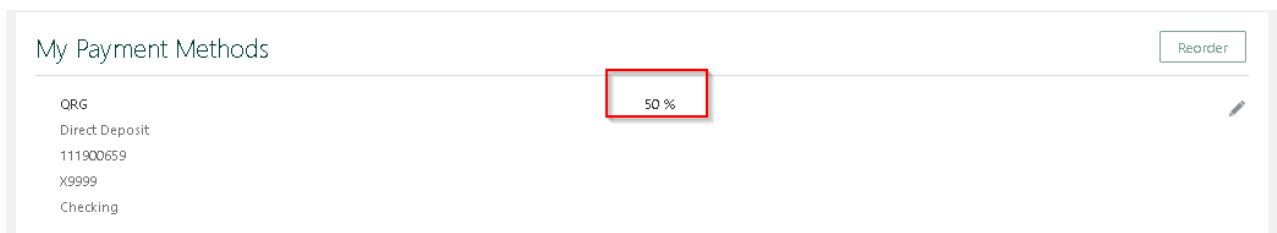
4. Navigate to **My Payment Methods**. To edit a **Payment Method**, select the **Edit** button (pencil icon).



5. The page below appears. Make any necessary changes. Once complete, select **Save**.



6. The page below appears and the changes you made are saved.

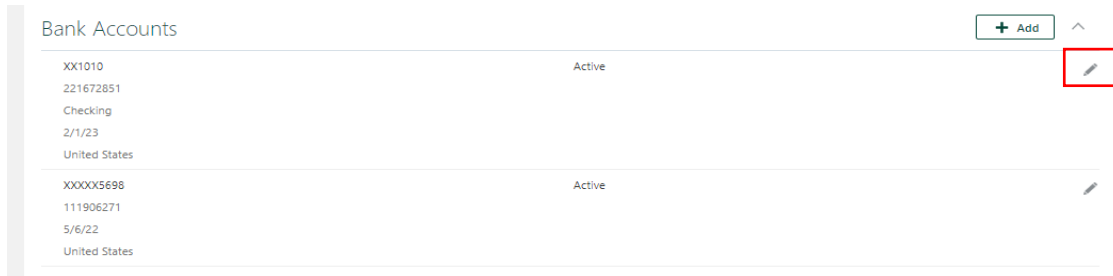


**Note:** If you have more than one payment method the percentage for all payment methods must add up to 100%.

## Deactivate Bank Accounts & Delete Payment Methods

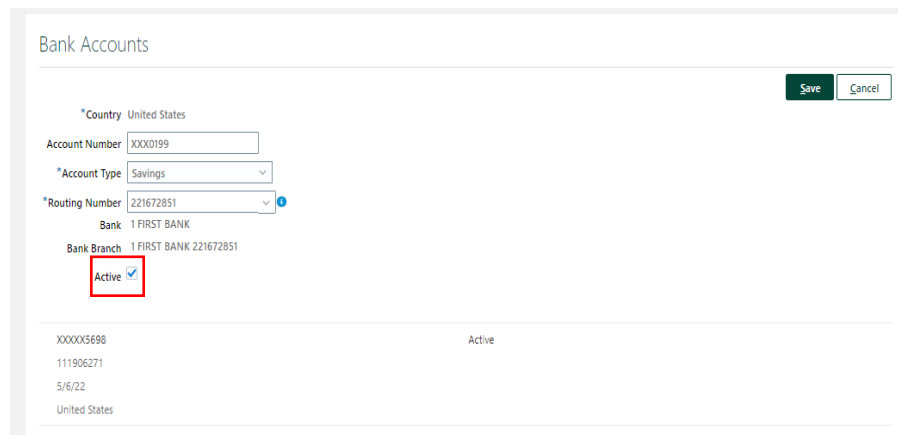
Performed by: Employee

1. The page below appears. Select the **Edit** button (pencil icon) next to the **Bank Account** you want to delete.

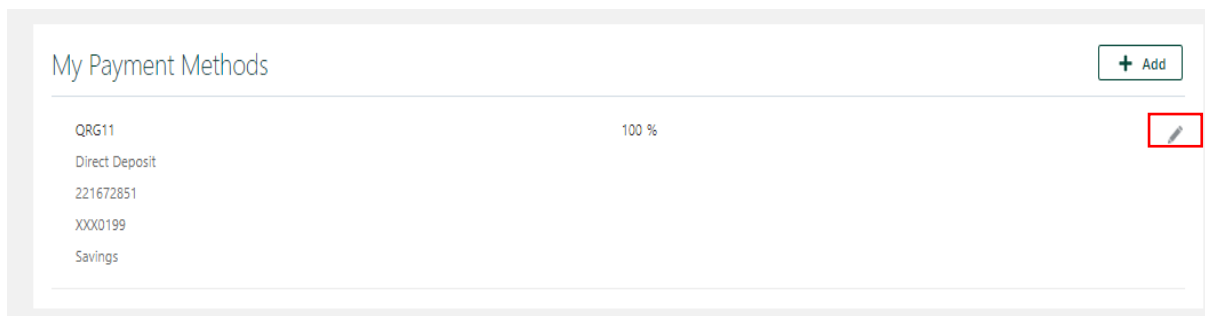


2. The page below appears. **Uncheck** the check box that says **Active**. Click **Save**. The Bank Account will reflect **Inactive**.

Note: You cannot delete a Bank Account, but you can deactivate it.



3. To delete a **Payment Method**, select the **Edit** button (pencil icon) next to the **Payment Method** you want to remove.



4. The page below appears. Select the **Delete** button.

The screenshot shows the 'My Payment Methods' form. At the top right, there are three buttons: 'Delete', 'Save', and 'Cancel'. The 'Delete' button is highlighted with a red box. Below the buttons, there are two input fields: '\*What do you want to call this payment method?' with the value 'QRG11' and '\*Bank Account' with a dropdown menu showing '221672851 XXXX0199 Savings'. Below these fields, the 'Payment Type' is set to 'Direct Deposit'.

5. You will receive a notice asking: “*You’re about to delete this payment method. Do you want to continue?*”. Click **OK**.

The screenshot shows a confirmation dialog box with a yellow background. It contains a warning icon and the text: “You’re about to delete this payment method. Do you want to continue? (PAY-1636684)”. At the bottom right, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box.

6. The page below appears with the deleted payment method.

The screenshot shows the 'My Payment Methods' page after the payment method has been deleted. At the top right, there is a '+ Add' button. Below it, there is a yellow warning box with a warning icon and the text: “You must also add a payment method to be paid into your bank account. (PAY-1636634)”. The entire page content is enclosed in a red border.