

Step-by-Step Instructions

Zachry Business Use Case

Use the Payment Method functionality of Oracle HCM to add, edit, or deactivate a bank account and to manage your Payment Methods.

- If an employee chooses not to set up a direct deposit account, the system will auto default to a Pay Card.
- Additional Payment Methods allow for a fixed percentage amount.
- There are a maximum of 3 Bank Accounts and 3 Payment Methods.
- Bank accounts can only be deactivated through employee self-service once added. Reach out to Payroll@zachrygroup.com for assistance with deleting a bank account.

Jump to:

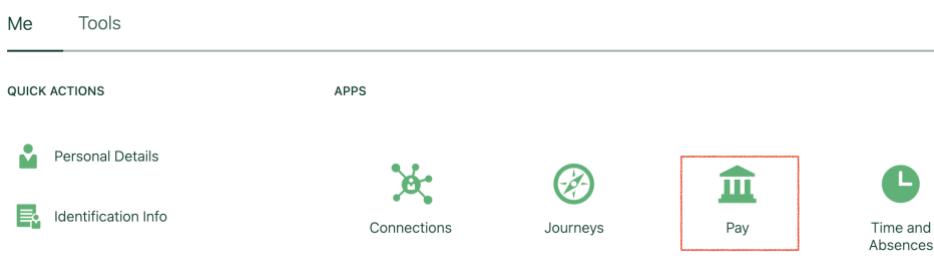
[Edit Payment Method & Bank Account](#)

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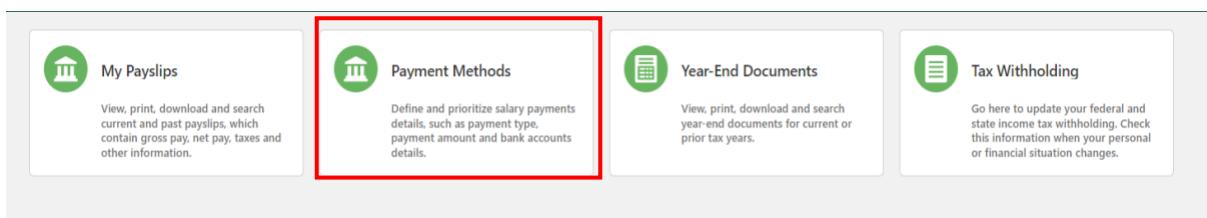
Add Bank Accounts & Payment Methods

Performed by: Employee

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



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



3. To view **Bank Accounts** already entered into the system, select the associated action button in the upper right-hand corner.

Payment Methods

Bank Accounts

All Active Inactive

Savings
SECURITY SERVICE FCU
United States
10/6/23 - 10/6/23

Account Number: XXXXX
Routing Number: 314088637
Not linked
Activate

Checking
SECURITY SERVICE FCU
United States
8/17/23

Account Number: XXXXXX
Routing Number: 314088637
Linked
Inactive

- To add a new payment method, select the **+Add** button. In the New Payment Method section, add details such as payment method name (e.g., “savings”) and the percentage or specific dollar amount to be deposited into the associated bank account. An existing bank account can be selected, or a new account can be added.

+ Add

New Payment Method

Details

What do you want to call this payment method? Required

Payment Type: Direct Deposit

Payment Amount: Percentage Required

Bank Details

Select an account New Account Existing Account

- To add a new bank account to a payment method, select the **New Account** bubble under **Bank Details**. Fill out the required fields. Once complete, select **Create**.

Note:

- The Bank and Bank Branch information will auto populate after the Routing Number is entered.
- A maximum of 3 banks accounts can be added to the Bank Account section.
- A *Pay Card* will be the default payment method until a bank account is added.
- Updates to payment methods must be entered by 9:30AM CST on Tuesdays to guarantee payment to the associated bank account.

Bank Details

Select an account

New Account Existing Account

Account Number Required

Account Type Required

Routing Number Required

Bank

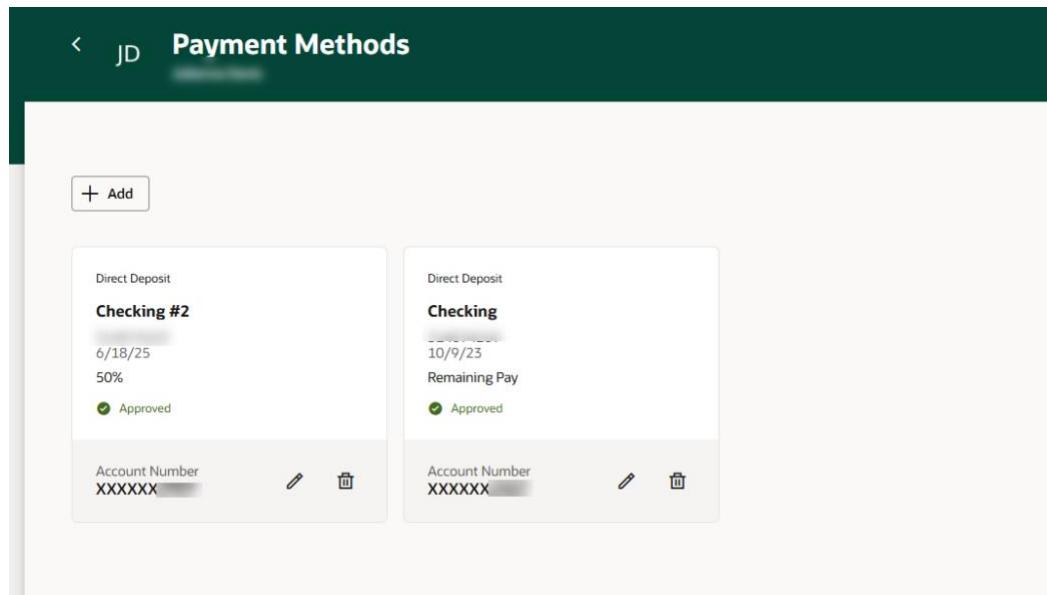
Bank Branch

Cancel Create

6. After selecting **Create**, the new payment method will appear on the Payment Methods page.

Note:

- If you have more than one payment method, the system will confirm 100% of the payment is allocated across the accounts.
 - For example, with two payment methods, if one is allocated 20% of the payment, the other payment method will allocate to “Remaining Pay” by default.



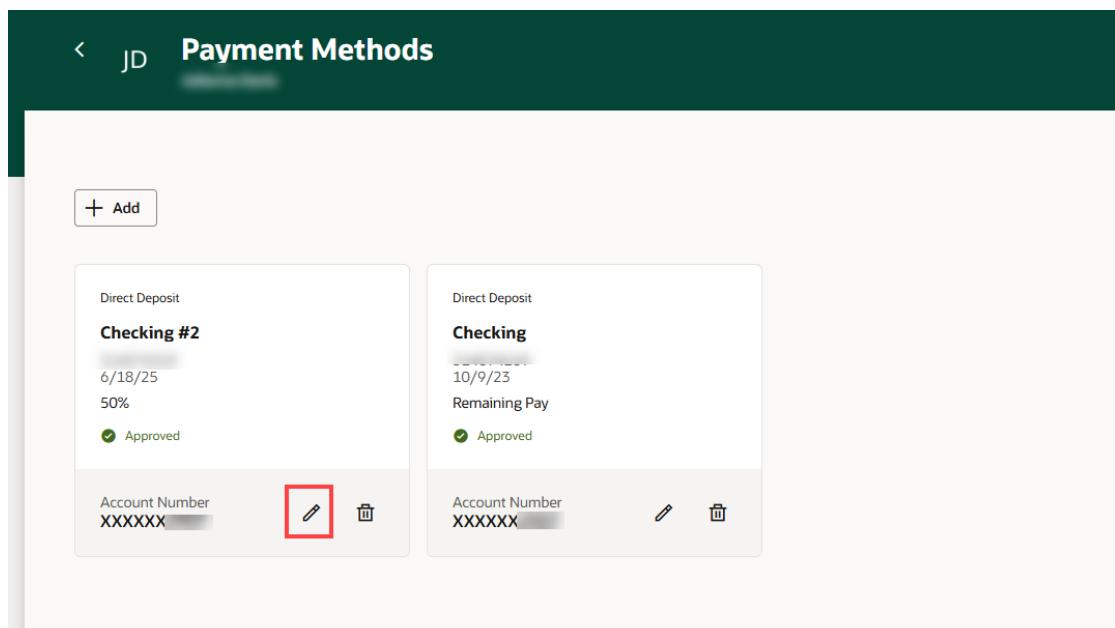
The screenshot shows the 'Payment Methods' page with two payment methods listed:

- Checking #2**
 - Direct Deposit
 - 6/18/25
 - 50%
 - Approved
 - Account Number: XXXXXX
 -
- Checking**
 - Direct Deposit
 - 10/9/23
 - Remaining Pay
 - Approved
 - Account Number: XXXXXX
 -

Edit Payment Methods & Bank Accounts

Performed by: Employee

1. From the Payment Methods page select the **pencil icon** to **edit a Payment Method**.



The screenshot shows the 'Payment Methods' page with the first payment method, 'Checking #2', selected for editing. The 'Edit' icon (a pencil icon) is highlighted with a red box.

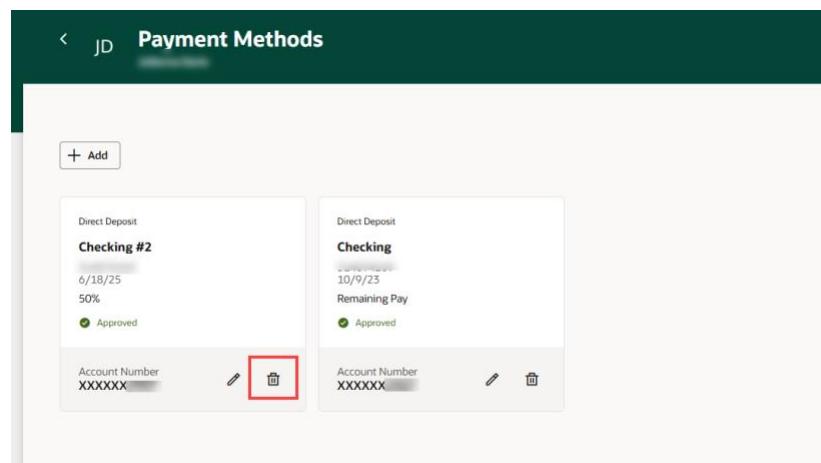
2. Update with changes and then select **Update**.

The screenshot shows the 'Checking #2' payment method details. In the 'Bank Details' section, the 'Bank Account' dropdown is set to 'CHECKING'. The 'Update' button at the bottom right is highlighted with a red box.

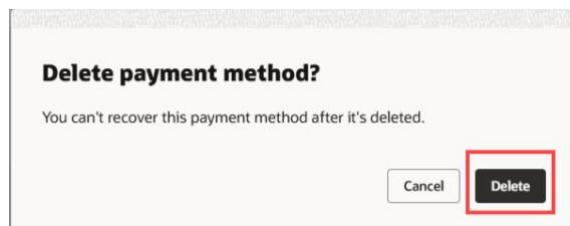
Delete Payment Method & Deactivate Bank Account

Performed by: Employee

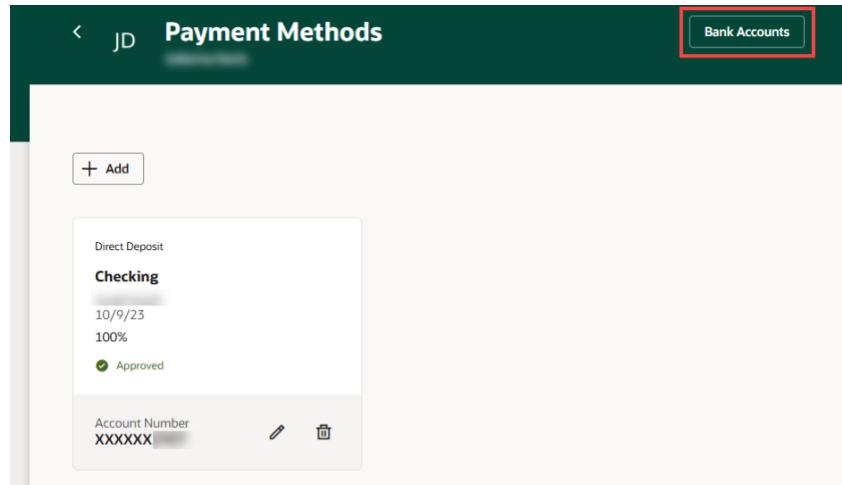
1. Navigate to Payment Methods page. Select the trashcan icon on the Payment Method you want to delete.



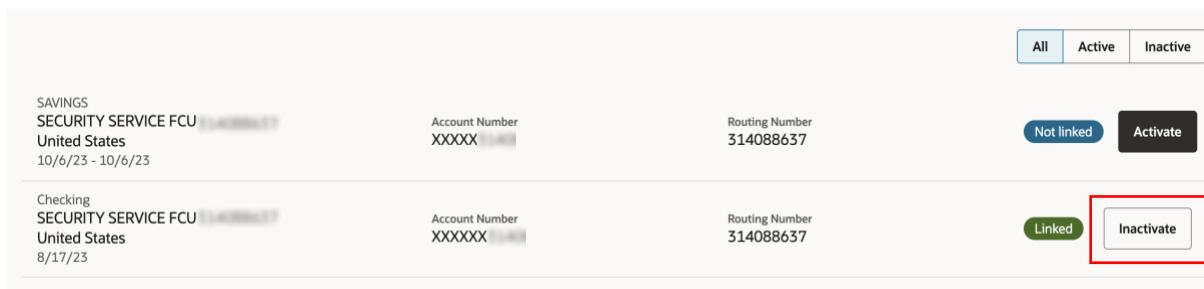
2. A pop-up warning shows: “Delete payment method? You can't recover this payment method after it's deleted”. To move forward, select **Delete**. Payment method will immediately be removed from the page.



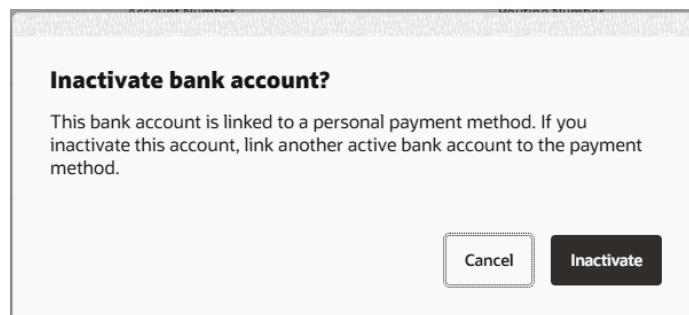
- To deactivate a **Bank Account**, select the **Bank Account** action button on the upper right-hand corner of the Payment Methods page.



- The **Bank Accounts** page appears. Click the **Inactivate** button on the bank account you want to delete. **Note:** Bank accounts cannot be deleted once entered into the system, only deactivated.



- A pop-up warning shows: "*Inactivate bank account?*" To move forward, select **Inactivate**.



- The Bank Account will be deactivated and reflect **Inactive** status.