



Employee enrollment and payroll direct deposit procedures

Follow these simple steps to set up an account with New York's 529 College Savings Program *Direct Plan* account using payroll direct deposit. Set up recurring contributions with as little as \$1 if using payroll direct deposit. It only takes 10 minutes to open an account.

Step 1

Go to the plan's website at www.ny529atwork.org and select **Open an account**.

Step 2

Follow the step-by-step instructions until you reach the **Pick a funding method** page, where you select **With payroll direct deposit**.

Step 3

At the end of the enrollment process, you'll be asked to print out a *Payroll Authorization Form* (see a sample on the back of this page). This form is prefilled with your name, the total payroll direct deposit amount, your unique account number, and routing (ABA) number for the plan's bank. Submit this form to your employer's human resources or benefits department—or if you have access to an employee payroll portal, you can enter the information yourself.

Step 4

Your employer will update the payroll system with your payroll direct deposit information and begin sending your contributions to the *Direct Plan*.

Note: If you already participate in the *Direct Plan*, you can start using payroll direct deposit by logging on at www.ny529atwork.org, selecting **Profile & Documents**, and selecting **Payroll Direct Deposit**. Then simply print the *Payroll Direct Deposit Authorization Form*, and submit it to your employer's human resources or benefits department—or if you have access to an employee payroll portal, you can enter the information yourself. Your employer will update the payroll system with your payroll direct deposit information and begin sending your contributions to the *Direct Plan*.

Sample: Payroll Authorization Form

At the end of the enrollment process, you'll be asked to print out a *Payroll Authorization Form* (see the sample below). Submit this form to your employer's human resources or benefits department—or if you have access to an employee payroll portal, you can enter the information yourself.

Note: This is a different form than the *Payroll Direct Deposit Instruction Form*, which is available on the *Direct Plan* website.



Print your Payroll Authorization Form

Step 1. (FOR EMPLOYEES): Complete this form and return to your employer

Please print this page, sign it, include your Social Security number and the date, and submit it to the HR, benefits, or payroll representative responsible for administering payroll deduction contributions to the Program. Your employer will initiate or change your payroll deduction after they receive this form.

Employee Name: _____

Total amount to be deducted per pay period: \$ _____

Employee Signature: _____ **Employee SSN:** ____ - ____ - ____ **Date:** ____ / ____ / ____

Step 2. (FOR EMPLOYERS): Establish Payroll Deduction Instructions on Your Payroll System

When updating ACH direct deposit instructions for this employee, please make sure that you provide the following information with your transmittal:

- 1. ABA Number 011001234 (Mellon Bank)**
- 2. Account Number 531 (+ 9 digits)**
- 3. Code Transmittal for Checking**

Note: The account number is a 12-digit field. The first 3 digits identify the new bank account of NY's *Direct Plan*. The last 9 digits are the first nine digits of the employee's account number in NY's *Direct Plan*.

If you have any questions, please call customer service at 1-877-NYSAVES on business days, between 8 a.m. and 9 p.m., Eastern time.

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