



# AZ529 PLAN FIDELITY ACCOUNT SELF SERVICE DIRECT DEPOSIT

# **Quick Reference Guide for State of Arizona Employees**

State of Arizona employees who open an AZ529 Plan account managed by Fidelity Investments have the option of signing up for Direct Deposit to have their AZ529 Plan dollar contributions deducted from their paycheck every pay period and deposited into their Fidelity 529 account. To sign up for Direct Deposit, please follow the instructions below.

#### ACCESS DIRECT DEPOSIT SELF SERVICE

- 1. Login to Y.E.S. <a href="https://hrsystems.azdoa.gov/">https://hrsystems.azdoa.gov/</a>
- 2. On the Bookmarks menu, click Your Employee Services, click Pay
- 3. On the Pay menu, click Direct Deposit

  All actions processed in Y.E.S. Direct Deposit will trigger email notifications to your Agency
  Payroll Office, your Work Email and your Personal Email. Provide/Confirm Personal Email
  Address on the Home Menu (Personal Information, Contact Information) or click the link on
  the Direct Deposit page before making entries.

#### ADD A NEW BANK ACCOUNT (NON-DEFAULT)

- **4.** Employees may establish up to a total of 5 active bank accounts (1 bank account must previously be designated as the default). To add a new account:
  - a. Click Add
  - **b.** Select I agree with this statement and click Continue



- **c.** Complete required fields.
  - i. For Bank Select "UMB, NA" (not Fidelity)
  - ii. For **Description** Enter "AZ529"
  - iii. For Account Type Select "Savings"
  - iv. For **Deposit Amount** *Complete* one field.

If Flat Amount - Enter up to two decimals XXXX.XX
Or

*If Percentage* – *Enter* a whole number

- v. For Routing Number Enter 101205681
- vi. For Account Number Enter prefix 3990001 + the 9-digit Fidelity 529 account number.





5. Review your entries and click Update

The Fidelity 529 direct deposit change should take effect starting with your Agency's next pay period. Please verify this with your Agency's Payroll Office and check to make sure your dollar contributions were taken out of your default bank account and deposited into your Fidelity 529 account.

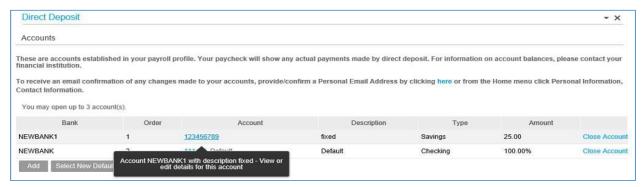
### STOP/CLOSE YOUR ACCOUNT

- 1. Click Close Account
- 2. Select I agree with this statement and click Continue
- 3. Warning Box Displays "Are you sure you want to close XXXX BANK?"
- 4. Click **OK** to stop the account

#### **MAKE CHANGES TO YOUR ACCOUNT**

Make changes to the Account Type, Account Description, Flat Amount or Percent of Net. To change Account Number or Routing Number you must close the old account and add a new account.

1. Click on the Account Number in the Account column



- 2. Select I agree with this statement and click Continue
- **3.** Make changes to applicable field(s)
- 4. Click Update

## HAVE A QUESTION OR NEED ASSISTANCE?

Please contact the AZ529 Plan Administrator at AZ529@aztreasury.gov or call 602-542-7529.

Direct Deposit Guide – Last reviewed 8/13/2021