Payment Election Enrollment Event (Onboarding)

Overview
This job aid outlines the process for an Employee to manage payment elections during the onboarding process.

Prerequisites: N/A

Important Information: Payment elections can also be managed outside the onboarding process by typing “Payment Elections” in the Search bar or by clicking “Payment Elections” in the Pay worklet.

Steps
From the Workday Home page:

1. Navigate to your inbox
2. Click the “Payment Election Enrollment Event” action item located in your inbox
3. In the Preferred Payment Method section, select information including:
   - Expense
   - Payroll

4. In the Account Information section, add or edit information including:
   - Account Nickname (optional)
   - Account Type
   - Bank Name
   - Routing Transit Number
   - Account Number

Note: The Bank Identification Code field will not be used at this time.

5. Click OK
6. To add additional accounts for direct deposit, click Add Account

   ![Account Table]

   - You can distribute funds over multiple bank accounts (limit 5)
   - You must first add the accounts in the Accounts section to make them available as options in the Payment Elections section
   - Click Change Account to edit information on an account
   - Click Delete Account to delete the account

7. In the Payment Elections section, click Change Election on the Payroll row to add your first election to an account
8. Verify the following fields are correct:
   - Country
• Currency
• Payment Type
• Account
• Balance / Amount / Percent

Notes: When distributing your funds over multiple accounts:

• Click the Add Row icon and fill in fields mentioned above

• Select Amount to specify the dollar portion of your check to be deposited into an additional account

• Select Percent to specify the percentage of your check to be deposited into an additional account

• Select Balance to specify that you want the remainder of your check to be deposited into a specified account

9. Click OK
10. Enter comments if necessary
11. Click Submit

This completes the Payment Election Enrollment Event (Onboarding) process

All completed events are fed nightly from Workday to legacy applications such as Datawarehouse and FAMIS