

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**

Preferred Payment Method

Expense * Direct Deposit

Payroll * Direct Deposit

4. In the **Account Information** section, add or edit information including:

- **Account Nickname (optional)**
- **Account Type**
- **Bank Name**
- **Routing Transit Number**
- **Account Number**

Account Information

Account Nickname (optional)

Account Type * Checking Savings

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**

Accounts 1 Item		
Account Nickname	Country	Bank Name
BB&T Personal	United States of America	Branch Banking and Trust Company

Notes:

- 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**

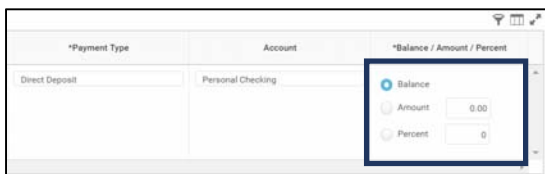
- **Currency**
- **Payment Type**
- **Account**
- **Balance / Amount / Percent**

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



The screenshot shows a 'Payment Elections' form with a table. The first row has columns for 'Order', '*Country', and '*Currency'. The 'Order' column has a plus icon and a minus icon. The 'Country' column contains 'United States of America' and the 'Currency' column contains 'USD'. A blue box highlights the plus icon in the 'Order' column.



The screenshot shows a 'Payment Elections' form with a table. The first row has columns for '*Payment Type', 'Account', and '*Balance / Amount / Percent'. The 'Payment Type' column contains 'Direct Deposit' and the 'Account' column contains 'Personal Checking'. The '*Balance / Amount / Percent' column has three radio button options: 'Balance' (selected), 'Amount' (with a value of 0.00), and 'Percent' (with a value of 0). A blue box highlights the 'Balance' radio button and its associated input field.

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