**Payment Elections**

This tip sheet helps you access, view, and select your payment elections in Workday.

Please note that this is a 2-step process, an account must first be added before linking it to a payment election.

University employees are paid through Direct Deposit. Therefore, employees must provide bank information.

Up to 5 accounts can be set up. When selecting multiple accounts, a percent or dollar allocation must also be entered. However, at least one account must have “Balance” as the allocation option. This ensures that an employee receives all amounts due, including business expense reimbursements.

*Note:* In order for your changes to be in effect for your next paycheck, changes must be completed prior to the close of payroll. Click [here](#) to view pay schedules.

**To View Your Payment Elections**

From the Pay worklet:

1. Click **Payment Elections** in the **Actions** section

**To Add an Account**

If adding accounts/elections for the first time, click **Add Elections** to begin. Otherwise, click **Add Account**:

1. Enter **Account Nickname**, use this field to enter your bank name to help you identify your account if you have multiple accounts of the same type
2. Next to **Account Type**, click whether it is a **Checking** or **Savings** account
3. Enter **Routing Transit Number**
4. Enter **Account Number**
5. Click **OK**

**To Edit Current Account**

A current account in the **Accounts** section can be changed or deleted

1. For the desired account, click **Change Account**
2. Enter revised account information
3. Click **OK**
4. Click **Done** in the **Payment Elections** screen
Payroll: Payment Elections

To Add/Change Payment Elections

Distribution

If completing payment elections for the first time, your payroll direct deposit balance will be paid by default to the first account that you add.

To add additional accounts to your payment elections, you must first add the account in the Payments Elections screen – Follow instructions under To Add an Account

From the Payment Elections section of the screen:

1. Click Change Election
2. Click to add a row
3. Click to select Country and choose United States of America
4. Click to select Payment Type and choose Direct Deposit
5. Click to select Account (accounts will be listed by their Account Nickname or the last 4 digits of the account number)
6. For each row, under Balance/Amount/Percent:
   - Select Balance to distribute remaining balance to this account
     Example: If 30% were distributed to the other account(s), the remainder will be distributed here
   - Select Amount to enter exact dollar amount to be distributed to this account
   - Select Percent to enter percentage amount to be distributed to this account
   - Note: To submit a valid payment election, the last election specified in the list must have a distribution type of Balance to capture the remaining amount.
7. Click OK
8. Click Done

To Delete Payment Elections

You must always have your payroll direct deposit balance distributed to at least 1 account.

If you currently only have 1 account setup, before deleting an account from your payment elections, you must first add an account in the Payments Elections screen – Follow instructions under To Add an Account.

From the Payment Elections section of the screen:

1. Click Change Election
2. If you currently have multiple accounts under Payment Elections:
   - Click to delete row
   - Adjust Balance/Amount/Percent to Balance to capture the remaining amount
3. If you currently have 1 account under Payment Elections:
   - Click to select new Account
   - Adjust Balance/Amount/Percent to Balance
4. Click OK

To Delete an Account

Before deleting an account, you must first remove it from Payment Elections.

You will not be able to remove an account if it is the only one listed. You will first have to add an account and then follow step 3 under To Delete Payment Elections:

1. Click Delete Account
2. Verify the details for the account to be deleted
3. Click OK

Notes

- Direct deposit is UM policy, but if there is a delay in entering account information, a physical check will be issued
- Details of your current direct deposit account(s) are listed in the Accounts section of the Payment Elections screen