

Audience: All Current Employees

Payment Election Enrollment

 Use the Payment Election Enrollment Event to set up or change how an employee is paid, including:

- Direct deposit to one or multiple bank accounts
- Check (paper) where allowed

This event is typically triggered for new hires, rehires, or employees updating banking information

Payment Election Enrollment Event

Workday Role(s)	• Employee
Steps	• Payment Election Enrollment Event, enters the required dates and arrangement details, and submits the request.

Payment Election Enrollment Event

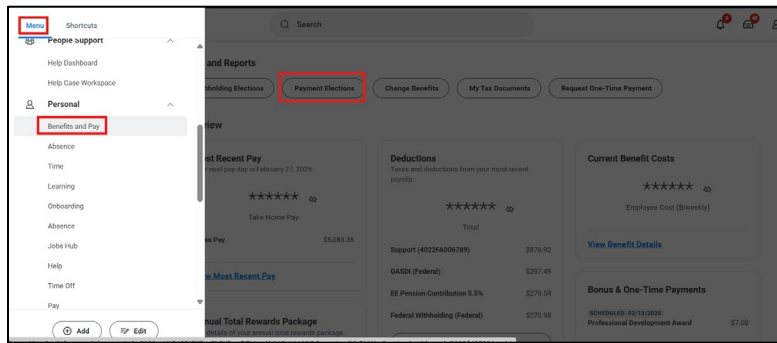
If accessing **during** employee onboarding:

1. From the Workday **Home** page, open your **My Tasks** Inbox
2. Locate the task titled **Payment Election Enrollment Event**.
3. Click the task name to open it

If accessing **outside** of employee onboarding:

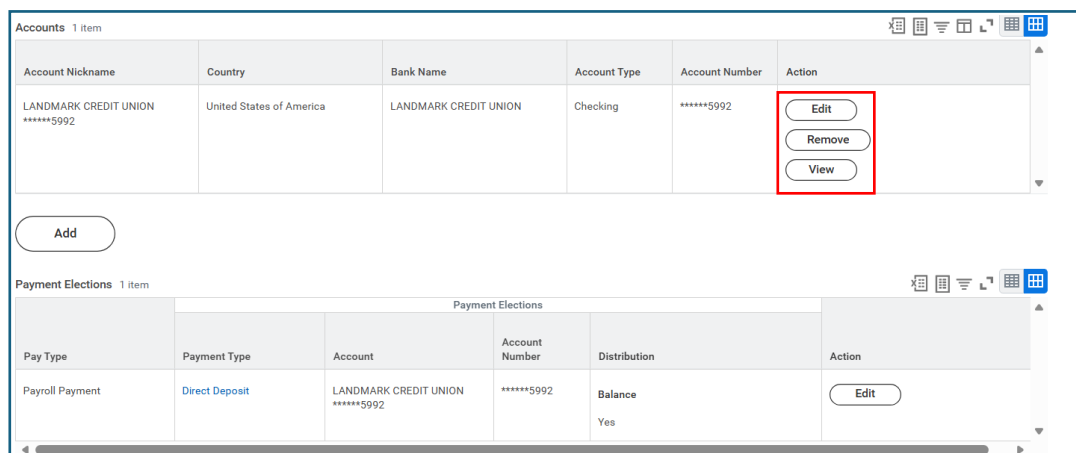
- From the **Menu**, under **Personal** select **Benefits and Pay**
- Select **Payment Elections** and, if prompted, complete any **enrollment event** that is in progress

Payment Elections Enrollment



Review Existing Payment Elections (If Any)

1. On the Payment Elections page, review any:
 - Existing **bank accounts** on file
 - Current **payment elections** (e.g., “Payroll – Direct Deposit”)
2. Confirm whether you are:
 - **Enrolling** for the first time
 - **Editing** existing elections
 - **Adding** or **removing** accounts



Add or Edit Bank Account(s)

To Add a New Bank Account

1. In the **Account** section, click **Add**.

Payment Elections Enrollment

Account Nickname	Country	Bank Name	Account Type	Account Number	Action
LANDMARK CREDIT UNION *****5992	United States of America	LANDMARK CREDIT UNION	Checking	*****5992	<button>Edit</button> <button>Remove</button> <button>View</button>

Add

Pay Type	Payment Type	Account	Account Number	Distribution	Action
Payroll Payment	Direct Deposit	LANDMARK CREDIT UNION *****5992	*****5992	Balance Yes	<button>Edit</button>

2. Enter the following details:

- **Account Type** (Checking / Savings)
- **Routing Number**
- **Account Number**
- **Bank Name** (may populate automatically from routing number)

3. Click **OK**

Account Information

Account Type: ☒ Checking ☐ Savings

Routing Transit Number: 02467213

Account Number: 123456789

Bank Name: Bank of Budha

Bank Identification Code:

Account Nickname (optional):

OK Cancel

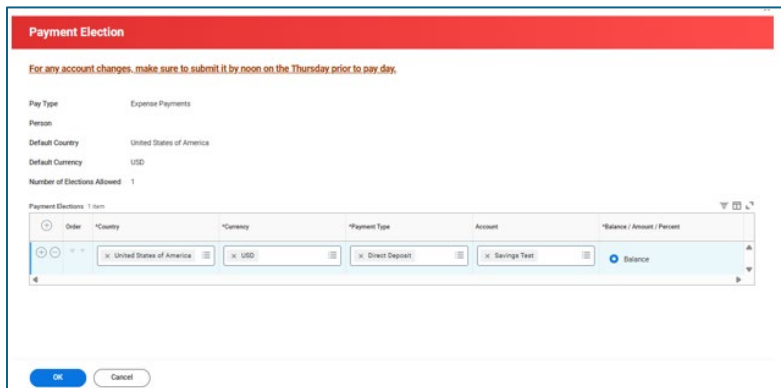
To Edit an Existing Account

1. Click the **Edit** icon next to the existing bank account.
2. Update details as needed.
3. Click **OK**.

Set Up Payment Elections for Expense Reports

In the **Payment Elections** section, locate the row for **Expense Payments**.

1. In the **Action** column, choose **ADD**:
 - **Country** will default,
 - **Currency** select **USD**
 - **Payment Type** select **Direct Deposit**
 - **Account** select preferred bank account from drop down menu



The screenshot shows the 'Payment Election' form. At the top, there's a red header bar with the title 'Payment Election'. Below it, a note states: 'For any account changes, make sure to submit it by noon on the Thursday prior to pay day.' The form contains several fields: 'Pay Type' (Expense Payments), 'Person' (blank), 'Default Country' (United States of America), and 'Default Currency' (USD). Below these, it says 'Number of Elections Allowed: 1'. The main section is a table titled 'Payment Elections: 1 item'. The table has columns: Order, Country, Currency, Payment Type, Account, and Balance / Amount / Percent. The first row shows: Order 1, Country United States of America, Currency USD, Payment Type Direct Deposit, Account Savings Test, and Balance. At the bottom, there are 'OK' and 'Cancel' buttons.

Splitting Pay Across Multiple Accounts

1. In the **Payroll** or **Expense Payment** Pay Type select **Edit** in the **Action** column
2. To add a line select the **Plus** icon (+)
3. For each line, specify:
 - **Currency** defaults to USD
 - **Payment Type** as **Direct Deposit**
 - **Account** as desired
 - **Amount Type**:
 - **Balance** indicates full amount if there is only one account selected or the remaining balance there are alternate accounts that are assigned a partial amount or percentage
 - **Percent** of pay if there are alternate accounts that are assigned a partial amount or percentage
 - **Amount** fixed dollar amount of pay if there are alternate accounts that are assigned a percentage or the remaining balance

4. PLEASE NOTE:

- **One account** - Amount type selected must be **Balance**
- **Two accounts** - If one account is a **flat** amount, the amount type for the second account would have to be **Balance**. If the amount type for **both** accounts are **Percent**, then they must equal 100
- **Three or Four accounts** - If all flat amounts are listed, then the amount type for the last account listed should be **Balance**. If the amount type for **all** accounts are **Percent**, then they must equal 100

Payment Election

For any account changes, make sure to submit it by noon on the Thursday prior to pay day.

Pay Type: Payroll Payment
Person: HAKIMAH TERRY
Default Country: United States of America
Default Currency: USD
Number of Elections Allowed: 4

Payment Elections: 2 items

Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
1	United States of America	USD	Direct Deposit	US Bank Milwaukee *****4316	☐ Balance ☐ Amount: 0.00 ☒ Percent: 80
2	United States of America	USD	Direct Deposit	Savings Test	☒ Balance ☐ Amount: 0.00 ☐ Percent: 0

OK Cancel

Confirm and Submit

1. Review the **Summary** of:
 - Bank accounts
 - Payroll payment elections
2. Confirm:
 - Correct routing and account numbers
 - Correct accounts and percentages/amounts
3. Click **OK**

Payment Elections Enrollment

Payment Elections 1 Item

Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
+ -	x United States of America	x USD	x Direct Deposit	x Navy Federal *****7845	☒ Balance

OK

Cancel

NOTE  For any account changes, make sure to submit it by NOON on Thursday PRIOR to pay day.