

Workday Job Aid: Payment Election

11 Steps [View most recent version](#) 

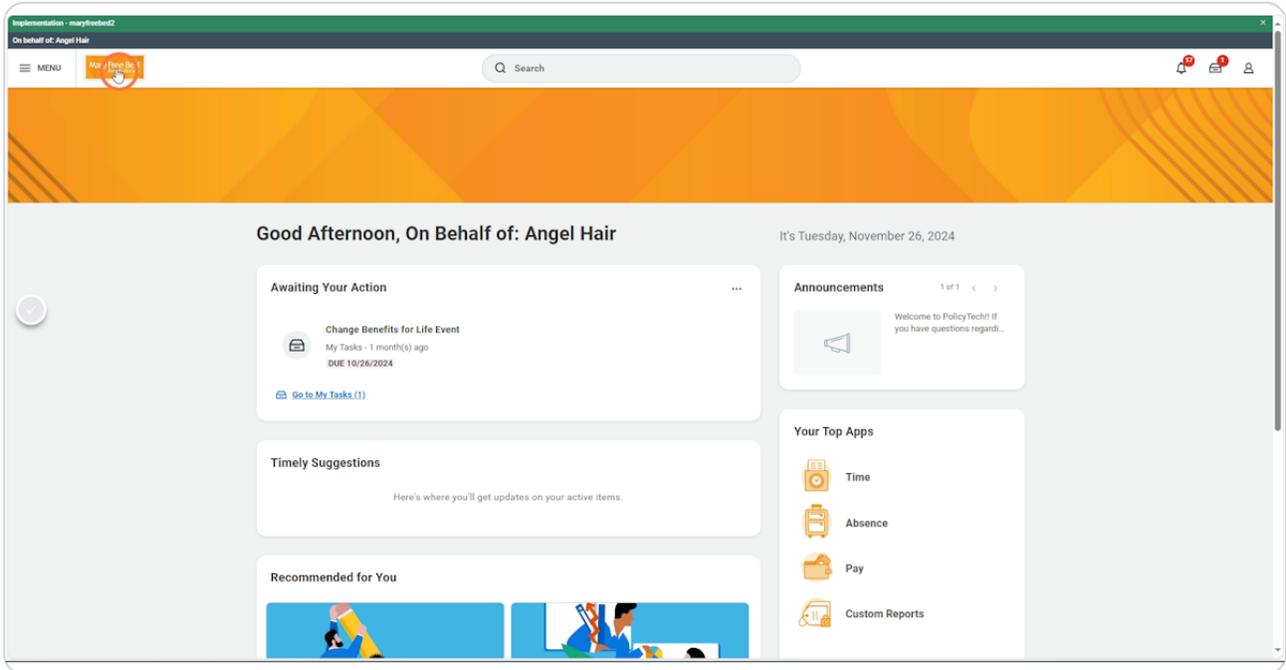
Created by
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Creation Date
Nov 26, 2024

Last Updated
Nov 26, 2024

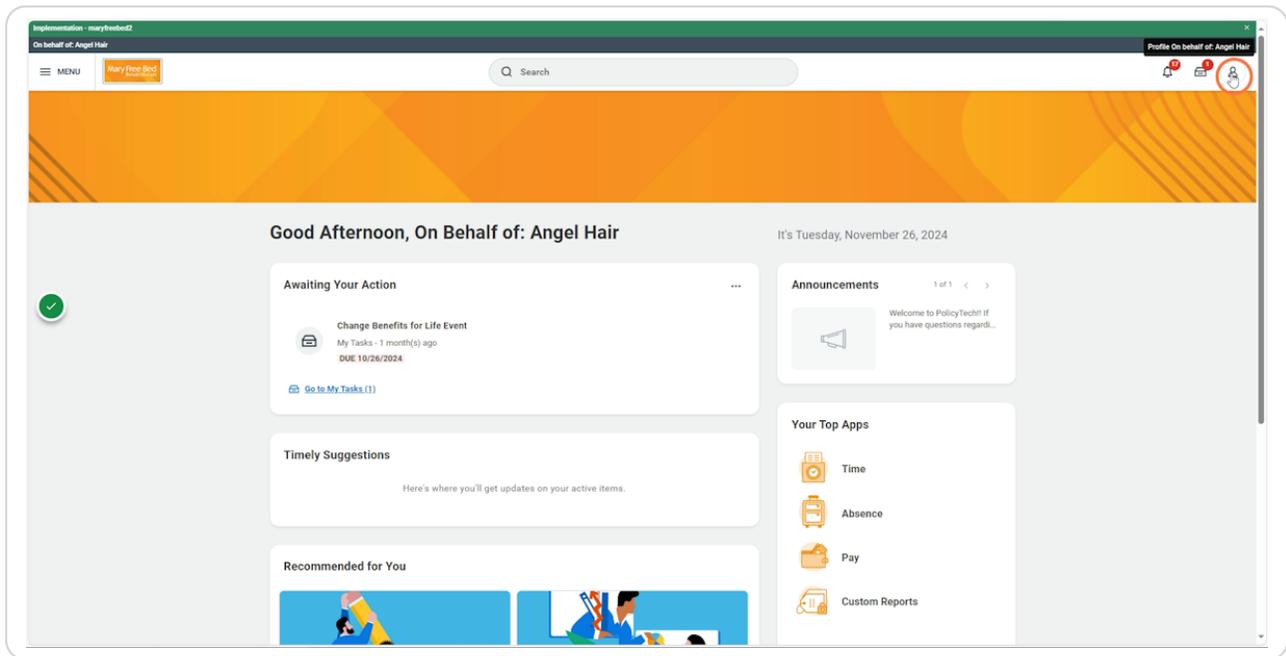
STEP 1

Navigate to the Workday Home page.



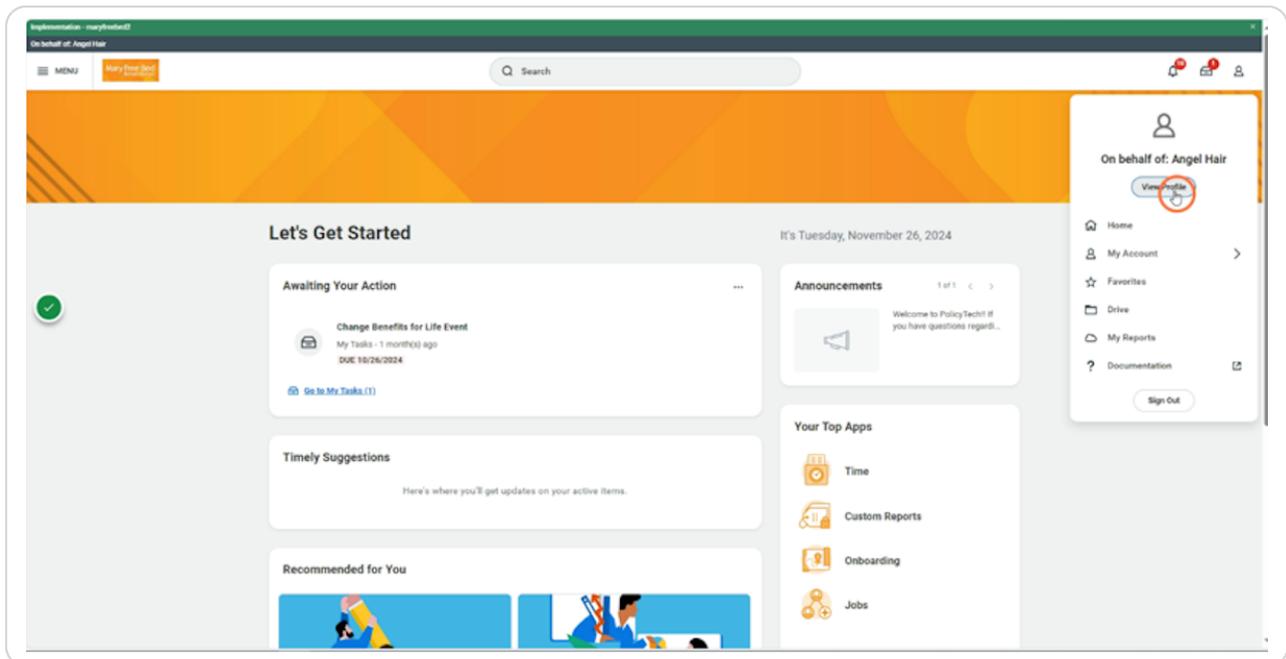
STEP 2

Click the Profile icon in the upper right-hand corner.



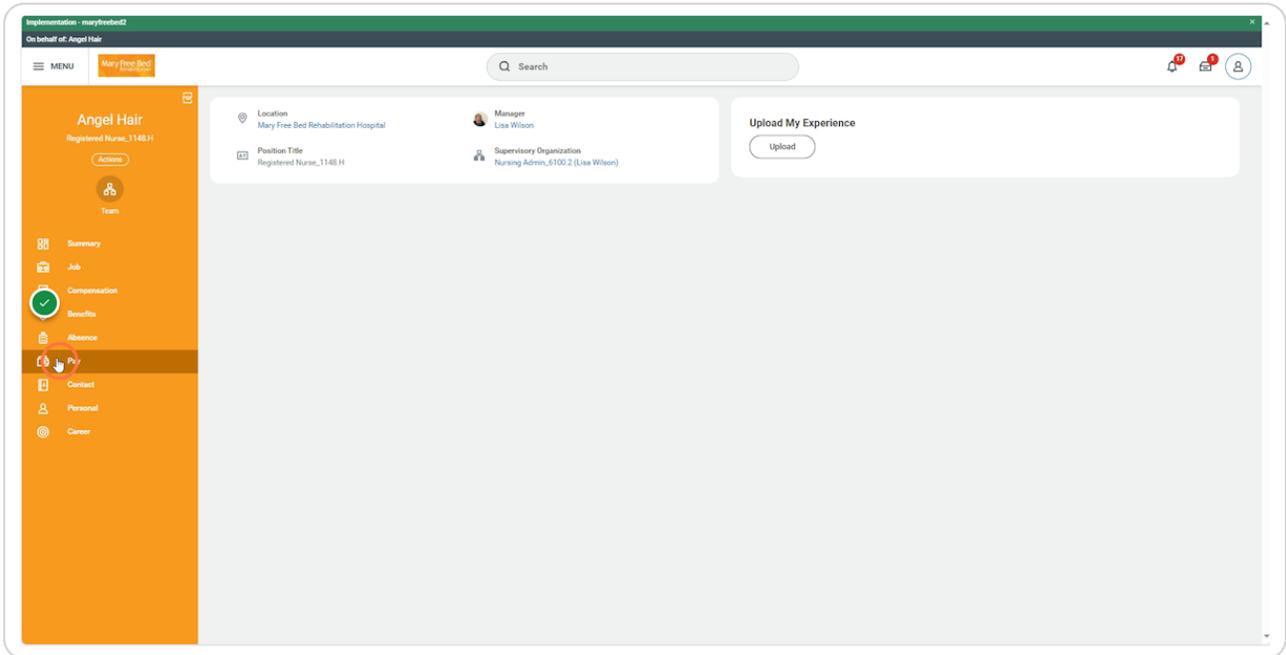
STEP 3

Click "View Profile".



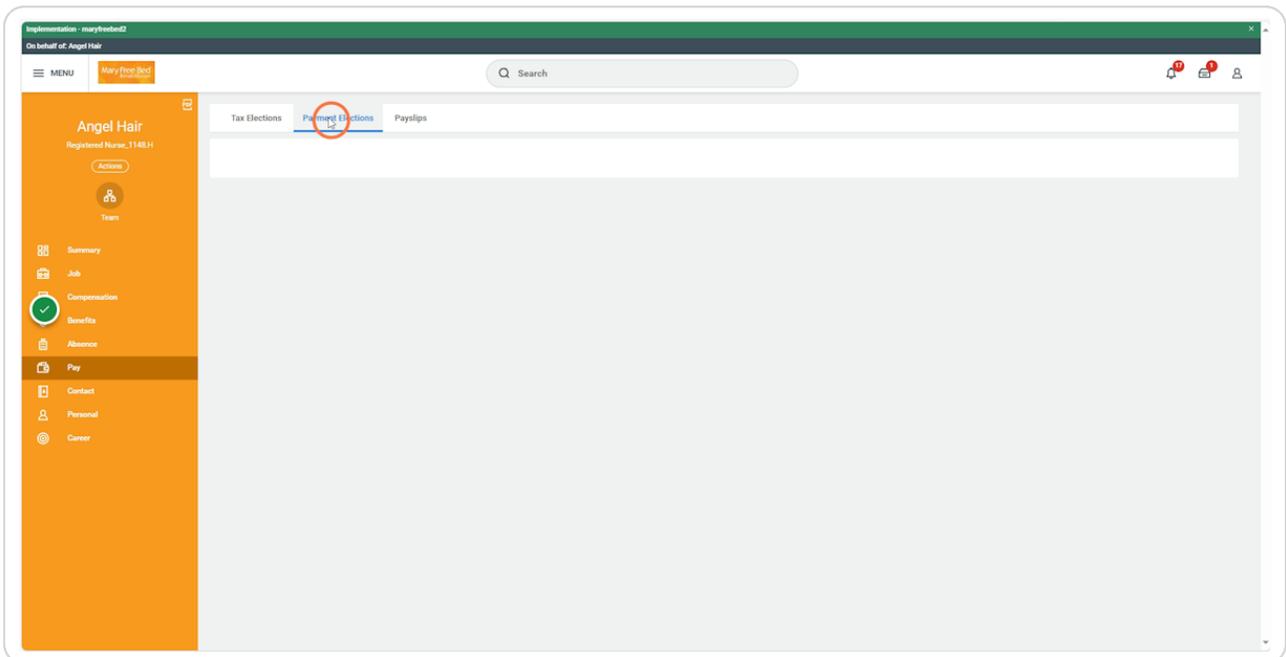
STEP 4

Click "Pay".



STEP 5

Click the "Payment Elections" tab.



STEP 6

Click "Add" to add a new Bank information. You can also edit, remove and view current bank information

The screenshot displays a web application interface for 'Angel Hair'. The left sidebar contains a navigation menu with options: Summary, Job, Compensation, Benefits, Absence, Pay, Contact, Personal, and Career. The main content area is titled 'Payment Elections' and shows the following details:

- Default Country: United States of America
- Default Currency: USD
- Status: Successfully Completed
- Last Updated: 10/24/2024 11:12 AM

Below these details is a table for 'Accounts' with 1 item:

Account Nickname	Country	Bank Name	Account Type	Account Number	Action
checking account	United States of America	PNC	Checking	*****878	Edit Remove View

An 'Add' button is highlighted with a red circle below the Accounts table. Below the Accounts table is a table for 'Payment Elections' with 2 items:

Pay Type	Payment Type	Account	Account Number	Distribution	Action
USA Payroll Payment	Direct Deposit	checking account	*****878	Balance Yes	Edit
HSA Payment	Manual			Balance Yes	Edit

STEP 7

Fill out the required information: Select the account type and enter in the Routing Transit Number, Account Number and Bank Name.

You can optionally type in a Bank Identification Code and Account Nickname, too. Account Nicknames are helpful if you have accounts with similar account numbers and want to differentiate between accounts.

Click "OK" when finished.

The screenshot shows a web application interface for adding a new account. The page title is "Add Account". Below the title, there is a sub-header: "Add account information to use when you specify payment elections." The form contains the following fields and options:

- Account Holder Name: Angel Hair
- Account Country: United States of America
- Sample Check: A sample check image is displayed with a "SAMPLE" watermark. Below it are two buttons: "8 Digit Routing # (Required for C payments)" and "Account # (Include all zeros)".
- Account Information:
 - Account Type: Checking, Savings
 - Routing Transit Number: 272490678
 - Account Number: 12345678
 - Bank Name: LMCU
 - Bank Identification Code: (empty field)
 - Account Nickname (optional): (empty field)

At the bottom of the form, there are two buttons: "OK" (highlighted with a red circle) and "Cancel".

STEP 8

If you would like to direct deposit different amount of money to more than one account, you can add another account by clicking "Edit" under Payment Elections.

***Note: After adding the bank information in the "Accounts" section, you will need to select the appropriate account under "Payment Elections" to ensure that your funds are deposited into the accounts that you select.

Angel Hair
Registered Nurse, 1148.H
Active

Summary
Job
Compensation
Benefits
Absence
Pay
Contact
Personal
Career

Tax Elections | **Payment Elections** | Payslips

Default Country: United States of America
Default Currency: USD
Status: Successfully Completed
Last Updated: 10/24/2024 11:12 AM

Accounts: 2 items

Account Nickname	Country	Bank Name	Account Type	Account Number	Action
checking account	United States of America	PNC	Checking	*****878	Edit Remove View
LMCU *****678	United States of America	LMCU	Checking	*****678	Edit Remove View

Add

Payment Elections: 2 items

Pay Type	Payment Type	Account	Account Number	Distribution	Action
USA Payroll Payment	Direct Deposit	checking account	*****878	Balance Yes	Edit
HSA Payment	Manual			Balance Yes	Edit

STEP 9

Click the "+" button on the left to add a new account. Use the "Account" and "Balance/Amount/Percent" columns to indicate what account you would like money allocated to, and how much to allocate to those accounts.

Payment Election

Designate how to receive payments. For direct deposit, you must first add a valid account on the previous page. Workday evaluates multiple payment elections in the order you specify. To submit a valid payment election, the last election specified must have a distribution type of balance to capture the remaining amount, or the percentages must add up to 100 percent.

Pay Type: USA Payroll Payment
Person: Angel Hair
Default Country: United States of America
Default Currency: USD
Number of Elections Allowed: 10

Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
+	United States of America	USD	Direct Deposit	checking account	<input checked="" type="radio"/> Balance <input type="radio"/> Amount <input type="text" value="0.00"/> <input type="radio"/> Percent <input type="text" value="0"/>

OK Cancel

STEP 10

Click in the Account column to select the Bank account information.

Payment Election

Designate how to receive payments. For direct deposit, you must first add a valid account on the previous page. Workday evaluates multiple payment elections in the order you specify. To submit a valid payment election, the last election specified must have a distribution type of balance to capture the remaining amount, or the percentages must add up to 100 percent.

Pay Type USA Payroll Payment
Person Angel Hair
Default Country United States of America
Default Currency USD

Number of Elections Allowed 10

Payment Elections: 2 items

Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
1	United States of America	USD	Direct Deposit	checking account!	<input checked="" type="radio"/> Balance <input type="radio"/> Amount 0.00 <input type="radio"/> Percent 0
2	United States of America	USD	Direct Deposit	checking account! M11*****5678	<input type="radio"/> Balance <input type="radio"/> Amount 0.00 <input type="radio"/> Percent 0

OK Cancel

STEP 11

In the "Balance / Amount / Percent" column select the appropriate option. If you select amount enter the dollar amount or if you select percent enter the percent. Then Click "OK".

Note: The bottom bank account must be selected as the balance account (this will deposit your full net pay if you only have one account or the remaining amount after the prior bank account set up)

Payment Election

Designate how to receive payments. For direct deposit, you must first add a valid account on the previous page. Workday evaluates multiple payment elections in the order you specify. To submit a valid payment election, the last election specified must have a distribution type of balance to capture the remaining amount, or the percentages must add up to 100 percent.

Pay Type: USA Payroll Payment
Person: Angel Hair
Default Country: United States of America
Default Currency: USD
Number of Elections Allowed: 10

Payment Elections: 2 items

Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
1	United States of America	USD	Direct Deposit	checking account!	<input type="radio"/> Balance <input checked="" type="radio"/> Amount: 300.00 <input type="radio"/> Percent: 0
2	United States of America	USD	Direct Deposit	LMOU*****5678	<input checked="" type="radio"/> Balance <input type="radio"/> Amount: 0.00 <input type="radio"/> Percent: 0

OK Cancel