Role: Employees

Overview

This guide covers how to change your direct deposit which is referred to as your **PAYMENT ELECTION**. This is useful if you need to change your banking information for your direct deposit for your regular paycheck and expense payments. An option is also available if/when a separate bonus payroll is processed (not included with regular payroll).

Note: You are allowed to add up to **FOUR** bank accounts for your regular paycheck (3 partial accounts and one Balance account). One bank account can be set up for expense payments, and two bank accounts for your separate bonus paycheck.

If you do not have a direct deposit account you will need to add a Pay Card, follow the instructions under the **Add a Pay Card** section.

This guide includes the following information and step-by-step instructions:
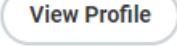
- Add or Change Bank Account
- Add or Change Payment Elections
- Add or Remove a Pay Card

Step-by-Step Instructions

Add or Change Bank Account

Note: If you currently have a Pay Card set up, the account should be removed prior to adding your new direct deposit account(s). Refer to the Remove a Pay Card section for steps to remove your Pay Card.

1. Navigate to the **Profile** icon.

2. Click the **Profile** ⊗ icon in the upper right corner.

3. Click the **View Profile** [View Profile] button.

4. Click **Pay** on the left navigation bar.

5. Click the **Payment Elections** tab. Your current bank information displays. You can take the following actions to add, change or view your current account:

   a. **Edit** - To update your current account.

   b. **Remove** - To remove your current account.

   c. **View** - To view your current account.

   d. **Add** - To add a new bank account.

6. If you need to change your bank account, click the **Edit** [Edit] button next to the account you want to change.

7. Enter the new account information:

   a. Account Nickname (optional)

   b. Routing Transit Number

   c. Bank Name

   d. Account Type

   e. Account Number

8. Click **OK**.

9. If you need to remove your bank account, click the **Remove** button.

10. Click **OK**.

11. If you need to view your bank account, click the **View** button.

12. To add a new bank account, click the **Add** button.

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Role: Employees

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13. Enter the new account information:

    a.   Account Nickname (optional)

    b.   Routing Transit Number

    c.   Bank Name

    d.   Account Type

    e.   Account Number

14. Click **OK**.

Note: ADDING A BANK ACCOUNT IN WORKDAY DOES NOT AUTOMATICALLY TIE YOUR PAYROLL TO THAT BANK ACCOUNT. You MUST continue below to specify the account(s) you want your regular paycheck, expense payment, and/or separate bonus payroll to be deposited. Your payments can be split between multiple accounts by dollar amounts (percentages are not allowed). If you set up a partial account, you must also have an account set up to accept the BALANCE of your deposit. The Balance account must be set up last in the distribution.

Change Payment Elections Distribution

1. From the **Payment Elections** tab. Your current bank information displays. You can take the following actions to add, change or view your current account:

    a.   **Edit** - To update your payment elections distribution amount(s) for your bank account(s).

    b.   **Add -** To add distribution amount(s) for your bonus, regular and expense payments.

2. To edit your payment elections distribution amounts, click the **Edit** button.

3. Click the plus icon to add an additional account to the payment election list.

4. Click the minus icon to remove an account from the payment election list.

5. You can also change the deposit order by clicking on the arrows in the order column.

6. Select Amount if you would like to deposit a specific amount in your account.

7. Select Balance if you have chosen to disburse your deposit in multiple accounts and the remaining balance of your deposit should be deposited in the account or if you want all your deposit to be deposited in one account.

8. Click **OK**.

Add Payment Elections Distribution

1. From the Payment Elections page, click the Add button.

2. Select the Payment Election by clicking the radial button next to the respective payment election.

3. Click **OK**.

4. Enter the following information:

    c.   Country

    d.   Currency

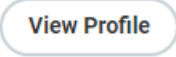   e.   Payment Type

f. Balance or Amount

5. Click **OK**.

Note: You can specify the account(s) you want your regular payroll, bonus payment, and expense payment to be deposited. Your payments can be split between multiple accounts.

Add a Pay Card

Note: Only Add a Pay Card if you do not have a direct deposit account.

1. Navigate to the **Profile** icon.

2. Click the **Profile** 👤 icon in the upper right corner.

3. Click the **View Profile** [View Profile] button.

4. Click **Pay** on the left navigation bar.

5. Click the **Payment Elections** tab. The Payment Election page displays.

6. Click the **Add** button. The Payment Election Option page displays.

7. Select the Pay Card (Online ACH) option as your preferred payment method.

8. Click **OK**.

9. You will receive an automated pay card form in your Workday Inbox within seconds.

10. Click the Inbox icon in the upper right corner of the page.

11. Click on the task labeled **Pay Card Form**.

12. Complete the **Pay Card Form**.

13. Download and save the completed Pay Card Form to your desktop.

14. Check the **"I Agree"** box.

15. Select the completed Pay Card Form and upload the attachment.

16. Click **Submit** to send the form to Payroll for processing.

Remove a Pay Card

1. Navigate to the **Profile** icon.

2. Click the **Profile** 👤 icon in the upper right corner.

3. Click the **View Profile** [View Profile] button.

4. Click **Pay** on the left navigation bar.

5. Click the **Payment Elections** tab. The Payment Election page displays.

6. Click the **Edit** button. The Payment Election page displays.

7. Click the **Minus** icon to remove the Pay Card (Online ACH) as your payment selection.

8. Click **OK**.

Related Materials

- Getting Started in Workday

Need Help?

For additional questions or help, please contact
servicedesk@cookchildrens.org