Employee Documentation

Job Aid: Change Payment Elections

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Version: 6

DOCUMENT OVERVIEW:

Change Payment Elections is the process an employee follows to add a new bank account, edit an existing bank account, remove an existing bank account, or add/edit payment elections for direct deposit in One Source (Workday).

Note: To ensure the validity and security of a request, employees must update or change payment elections through One Source (Workday). Change requests submitted by email or phone call will not be processed.

STEP-BY-STEP PROCEDURE:

1. Open the *One Source* (Workday*)* application and log in.

2. On the left-hand side of the page next to *Most Used Apps*, click **View All** and select **Pay**.

3. Locate the *Payroll Links* section and click **Payment Elections**.

4. Follow the steps below to **Add New Bank Account**, **Edit Existing Bank Account**, **Remove Existing Bank Account**, or **Add / Edit Payment Elections**.

Add New Bank Account

1. Click the **Add** button under the *Accounts* table.
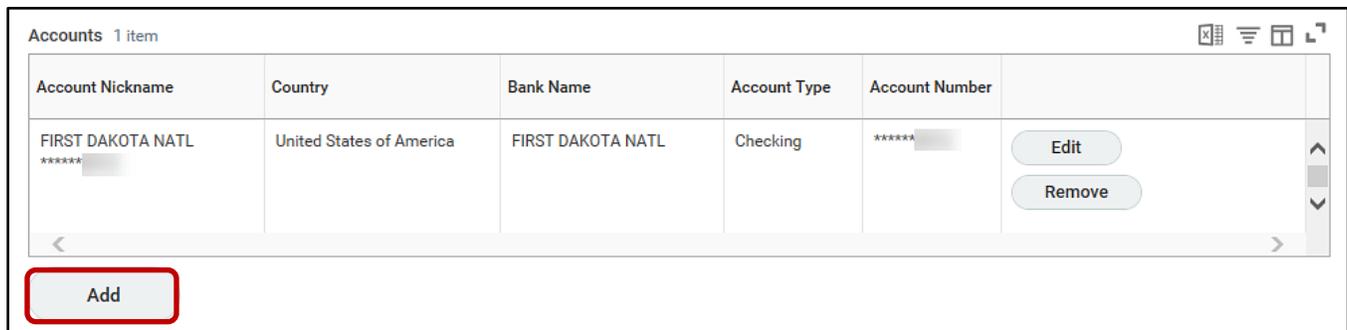
2. Enter all required *Account Information.*

Note: All required fields are indicated by a red asterisk.

3. Click **OK**.

Edit Existing Bank Account

1. Click the **Edit** button to the right of the account you want to update in the *Accounts* table.

2. Update all required *Account Information.*

Note: All required fields are indicated by a red asterisk.

3. Click **OK**.

Remove Existing Bank Account

Note: You must have multiple accounts listed to remove an existing bank account. See **Add New Bank Account** above to add additional bank accounts.

1. In the *Payment Elections* table, click the **Edit** button to the right of the account you want to remove.

2. Click the **Minus sign icon** to the left of the account you want to remove.

3. Click **OK**.

4. In the *Accounts* table, click the **Remove** button to the right of the account you want to remove.

5. Click **OK**.

Add/Edit Payment Elections

1. Click the **Edit** button under *Payment Elections.*

2. Click the **Plus sign icon** to add a new line.

3. Under the *Country* column, click the dropdown and select **United States of America**.

4. Under the *Payment Type* column, click the dropdown and select **Direct Deposit**.

5. Under the *Account* column, click the dropdown and select the account you want to add.

6. Under the *Balance / Amount / Percent* column, click the radio button for **Amount** or **Percent** and enter the dollar amount or percentage you want to designate to each account.

Note: The last direct deposit amount must be set to *Balance* to capture the remaining amount or the percentages must add up to 100%.

7. To designate the order of payment, click the *Order* arrows on the left-hand side of each entry.

8. Click **OK**.