

Edit Payment Elections

Overview

This job aid outlines the process for an Employee to set up and / or edit payment elections outside of the onboarding process

Prerequisites: The individual must be an existing employee, not going through the Onboarding process

Important Information:

- Payment Elections are separated into Payroll and Expense. Payroll represents the employee's paycheck. Expense represents reimbursement payments made to the employee
- Employees working for the Texas A&M University System during conversion to Workday, and enrolled in direct deposit for expenses, will have "check" displayed in the expense section of their payment elections. These individuals *are still* enrolled in direct deposit for these payments
 - The process described in this job aid can be used to update what is displayed in Workday under expense to match an employee's enrollment in direct deposit for expense
 - Employees who do not update this information and move to another member within the System would receive their first expense payment as check, and those thereafter, unless this election information is updated in Workday
- This job aid is divided into two sections. The first section is for editing payment elections soon after conversion to Workday. The second section explains editing payment elections in general

Steps

From the Workday Home page:

- 1. Click the Pay worklet
- 2. Under Actions tab, click Payment Elections
- 3. Scroll down to the **Payment Elections** section of the page

<u>Note</u>: Initially, you will likely see a section called **Payment Elections Requiring Setup** that shows your elections for expense

4. Click Add in the far right hand column of Expense to set up this payment election

Note: If you are currently set up for direct deposit for these reimbursements, you are still enrolled. However, it has defaulted to "Check" in Workday

Payment Electi	ons 1 item					XII 👳 L
		Payment Elections				
Pay Type	Payment Type	Account	Account Number	Distribution		
Payroll	Direct Deposit	Bank ******6157	*****6157	***6157 Balance Yes		Ĵ
€						Þ
Payment Electi	ons Requiring Setup 1 item					
Pay Type		Default Payment Type		Description		
Expense		Check	Check		Add	
4						÷

- 5. In the **Payment Elections** section fill out the following information:
 - **Country** (currency will automatically populate)
 - **Payment type** (Direct Deposit or Check)
 - Account

(+)	Order	*Country	*Currency	
$\oplus \bigcirc$	₹ •	\times United States of America	× USD	:=







*Payment Type	Account	*Balance / Amount / Percent
× Direct Deposit	:≡ × Bank *****6157 :≡	Balance

- 6. Click the radio button for **Balance**
- 7. Click OK

Changing Payment Elections

From the Workday Home page:

- 1. Click the Pay worklet
- 2. Under Actions tab, click Payment Elections
- 3. Scroll down to the **Payment Elections** section of the page
- Click Change Election for either Payroll or Expense, depending on the change you want to make

Payment Election	ons 2 items				
Рау Туре			Payment Elections		
	Payment Type	Account	Account Number	Distribution	
Payroll	Direct Deposit	Bank *****6157	*****6157	Balance Yes	Edit
Expense	Direct Deposit	Bank *****6157	*****6157	Balance Yes	Edit
Expense	Direct Deposit	Bank *****6157	*****6157	Balance Yes	Edit

- 5. In the **Payment Elections** section fill out the following information:
 - **Country** (currency will automatically populate)
 - Payment type (Direct Deposit or Check)
 - Bank Account

Order	*Country	*Cu	rrency
₹ •	imes United States of America	×	USD 🗄
e 🖊	Account		*Balance / Amount / Percent
eposit	:≡ × Bank *****6157 ÷	≡	O Balance
	Order	Order *Country V V United States of America := Account Account x Bank ******6157 :=	Order *Country *Cu V V United States of America := > Account Account x Bank *****6157 :=

Notes:

• If you do not currently have a bank account associated with your payment elections (e.g. you are not enrolled in

THE TEXAS A&M UNIVERSITY SYSTEM



direct deposit) you must add a bank account to the **Accounts** section of this page to add a direct deposit election

- If you need to use multiple bank accounts, be sure all accounts are listed in the Accounts section of the page. To add an account, click **Add Account**
- 6. Click the radio button for Balance
- 7. Click OK

This completes Edit Payment Elections