

Payment Election Enrollment Event (ESS)

Overview

This job aid outlines the process for an Employee to manage his / her payment election during the Onboarding process

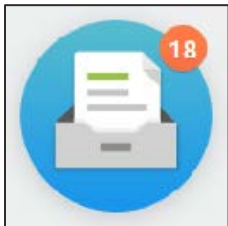
Prerequisites: The Employee must already be hired in Workday and undergoing the Onboarding process

Important Information: Payment elections can also be managed outside the Onboarding process by typing "Payment Elections" in the **Search** bar or by clicking "Payment Elections" in the **Pay** worklet

Steps

From the Workday Home page:

1. Click the **Inbox** worklet



2. Click the "Payment Election Enrollment Event" action item
3. In the **Preferred Payment Method** section, select information including:
 - **Expense**
 - **Payroll**

4. In the **Account Information** section, add or edit information including:
 - **Account Nickname (optional)**
 - **Account Type**
 - **Bank Name**
 - **Routing Transit Number**
 - **Account Number**

Note: The **Bank Identification Code** field will not be used at this time

5. Click **OK**
6. In the **Accounts** section, click **Add Account** to add additional accounts to your profile

Account Nickname	Country	Bank Name	Account Type
Personal Checking	United States of America	Bank of TAMUS	Checking

Note:

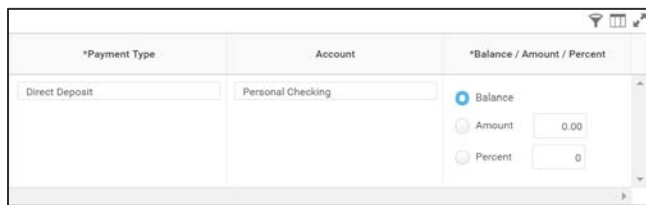
- You can divide your payment up to 5 accounts
- Click **Change Account** to edit information on an account
- Click **Delete Account** to delete the account

7. In the **Payment Elections** section, click **Change Election** on the **Payroll** row to add your first election to an account



8. Verify the following fields are correct:

- **Country**
- **Currency**
- **Payment Type**
- **Account**
- **Balance / Amount / Percent**



Note: If you are dividing your check to different accounts:

- You can divide your check up to 5 different accounts by clicking the add row icon (+) and filling in the fields mentioned above
- Select **Amount** if you want a certain amount of your payment to go to an account
- Select **Percent** if you want a certain percentage of your payment to go to an account
- Select **Balance** if you want the remainder of your payment to go to an account. Only one of your accounts can have **Balance** selected

9. Click **OK**

10. Enter any comments, as needed



11. Click **Submit**

This completes the **Payment Election Enrollment Event (ESS)** process