

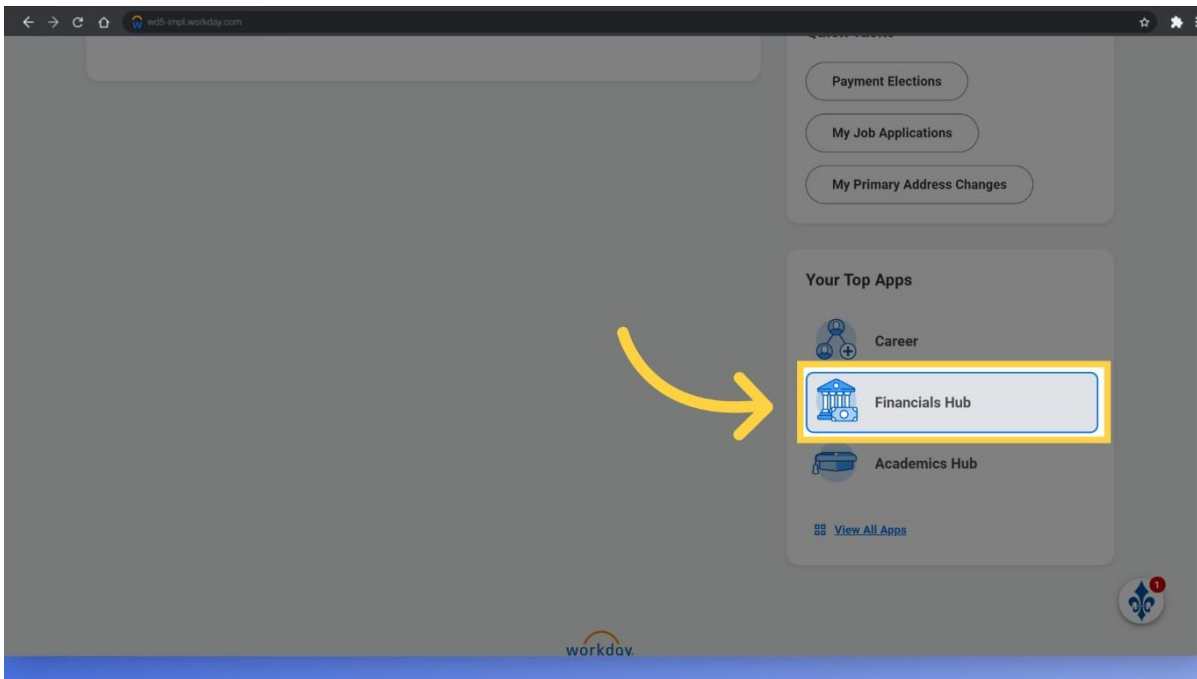
How to set up payment elections in Workday



Students should set up payment elections through the Financials Hub in Workday for any refunds they may be owed. Learn how to efficiently set up payment elections in Workday with these straightforward instructions. If you're a student worker, be sure to watch for the additional training steps towards the end of this video.

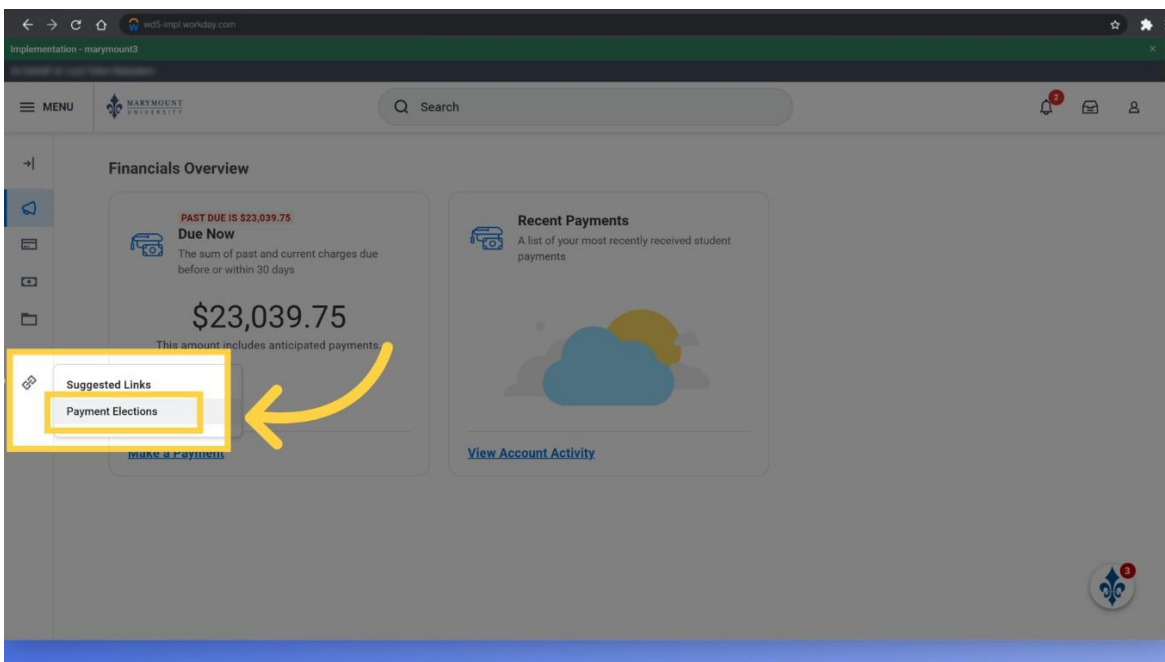
1. Financials Hub

Click on the Financials Hub on the Your Top Apps tile, on the main Workday screen.



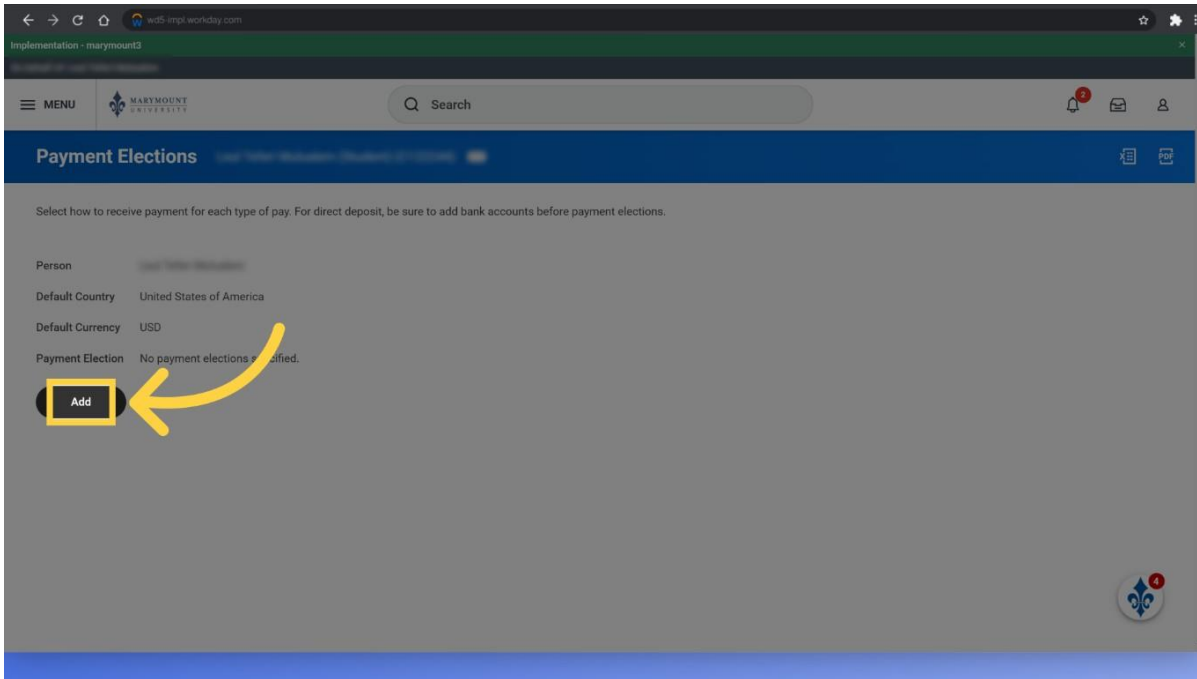
2. Payment Elections

Access the Payment Elections feature by clicking on the Suggested Links icon, and then choosing the Payment Elections option from the list provided.



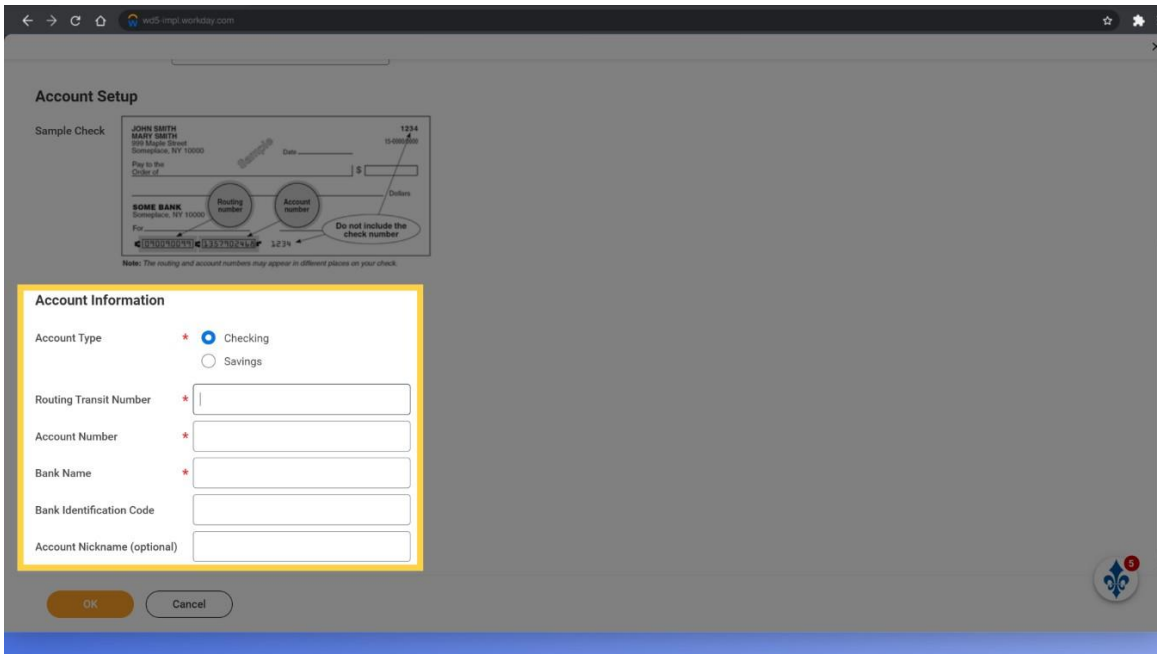
3. Add

Initiate the process to add a new payment election by clicking on the add button.



4. Bank Information

You will now be asked to enter bank account information. Select the Account type, enter the Routing Transit Number of your bank account, enter your bank account number, and enter the Bank Name. You can also enter an account nickname if desired.



5. Confirm and Save

When your account information has been entered, please review and when ready, click on the ok button to confirm and save your payment election setup.

Account Setup

Sample Check

JOHN SMITH
MARY SMITH
100 Maple Street
Someplace, NY 10000

Pay to the Order of: \$ 1234
Twelve hundred and 34/100 Dollars

SOME BANK
Someplace, NY 10000

Routing number: 021000021
Account number: 123456

Note: The routing and account numbers may appear in different places on your check.

Account Information

Account Type: Checking, Savings

Routing Transit Number: 021000021

Account Number: 123456

Bank Name: My Bank

Bank Identification Code: [Empty]

Account Nickname (optional): [Empty]

OK

6. Student Workers

As a student worker, your steps will be a little different than a new student. When you get to the Payment Elections screen in Workday, scroll down to the very bottom of the payment election screen. You will see the Payment Elections Requiring Setup section in addition to your worker elections. Click the add button to setup the Student Payment Rule.

Status: Successfully Completed

Last Updated: 07/20/2021 08:07 AM

Accounts: 1 item

Account Nickname	Country	Bank Name	Account Type	Account Number	Action
[Empty]	[Empty]	[Empty]	[Empty]	[Empty]	Edit, Remove, View

Add

Payment Elections: 2 items

Pay Type	Payment Type	Account	Account Number	Distribution	Action
[Empty]	[Empty]	[Empty]	[Empty]	[Empty]	Edit
[Empty]	[Empty]	[Empty]	[Empty]	[Empty]	Edit

Payment Elections Requiring Setup: 1 item

Pay Type	Default Payment Type	Description	Action
Student Refund Rule	Check - Student	No elections found.	Add

7. Save

Select the currency and payment type. Also choose the Account, which may be there already from your student worker direct deposit, or you can add a new account. Finally, choose the BALANCE option. When done, you can click on the OK button to finalize your Student Refund Rule setup.

Payment Election

Pay Type Student Refund Rule

Default Country United States of America

Default Currency USD

Number of Elections Allowed 1

Payment Elections 1 item

Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
	United States of America	USD	Direct Deposit		Balance

OK

This guide covered the process of setting up payment elections in Workday, including accessing the Financials Hub, adding a new payment election, and inputting payment details like the Routing Transit Number and bank information. Save time and effort by following these simple steps.

For additional training materials and videos, please go to:

<https://ebtly.com/B2228AC9>