

Quick Reference Guide: *Updating Payment Elections (direct deposit)***Keep in mind**

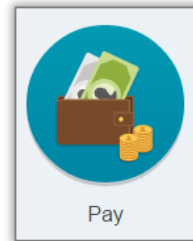
- You can have up to 6 regular payment elections, and 1 for expense reimbursement.

Information Needed

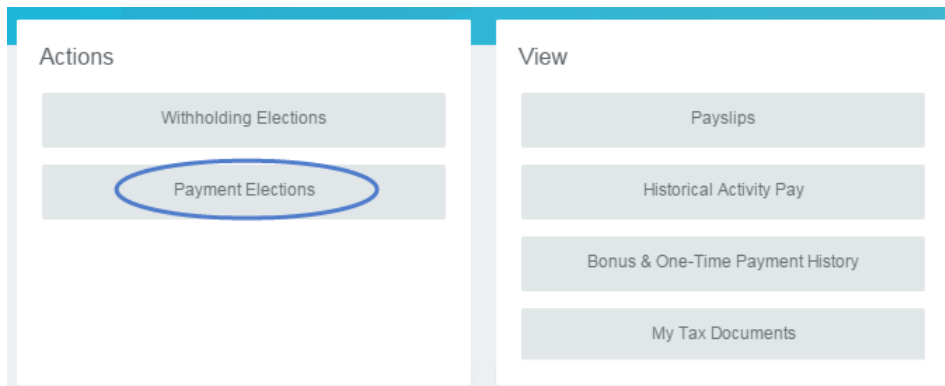
- Payment type
- Account type
- Bank name
- Account number
- Routing number

Add Account Steps:

1. From the Home page, click the **Pay worklet**.



2. Under the Actions header, click **Payment Elections**.



Quick Reference Guide: *Updating Payment Elections (direct deposit)*

- From the Payment Elections page, click the **Add Elections** icon.

Payment Elections Louis Litt

Designate how to receive payment for each type of pay. For direct deposit be sure to add accounts prior to changing elections.

Worker: Louis Litt
Default Country: United States of America
Default Currency: USD
Payment Election: No payment elections specified.

Add Elections

- On the Payment Election Option screen, update the following:
 - Payment Type** – this will default to Direct Deposit (suggested form of payment). You may also select **Check**.
 - Use for Pay Type** – check/uncheck boxes based on preferences.

Payment Election Option

Elect how to receive payment for the selected types of pay. If selecting direct deposit, also set up an account to use. You can add additional accounts later.

Worker: Louis Litt
Default Country: United States of America
Default Currency: USD
Payment Type: Direct Deposit
Use for Pay Type:
 Expense Reimbursement
 Fiscal Year End
 Regular

Quick Reference Guide: *Updating Payment Elections (direct deposit)*

5. In the Account Information section, complete the following:

- **Account Type** – select Checking or Savings
- **Bank Name**
- **Routing Transit Number** – note: invalide routing numbers will not be excepted.
- **Account Number**



You can also add an **Account Nickname** (if desired) and **Bank Identitification Code** (if applicable).

Account Information	Additional Information
Account Nickname (optional) <input type="text"/>	Bank Identification Code <input type="text"/>
Account Type * <input checked="" type="radio"/> Checking <input type="radio"/> Savings	
Bank Name * <input type="text"/>	
Routing Transit Number * <input type="text"/>	
Account Number * <input type="text"/>	

6. Click **OK** when done and you will see that this task has been successfully completed.

Quick Reference Guide: *Updating Payment Elections (direct deposit)***Change Election Steps:**

1. Repeat Steps 1 and 2 above.
2. Under the Payment Elections section, click the **Change Elections** icon next to the election you desire to update.

Pay Type	Payment Elections					Change Election
	Payment Type	Account	Account Number	Distribution		
Regular	Direct Deposit		*****8528	Balance	Yes	Change Election
Expense Reimbursement	Direct Deposit		*****8528	Balance	Yes	Change Election
Fiscal Year End	Direct Deposit		*****8528	Balance	Yes	Change Election

3. On the Payment Election screen, make updates to the applicable fields. These include **Payment Type**, **Account**, and **Balance/Percent/Amount** information. Click **OK** when done and you will see it has been successfully completed.

+	Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
+ -	▼	✕ United States of America	✕ USD	✕ Direct Deposit		<input checked="" type="radio"/> Balance <input type="radio"/> Amount <input type="text" value="0.00"/> <input type="radio"/> Percent <input type="text" value="0"/>



If you have more than one Payment Election listed, ensure that the Balance/Amount/Percent information accurately reflects your intended payment preferences. For example, make sure that your total payment elections total 100%.