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

4. 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.
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5. In the Account Information section, complete the following:
   - **Account Type** – select Checking or Savings
   - **Bank Name**
   - **Routing Transit Number** – note: invalid routing numbers will not be accepted.
   - **Account Number**

   ![Account Information Form]

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

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

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.

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%.