

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

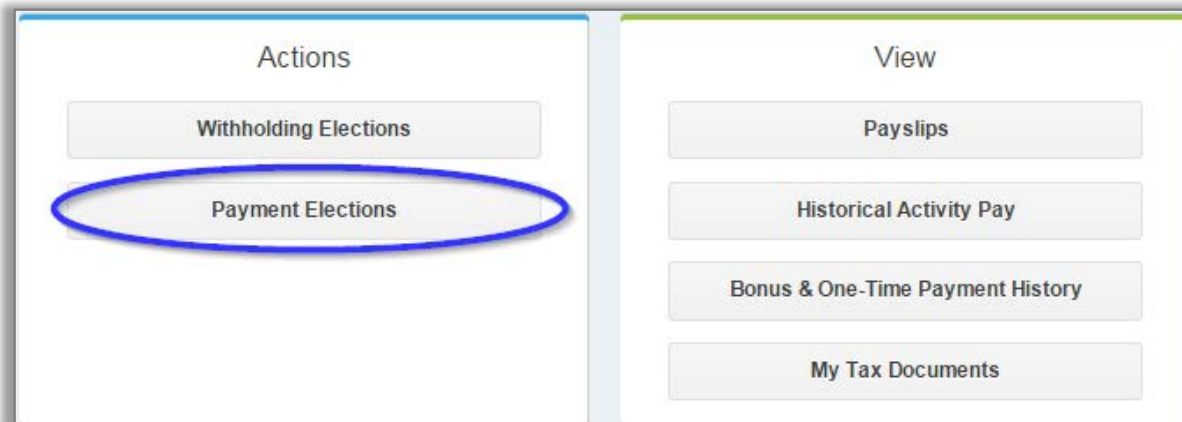
- Payment type
- Account type
- Bank name
- Account number
- Routing number

Add Account Steps:

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

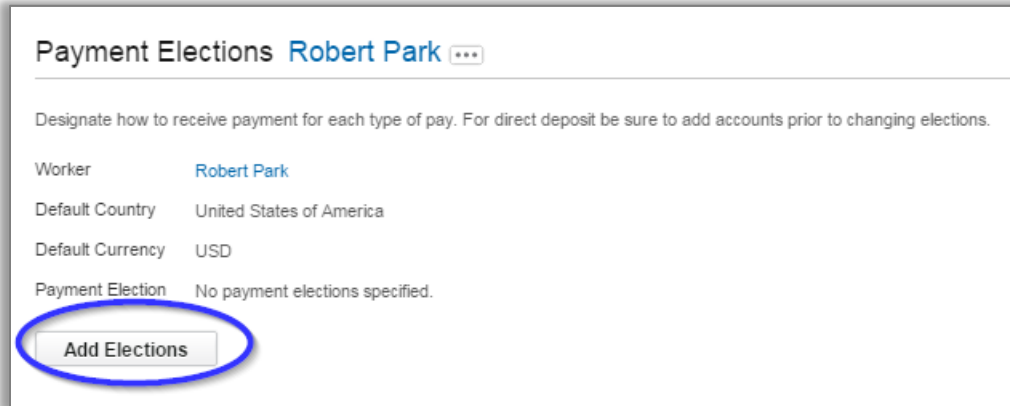


2. Under the Actions header, click **Payment Elections**.



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



Payment Elections Robert Park ...

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

Worker Robert Park

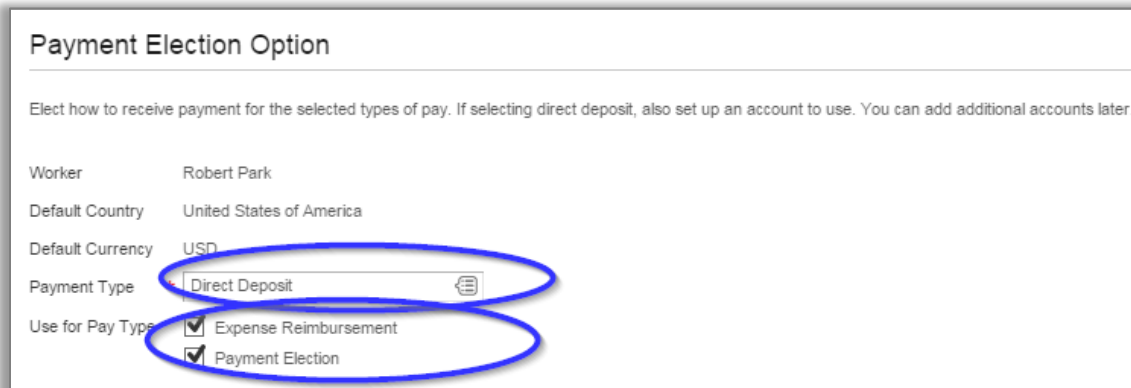
Default Country United States of America

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.

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Default Country United States of America

Default Currency USD

Payment Type Direct Deposit ⌵

Use for Pay Type Expense Reimbursement Payment Election

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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: invalide routing numbers will not be excepted.
 - **Account Number**

6. Click OK.



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

Account Setup
Worker Robert Park

Account Information

Account Nickname (optional)

Account Type Checking Savings

Bank Name

Routing Transit Number

Account Number

Additional Information

Bank Identification Code

OK Cancel

7. 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		
Payment Election	Direct Deposit	Test	*****3245	Balance	Yes	Change Election
Expense Reimbursement	Direct Deposit	Test	*****3245	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.

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

OK Cancel

4. Click **OK**.



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%.

5. A message will display indicating that this task has been successfully completed.