Payroll: Manage Employee Pay Profile

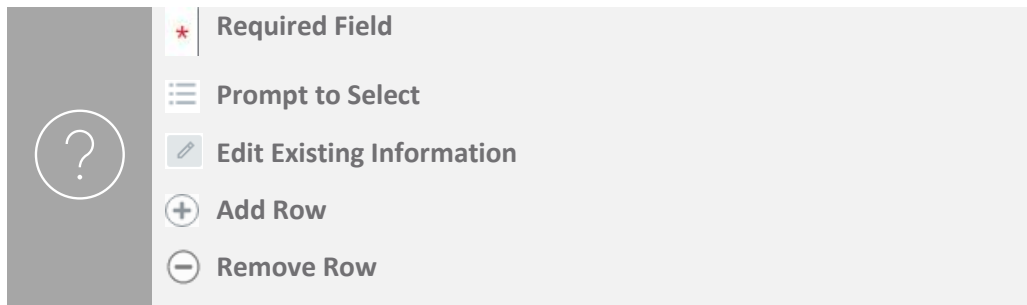WILLIAM PATERSON UNIVERSITY

Overview

This quick reference guide covers how to manage your employee pay profile including changes to withholding (tax) elections and payments elections (direct deposit), viewing and printing payslips, and accessing tax documents.

Icons:

✱	Required Field
☰	Prompt to Select
✎	Edit Existing Information
⊕	Add Row
⊖	Remove Row

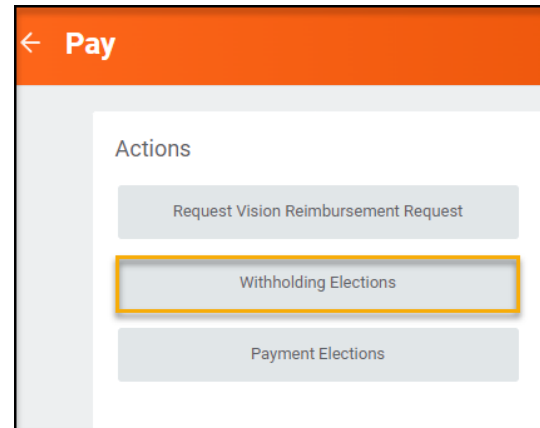### View or Change Withholding Elections

1. After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.
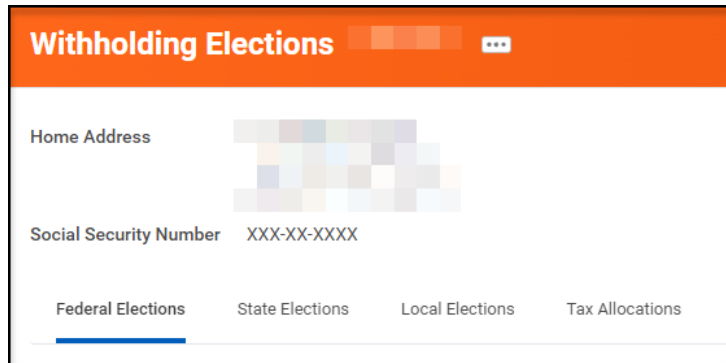
☰ MENU

2. Click the **Pay** app.

Pay

3. Under **Actions**, click on **Withholding Elections**.

← Pay

Actions

Request Vision Reimbursement Request
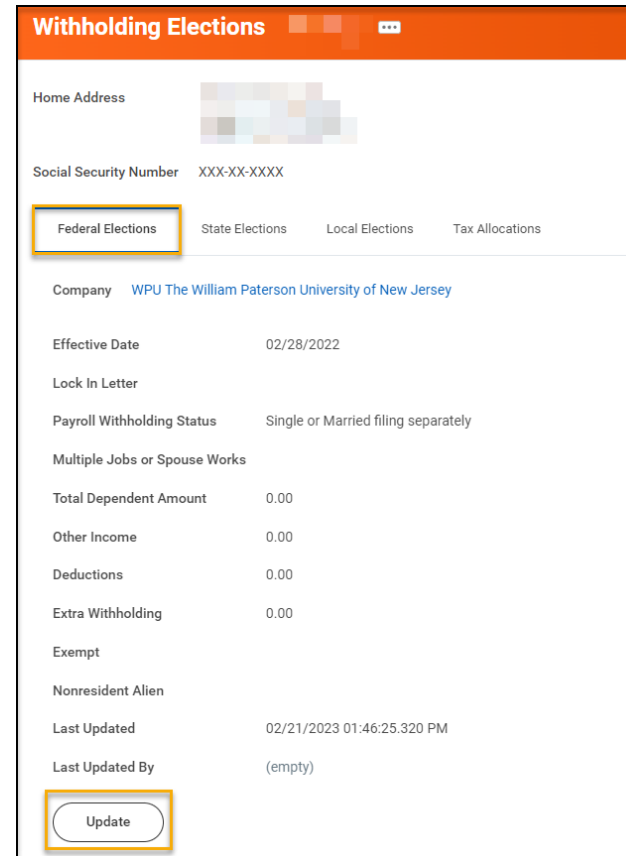
Withholding Elections

Payment Elections

4. Click on the appropriate tab to view your current withholding elections.
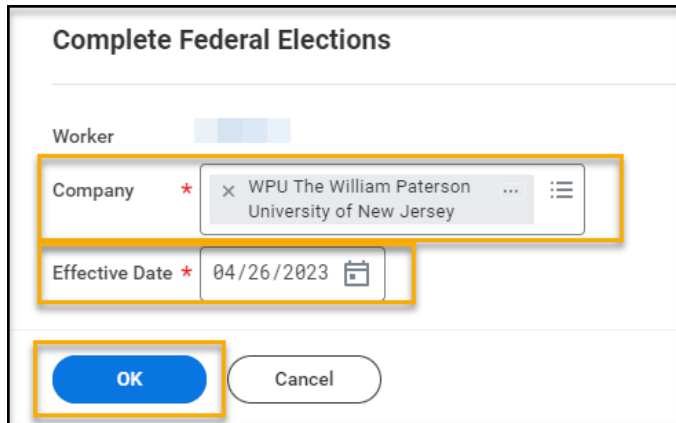
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5. To make changes to your election, click the **Update** button under the appropriate sections - **Federal Elections**, **State Elections**, or **Local Elections**.
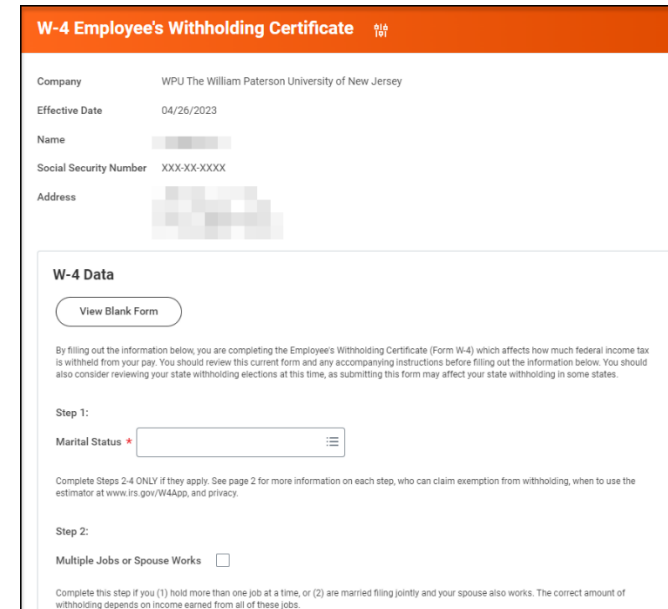

6. For Federal Elections:

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- Fill out the **Complete Federal Elections** screen.

- **Worker**: name is prepopulated and not editable

- **Company**: WPU The William Paterson University of New Jersey

- **Effective Date**: prepopulated with today's date. You may update this with the date on which you wish the changes to go into effect.

- Click **OK**.

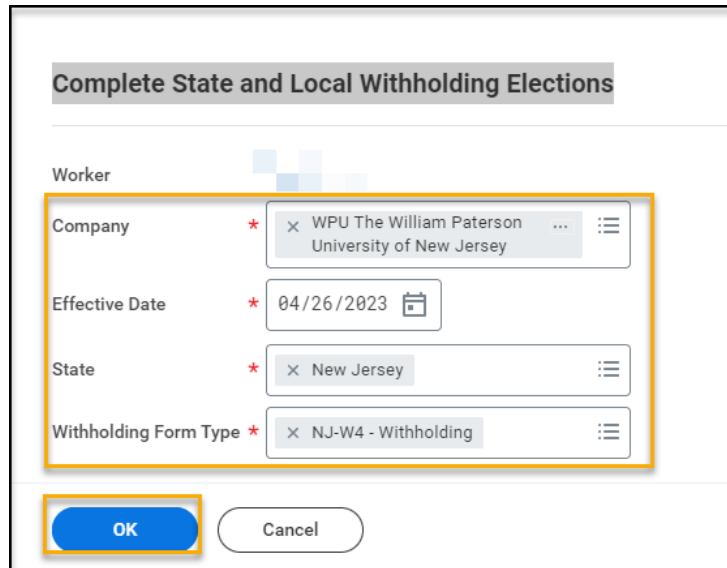- From the **W-4 Employee's Withholding Certificate** complete the W-4 Data form.

7. For State and Local Elections:

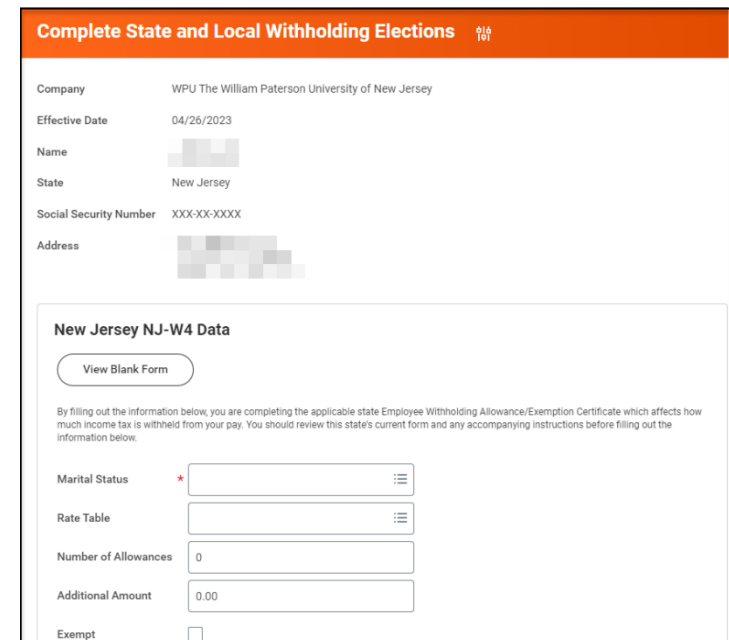- Fill out the **Complete State and Local Withholding Elections** screen.

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- **Worker**: name is prepopulated and not editable

- **Company**: WPU The William Paterson University of New Jersey

- **Effective Date**: prepopulated with today's date. You may update this with the date on which you wish the changes to go into effect.

- **State**: prepopulated with New Jersey. Update to another available option, if applicable.

- **Withholding Form Type**: prepopulated with NJ-W4 – Withholding. Select NJ- 165 – Non-Resident

Exempt if you selected New York or Pennsylvania in the State field.

- Click **OK**.

- From the **Complete State and Local Withholding Elections** complete the **New Jersey NJ-W4 Data** or the **New Jersey JN-165 Data** form.

8. You must check the box next to **I Agree** before submitting the changes. When you are ready to submit your changes, click **OK**.

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9. Upon submission, the changes to withholding will now route to the next step of the business process for approval for federal elections. Change to state and local withholding elections to not require approval.

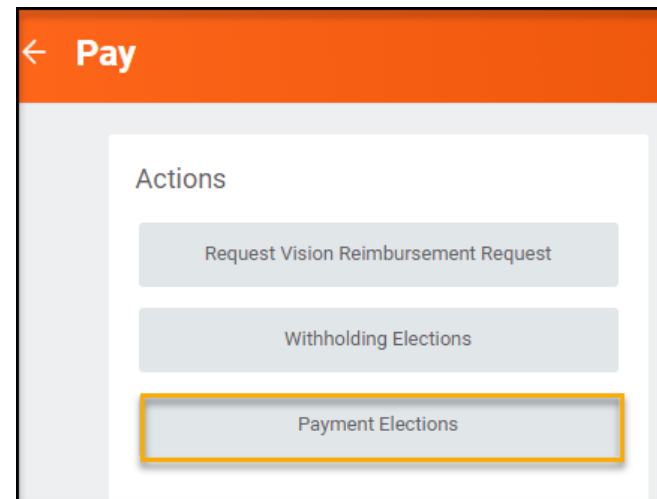## Add Payment Elections for Direct Deposit

1. After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.

2. Click the **Pay** app.

3. Under **Actions**, click on **Payment Elections**.

4. Under **Accounts** on the **Payment Elections** screen, click the **Add** button. You may also Edit, Remove or View an account from this screen.

5. On the **Add Account** screen, enter your bank account information, including **Routing Transit Number**, **Bank Name**, **Account Type**, and **Account Number** which are required fields.

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6. When you have entered all required information, click the **OK** button.

7. On the **Payment Elections** screen, your Payment Elections will appear. You can use the **Edit** button in this grid to change how you receive payments for Payroll Payment or Expense Payments. Note: If you have payment elections that require initial setup, they will be listed under the Payment Elections Requiring Setup section.

For Direct Deposit, you must first set up accounts. If an account is not available, return to the summary page and add it to the list of valid accounts.

a. For **Payroll Payments**, you may designate how to receive payments under **Payment Type** (Direct Deposit or Check - Payroll).
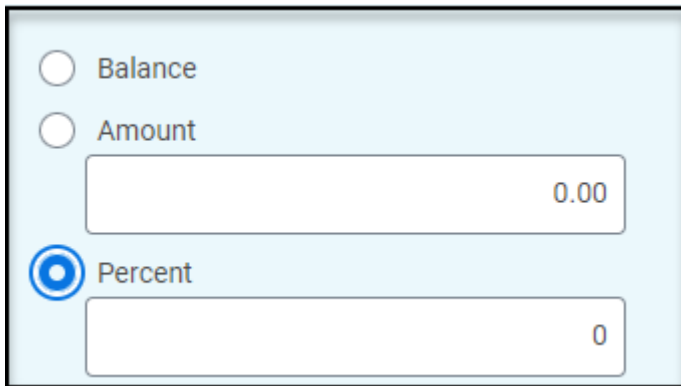
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Note: If you wish to split your payroll distribution (balance, amount, or percent) into multiple accounts,

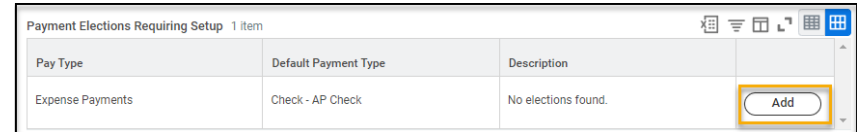click the plus sign ⊕ . Up to six elections are allowed.

b. For Expense Payment Elections, you may designate how to receive payments under Payment Type (Direct Deposit, Check Payment). Please choose one account. For the payment type of Checking-Foundation Checking - only choose this if Authorized.

8. After your changes have been made, click **OK**.
9. The changes to your elections will be reflected under the **Payment Elections** section.
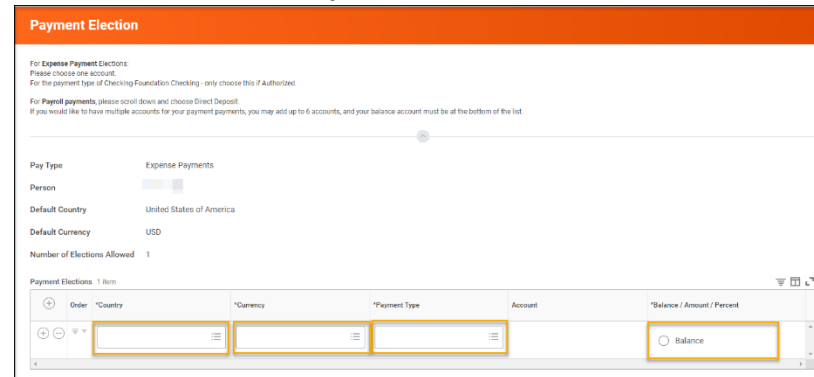
Payment Elections Requiring Setup (Expense Payments)

1. To setup the election for a Pay Type listed in **Payment Elections Requiring Setup**, click the **Add** button in the row of the **Pay Type**.

2. Fill out the fields under **Payment Elections**.

   a. **Country**: Select United States of America
   b. **Currency**: will prepopulate with USD after Country is selected
   c. **Payment Type**: Choose from the available options: Check – AP Check, Check – Foundation Checking, Direct Deposit
   d. **Account**: This field will become editable if Direct Deposit is selected for the Payment Type. Select from your accounts.
   e. **Balance**: Click the radio button.

3. Click **OK**.

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4. The changes to your elections will be reflected under the **Payment Elections** section.
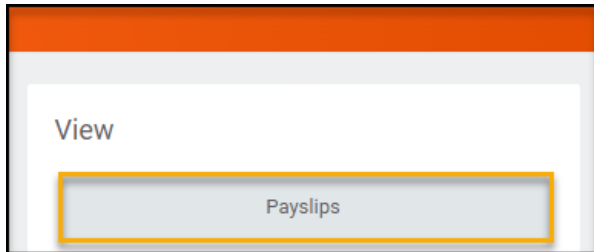
View Payslips

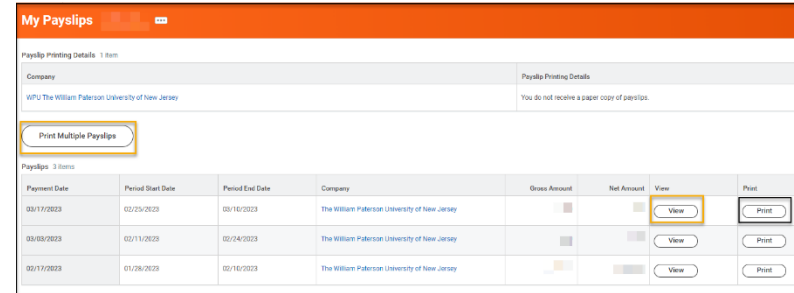1. After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.

2. Click the **Pay** app.

3. Under **View**, click on **Payslips**.

4. Under Payslips, you may **View** or **Print** any of the payslips listed. You may also **Print Multiple Payslips** by clicking on the button and selecting a date range.

5. Click **View** to see the details on an individual payslip.

6. On the **Payslip** screen, you will see all the details for the selected payslip.

7. Using the buttons at the top of the screen, you may select Previous Payslip, Return to My Payslips, or Print Payslip Image.

8. When viewing a payslip, click the **Print Payslip Image** button to print a pdf.

9. A message will display that **Your request is being processed**. You may wait or select **Notify Me Later**.

10. You will receive a notification when the document is available. Click the **Notification** icon at the top right corner, as circled below. The number that appears on the icon represents the number of items currently awaiting your review.

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11. To review the notification, click on the notification titled **Document Available** in the list on the left-hand side to view the details which includes a link to the pdf document for download.
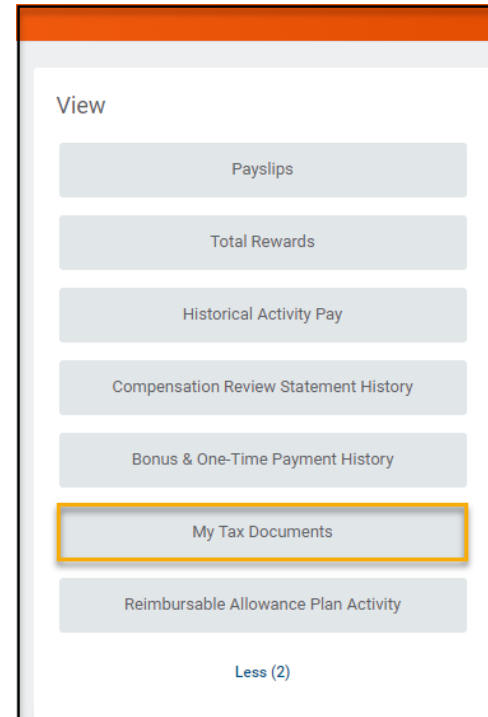
View Tax Documents and Edit Printing Elections

1. After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.
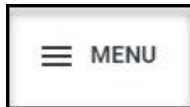

2. Click the **Pay** app.

3. Under **View**, click on **My Tax Documents**. Note: You may need to click **More** to reveal this link.

4. On the **My Tax Documents** screen, any tax documents will be listed below the **Tax Forms Printing Elections** box including your W-2, when available.

5. From the **Tax Forms Printing Elections** box, you may **Edit** your printing elections.

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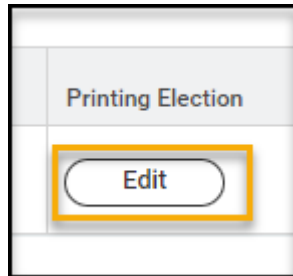
6. On the Change Year End Tax Documents Printing Elections screen, you may select to **Receive electronic copy of my Year End Tax Documents** or **Receive both electronic and paper copies of my Year End Tax Documents**. Select one of the options and click **OK**.

7. The printing election will be reflected on the **Change Year End Tax Documents Printing Elections** screen. Select **Done** to exit.