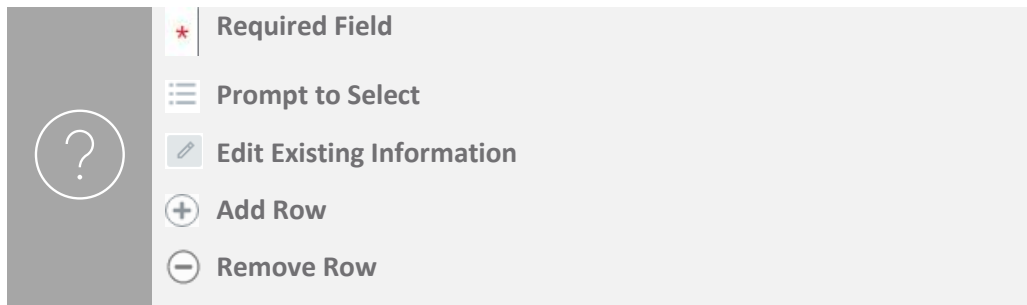


# Payroll: Manage Employee Pay Profile

## 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:



### View or Change Withholding Elections

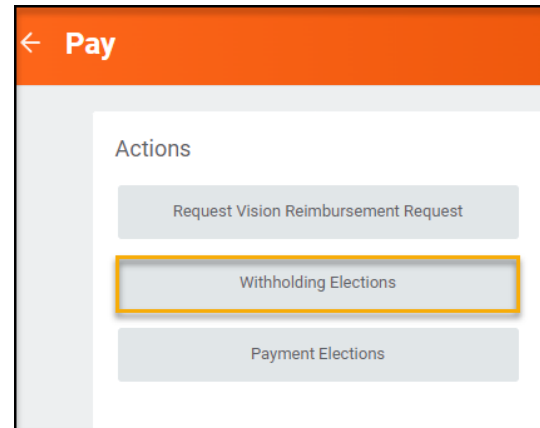
1. After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.



2. Click the **Pay** app.

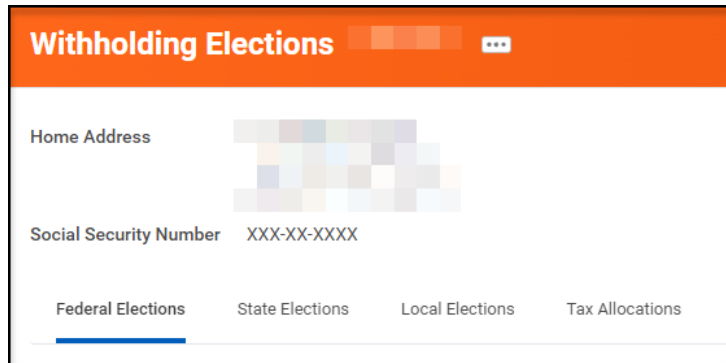


3. Under **Actions**, click on **Withholding Elections**.

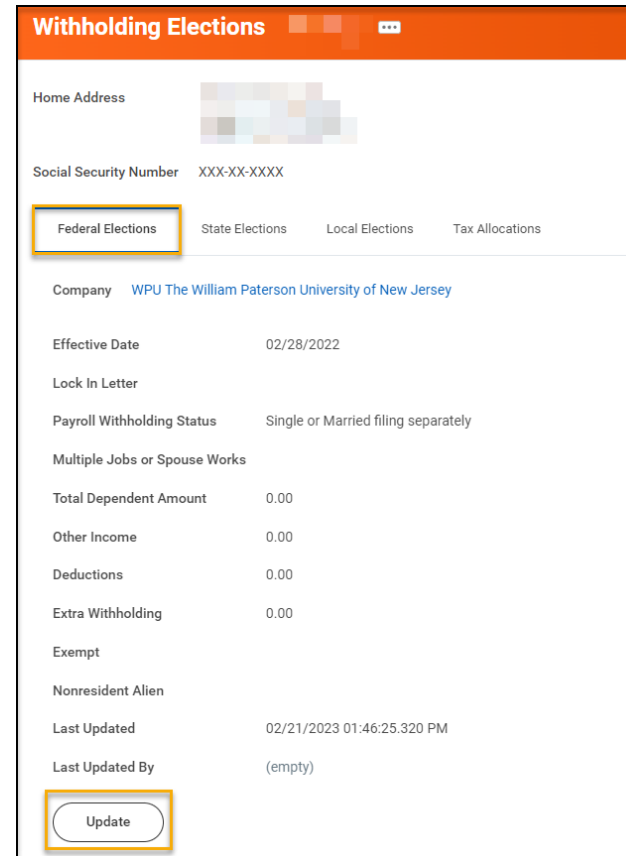


4. Click on the appropriate tab to view your current withholding elections.

# Payroll: Manage Employee Pay Profile



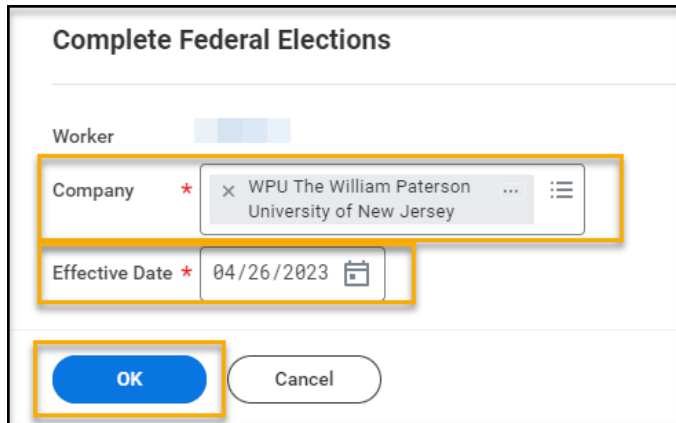
- To make changes to your election, click the **Update** button under the appropriate sections - **Federal Elections**, **State Elections**, or **Local Elections**.



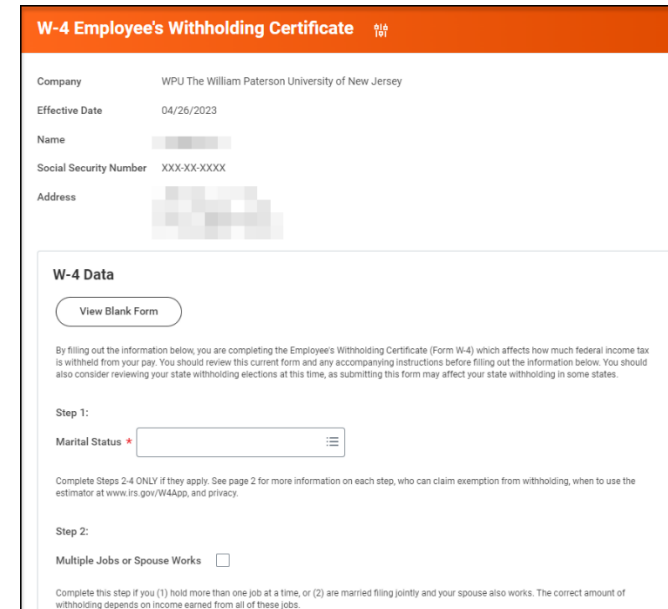
- For Federal Elections:

# Payroll: Manage Employee Pay Profile

- 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.

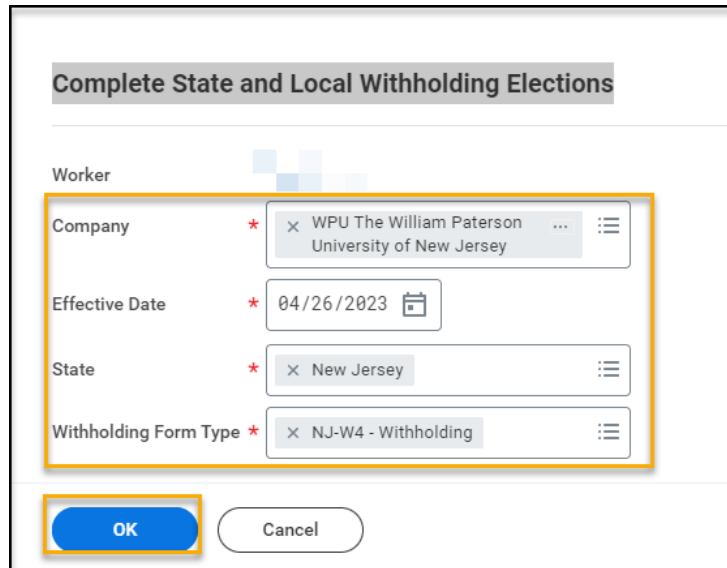


## 7. For State and Local Elections:

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

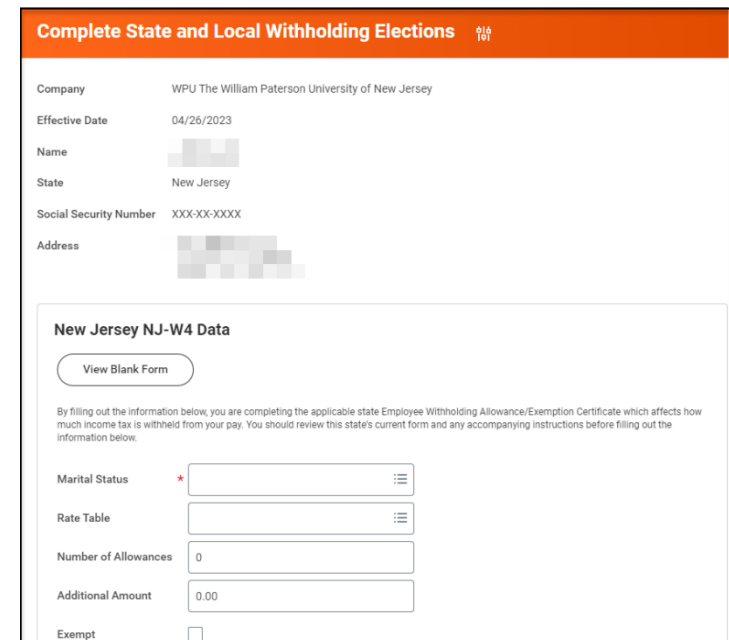
# Payroll: Manage Employee Pay Profile

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



- **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

- 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**.

# Payroll: Manage Employee Pay Profile

Step 5:

**Legal Notice** Your Name and Password are considered as your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you click in the "I Agree" checkbox, you are certifying that:

1. Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.
2. You understand that your payroll tax withholding election is a legal and binding transaction.
3. You understand that all submissions are contingent upon acceptance by your Payroll representative.

If you do not wish to use the electronic signature option, print a paper copy of the form. The form is not valid without a signature.

I Agree

**OK** Cancel

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

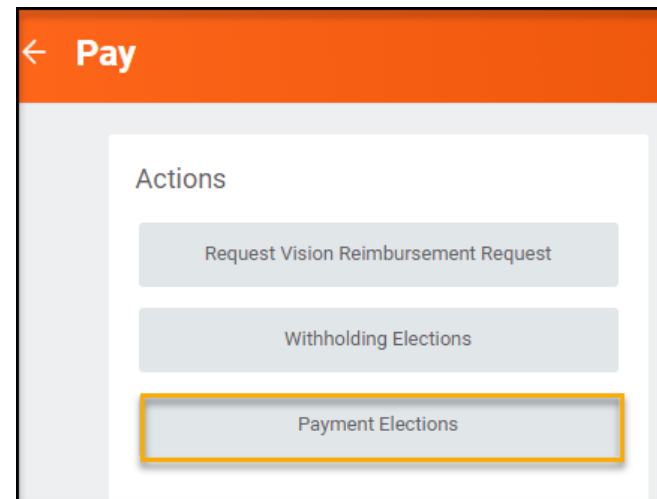
1. After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.



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.

Account Nickname	Country	Bank Name	Account Type	Account Number	
██████████	United States of America	██████████	Checking	██████████	<input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="View"/>
██████████	United States of America	██████████	Savings	██████████	<input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="View"/>

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.

# Payroll: Manage Employee Pay Profile

Add Account

Add account information for use when electing direct deposit for payments. Assign the account a nickname for easy identification later. The bank name is informational only. The numbers drive the direct deposit transaction and may be found on checks. Please contact your bank for further information on direct deposit.

Account Holder Name

Account Country United States of America

Sample Check

Jonathan Doe  
4321 Main St  
Anytown, CA 94000

DATE

\_\_\_\_\_  
Dollars

YOUR BANK NAME  
3078 St St  
Anytown, CA 94000

DO NOT INCLUDE  
Check #

⑆ 23456789⑆ 000 1234567890 ⑆ 99 123

9 Digit Routing # Between the 12 symbols    Account # Include all zeros

**Account Information**

Account Nickname (optional)

Routing Transit Number \*

Bank Name \*

Bank Identification Code

Account Type \*  Checking  Savings

Account Number \*

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

## Edit Payment Elections for Direct Deposit

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.

Pay Type	Payment Type	Account	Account Number	Distribution	
Payroll Payment	Direct Deposit			Percent 15.00%	<input type="button" value="Edit"/>
	Direct Deposit			Balance 100	

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).


Check - Payroll

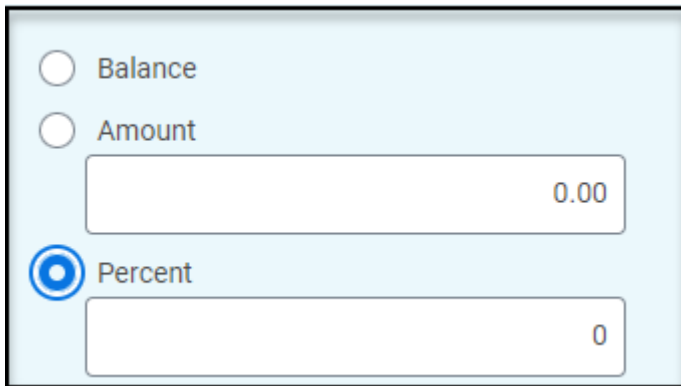
Direct Deposit

Search ☰

✕ Direct Deposit

# Payroll: Manage Employee Pay Profile

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.

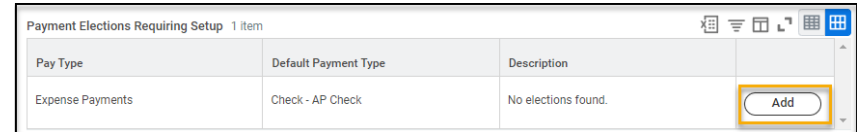


The form shows three radio button options:   
 Balance   
 Amount   
 Percent   
 Below the 'Amount' option is a text input field containing '0.00'.   
 Below the 'Percent' option is a text input field containing '0'.

- 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.

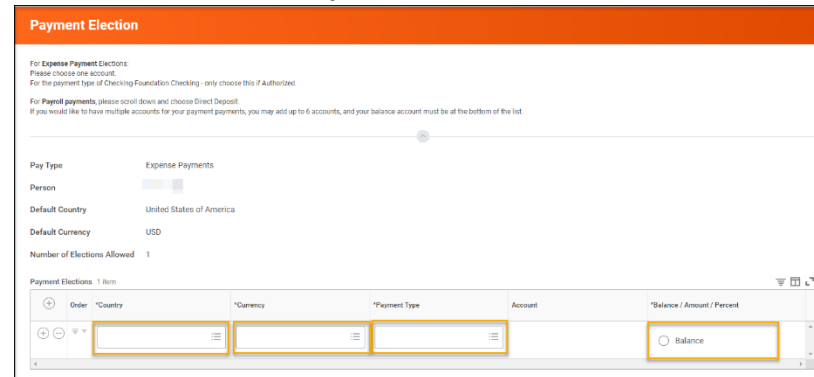
## Payment Elections Requiring Setup (Expense Payments)

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**.



Pay Type	Default Payment Type	Description	
Expense Payments	Check - AP Check	No elections found.	<b>Add</b>

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



The form contains the following fields and options:   
 - **Pay Type:** Expense Payments   
 - **Person:**    
 - **Default Country:** United States of America   
 - **Default Currency:** USD   
 - **Number of Elections Allowed:** 1   
 - **Payment Elections:** A table with columns: Order, Country, Currency, Payment Type, Account, Balance / Amount / Percent.   
 - In the table, the 'Country' and 'Currency' columns have dropdown menus. The 'Account' column has a dropdown menu. The 'Balance / Amount / Percent' column has a radio button for 'Balance'.

- 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**.

# Payroll: Manage Employee Pay Profile

- The changes to your elections will be reflected under the **Payment Elections** section.

## View Payslips

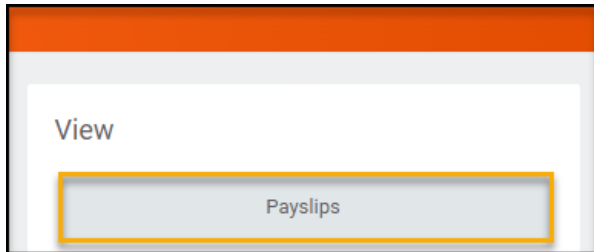
- After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.



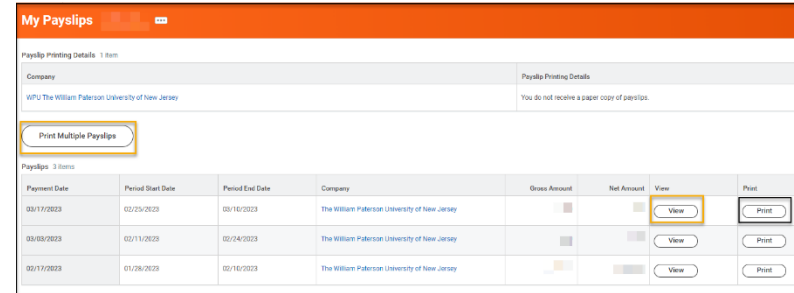
- Click the **Pay** app.



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



- 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.



- Click **View** to see the details on an individual payslip.
- On the **Payslip** screen, you will see all the details for the selected payslip.
- Using the buttons at the top of the screen, you may select Previous Payslip, Return to My Payslips, or Print Payslip Image.



- When viewing a payslip, click the **Print Payslip Image** button to print a pdf.
- A message will display that **Your request is being processed**. You may wait or select **Notify Me Later**.
- 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.



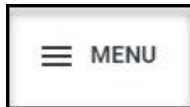
# Payroll: Manage Employee Pay Profile



- 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

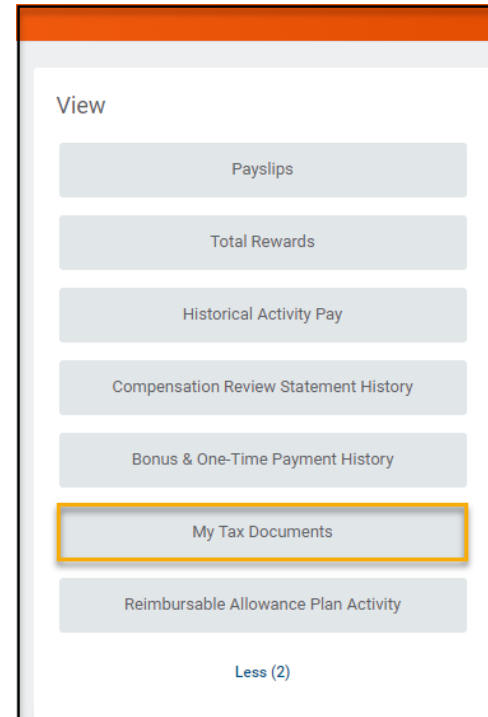
- After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.



- Click the **Pay** app.

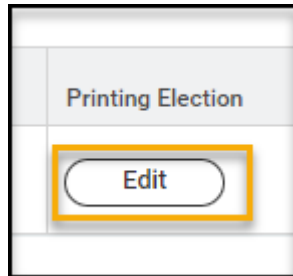


- Under **View**, click on **My Tax Documents**. Note: You may need to click **More** to reveal this link.



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

# Payroll: Manage Employee Pay Profile



- 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**.

A screenshot of the "Change Year End Tax Documents Printing Elections" screen. The page has an orange header with the title. Below the header, there are several sections: "Worker" (with a blurred name), "Company" (WPU The William Paterson University of New Jersey), "Last Updated" (empty), and "Current Year End Form Printing Election" (You are currently receiving both electronic and paper copies of your Year End Tax Documents). The "New Election" section contains two radio button options: "Receive electronic copy of my Year End Tax Documents" (which is selected with a red asterisk) and "Receive both electronic and paper copies of my Year End Tax Documents". Below this is an "Important Note" and a "Disclaimer Text" section. At the bottom, there are "OK" and "Cancel" buttons, with the "OK" button highlighted by a yellow box.

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