

Manage Payroll Options – Payslips and Elections

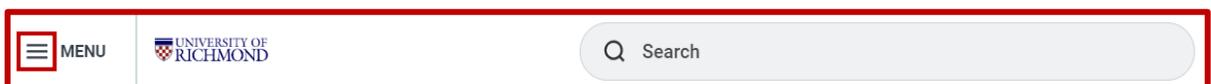
This guide provides step-by-step instruction on how to view your payslip and update payroll elections.

The Pay Application contains worklets with links to payroll related task and information. The Pay application includes:

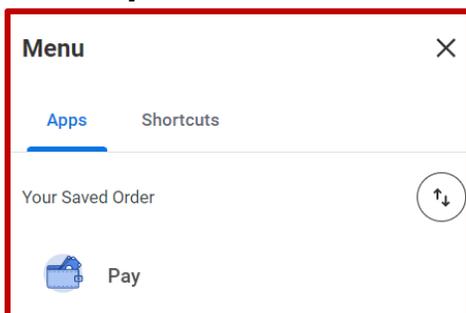
- **Withholding Elections:** Review and update withholding elections on the Federal, State, and Local Elections tabs.
- **Payment Elections:** Distribute payroll and expense payments between different bank accounts (checking or savings), and specify the payment method, such as check or direct deposit.
- **Payslips:** View and print payslips or change your payslip printing election. You can view payslips for any previous period when the data is provided.
- **Historical Activity Pay:** View and print historical period activity pay assignments (if applicable).
- **Bonus & One Time Payment History:** Review payments received outside of the regularly scheduled payroll process, such as bonuses.

View Your Withholding Deductions

1. From the Workday homepage, select the navigation **Menu** at the top left corner of the toolbar.

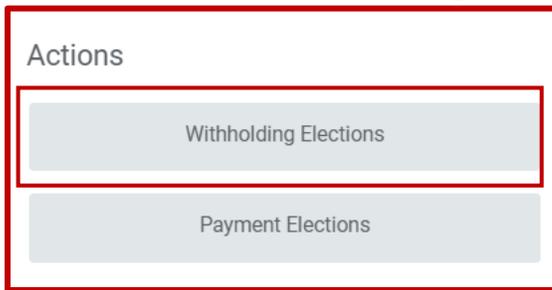


2. Select **Pay**.

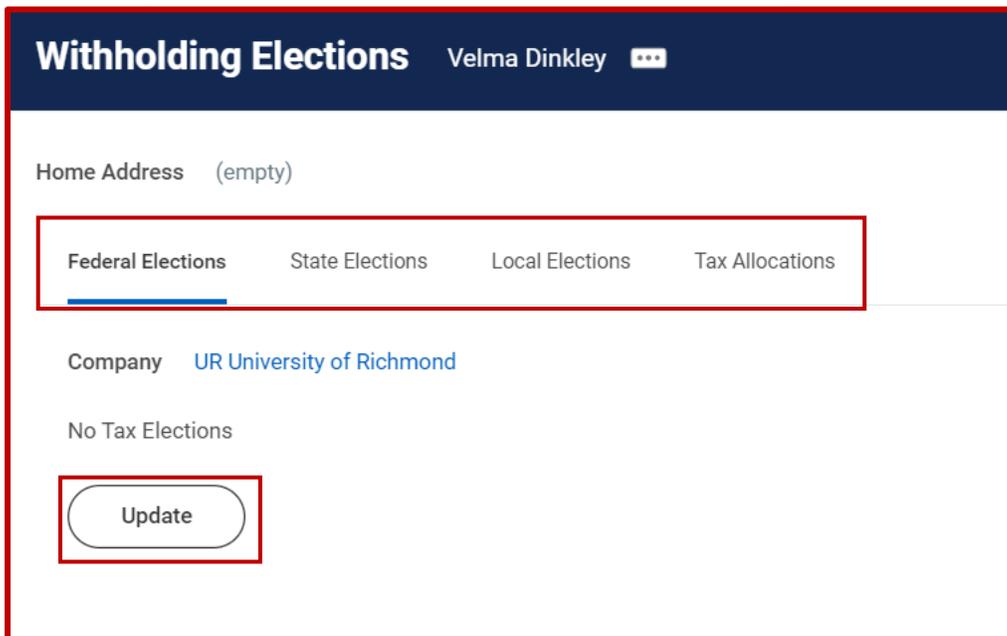


Note: To add **Pay** in the menu App, select **Menu** > **Add Apps** > Type in **Pay** > click **+** **icon** to add.

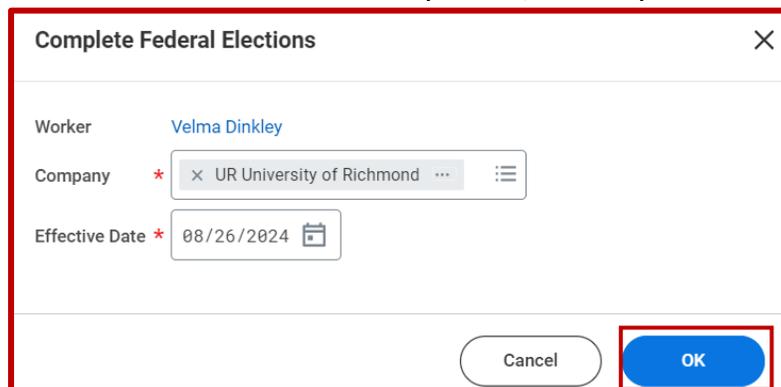
3. Under **Actions** select **Withholding Elections**.



4. To view status, select the tab **Federal Elections, State Elections, Local Elections** or **Tax Allocations**.
5. Click the **Update** button on each tab to make elections changes.



6. For this example, **Federal Elections** is selected.
- Company** defaults to University of Richmond.
 - Effective Date** defaults to today's date, edit only if necessary.



7. Select **OK**.
8. Make necessary update to W-4 Data

W-4 Employee's Withholding Certificate 

Company: UR University of Richmond
 Effective Date: 08/27/2024
 Name: Velma Dinkley
 Social Security Number: (empty)
 Address: (empty)

W-4 Data

[View Blank Form](#)

By filling out the information below, you are completing the Employee's Withholding Certificate (Form W-4) which affects how much federal income tax is withheld from your pay. You should review this current form and any accompanying instructions before filling out the information below. You should also consider reviewing your state withholding elections at this time, as submitting this form may affect your state withholding in some states.

Step 1:
 Marital Status *

Complete Steps 2-4 ONLY if they apply. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.

9. Scroll down select **I Agree** checkbox and select **OK**.

(b) Deductions

Extra Withholding: Enter any additional tax you want withheld each pay period.

(c) Extra Withholding

Exempt: You had no federal income tax liability in 2023 and you expect to have no federal income tax in 2024. Note: By checking the Exempt box you will have no federal taxes withheld.

Exempt

Nonresident Alien: If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Nonresident Alien

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:

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

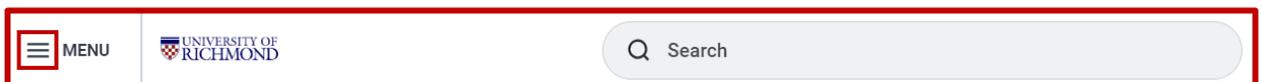
If you do not wish to use the electronic signature option, print a paper copy of the form. The form is not valid without a signature.

I Agree

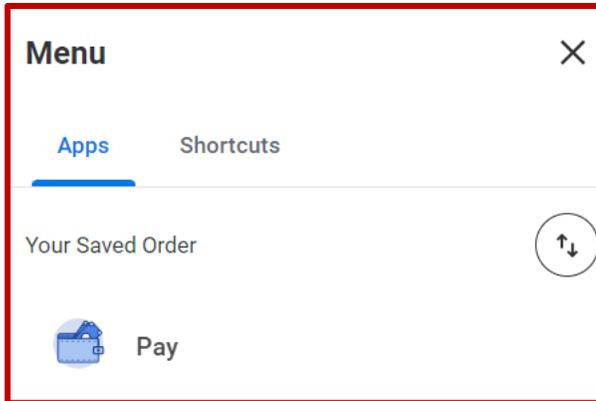
[OK](#) [Cancel](#)

Add a Direct Deposit Account

1. From the Workday homepage, select the navigation **Menu** at the top left corner of the toolbar.

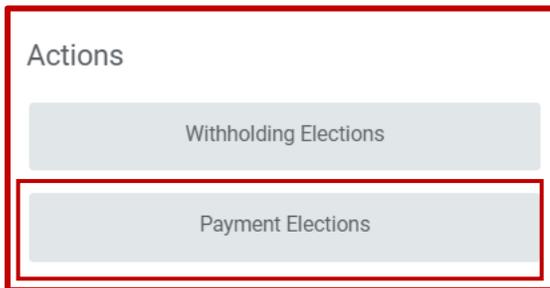


2. Select **Pay**

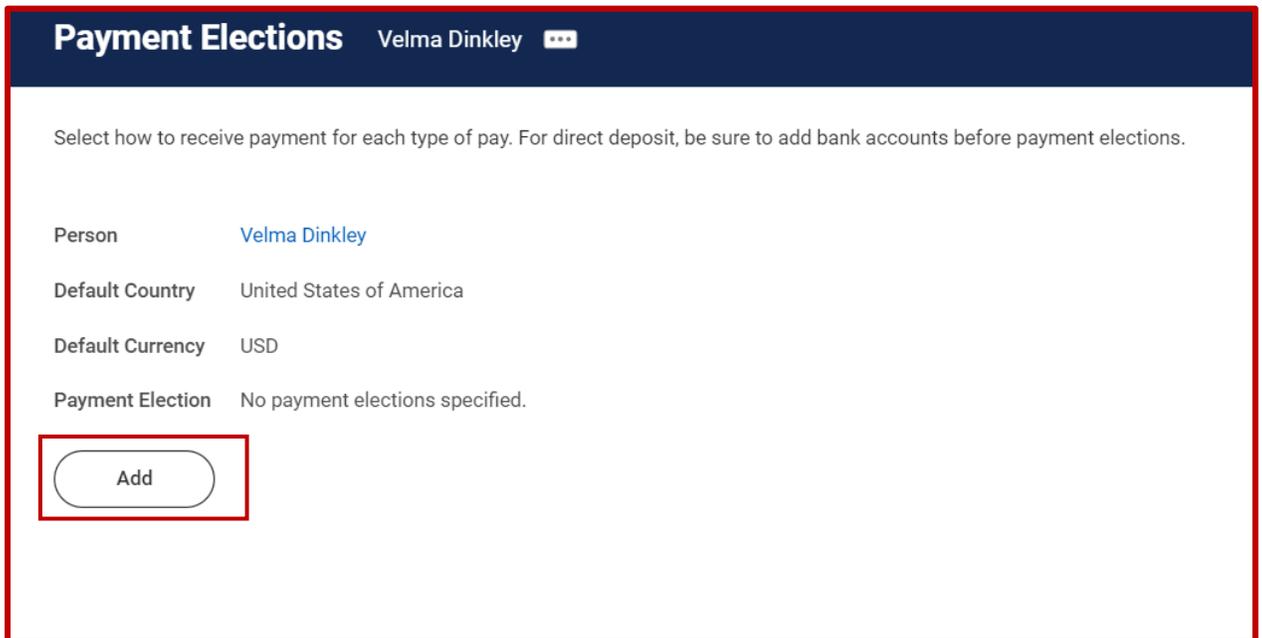


Note: To add **Pay** in the menu App, select **Menu** > **Add Apps** > Type in **Pay** > click **+** icon to add.

3. Under Actions, select **Payment Elections**



4. Click **ADD**.



Note: If you are working remotely to access Direct Deposit election and changes, you need to connect to UR VPN.

5. Under **Preferred Payment Method:**
 - i. **Expense Payment** field defaults to Direct Deposit, edit only if necessary.
 - ii. **Payroll Payment** field defaults to Direct Deposit, edit only if necessary.

6. Under **Account Information** fill in the following:
 - i. Select **Account Type**, for this example Checking is selected.
 - ii. Type in **Routing Transit Number**.
 - iii. Type in **Account Number**.
 - iv. Type in **Account Name**.

Payment Election Option

Person Velma Dinkley

Default Country United States of America

Default Currency USD

Preferred Payment Method

Expense Payment *

Payroll Payment *

Account Setup

Account Holder Name Velma Dinkley

Sample Check

Jonathan Doe
4321 Main St
Anywhere, CA 94000

DATE _____

_____ Dollars

YOUR BANK NAME
3678 1st St
Anywhere, CA 94000

DO NOT INCLUDE
Check #

⑆ 123456789 ⑆ 0001234567890 ⑆ -00123

9 Digit Routing #
Between the ⑆ symbols

Account #
Include all zeros

Account Information

Account Type * Checking
 Savings

Routing Transit Number *

Account Number *

Bank Name *

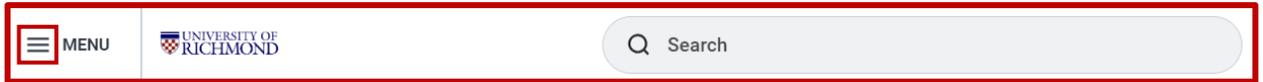
Bank Identification Code

Account Nickname (optional)

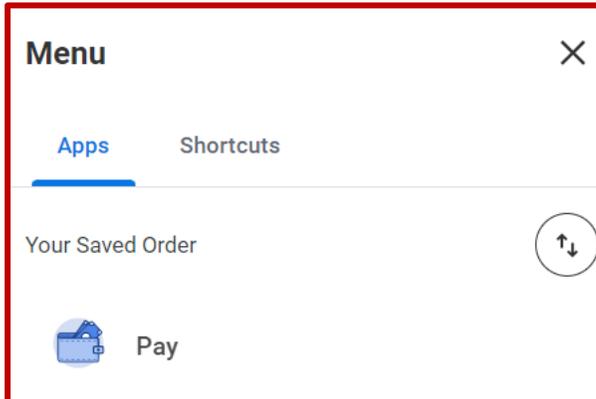
7. Select **OK** to save. Once the account has been added, you can use it to make payment elections.

Manage Your Payment Elections

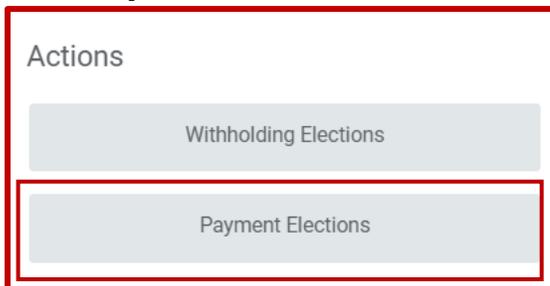
1. From the Workday homepage, select the navigation **Menu** at the top left corner of the toolbar.



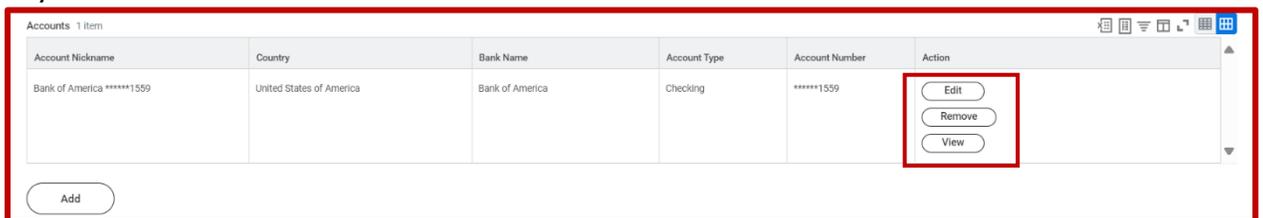
2. Select **Pay**.



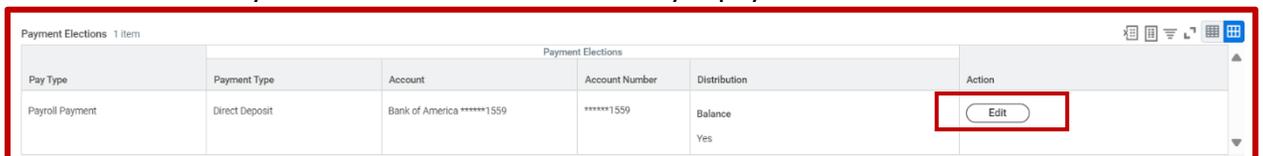
3. Select **Payment Elections**.



4. Edit or Remove bank accounts using **Edit** or **Remove** buttons. An account can only be removed if it is no longer as payment election. Click **View** button to view all the details of your account information



5. Click **Edit** in the Payment Elections section to modify a payment election.



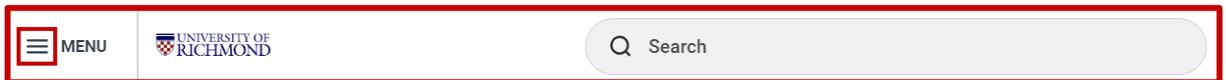
- Change the **Amount** or **Percent** that is deposited into the account; or change the account that receives the balance of the payment for the type. Your organization's payment elections policy determines what changes are allowed.

The screenshot shows a 'Payment Elections' form with the following fields: Order, *Country (United States of America), *Currency (USD), *Payment Type (Direct Deposit), and Account (Bank of America ****1559). A dropdown menu is open for the '*Balance / Amount / Percent' field, showing three options: 'Balance' (selected), 'Amount' (0.00), and 'Percent' (0). The form has 'OK' and 'Cancel' buttons at the bottom.

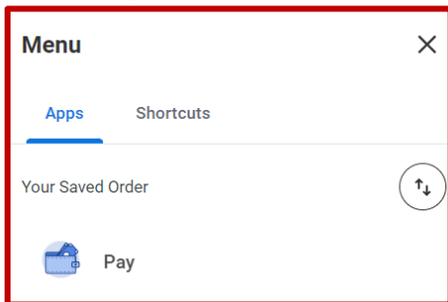
- Select **OK** to save.

View and Print Payslips

- From the Workday homepage, select the navigation **Menu** at the top left corner of the toolbar.

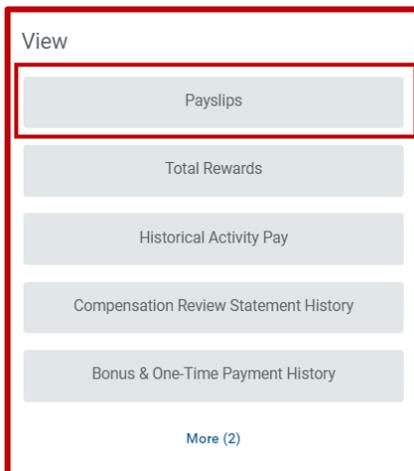


- Select **Pay**



Note: To add **Pay** in the menu App, select **Menu** > **Add Apps** > Type in **Pay** > click **+** icon to add.

- Under View, select **Payslips**. Please note that no historical payslip data will be available in this section



- Here you can view a list of all payslips. To print, click the **Print** button.

My Payslips Velma Dinkley

Payslip Printing Details 1 item

Company: UR University of Richmond

Payslip Printing Details: You do not receive a paper copy of payslips.

[Print Multiple Payslips](#)

Payslips 5 items

Payment Date	Period Start Date	Period End Date	Company	Gross Amount	Net Amount	Print
08/01/2024	07/01/2024	07/31/2024	University of Richmond	4,875.00	3,864.26	Print
06/28/2024	06/01/2024	06/30/2024	University of Richmond	4,875.00	3,864.26	Print
05/31/2024	05/01/2024	05/31/2024	University of Richmond	4,875.00	3,864.27	Print
05/01/2024	04/01/2024	04/30/2024	University of Richmond	4,875.00	3,864.26	Print
04/01/2024	03/01/2024	03/31/2024	University of Richmond	4,875.00	3,864.26	Print

Note: To print multiple payslips, click the **Print Multiple Payslips** button.

- A pop-up message will appear, then click **Notify Me Later**

Your request is being processed

You can continue to wait or choose to be notified later.

[Notify Me Later](#)

- You will a notification that your document is already available to view, click the notification bell icon.

Notifications

Viewing: All | Sort By: Newest

From Last 30 Days

Document Available

21 minute(s) ago

INT503_REP_BIRT_Payslip_Print_Layout_08_26_2024.pdf is now available in My Reports

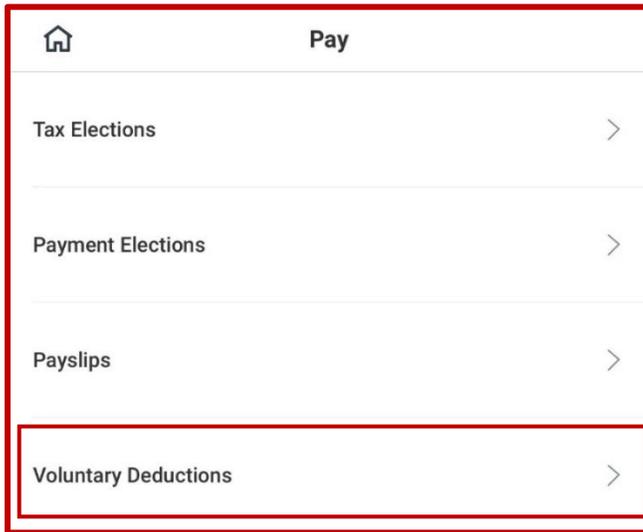
Details [INT503_REP_BIRT_Payslip_Print_Layout_08_26_2024.pdf](#)

Mobile

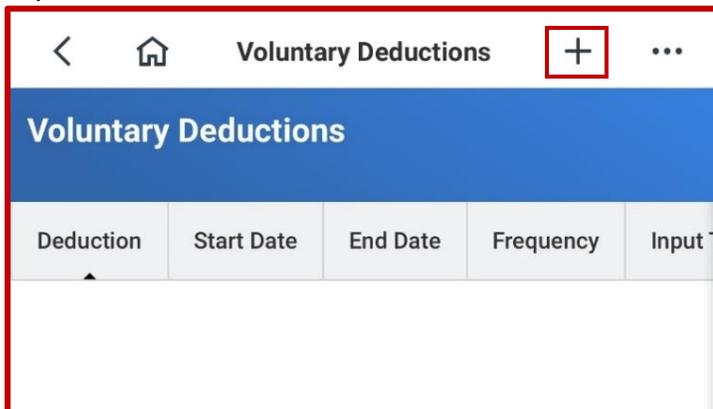
New Deduction

Use the Pay section of the Worker Profile to add voluntary deductions.

1. Tap your **Worker Profile** image.
2. Tap **Pay**. You may have to tap **More** to view additional options.
3. Tap **Voluntary Deductions**.



4. Tap the **+ Add** icon to add a new deduction.



5. Select the type of **Deduction**. For this example, UR Gift is selected.
6. Enter the required information indicated in red asterisk.
7. Tap **Done** to save.

The screenshot shows a mobile application interface for adding a voluntary deduction. At the top, there are three buttons: 'Cancel', 'Add Voluntary Deduction', and 'Done'. Below this, the worker's name 'Velma Dinkley' is displayed. The 'Deduction' field is set to 'UR Gift'. Under 'Frequency', 'One-time' is selected. The 'Date' is set to '10/01/2024', and the 'Next Payment Date' is '11/01/2024'. Under 'Type', 'Amount' is selected. The 'Value' field is set to '10'. The entire form is enclosed in a red border.

Edit Deduction

Use the Pay section of the Worker Profile to update voluntary deductions.

1. Tap your **Worker Profile** image.
2. Tap **Pay**. You may have to tap **More** to view additional options.
3. Tap **Voluntary Deductions**.
4. Tap the deduction you wish to edit.

Deduction	Start Date	End Date	Frequency	Input Type
UR Gift	10/01/2024	10/01/2024	One-time	Amount

5. Tap **Edit**.

Close 1 of 1

Deduction
UR Gift

Start Date
10/01/2024

End Date
10/01/2024

Frequency
One-time

Input Type
Amount

Value
10.00

Next Payment Date
11/01/2024

Edit

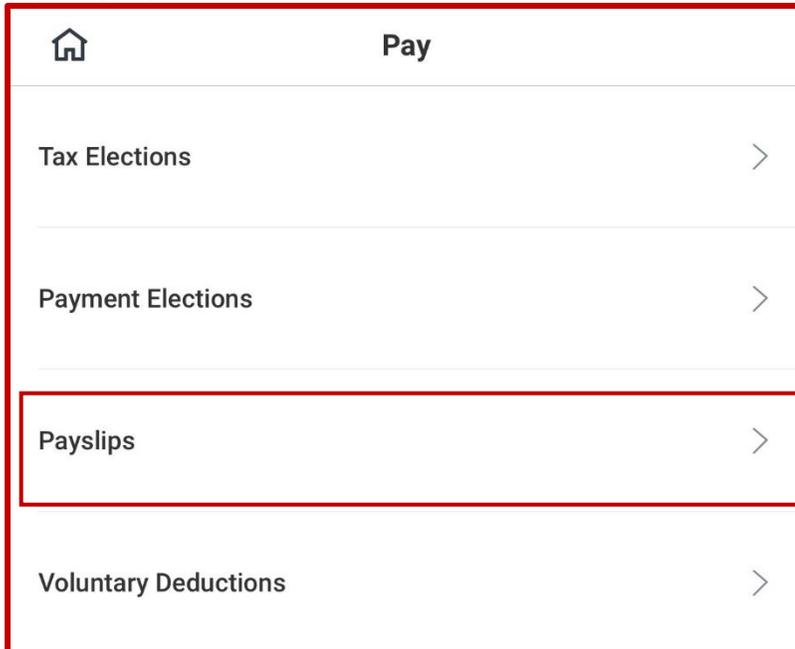
Delete

6. Make changes as necessary and tap **Done** to complete.

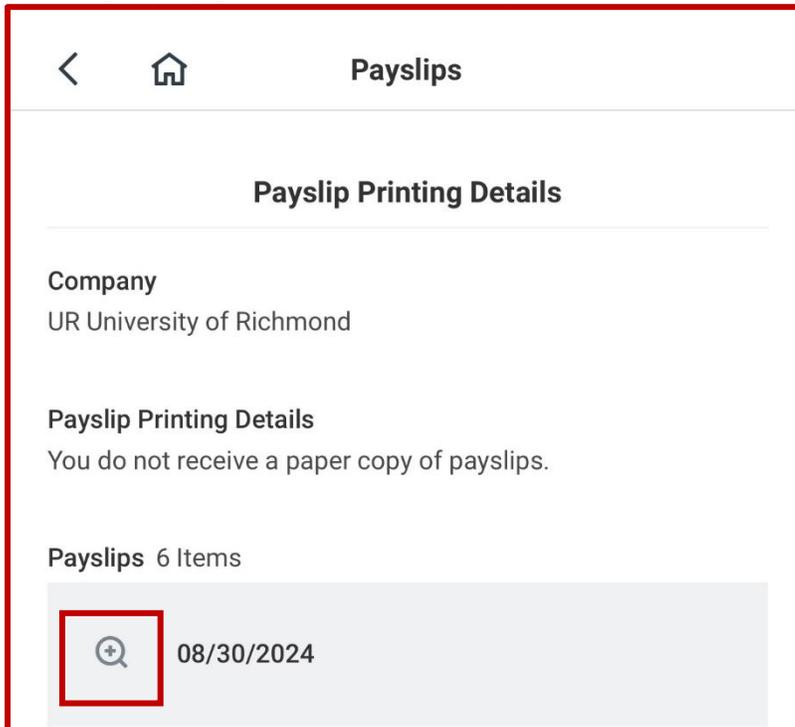
View and Print Payslips

To print payslips:

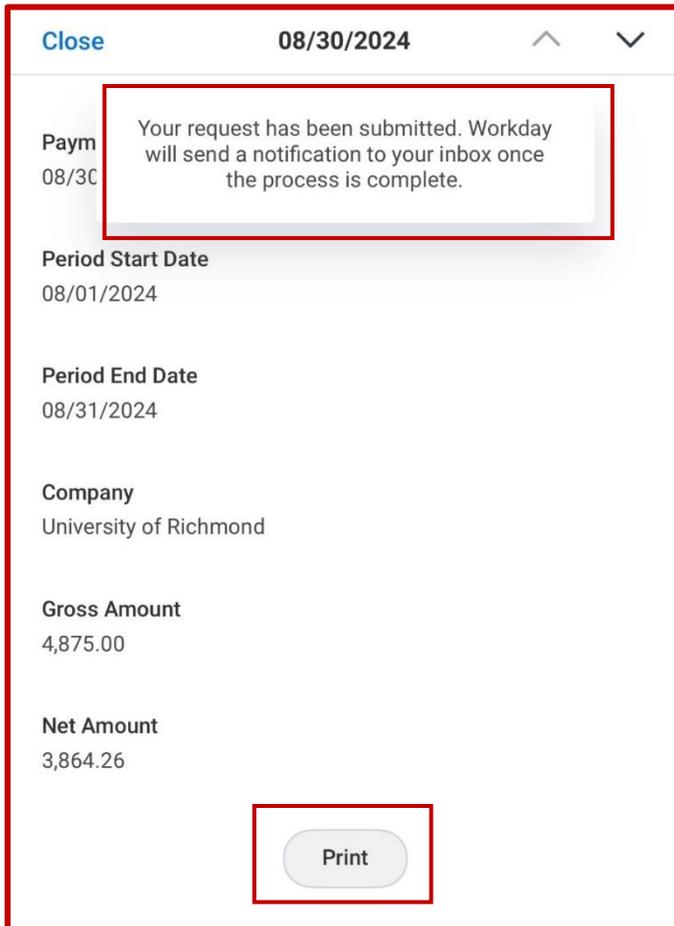
1. Tap your **Worker Profile** image.
2. Tap **Pay**. You may have to tap **More** to view additional options.
3. Tap **Payslips**.



4. Tap magnifying glass icon next to a payslip date.



5. Tap the **Print** button and a pop-up message will appear that your request has submitted.



6. Workday will send a notification to your inbox once the process is complete. You can then view and print the payslip or save the payslip as a PDF on your mobile device.

