Setting Up a Payment Election

In order to receive reimbursement from a Workday Expense Report, you must set up your **Payment Election.** Although you may have entered this information into HRMS for previous reimbursements, it will not carry over to this new system. This is a one-time process (unless you choose to make a change in the future) and will be saved to your profile.
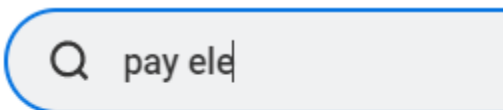
Log into Workday.
Copy the following link:
https://wd5.myworkday.com/rochester/d/home.htmld
Choose University of Rochester and login with your credentials.

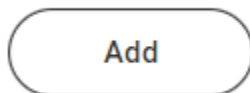Navigate to **Payment Elections** by typing in your Workday search bar:
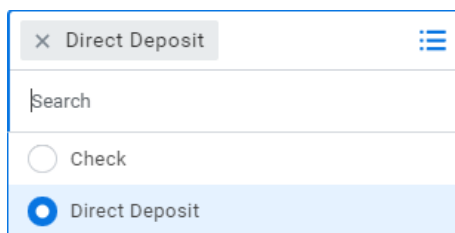
Click on the Report **Payment Elections**.
Read the Instructional/Help Text at the top.
You should see that you do not have any payment elections specified.

Upon seeing that you have no **Payment Elections** designated you should click **Add**:

For **Preferred Payment Method > Expense Payment**, select **Direct Deposit**.
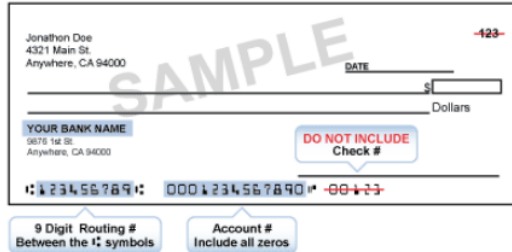
Check is an option, but **Direct Deposit** is strongly preferred/recommended so that you can receive your reimbursement the quickest method possible.

You are then prompted to fill in your bank **Account Information**. You will find the information you need on a check from your account.

Account Setup

Account Holder Name   Martina Corbelli

Sample Check

Account Information

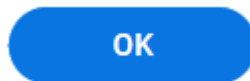| Account Nickname (optional)	
Routing Transit Number	*
Bank Name	*
Account Type	* ● Checking ○ Savings
Account Number	*
Name On Account	*

The **Account Nickname** is optional. You can name it however you refer to the bank account you will be entering, such as Main Checking. The **Name on Account** should be your name as it exists on your bank account.

Click on **OK** when complete.

A confirmation will briefly display for a few seconds at the top of your screen:

✓   Your changes have been saved

Your screen will update to reflect your Bank Account and all Payment Elections. Note that now your Payment Elections screen provides the ability for you to initiate changes as well.

Select how to receive payment for each type of pay. For direct deposit, be sure to add bank accounts before payment elections.

Person	Martina Corbelli
Default Country	United States of America
Default Currency	USD
Status	Successfully Completed
Last Updated	05/04/2022 09:51 AM

Turn off the new tables view 🔵

Accounts 1 item

Account Nickname	Country	Bank Name	Account Type	Account Number	
Main Checking	United States of America	HSBC	Checking	******5678	Edit Remove View

Add

Turn off the new tables view 🔵

Payment Elections 1 item

	Payment Elections				
Pay Type	Payment Type	Account	Account Number	Distribution	
Expense Payment	Direct Deposit	Main Checking	******5678	Balance Yes	Edit