

Direct Deposit – Employee Self-Service AND HR Partner

CONTENTS

Purpose	1
Log in to Workday	1
Add, Change, or Delete Accounts	2
Employee Self-Service	2
Employee – Edit Account Information	2
HR Partner – Edit Account Information.....	2
Add Account.....	2
Change Account.....	4
Delete Account	4
Add Payment to New Account or Change Amounts (Change Payment Elections).....	4
Add New Election	5
Change Elections.....	6
Remove Elections	6
Link Help Desk Contact Information	6

PURPOSE

This is for:

- An employee to manage her/his direct deposit information in Workday, or,
- An HR Partner to manage an employee’s direct deposit information in Workday ... add, change, or remove accounts and add or change payment elections.

The accounts are where the paycheck should go; the payment elections are to designate the amount to go to each account.

LOG IN TO WORKDAY

1. Log in to Workday (Employee Work Center) from this page, <http://link.nebraska.gov/>.
 - a. **If you have an @nebraska.gov email**, click the first link that says, “Log in with your @nebraska.gov email.” On the next screen, type your email address and your email address password.
 - b. **If you do NOT have an @nebraska.gov email**, click the second link that says, “Log in with your User Name / Workday password.” On the next screen, type your User Name and Workday password.
2. Click Sign In (or press Enter).

IMPORTANT!

- **You are only able to edit the Direct Deposit information for your paycheck in Workday.**

Direct Deposit – Employee Self-Service AND HR Partner

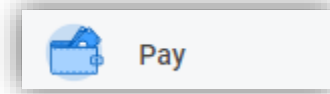
- Expense Reimbursement account information is entered separately in the Payroll and Financial Center.
- If you want your Expense Reimbursement account information to also be updated, you must contact your agency HR Partner.
- Otherwise, any Expense Reimbursement checks will continue to go to the existing account on record in the Payroll and Financial Center.

ADD, CHANGE, OR DELETE ACCOUNTS

For direct deposit, the accounts need to be entered in the system before designating the amounts to go to each account.

EMPLOYEE SELF-SERVICE

1. To change your bank account information, on your Home Page, find and click the link for “View All Apps” (on the right side of the page).
2. That will display a list of the Workday applications that you can access.
3. In that list, look for and click on the Pay icon (see screenshot at right).
4. On the next screen, click Payment Elections.



EMPLOYEE – EDIT ACCOUNT INFORMATION

1. On the next page, click Edit to change existing account information, or to change your Payment Elections (i.e., where the money goes and how much). Continue to one of the following sections based on what you need to do, either [Add Account](#), [Change Account](#), or [Delete Account](#).

HR PARTNER – EDIT ACCOUNT INFORMATION

1. To change the Payment Elections information for one of your employees:
 - a. Search for the employee record; type her/his name or Employee ID in the search box, then click the employee record.
 - b. Click the Actions icon (underneath the employee Job Title) and go to Personal Data > Maintain Payment Elections for Worker.
2. This takes you to the Manage Payment Elections screen, where you can change the account information or change the Payment Elections (i.e., where the money goes and how much). Continue to the next section based on what you need to do, either [Add Account](#), [Change Account](#), or [Delete Account](#).

ADD ACCOUNT

1. Click the Add button (below any already-existing accounts ... see red arrow).



Direct Deposit – Employee Self-Service AND HR Partner

2. Enter all relevant account information. The fields marked with a red asterisk (*) are required. The optional fields can be left blank if they do not apply or are unknown. IMPORTANT: Please double-check (or triple-check) all information to verify accuracy.

Account Information

Account Nickname (optional)	<input type="text"/>
Routing Transit Number *	<input type="text"/>
Bank Name *	<input type="text"/>
Bank Identification Code	<input type="text"/>
Account Type *	<input checked="" type="radio"/> Checking <input type="radio"/> Savings
Account Number *	<input type="text"/>

OK

Cancel

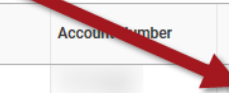
- Account Nickname (optional).
 - Routing Transit Number (*). The system will verify that this is a valid Routing Transit Number. If it is not valid, you will see an error button pop up on the right edge of the screen. If you click the error button, you may see one of the following error messages:
 - If you don't have enough digits, you will see this: Error -- Bank Format Error: Routing Transit Number must be 9 numeric digits. Enter the correct number of digits.
 - If the routing number is incorrect, you will see this: Error – The check sum validation failed for the entered Routing Transit Number. Please verify it against the Routing Transit Number provided by your financial institution. Enter the correct number.
 - Bank Name (*).
 - Bank Identification Code (optional).
 - Account Type – Select the appropriate account type (*).
 - Account Number (*).
3. Click OK when you are done, which returns you to the Manage Payment Elections screen.
4. IF you want monies to go into the account you just added, you must also Add, or Edit, your Payment Elections. See the section [Add Payment to New Account or Change Amounts \(Change Payment Elections\)](#).

Direct Deposit – Employee Self-Service AND HR Partner

CHANGE ACCOUNT

1. In the Accounts list, click Edit to the right of the account that needs to be changed.

Accounts 4 items

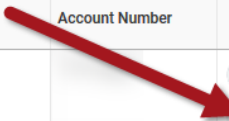
Account Nickname	Country	Bank Name	Account Type	Account Number	
US Bank	United States of America	US Bank	Checking		 Edit Remove

2. Change the relevant information. IMPORTANT: Double-check (or triple-check) all numbers to verify accuracy.
3. Click OK when you are done, which saves the changes and returns you to the Manage Payment Elections screen.
4. When editing account information, all payment elections that use the account are updated automatically.
 - a. To split payment between multiple accounts, add a new account and then change the payment elections to reflect the account distribution appropriately.
5. Continue to the [Add Payment to New Account or Change Amounts \(Change Payment Elections\)](#) section.

DELETE ACCOUNT

1. Click Delete Account from the Manage Payment Elections screen. There must be at least one account listed for direct deposit. If only one account is listed, it cannot be deleted.

Accounts 4 items


Account Nickname	Country	Bank Name	Account Type	Account Number	
US Bank	United States of America	US Bank	Checking		 Edit Remove

2. Review the Delete Bank Account information. You will see the following message: “Confirm you would like to delete the account shown below. If the account is in use remove the account from any elections before deleting.” IF the account is in use, you will not be able to delete it; you will need to do [Change Elections](#) and remove the account from the payment elections.
 - a. If you have only one account listed, you cannot delete that account!
3. Click OK, which deletes the account and returns you to the Manage Payment Elections screen.
4. Continue to the [Add Payment to New Account or Change Amounts \(Change Payment Elections\)](#) section.

ADD PAYMENT TO NEW ACCOUNT OR CHANGE AMOUNTS (CHANGE PAYMENT ELECTIONS)

1. On the Manage Payment Elections screen, scroll down, and click Edit (on the right side of the page).

Payment Elections 3 items

Pay Type	Payment Elections				
	Payment Type	Account	Account Number	Distribution	
Payroll	Direct Deposit				 Edit
	Direct Deposit				
	Direct Deposit			Balance Yes	

Direct Deposit – Employee Self-Service AND HR Partner

- On the next screen, add a payment election for a different account or re-distribute the amounts in the existing accounts. See [Add New Election](#), [Change Elections](#), or [Remove Elections](#).
 - If there is only one account listed, the balance of the check will be deposited into that account.
 - If there is more than one account, you need to designate the amount to be deposited into each account.
- If you just need the one account, click OK.
- If you have not yet set up any payment elections, read the next section, [Add a New Election](#). If you have already set up the payment elections, go on to #5.
- On the Manage Payment Elections screen, you MUST CLICK Submit for the changes to take effect.

ADD NEW ELECTION

- To have some of your paycheck go to the new account you just added, or to redistribute the amounts to your different accounts, on the Payment Elections screen, scroll down, and click Edit in the Payment Elections section (on the right side of the page).
- Click the plus sign (on the left side of the table, see the red arrow) to add a new row.

The screenshot shows a table titled "Payment Elections" with 3 items. The table has columns: Order, *Country, *Currency, *Payment Type, Account, and *Balance / Amount / Percent. A red arrow points to a plus sign (+) in the Order column. The first row contains: United States of America, USD, Direct Deposit, and a search prompt in the Account column. On the right side of the table, there are radio buttons for Balance, Amount (selected), and Percent, with input fields for Amount and Percent (0).

- Complete the following for this new election:
 - Country – only option is United States of America.
 - Currency – defaults to USD.
 - Payment Type – only option is Direct Deposit.
 - Account – click the search prompt and select the account from the list of your accounts.
 - Enter how you want the money distributed to each account. Choose one of the following:
 - Balance – Use this option if a) there is only one account listed, or, b) for the last account in the list. REMEMBER to click the Balance radio button on the last account in the list to designate the remainder be deposited into that account (see Balance NOTE below).
 - Amount – Use this option to specify a dollar amount into this account (see Balance NOTE below).
 - Percent – Use this option to specify a percentage into this account (see Balance NOTE below). If you are using percentages, the total for the percentages must add up to 100%.

Balance NOTE: If there is more than one account listed, and you are entering dollar amounts or percentages, you need to designate which account will receive the balance.

In addition, to designate the balance, the "balance" account needs to be the LAST account in the list AND you need to click the "Balance" radio button for that account. Change the order of the accounts by clicking the up or down arrows in the Order column.

- After editing your account information, click OK.

Direct Deposit – Employee Self-Service AND HR Partner

CHANGE ELECTIONS

1. To re-distribute the amounts among the listed accounts, change any of the following:
 - a. Balance – Use this option if a) there is only one account listed, or, b) for the last account in the list. REMEMBER to click the Balance radio button on the last account in the list to designate the remainder be deposited into that account (see Balance NOTE below).
 - b. Amount – Use this option to specify a dollar amount into this account (see Balance NOTE below).
 - c. Percent – Use this option to specify a percentage into this account (see Balance NOTE below). If you are using percentages, the total for the percentages must add up to 100%.

Balance NOTE: If there is more than one account listed, and you are entering dollar amounts or percentages, you need to designate which account will receive the balance.

In addition, to designate the balance, the "balance" account needs to be the LAST account in the list AND you need to click the "Balance" radio button for that account. Change the order of the accounts by clicking the up or down arrows in the Order column.

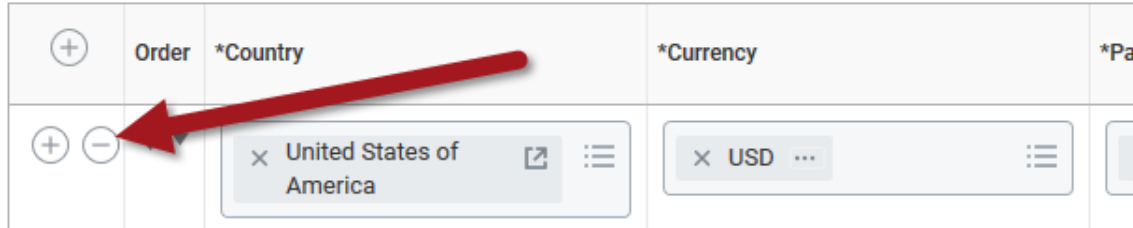
2. After editing the new direct deposit account, click OK.

REMOVE ELECTIONS

1. To remove an account from the payment elections list, click the minus sign next to that account. There must be at least one account listed on the Manage Payment Elections page. If there will be only one account remaining after deleting another, then the remaining account must be set to Balance.

Payment Elections 4 items

	Order	*Country	*Currency	*Pa
<input type="radio"/>	<input type="radio"/>	<input type="text" value="United States of America"/>	<input type="text" value="USD"/>	<input type="text"/>



2. If you remove an account, be sure to re-distribute the amounts appropriately, see [Change Elections](#) above.
3. Click OK.

LINK HELP DESK CONTACT INFORMATION

The LINK Help Desk can assist with: Workday (Employee Work Center) and the Employee Development Center.

- Email: as.linkhelp@nebraska.gov
- Phone: 402-471-6234 (this number is only monitored during normal business hours)