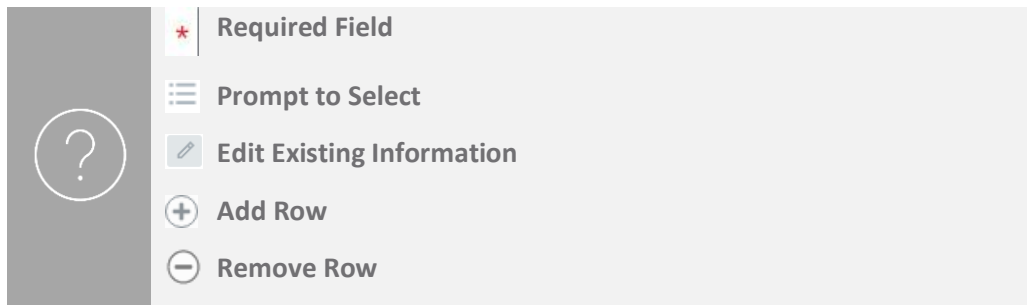


Payroll: Manage Employee Pay Profile

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

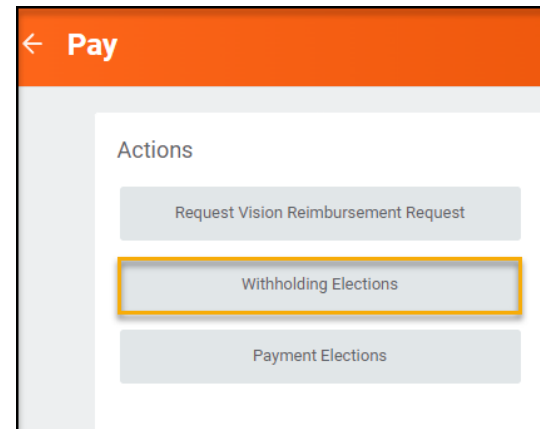
1. After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.



2. Click the **Pay** app.



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



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

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The screenshot shows the top portion of the 'Withholding Elections' page. The header is orange with the text 'Withholding Elections' and a menu icon. Below the header, there are fields for 'Home Address' and 'Social Security Number' (displayed as XXX-XX-XXXX). At the bottom, there are four tabs: 'Federal Elections', 'State Elections', 'Local Elections', and 'Tax Allocations'. The 'Federal Elections' tab is currently selected and highlighted with a blue underline.

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

This screenshot shows the full 'Withholding Elections' page with the 'Federal Elections' tab selected. The page displays the following information:

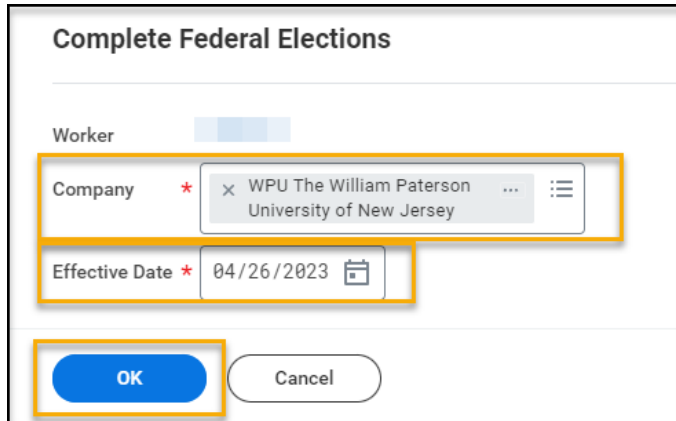
- Home Address: [Redacted]
- Social Security Number: XXX-XX-XXXX
- Company: WPU The William Paterson University of New Jersey
- Effective Date: 02/28/2022
- Lock In Letter: [Redacted]
- Payroll Withholding Status: Single or Married filing separately
- Multiple Jobs or Spouse Works: [Redacted]
- Total Dependent Amount: 0.00
- Other Income: 0.00
- Deductions: 0.00
- Extra Withholding: 0.00
- Exempt: [Redacted]
- Nonresident Alien: [Redacted]
- Last Updated: 02/21/2023 01:46:25.320 PM
- Last Updated By: (empty)

The 'Update' button at the bottom of the page is highlighted with a yellow box.

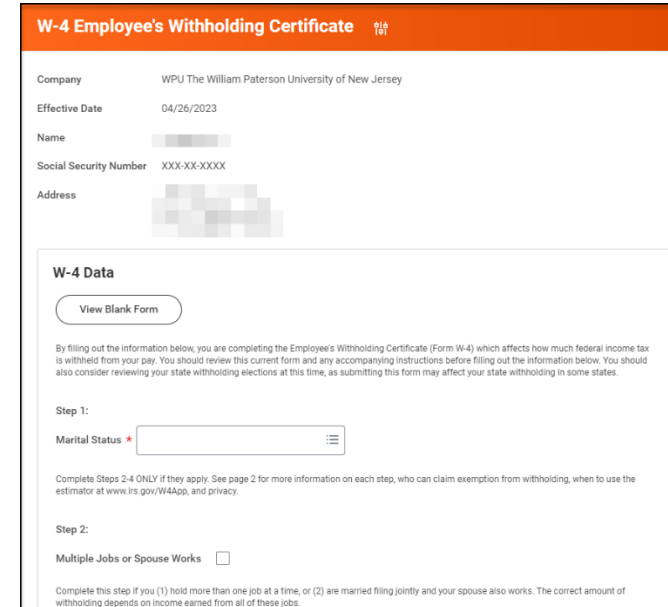
- For Federal Elections:

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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.

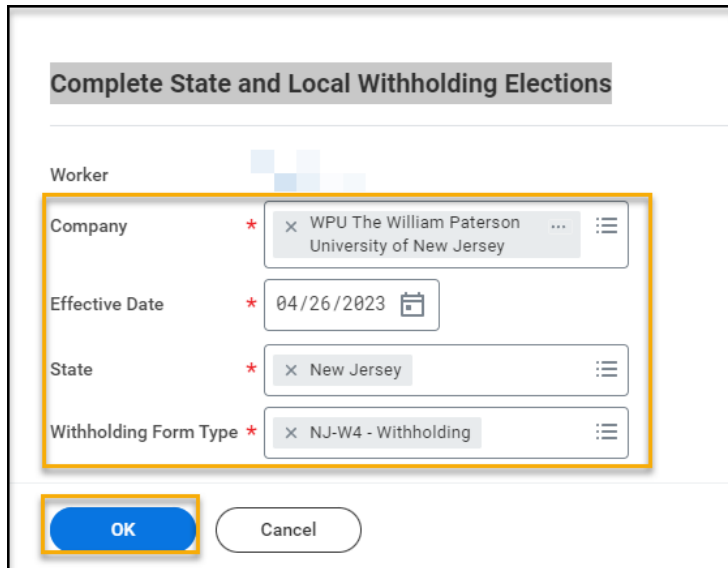


7. For State and Local Elections:

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

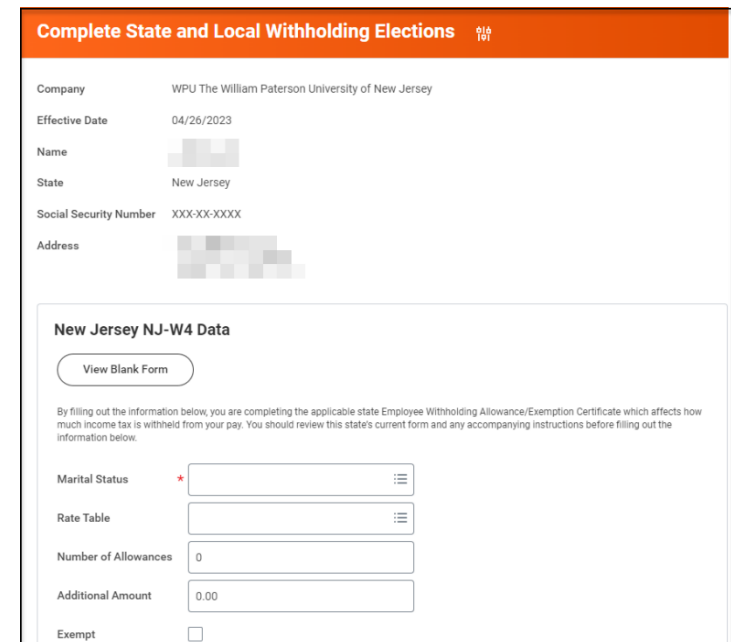
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Exempt if you selected New York or Pennsylvania in the State field.



- **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**.

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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

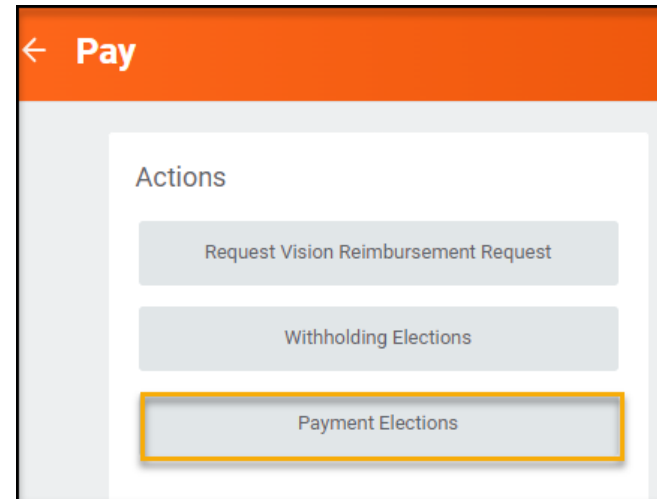
1. After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.



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.

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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).

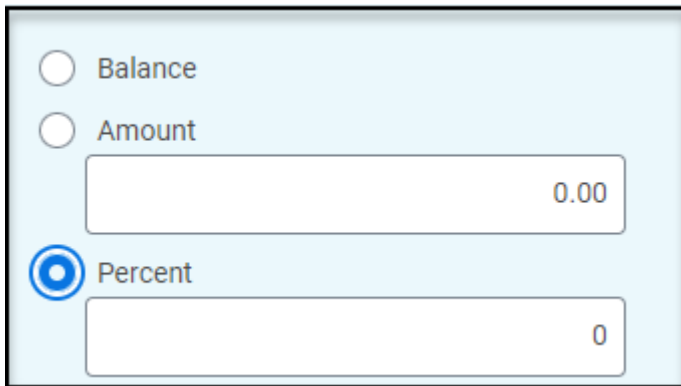
Check - Payroll

Direct Deposit

Search ☰

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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.

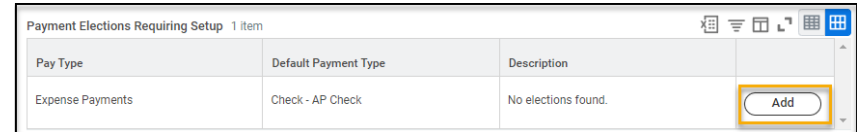


Balance
 Amount
 Percent

- 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.

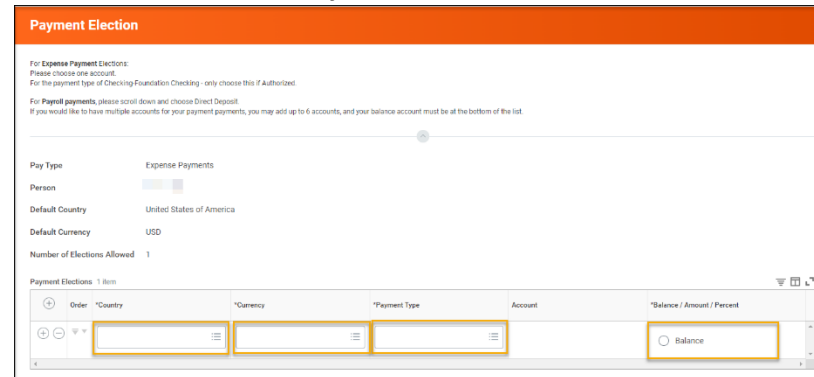
Payment Elections Requiring Setup (Expense Payments)

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.	Add

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



Payment Election

For Expense Payment Elections: Please choose one account. For the payment type of Checking-Foundation Checking - only choose this if Authorized.

For Payroll payments, please scroll down and choose Direct Deposit. If you would like to have multiple accounts for your payment payments, you may add up to 6 accounts, and your balance account must be at the bottom of the list.

Pay Type: Expense Payments
 Person:
 Default Country: United States of America
 Default Currency: USD
 Number of Elections Allowed: 1

Order	Country	Currency	Payment Type	Account	Balance / Amount / Percent
					<input type="radio"/> 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**.

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

View Payslips

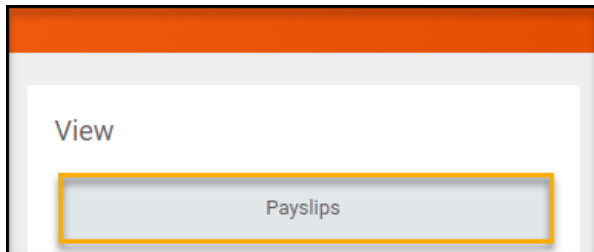
- After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.



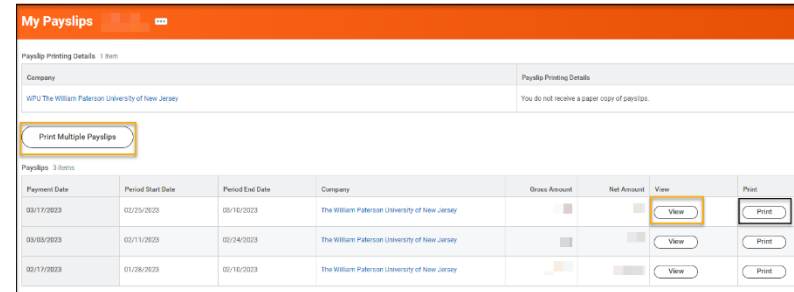
- Click the **Pay** app.



- 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.

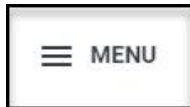
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- To review the notification, click on the notification titled **Document Available** in the list on the left-hand side to view the details which includes a link to the pdf document for download.

View Tax Documents and Edit Printing Elections

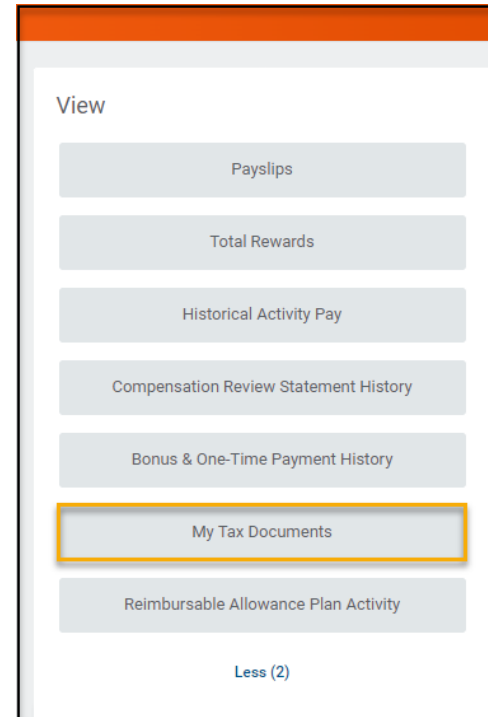
- After logging into Workday, click the **Menu** in the top navigation bar to access the global navigation.



- Click the **Pay** app.

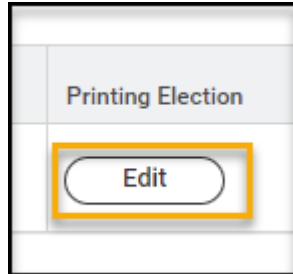


- Under **View**, click on **My Tax Documents**. Note: You may need to click **More** to reveal this link.



- 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.

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- 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**: [Redacted]
- Company**: WPU The William Paterson University of New Jersey
- Last Updated**: (empty)
- Current Year End Form Printing Election**: You are currently receiving both electronic and paper copies of your Year End Tax Documents.
- New Election**:
 - Receive electronic copy of my Year End Tax Documents
 - Receive both electronic and paper copies of my Year End Tax Documents
- Important Note**: If you select the option to "Receive electronic copy of my Year End Tax Documents":
- Disclaimer Text**: Online Statements require a computer with Internet access and Adobe Reader to view and print the tax document. After you submit your consent, it will remain valid for all future tax years or until you revoke your consent (so this process does not need to be repeated). If you do not submit your consent, the Payroll Department will provide you with a paper copy of your Year End Forms (Original/Corrected) although you will still be able to access the electronic version as well. If you have any questions, please contact the Payroll Office.

At the bottom of the form, there are two buttons: "OK" (highlighted with a yellow border) and "Cancel".

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