

Description: Add or change bank accounts (payment elections) for student refunds.

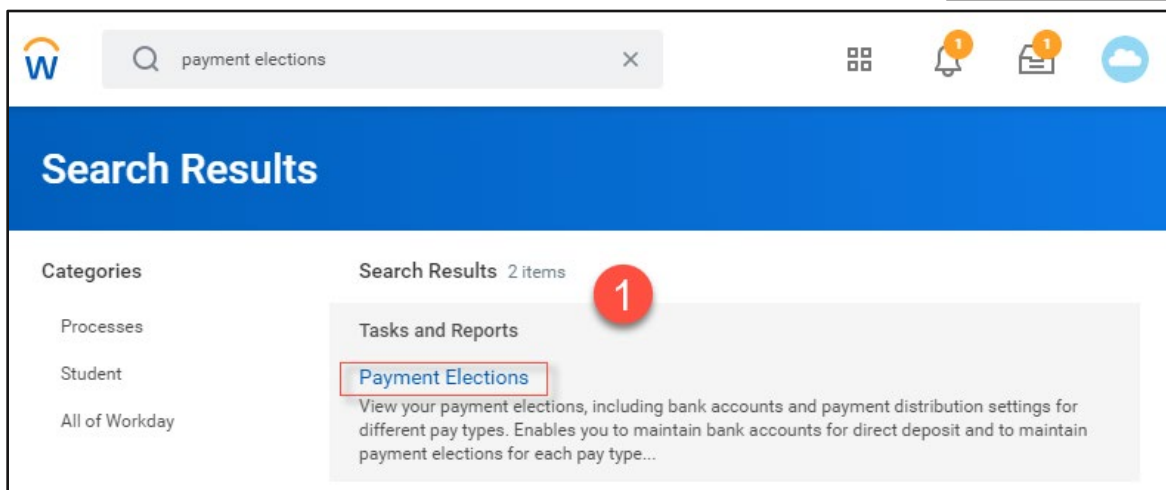
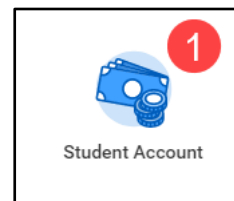
Applies to: Students

Notes: If you have already set up a bank account for payroll purposes for a student job, you do not need to set up a new account; skip to the section on changing the payment type.

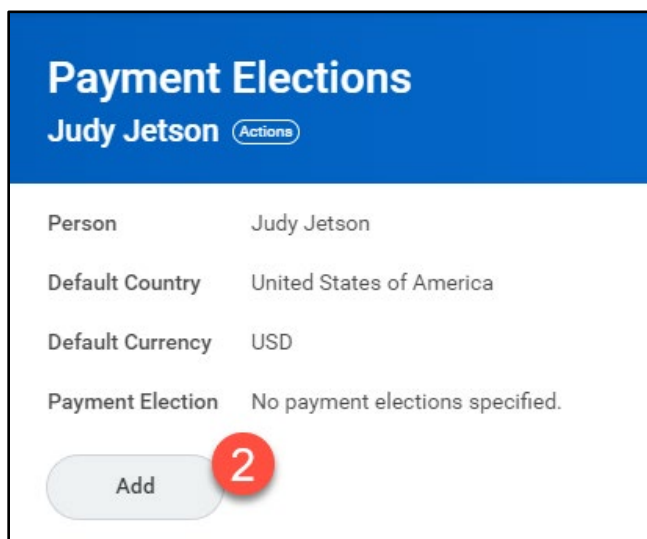
Instructions: Fields not specified in this document are to be skipped or left blank.

SET UP YOUR ACCOUNT – FIRST TIME ACCESS, NO EXISTING PAYROLL ACCOUNT

1. Select the **Student Accounts** worklet or type “payment elections” in the search box and select the task.
 - If you have an existing payroll account set up, skip to the *Change Your Payment Type* section.



2. Click the **Add** button.



3. Select your Preferred Payment Method for Student Refunds.

- Check is the default.
- Direct Deposit will require account information.

4. For Direct Deposit, enter your account information as instructed.

- The name associated with the bank account number entered for your direct deposit must match the student name in Workday.

5. Click OK.

Payment Election Option

Preferred Payment Method

Student Refund * 3

Account Setup

Sample Check



BANK ROUTING NUMBER BANK ACCOUNT NUMBER

Account Information

Account Nickname (optional)

Routing Transit Number * 4

Bank Name *

Bank Identification Code

Account Type * ☒ Checking ☐ Savings

Account Number *

5

CHANGE YOUR PAYMENT TYPE

1. Search for the “payment elections” task.
2. Use the **Add** button to add a bank account.
3. Click **Edit** to change your payment type.

Payment Elections
Judy Jetson Actions

Add **2**

Payment Elections 1 item

Pay Type	Payment Elections			
	Payment Type	Account	Account Number	
Student Refund	Check			Balance Yes Edit 3

4. Select Direct Deposit from the **Payment Type**.

Payment Election

Pay Type Student Refund

Payment Elections 1 item

	Order	*Country	*Currency	*Payment Type 4	Account 5	*Balance / Amount / Percent
+ + −	▼▼	× United States of America	× USD	Search × Direct Deposit - Student		☒ Balance

OK **6** Cancel

5. Select your **Account** if previously added. Otherwise, you will be prompted to add one.
6. Click **OK**.

VIEW YOUR PAYMENT ELECTIONS

1. Search for “payment elections.”
2. You may **Edit** or **Remove** your bank account.
3. Payment Elections display for your **Pay Types**.
 - This example shows elections for a student worker.

Payment Elections

Accounts 1 item

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

Add

Payment Elections 3 items

Pay Type	Payment Elections				
	Payment Type	Account	Account Number	Distribution	
Regular Payroll	Direct Deposit - Payroll			Balance Yes	Edit
Expense	Direct Deposit - JPM - Employee Reimbursement			Balance Yes	Edit
Student Refund	Check			Balance Yes	Edit