

How do I Update My Tax and Payment Elections in Workday?

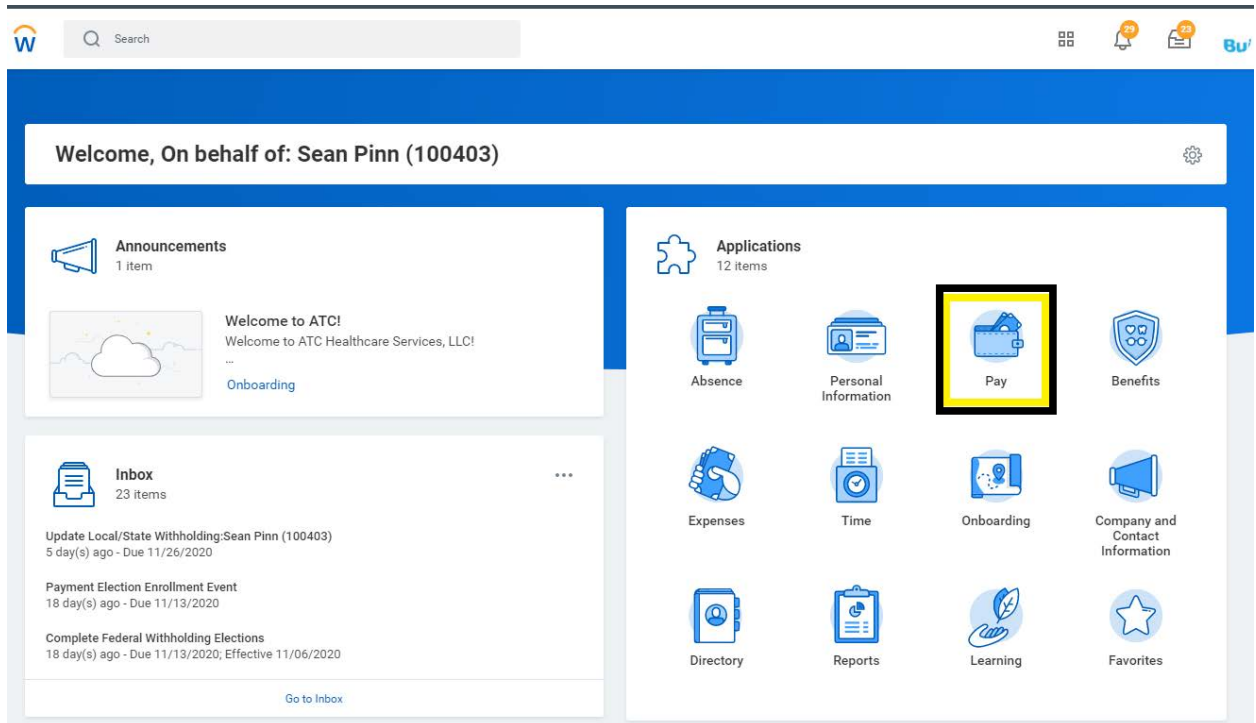
This document will guide you through updating your tax and payment elections in Workday. Please follow all steps. If you have any trouble, please contact your local office.

Before we start:

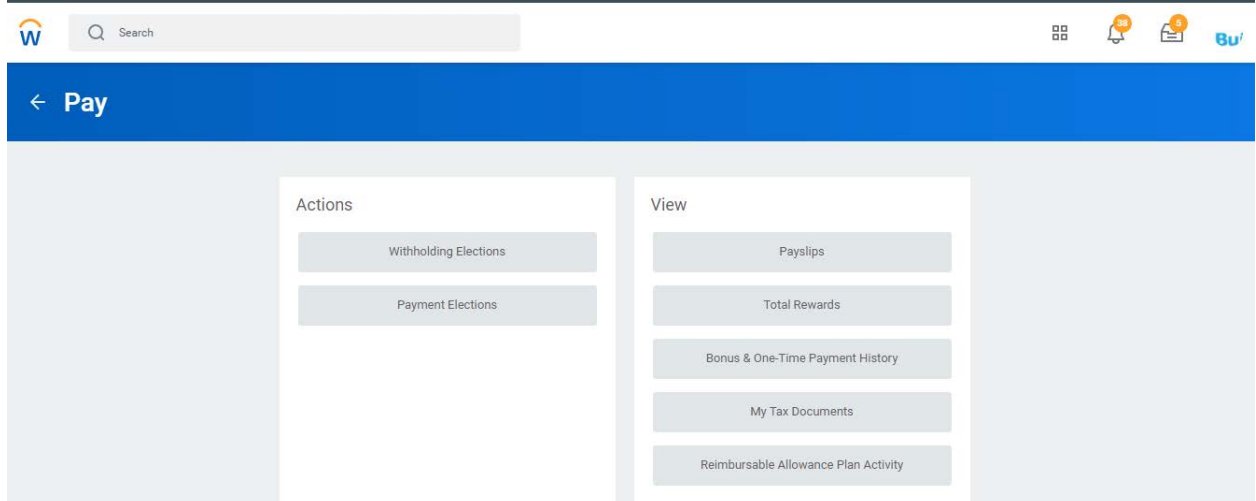
1. Logon to Workday.
 - a. <http://www.myworkday.com/atchealthcare/login.html>
 - b. Enter your User ID and Password.
 - c. Enter the security code from the Microsoft Authenticator app.

Reviewing and Updating your Tax and Payment Elections in Workday:

1. Once you've successfully logged onto Workday, use the Application/icon on the right to open Pay.



- The list on the left lets you view and modify your information, while the list on the right only lets you view.




- Click on “Withholding Elections” to update your state/local and federal tax elections.
 - To modify the elections, first click on the tab, such as Federal, State, Local, or Tax Allocations and click on

“Update” at the bottom left.

The screenshot shows a web interface for 'Withholding Elections' for user Sean Pinn (100403). The page has a blue header with a search bar and navigation icons. Below the header, there are tabs for 'Federal Elections', 'State Elections', 'Local Elections', and 'Tax Allocations'. The 'Federal Elections' tab is active. The form contains the following fields:

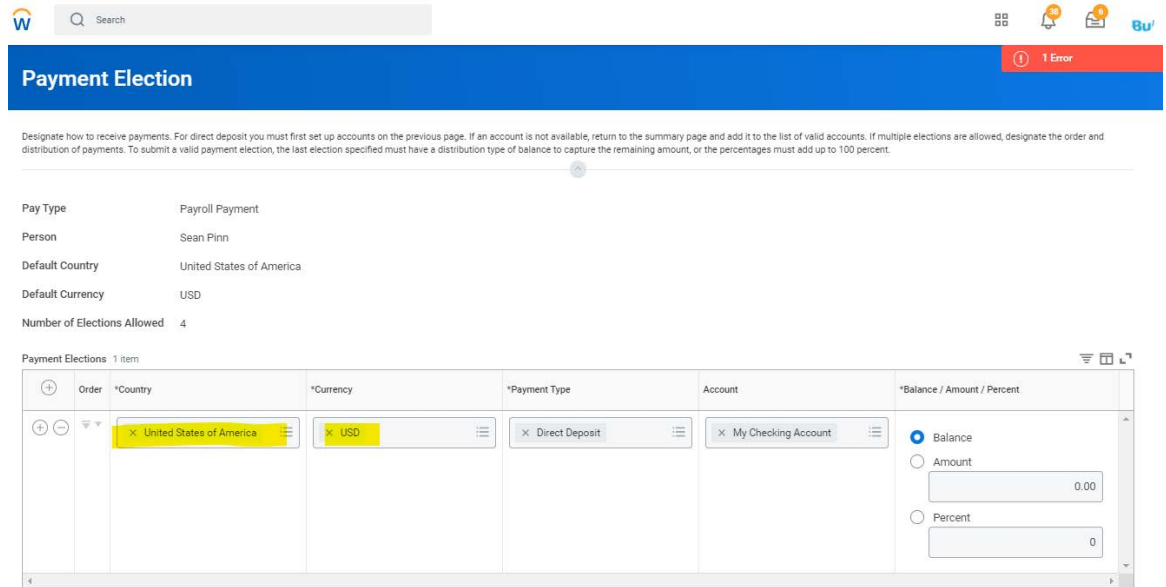
- Home Address: 1234 Main Street, Lake Success, NY 12345, United States of America
- Social Security Number: XXX-XX-XXXX
- Company: ATC Healthcare Services, LLC
- Effective Date: 11/05/2020
- Lock In Letter: (empty)
- Payroll Withholding Status: Single or Married filing separately
- Multiple Jobs or Spouse Works: (empty)
- Total Dependent Amount: 0.00
- Other Income: 0.00
- Deductions: 0.00
- Extra Withholding: 0.00
- Exempt: (empty)
- Nonresident Alien: (empty)
- Last Updated: 11/05/2020 11:10:28.048 AM
- Last Updated By: Sean Pinn (100403)

An orange 'Update' button is located at the bottom left of the form.

- b. A date page will pop-up. You can skip this page by clicking the orange “OK” button at the bottom left.
 - c. Next, complete the page as needed. If you are not sure of what to select, please contact your local office for assistance.
 - d. When you’ve updated all necessary information, click the  icon at the top-left corner of the screen (next to the search box).
4. Click on Pay again.
 5. Next, click on Payment Elections. This is where you can set how you want to be paid, such as by check or direct deposit.
 - a. Please ensure that all details are accurate.
 6. There are two sections to this page. The first is Accounts and the second is Payment Elections.

7. The Accounts section lists all of your accounts. This does not mean they are in use; it just means you listed that as an option to be paid into.
 - a. To add a new account, click on the “Add” button in the Accounts section.
 - b. Enter the account name, such as “my checking account”, the routing number for the bank, the bank name, account type (checking/savings), and finally the account number.
 - c. When finished, click the orange “Submit” button at the bottom-left corner.
8. Now, back on the Account/Payment Election screen, scroll down to the Payment Elections section.
9. You’ll see 3 payment types.
 - a. Payroll Payment – This is your standard weekly payroll account.
 - b. Expense Payments – This is your expense account.
 - c. Daily Payroll Payment – This is your Global Cash Card (Wisely) account.
10. Click on the “Edit” button on the right for each account.

a. The following page will load.



Designate how to receive payments. For direct deposit you must first set up accounts on the previous page. If an account is not available, return to the summary page and add it to the list of valid accounts. If multiple elections are allowed, designate the order and distribution of payments. To submit a valid payment election, the last election specified must have a distribution type of balance to capture the remaining amount, or the percentages must add up to 100 percent.

Pay Type: Payroll Payment
 Person: Sean Pinn
 Default Country: United States of America
 Default Currency: USD
 Number of Elections Allowed: 4

Payment Elections: 1 item

Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
	United States of America	USD	Direct Deposit	My Checking Account	<input checked="" type="radio"/> Balance <input type="radio"/> Amount: 0.00 <input type="radio"/> Percent: 0

b. The fields can be completed by clicking into each of them and a list will populate.

c. For Country – Select United States of America.

d. For Currency – Select USD.

e. Payment Type – Select your payment type.

i. Check, Direct Deposit or Global Cash Card – Payroll.

f. Balance/Account/Percent.

i. Balance - If you setup multiple direct deposit accounts, the account marked with the 'Balance' option will be used last. Whatever funds weren't entered into the other account(s) will be paid here.

ii. Amount – The amount you want to put into this account from your payroll payment.

iii. Percent – Rather than using the amount, you can use a percentage. For example, if you want to put 10% into your savings account, you can do that here. Then on

your other payment account, you can mark it as 'Balance' so the remaining 90% will be paid into that account.

- iv. When finished, click on the orange "Submit" button at the bottom-left corner.
- v. Repeat step 10 for each Payment Election type (Payroll Payment, Expense Payments, Daily Payroll Payment).