

Payroll: Manage Your Employee Pay Profile

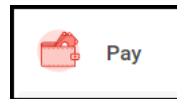


Overview

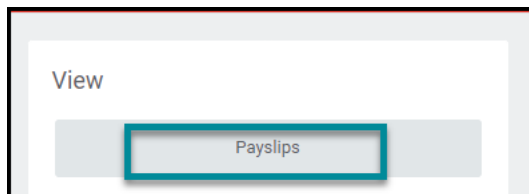
This quick reference guide covers how to manage your pay profile, including how to view payslips, change w-4 elections, view W2, and manage payment elections.

View Payslips

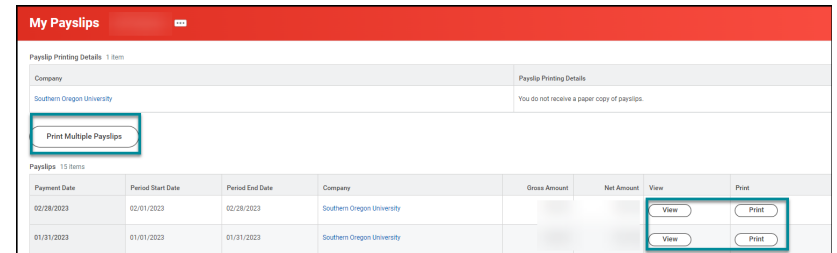
1. After logging into Workday, click the Menu in the top navigation bar to access the global navigation. Click the Pay app.



2. In the Pay dashboard, under View, click on **Payslips**.



3. 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.



4. Click **View** to see the details on an individual payslip.
5. On the **Payslip** screen, you will see all the details for the selected payslip.
6. Using the buttons at the top of the screen, you may select Previous Pay slip, Return to My Payslips, or Print Payslip Image.



7. When viewing a pay slip, click the Print Pay slip Image button to print a pdf.
8. A message will display that Your request is being processed. You may wait or select Notify Me Later.
9. 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.

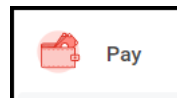
Payroll: Manage Your Employee Pay Profile



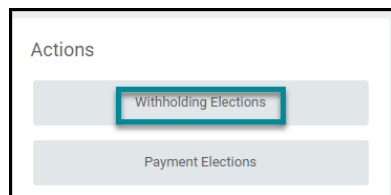
- 10. To review the notification, click on the notification titled Document Available in the list on the left-hand side to view the details, which includes a link to the pdf document for download.

View or Change Federal or State Tax Withholding Elections

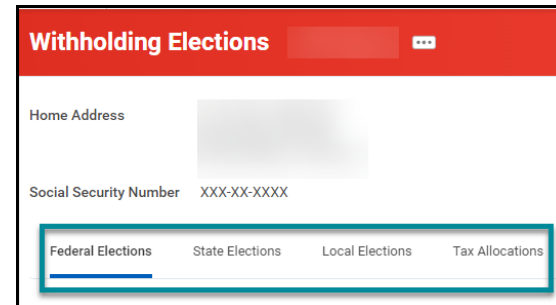
- 1. After logging into Workday, click the Menu in the top navigation bar to access the global navigation. Click the Pay app.



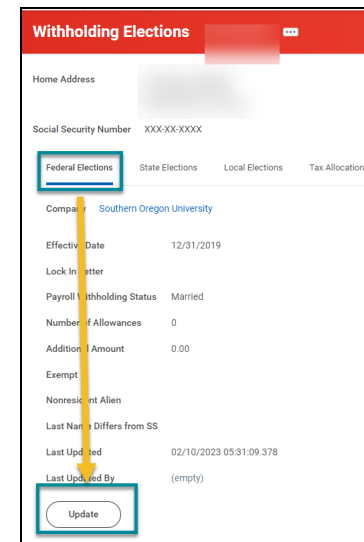
- 2. Under Actions, click on Withholding Elections.



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

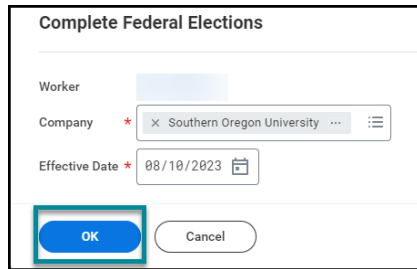


- 4. To make changes to your election, click the **Update** button under the appropriate section – Federal Elections, State Elections, or Local Elections.



Payroll: Manage Your Employee Pay Profile

5. For Federal Elections, fill out the **Complete Federal Elections** screen.



- **Worker:** Name is pre-populated and is not editable
- **Company:** Southern Oregon University
- **Effective Date:** pre-populated with today's date.

6. Click **OK**.

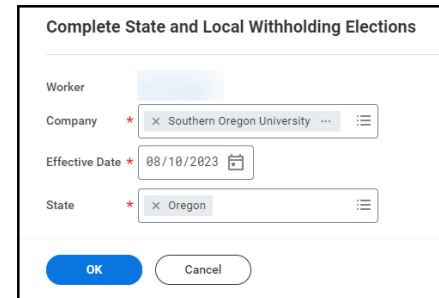
7. Complete the **W-4 Employee Withholding Certificate**.

- **Marital Status** is required (*).

8. Scroll to the bottom of the page and click the **I Agree** box.

9. Click **OK**.

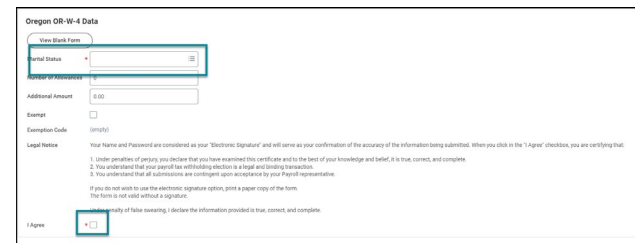
10. If you are updating your State Elections, select the State Elections tab, click the **Update** button.



- **Worker:** Name is pre-populated and is not editable
- **Company:** Southern Oregon University
- **Effective Date:** pre-populated with today's date
- **State:** is pre-populated with Oregon. Update to another available option, if applicable.

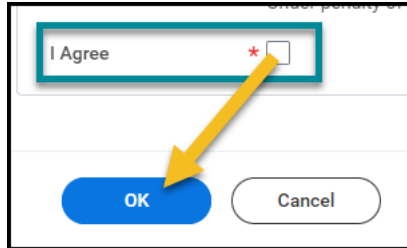
11. Click **OK**.

12. **Complete State and Local Withholding Elections:** Complete the Oregon OR-W4 Data.



Payroll: Manage Your Employee Pay Profile

13. You must check the box next to **I Agree** before submitting the changes. When you are ready to submit your changes, click **OK**.

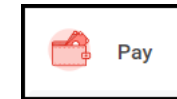


14. Upon submission, the changes to withholding will now route to the next step of the business process for approval for federal elections. Change to state and local withholding elections to not require approval.

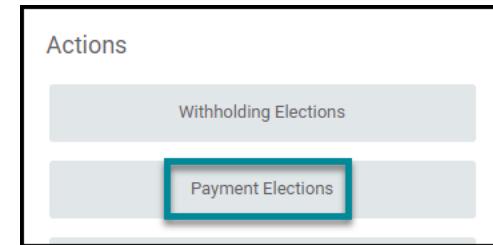
MANAGE DIRECT DEPOSITS

Add Payment Elections for Direct Deposit

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

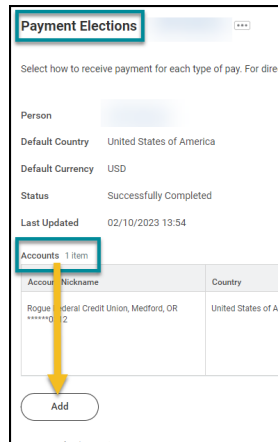


2. Under Actions, click on Payment Elections.

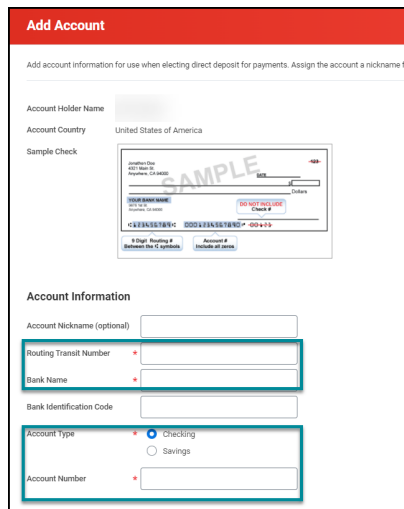


3. Under Accounts on the Payment Elections screen, click the Add button.

Payroll: Manage Your Employee Pay Profile



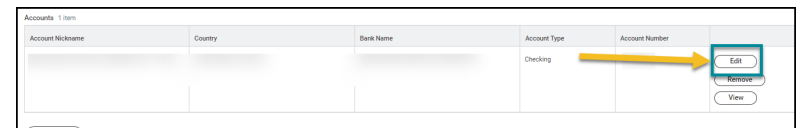
- On the Add Account screen, enter your bank account information, including Routing Transit Number, Bank Name, Account Type, and Account Number, which are required fields.



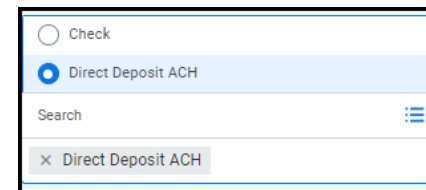
- When you have entered all required information, click the **OK** button.

Edit Payment Elections for Direct Deposit

- 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 Payments or Expense Payments. Note: If you have payment elections that require initial setup, they will be listed under the Payment Elections Requiring Setup section.



- 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.
 - For Payroll Elections, you may designate how to receive payments under Payment Type (Direct Deposit- ACH or Check).



Payroll: Manage Your Employee Pay Profile

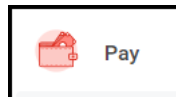
Note: If you wish to split your payroll distribution (balance, amount, or percent) into multiple accounts, click the plus sign. Up to six elections are allowed.

- For Expense Payment Elections, you may designate how to receive payments under Payment Type (Direct Deposit, Check Payment).

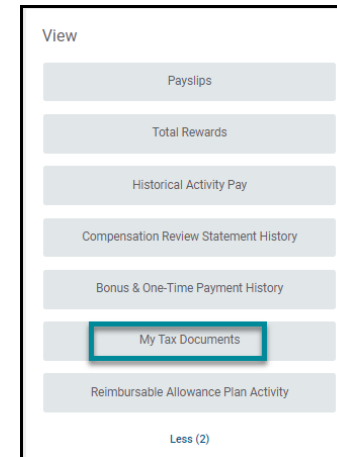
3. After your changes have been made, click OK.
4. The Changes to your elections will be reflected under the **Payment Elections** section.

View Tax Documents and Edit Printing Elections

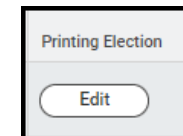
1. After logging into Workday, click the Menu in the top navigation bar to access the global navigation. Click the Pay app.



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



3. 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.
3. From the Tax Forms Printing Elections box, you may Edit your printing elections.



4. On the Change Year End Tax Documents Printing Elections screen, you may select:

- Receive an electronic copy of my Year End Tax Documents
- Receive both electronic and paper copies of my Year End Tax Documents.

Payroll: Manage Your Employee Pay Profile

* Receive electronic copy of my Year End Tax Documents

Receive both electronic and paper copies of my Year End Tax Documents

5. Select one of the options and click **OK**.
6. The printing election will be reflected on the Change Year End Tax Documents Printing Elections screen.
7. Select **Done** to exit.