

# MANAGING YOUR Payment Elections



As a new employee, you'll be asked to set up your pay elections. The instructions below will help you initially set up your payment elections as well as make any changes to them in the future.

## You can receive your pay by:

- Direct deposit (to one or multiple accounts)
- CDWA issued Wisely Pay card
- An existing pay card
- Or a combination of direct deposit and pay card

You will need your account information. *Inaccurate information will result in delays in receiving your pay.*

## How to Access Your Payment Elections

### Accessing your payment elections through the Pay app in Workday

1. Log in to CDWA's [DirectMyCare web portal](#).
2. From the My Dashboard screen, click the **Workday** button to go to your Workday homepage.  
*\*If you reach a log in page, enter the same username and password as used to log into the [DirectMyCare web portal](#).*
3. Click on **View All Apps**.
4. Click the **Pay app**.
5. Click **Payment Elections** in the View/Update Elections section. (Fig. 01)

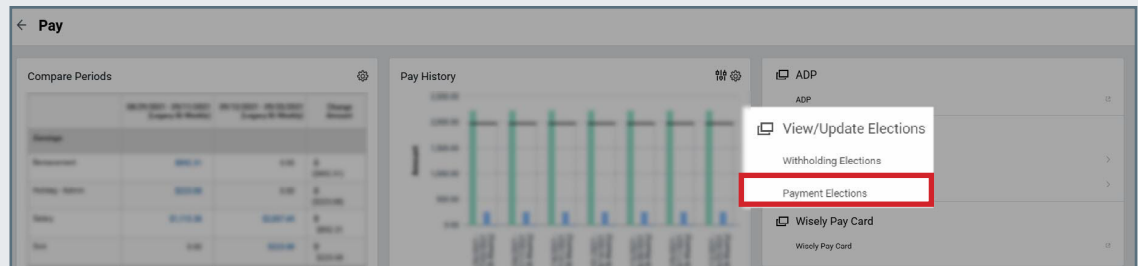


Fig. 01

6. Use the buttons to manage current payment elections. (Fig. 02)
  - **Edit:** change/correct bank information
  - **Remove:** remove direct deposit information
  - **View:** view direct deposit information

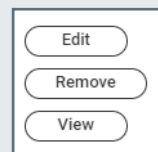


Fig. 02

### Accessing your payment elections through your Onboarding tasks in Workday

As part of your onboarding task you'll need to set up your payment elections (instructions below). If you are returning to Payment Elections by clicking on the Pay app. in Workday, you will be able to access the same selections by clicking the **Add** button below your account information. (Fig. 03)

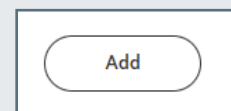
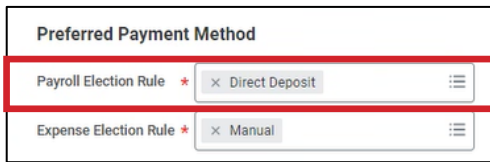


Fig. 03

## Selecting Payment Method (required)

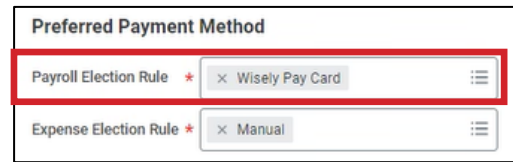
### Preferred Payment Method

1. In the **Payroll Election Rule** field, choose if you want Direct Deposit (this includes to an existing pay card) (Fig. 04) or a new Wisely Pay card (Fig. 05).



The screenshot shows a form titled "Preferred Payment Method". It has two rows. The first row is "Payroll Election Rule" with a red asterisk, a dropdown menu showing "Direct Deposit", and a close button. The second row is "Expense Election Rule" with a red asterisk, a dropdown menu showing "Manual", and a close button. A red box highlights the first row.

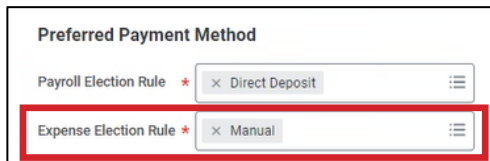
Fig. 04



The screenshot shows a form titled "Preferred Payment Method". It has two rows. The first row is "Payroll Election Rule" with a red asterisk, a dropdown menu showing "Wisely Pay Card", and a close button. The second row is "Expense Election Rule" with a red asterisk, a dropdown menu showing "Manual", and a close button. A red box highlights the first row.

Fig. 05

2. In the **Expense Election Rule** field, select **Manual** for your expense payment election. (Fig. 06)
  - If you are an IP authorized for mileage, you will be reimbursed on your regular payroll.



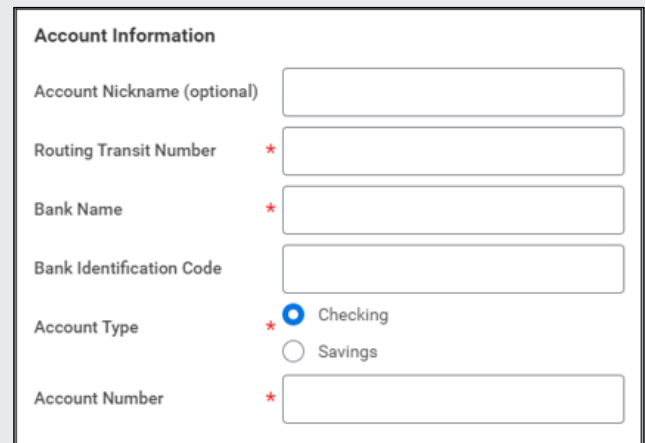
The screenshot shows a form titled "Preferred Payment Method". It has two rows. The first row is "Payroll Election Rule" with a red asterisk, a dropdown menu showing "Direct Deposit", and a close button. The second row is "Expense Election Rule" with a red asterisk, a dropdown menu showing "Manual", and a close button. A red box highlights the second row.

Fig. 06

### Account Information

3. If you selected **Direct Deposit**, enter your account information in the required fields indicated by a red asterisk (\*). (Fig. 07) **Double check your account and routing information.** Errors may result in being issued a Wisely Pay card.

**NOTE:** Do not include dashes in account or routing numbers. This will cause your information to be rejected and a Wisely Pay card may be issued.



The screenshot shows a form titled "Account Information". It has several fields: "Account Nickname (optional)", "Routing Transit Number" with a red asterisk, "Bank Name" with a red asterisk, "Bank Identification Code", "Account Type" with radio buttons for "Checking" (selected) and "Savings", and "Account Number" with a red asterisk.

Fig. 07

4. If you selected **Wisely Pay Card**, enter the following information in the required fields exactly as shown. (Fig. 08)

● **Routing Transit Number:** 071922476

● **Bank Name:** Wisely

● **Account Type:** Checking

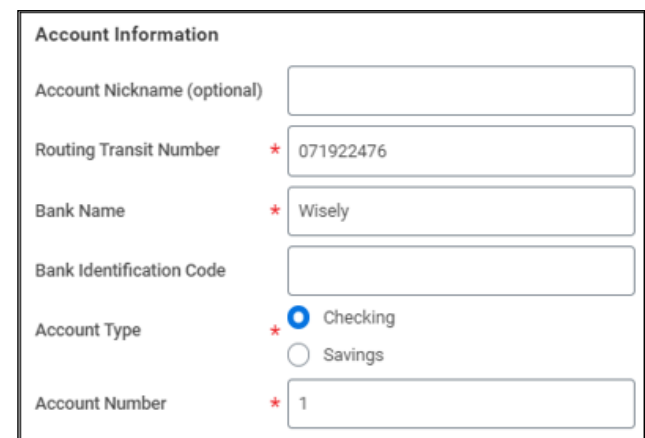
● **Account Number:** 1

**NOTE:** Allow 7-10 business days for your Wisely Pay card to arrive in the mail in a plain white envelope. This envelope will contain instructions on how to activate your Wisely Pay card.

5. When finished, click **OK** to continue.

**NEXT:** You will have the option to split your pay between accounts. If not splitting pay, review your information and click **Submit**.

● If you want to split your payroll between accounts, continue with the next steps.



The screenshot shows a form titled "Account Information". It has several fields: "Account Nickname (optional)", "Routing Transit Number" with a red asterisk and the value "071922476", "Bank Name" with a red asterisk and the value "Wisely", "Bank Identification Code", "Account Type" with radio buttons for "Checking" (selected) and "Savings", and "Account Number" with a red asterisk and the value "1".

Fig. 08

## Splitting Payroll Between Accounts (optional)

You can choose to have your pay deposited into multiple accounts (checking, savings, and/or Wisely Pay card). You can split the pay by amount or percentage. You can have up to one Wisely Pay card and six direct deposit bank accounts.

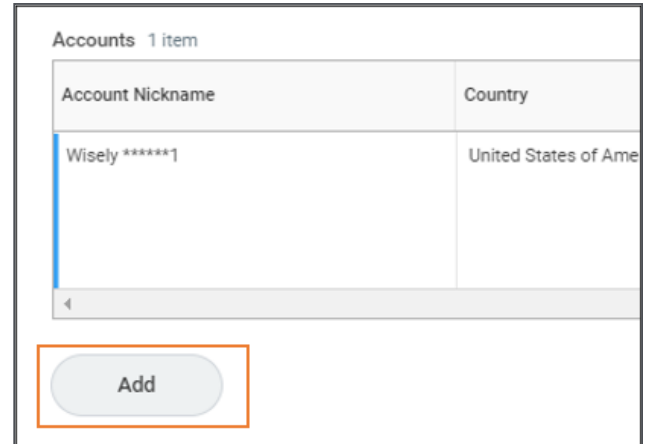
To split your pay between multiple accounts, you'll need to first add all your accounts.

Follow the steps below:

1. Click the **Add** button. (Fig. 09)
2. Enter the information in the required fields.
3. Click **OK**.
4. Repeat steps 1-3 if you have more accounts.
5. When you have added all your accounts, click **Save**.

**NOTE:** Do not include dashes in account or routing numbers. This will cause your information to be rejected.

Double check your account and routing information for each account.  
*Inaccurate information will result in delays in receiving your pay.*

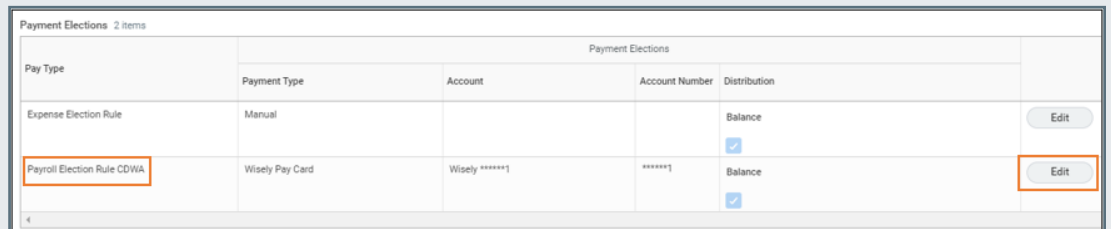


The screenshot shows a table titled "Accounts 1 item". The table has two columns: "Account Nickname" and "Country". The first row contains "Wisely \*\*\*\*\*1" and "United States of Ame". Below the table is a button labeled "Add" which is highlighted with an orange box.

Fig. 09

After your accounts are added, you'll need to assign the accounts to your Payroll Election.

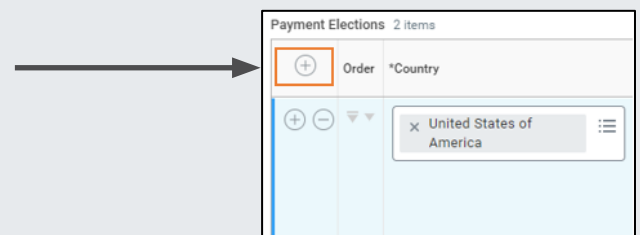
1. In the Payment Elections section, click the **Edit** button on the Payroll Election Rule CDWA line. (Fig. 10)



The screenshot shows a table titled "Payment Elections 2 items". The table has columns: "Pay Type", "Payment Type", "Account", "Account Number", "Distribution", and "Edit". The first row is "Expense Election Rule", "Manual", "", "", "Balance", and "Edit". The second row is "Payroll Election Rule CDWA", "Wisely Pay Card", "Wisely \*\*\*\*\*1", "\*\*\*\*\*1", "Balance", and "Edit". The "Edit" button for the second row is highlighted with an orange box.

Fig. 10

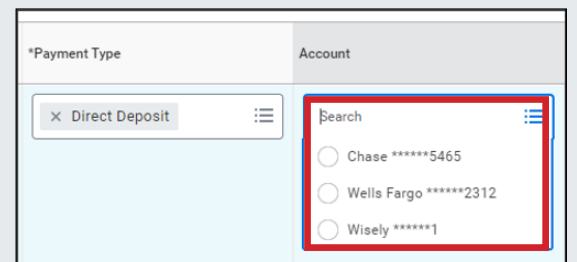
2. Click the **+** button to add the additional account(s) you created. (Fig. 11)



The screenshot shows a dropdown menu titled "Payment Elections 2 items". The menu has a "+" button highlighted with an orange box. Below the "+" button is a search bar with "United States of America" selected. There are also "-" and "x" buttons.

Fig. 11

3. Click into the fields to select from the dropdowns for the following:
  - **Country** (select - United States of America)
  - **Currency** (select - USD)
  - **Payment Type** (select Direct Deposit or Wisely Pay card)
  - **Account** (select from the list of accounts you added) (Fig. 12)



The screenshot shows two dropdown menus. The first is labeled "\*Payment Type" and has "Direct Deposit" selected. The second is labeled "Account" and has a search bar with "Search" and a list of accounts: "Chase \*\*\*\*\*5465", "Wells Fargo \*\*\*\*\*2312", and "Wisely \*\*\*\*\*1". The list of accounts is highlighted with a red box.

Fig. 12

4. In the **Balance/Amount/Percent** fields, choose the dollar amount or percent you want deposited into each account.
  - If splitting by percent, the totals must add up to 100%.
  - If splitting by amount, the last account needs to have **Balance** selected to capture the remaining amount. (Fig. 14)
  - You can change the order of accounts by clicking the arrows in the Order column. (Fig. 13)

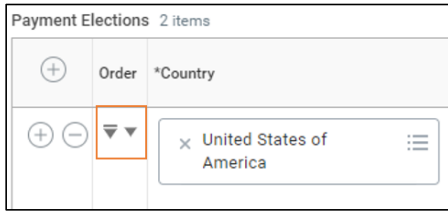


Fig. 13

The screenshot shows a form titled "\*Balance / Amount / Percent". It has three radio button options: "Balance", "Amount", and "Percent". The "Balance" option is selected, indicated by a blue dot. Below each radio button is a text input field. The "Amount" field contains "0.00" and the "Percent" field contains "0".

Fig. 14

5. When you have finished, review all information before you click **Submit**. *Inaccurate information will result in delays in receiving your pay.*
6. You will be taken back to the Manage Payment Elections screen. If you are completely finished, click **Submit**.