

Workday 101





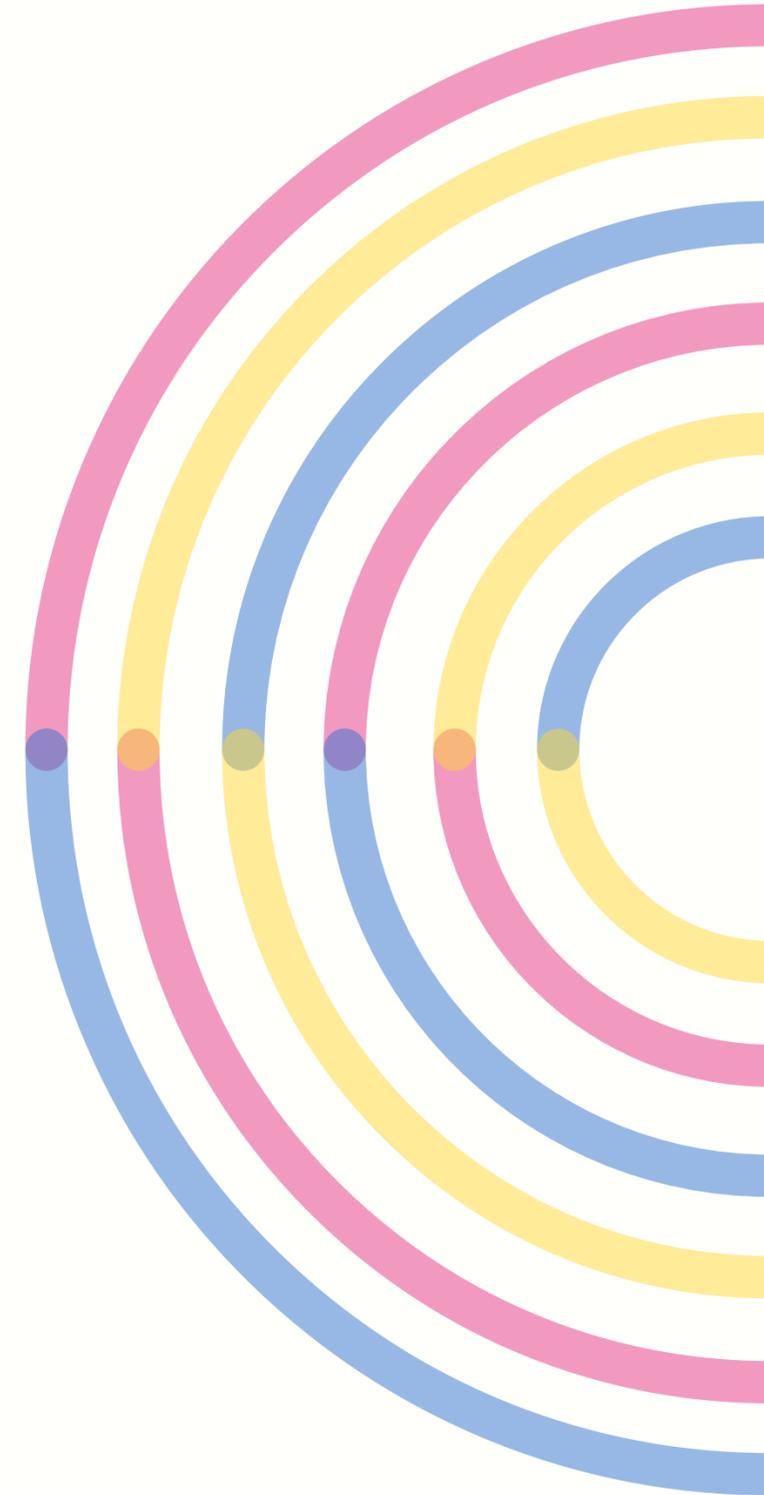
What will you do on Workday?



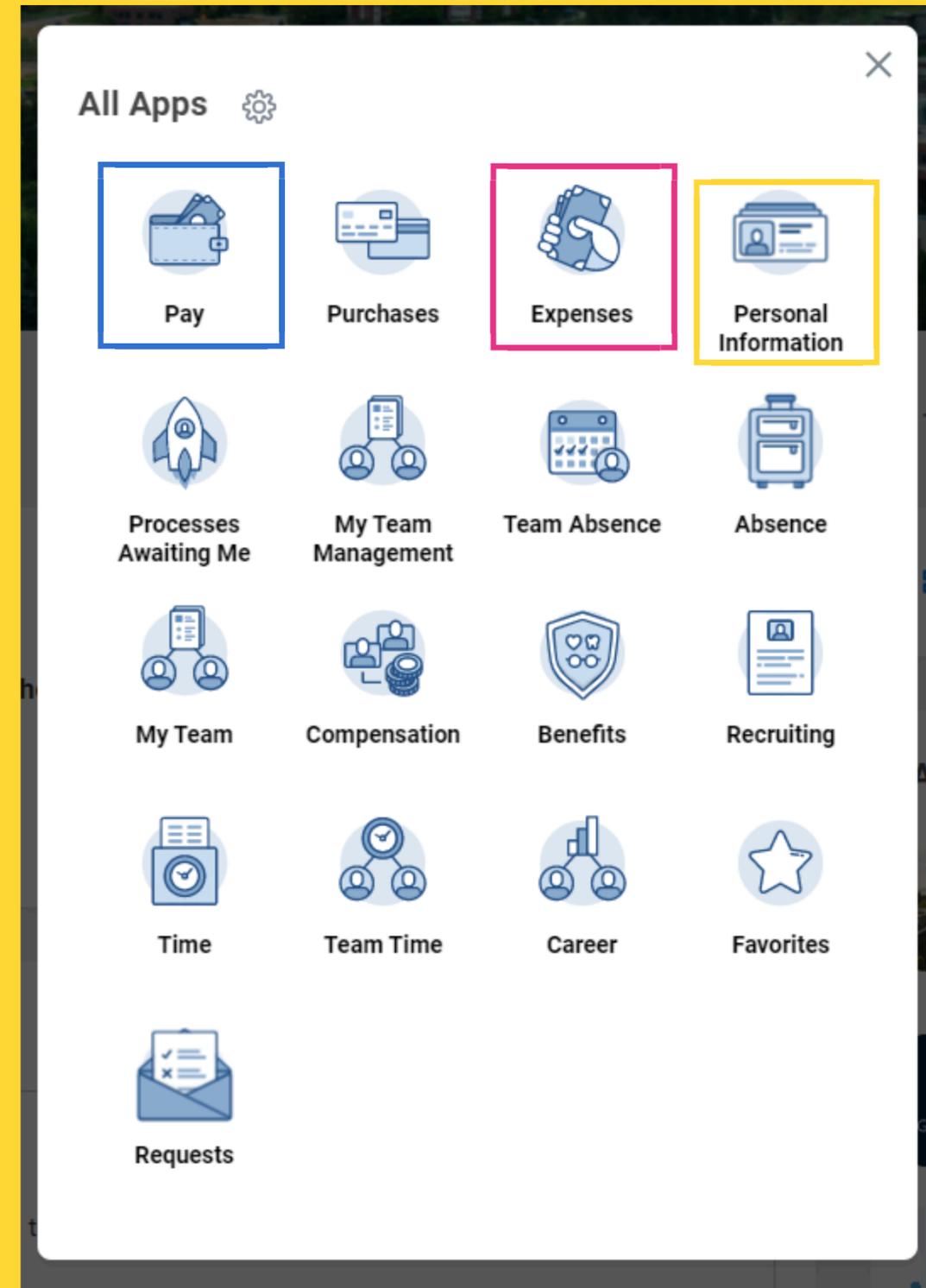
- Update your personal & contact info (preferred name, address, etc.)
- Obtain reimbursement for expense reports for job-related purchases
 - RLM approval BEFORE you shop
 - Must submit within 3 days of the program
- Update Federal and Provincial Tax documents
- Update direct deposit information for payslips & reimbursement
- Download your T4 Tax Form (late February/early March)

Profile View

- You have two profiles: student and worker
- You will need to switch between them based on why you logged into Workday
 - Click your profile icon and then “view profile”
 - Click the blue link titled with your name under either the Student or Worker profile summary. The page will refresh in that view.
- Your default profile is your student one. To change your default, click the profile icon and then “My Account”, then click “Change Preferences”, then scroll down to “Preferred Default Profile View” to set your preference



Workday Apps



Tax Forms & Direct Deposit



Pay

This is where you update tax forms

This is where you add direct deposit info

Actions

Withholding Elections

Payment Elections

On the screen under this, you can view past paylips

View

T2200S(21) Declaration of Conditions of Employm...

Payslips

Total Rewards

Bonus & One-Time Payment History

My Tax Documents

Direct Deposit Information: Payment Elections

Payment Elections Katrina Stefopoulos



Select how to receive payment for each type of pay. For direct deposit, be sure to add bank accounts before payment elections.

Person [Katrina Stefopoulos](#)
Default Country Canada
Default Currency CAD
Status Successfully Completed
Last Updated 2020-10-14 02:38 AM

Enter it exactly as it's written on the direct deposit slip from your bank. If you make a mistake, we won't be able to pay you!

Turn off the new tables view

Accounts 1 item



Account Nickname	Country	Bank Name	Account Type	Account Number	
					<p>Edit</p> <p>Remove</p> <p>View</p>

Add

Turn off the new tables view

Payment Elections 2 items

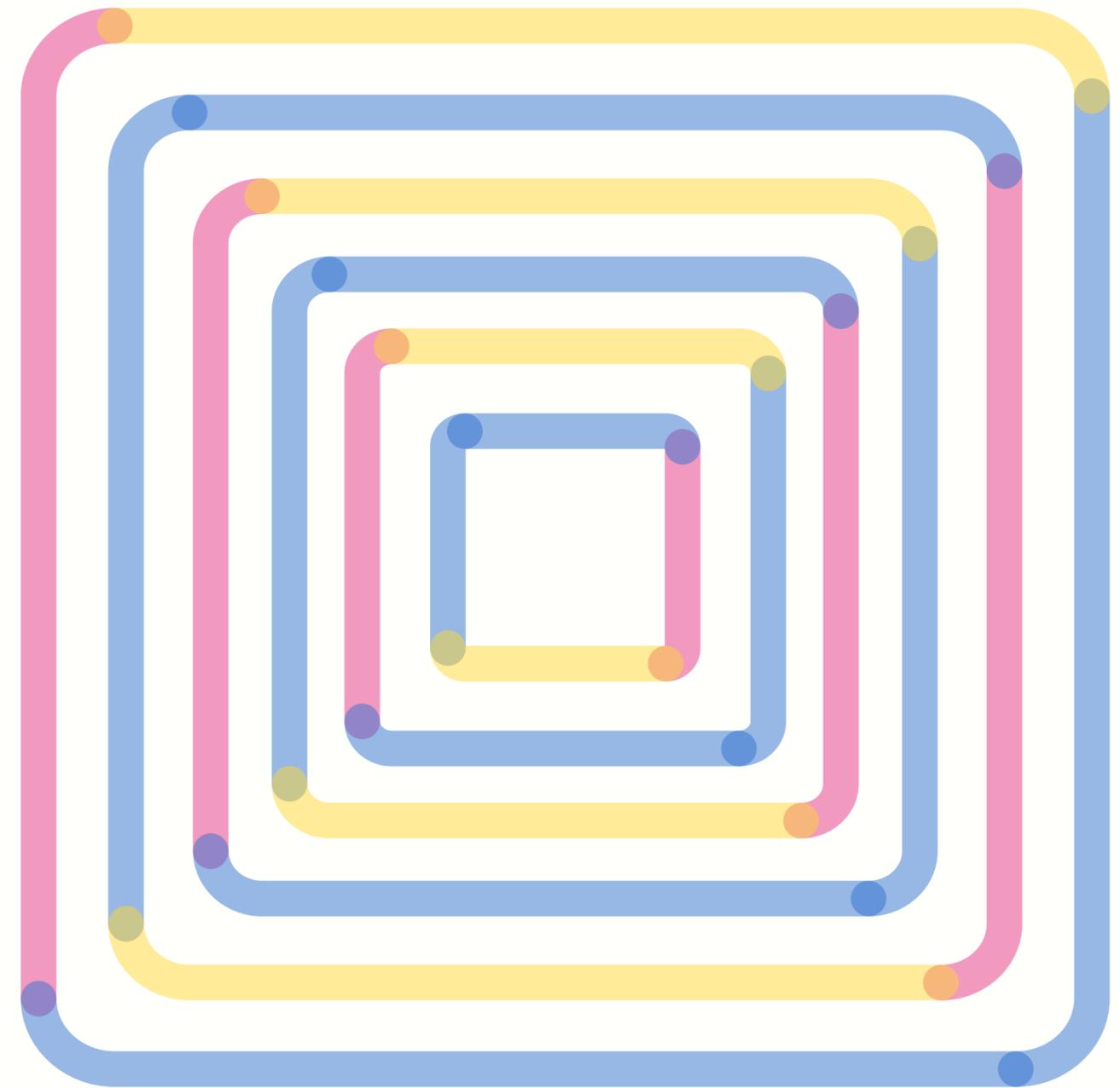


Payment Elections					
Pay Type	Payment Type	Account	Account Number	Distribution	
Regular	Direct Deposit			Balance Yes	<p>Edit</p>
Expenses	Direct Deposit			Balance	<p>Edit</p>

If you don't have your direct deposit information from your bank...

Change your address in Personal Information from your home address to your campus address

Your paylips will be mailed as physical cheques until your direct deposit info is added



Tax Forms: Withholding Elections

Withholding Elections Katrina Stefopoulos

Home Address 1290 International Mews
Kelowna, BC V1V 1V8
Canada

Social Insurance Number XXX XXX XXX

Province of Employment British Columbia

Federal Elections Province Elections

Company UBC The University of British Columbia

Name Katrina Stefopoulos for UBC The University of British Columbia has TD1 for payroll date 2022-01-05

Effective Date 2022-01-05

1. Basic personal amount	14,398
2. Canada caregiver amount for infirm children under age 18	0
3. Age amount	0
4. Pension income amount	0
5. Tuition (full time and part time)	0
6. Disability amount	0
7. Spouse or common-law partner amount	0
8. Amount for an eligible dependant	0
9. Canada caregiver amount for eligible dependant or spouse or common-law partner	0
10. Canada caregiver amount for dependant(s) age 18 or older	0

You'll have to update both Federal & Province Elections. There are lines to disclose tuition amounts and other expenses related to school.

This is tuition amounts from the calendar year, not the academic year. It's mostly an estimate, exact costs are provided through your T2202A when you submit your tax return and any corrections will be applied then

Where did my pay go?

At the very bottom of your payslip, you'll see:

Payment Information 1 item

Bank	Account Name	Account Number	Amount in Pay Group Currency	Pay Group Currency
Canadian Imperial Bank of Comm	Canadian Imp [REDACTED]	[REDACTED]	[REDACTED]	CAD
			Total:	[REDACTED]



Expense Reports



DUE WITHIN 3 DAYS OF YOUR PROGRAM

Don't you want your money??? Submit your expense report as soon as possible. We can't approve something months after the purchase happened.

There's a demonstration video with these training notes on the PRA website, and on the homepage of the PRA website

Make note of the expense report number in the top-left corner, you'll need it for your programming log!