How To: Sign-up for Charitable Giving with Payroll Deductions in Workday

Select what you wish to do?

- Setup Ongoing Charitable Payroll Deductions
- One-Time (Lump Sum) Charitable Payroll Deduction
- Confirm Your Charitable Elections

Setup **Ongoing** Charitable Payroll Deductions

Follow these steps to setup your charitable deductions for payroll deductions in Workday

**Step 1: Initiate a Benefit Change**

Login to MyWellesley and go to Workday.
On the Home screen, click on Benefits.
Click on Benefits button under the “Change” column on the left.
Step 2: Select Charitable Giving Event

Click the dot next to “Charitable Giving”

Enter 01/01/2019 for the Benefit Event Date.

(Note: If you want your donations to start on another date in the future enter that date. The payroll deduction will begin coming out on the first paycheck after this date.)

<table>
<thead>
<tr>
<th>Benefit Event Type</th>
<th>Charitable Giving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birth/Adoption/Legal Guardianship of Child</td>
<td></td>
</tr>
<tr>
<td>Divorce/Legal Separation</td>
<td></td>
</tr>
<tr>
<td>Gain or Loss of Coverage (Employee/Spouse/Dependent)</td>
<td></td>
</tr>
<tr>
<td>Health Savings Account Change</td>
<td></td>
</tr>
<tr>
<td>Leave of Absence</td>
<td></td>
</tr>
<tr>
<td>Life Insurance Plan Coverage Changes</td>
<td></td>
</tr>
<tr>
<td>Marriage</td>
<td></td>
</tr>
<tr>
<td>Retirement Plan Contribution Changes</td>
<td></td>
</tr>
</tbody>
</table>

Benefit Event Date: 01/01/2019

Submit Elections By: 01/30/2019

Enrollment Offering Types: Charitable

Scroll to the bottom of the page.
Click Submit button on bottom left.
Step 3: Open the Benefit Change
A new page will appear with a grey “Open” button. Click the Open button.

(If you accidentally miss this step, you can find the Benefit Change item in your Workday Inbox.)

Step 4: Enter Your Contributions
Read the instructions at the top of the Additional Benefits Elections area.

The double arrow opens this view to a full screen. Click this to make the selection area larger.

Review the five charities and click the Elect dot for the charity(ies) for which you want to contribute to through payroll deductions.
Then enter the amount to be deducted for EACH pay period (weekly or monthly).

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Elect/ WAive</th>
<th>Coverage</th>
<th>Amount (Monthly)</th>
<th>Percent</th>
<th>Employee Cost (Monthly)</th>
<th>Employee Contribution (Monthly)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charitable - Community Works</td>
<td>Elect</td>
<td></td>
<td>20.00</td>
<td>0</td>
<td>$20.00</td>
<td>0</td>
</tr>
<tr>
<td>Charitable - NAMI</td>
<td>Elect</td>
<td></td>
<td>20.00</td>
<td>0</td>
<td>$20.00</td>
<td>0</td>
</tr>
<tr>
<td>Charitable - Oxfam America</td>
<td>Elect</td>
<td></td>
<td>20.00</td>
<td>0</td>
<td>$20.00</td>
<td>0</td>
</tr>
<tr>
<td>Charitable - Rosie's Place</td>
<td>Elect</td>
<td></td>
<td>0.00</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Charitable - United Way</td>
<td>Elect</td>
<td></td>
<td>0.00</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Click the corner double arrows to make the view smaller again.

Scroll to the bottom of the page and Click the green “Continue” button.
Step 5: Confirm & Agree

Review your selections and contributions on the Confirm page.

Confirm

Event Date
Initial On
Submit Electronically By

Thank you for completing your benefit plan elections. As noted, many of the benefit plans have a required participant premium taken from your pay via payroll deduction. It is important for you to review your paycheck deductions as early as possible in 2017 to ensure the appropriate premium charge is being taken from your paycheck. If there is a deduction error, please contact Human Resources at your earliest convenience.

Elected Coverages

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Coverage Begin Date</th>
<th>Deduction Begin Date</th>
<th>Coverage</th>
<th>Dependents</th>
<th>Beneficiaries</th>
<th>Employee Cost (Monthly)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charitable - MMB</td>
<td>01/01/2016</td>
<td>01/01/2016</td>
<td>$99.00</td>
<td></td>
<td></td>
<td>$30.00</td>
</tr>
<tr>
<td>Charitable - Cigna America</td>
<td>01/01/2016</td>
<td>01/01/2016</td>
<td>$99.00</td>
<td></td>
<td></td>
<td>$30.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total: $60.00</td>
</tr>
</tbody>
</table>

Attachments

Drop files here

Scroll down to agree to the authorization of the payroll deduction

Electronic Signature

Legal Notice: Please Read

Your name and Position are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you check the "I agree" checkbox, you are certifying that:

With respect to your health and welfare benefits:

- You understand and agree to the enrollment as indicated above. You hereby authorize the College to deduct from your earnings the amount of your premium or other contributions (if any) for the benefit options elected above.
- You understand and acknowledge that under federal and state laws, you may not change your personal health and welfare plan benefit elections during the calendar year unless you experience a qualifying change in status.
- You understand that you will not pay taxes for COBRA or on medical, dental, vision, or Flexible Spending Account contributions. Those benefit deductions are made on a pre-tax basis.
- You understand that the insurance that exceeds $50,000 will result in required taxes on your pay.
- Each year, during the annual enrollment period, you will have the option to change your coverage.
- The College has offered an affordable optional supplemental medical coverage as defined under the Affordable Care Act (ACA).

If you elect medical coverage, I certify that I understand the benefits of the Plan.

If you elect medical coverage, and I do not obtain coverage in my own, I will be subject to the individual responsibility requirement of the ACA.

With respect to your 403(b) retirement benefits:

- I hereby agree and authorize the College to reduce my pay as a post-tax compensation, as defined by the elected plan, for each pay period by the percentage shown during the remainder of this calendar year and each succeeding year, and that the College will forward such amounts to the Wesleyan College 403(b) Retirement Plan (the Plan).
- I understand that my contributions to the Plan are subject to limitations set forth in the Internal Revenue Code, and that no contributions will be permitted to the Plan in excess of such limits.
- I understand that this agreement superseded any prior salary reduction agreement in effect under the Plan.
- I understand that I may make an election to participate in the Plan at any time, provided that I do not make an election to participate in the Plan in excess of any limitations.
- I understand that the election made under this agreement shall be legally binding and irrevocable with respect to amounts earned and payable while the agreement is in effect, but that I may revoke or modify this agreement at any time with respect to future compensation.

I Agree

Submit

Save for Later | Go Back | Cancel

Read the text and

Click the box next to "I agree".

Congratulations!

Your on-going payroll deduction for charitable giving is now ready.
One-Time (Lump Sum) Charitable Payroll Deduction

To make one donation payment, you will start an on-going deduction and then cancel the on-going deduction in the next pay cycle.

1. First, follow the steps above to create an on-going deduction.

2. Second, repeat the steps above but enter the next pay period date as the Benefit Event Date in the first step.

Example: Set the start date for the on-going donation of 1/1/19 and enter $50 (or any amount) on a charity and submit. Then select a benefit change again and enter an effective date of 1/7/19 (Weekly) or 2/1/19 (Monthly). “Open” the task and change the amount(s) to $0 and/or click waive on all the charities. Then click submit, review, agree, and click submit one final time.

This will allow the donation to deduct from your payroll only one-time.

Confirm Your Charitable Elections

If you wish to confirm this future dated deduction, go back to the Workday Home page and click on the Benefits button again. Click on the “Benefit Elections” button under the View (right) column.

Scroll down to see the Future Benefits Elections section.

Thank you again for your charitable contributions.