How To: Sign-up for Charitable Giving with Payroll Deductions in Workday
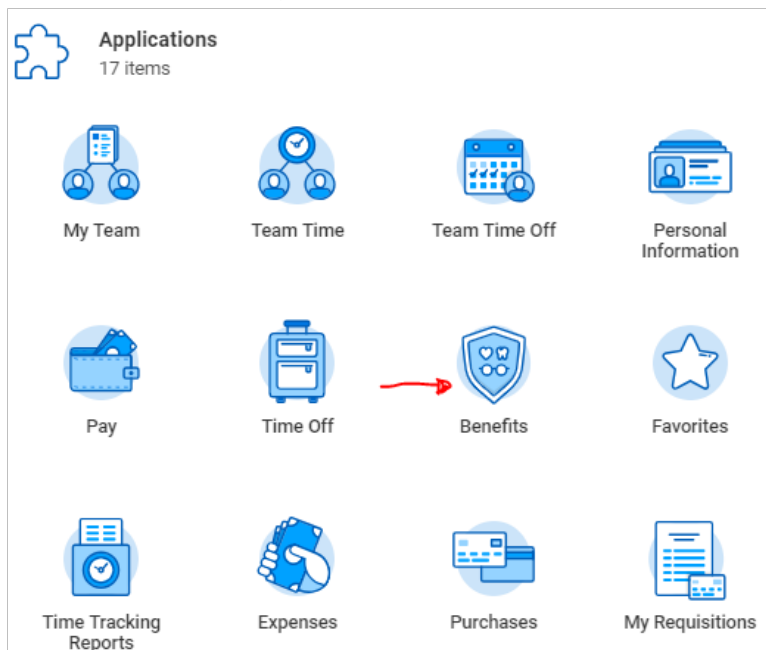
Select what you wish to do?

Setup **Ongoing** Charitable Payroll Deductions

Follow these steps to setup your charitable deductions for payroll deductions in Workday
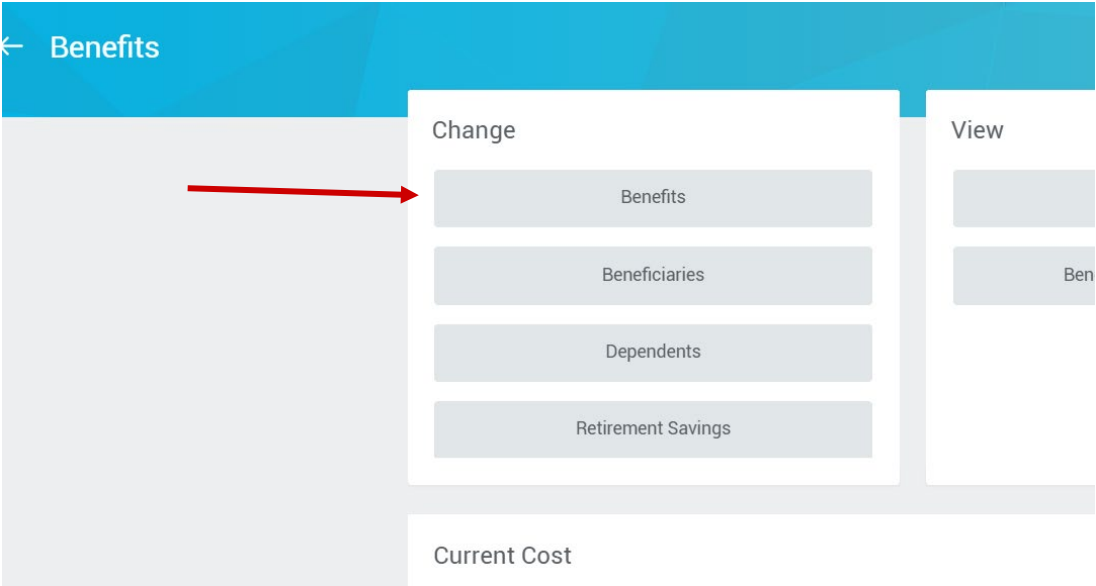
Step 1: Initiate a Benefit Change

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.)

Benefit Event Type	* ◯	Birth/Adoption/Legal Guardianship of Child
	⬤	Charitable Giving
	◯	Divorce/Legal Separation
	◯	Gain or Loss of Coverage (Employee/Spouse/Dependent)
	◯	Health Savings Account Change
	◯	Leave of Absence
	◯	Life Insurance Plan Coverage Changes
	◯	Marriage
	◯	Retirement Plan Contribution Changes

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.
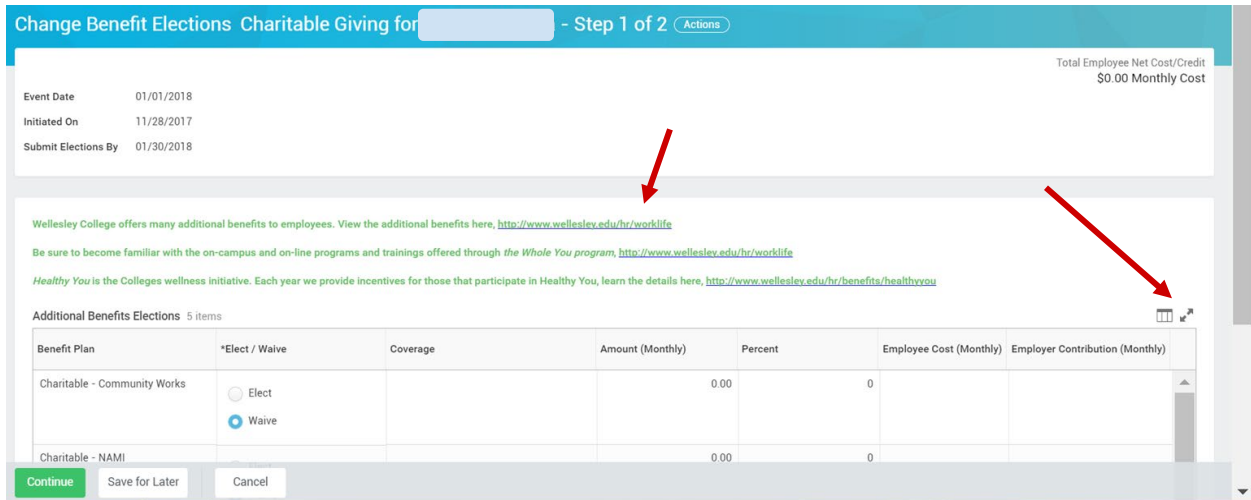
Submit

Step 3: Open the Benefit Change

A new page will appear with a grey "Open" button. Click the Open button.
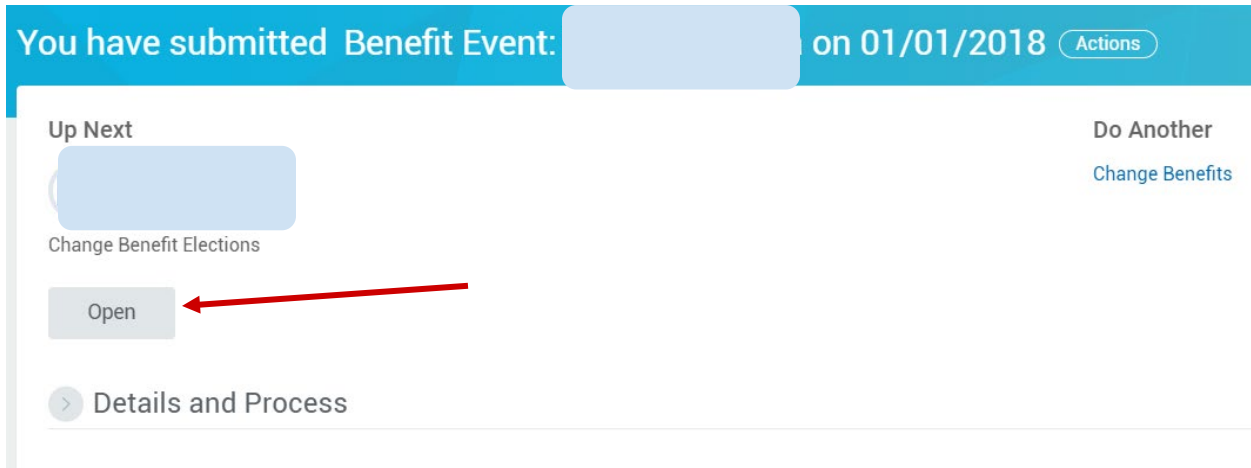
(If you accidentally miss this step, you can find the Benefit Change item in your Workday Inbox.)

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.
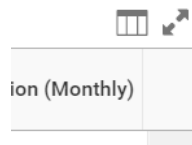
Review the five charities and click the Elect dot for the charity(ies) for which you want to contribute to through payroll deductions.

Then enter the amount to be deducted for EACH pay period (weekly or monthly).

Additional Benefits Elections
5 items

Benefit Plan	*Elect / Waive	Coverage	Amount (Monthly)	Percent	Employee Cost (Monthly)	Employer Contribution (Monthly)
Charitable - Community Works	○ Elect ● Waive		0.00	0		
Charitable - NAMI	● Elect ○ Waive		20.00	0	$20.00	
Charitable - Oxfam America	● Elect ○ Waive		20.00	0	$20.00	
Charitable - Rosie's Place	○ Elect ◉ Waive		0.00	0		
Charitable - United Way	○ Elect ● Waive		0.00	0		
					40.00	0

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

ion (Monthly)
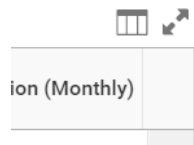
Scroll to the bottom of the page and Click the green "Continue" button.

Continue   Save for Later   Cancel

Step 5: Confirm & Agree

Review your selections and contributions on the Confirm page.

Confirm

Event Date	01/01/2018
Initiated On	11/28/2017
Submit Elections By	01/30/2018

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 <u>as early as possible in 2017</u> 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 2 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)
Charitable - NAMI	01/01/2018	01/01/2018	$20.00			$20.00
Charitable - Oxfam America	01/01/2018	01/01/2018	$20.00			$20.00
					Total:	$40.00

Attachments

Drop files here

Submit   Save for Later   Go Back   Cancel

Scroll down to agree to the authorization of the payroll deduction

Electronic Signature

Legal Notice: Please Read

Your name and Password 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:

<u>With respect to your health and welfare benefits:</u>

- You understand and approve the enrollment as indicated above. You hereby authorize the College to deduct from your earnings the amount of your premiums or other contributions (if any) for the benefit options elected above.
- You understand and acknowledge that under Internal Revenue Code regulations, you may not change your pre-tax health and welfare plan benefit elections during the calendar year unless you experience a qualified change in status.
- You understand that you will not pay income tax or FICA tax on medical, dental, vision, and Flexible Spending Account contributions. These benefit deductions are made on a pre-tax basis.
- College-provided life insurance that exceeds $50,000 will result in imputed income to you.
- Each year, during the annual enrollment period, you will have the option to change your coverage.
- The College has offered me affordable minimum essential medical coverage as defined under the Affordable Care Act (ACA).
- If I declined medical coverage, I may not qualify for government credits and subsidies to purchase individual health insurance on the Marketplace.
- If I decline medical coverage, and I do not obtain coverage on my own, I will be subject to a penalty under the individual responsibility requirement of the ACA.

If you declined medical insurance for yourself or your dependents, including your spouse, because of other medical insurance coverage, you may in the future be able to enroll yourself or your dependents in this plan, provided you request enrollment within 31 days after your other coverage ends. In addition, if you have a new spouse or dependent as a result of marriage, birth, or adoption, you may be able to enroll yourself, your spouse and your dependents, provided you request enrollment within 31 days after the marriage, birth, or adoption.

<u>With respect to your 403(b) retirement benefits:</u>

- I hereby agree and authorize the College to reduce my pre-tax or post-tax compensation, as defined by the elected plan, for each pay period by the percentage amount shown during the remainder of this calendar year and each succeeding year, and that the College will forward such amount to the Wellesley College 403(b) Retirement Plan (the "Plan").
- I understand that my contributions to the Plan are subject to certain limits 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 supersedes any prior salary reduction agreement in effect under the Plan.
- I understand that I am eligible for the Plan and if I am not now making any election to make contributions to the Plan, I have elected not to participate in the Plan at this time. I understand that I may later choose to make an election to participate in the Plan.
- I understand that 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".
Click the green "Submit" button.

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.
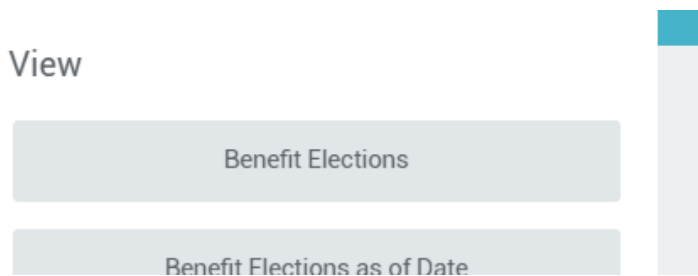
Scroll down to see the Future Benefits Elections section.

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)
403(b) - TIAA Voluntary ROTH Contribution (Post-Tax)	01/01/2018	01/01/2018	3%			
Charitable - NAMI	01/01/2018	01/01/2018	$20.00			$20.00
Charitable - Oxfam America	01/01/2018	01/01/2018	$20.00			$20.00
					Total:	$40.00

Thank you again for your charitable contributions.