System User Guide

Employee Guide - How to Add or Change Bank Details

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Contents

Introduction

All new staff are prompted to enter their bank account details when they join the University via the task within Journeys in People and Money, these tasks should be completed by day 1 of employment. Further information is available within the [Pending Worker/Employee Guide to Journeys.](#)

This guide covers the steps to take if you have forgotten to add your bank details at the time of joining or need to change these.

Note - You can only have one Linked Bank Account at a time, i.e. you can only be paid to one account.

In Brief

This section is a simple overview and should be used as a reminder. More detailed information on each outcome is provided later in this guide.

Adding your bank details

1. From the Homepage, Me section click the 'Pay' tile
2. Click on **Payment Methods.**
3. On the **My Payment Methods** page select 'Worker' in the Payroll relationship field and then click **+Add**
4. Enter your bank details and click **Create**

Changing your bank details

Please note this is a **two-step** process.

1. From the Homepage, Me section click the 'Pay' tile
2. Click on Payment Methods.
3. On the **My Payment Methods** page select Worker in the payroll relationship and then click on the edit (pencil icon)
4. Select New Account and enter the new bank information
5. Click **Update**
6. **Set old account to inactive** – Navigate to Bank Accounts at the top right of the screen icon
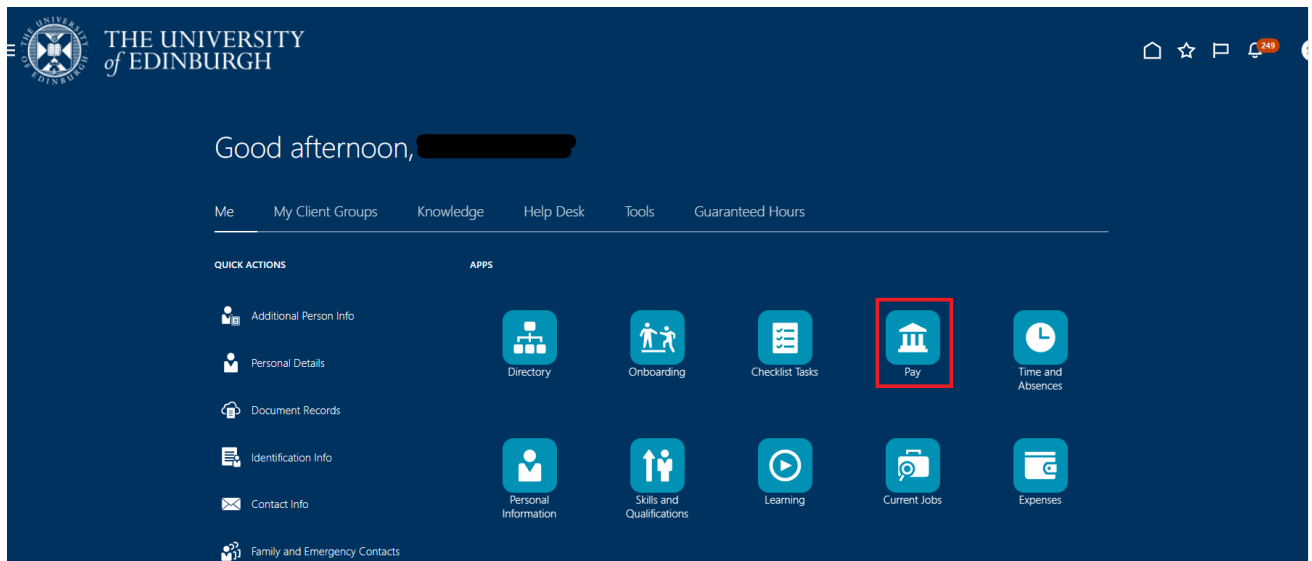7. **Make your old account inactive.** Select **Inactivate** next to the account you are no longer using.

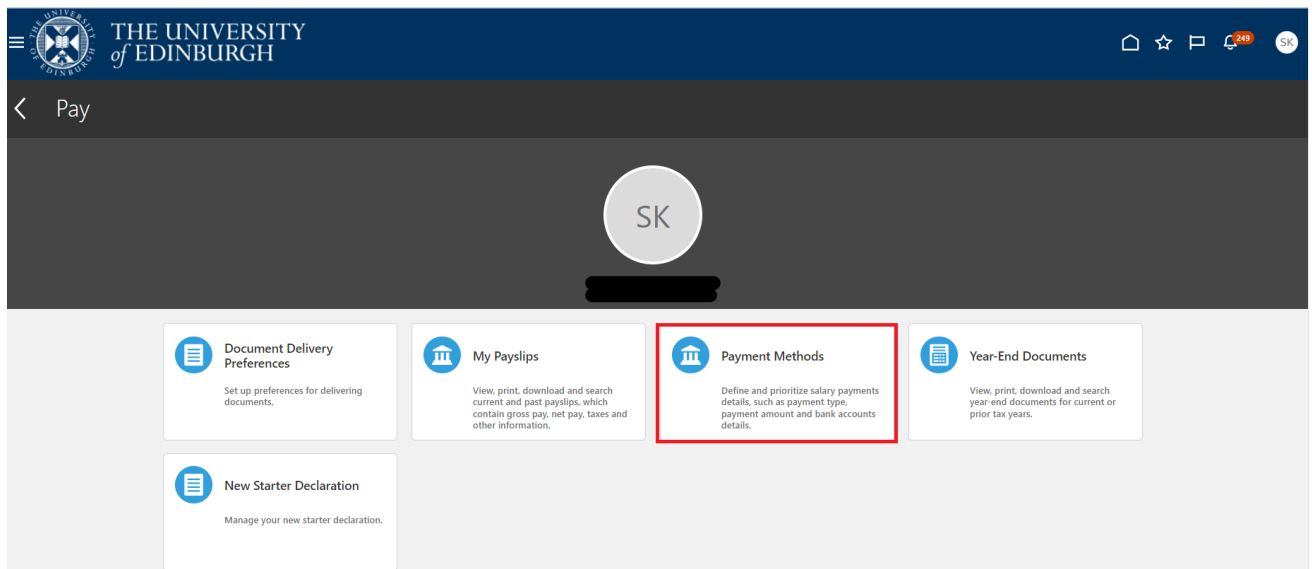For detailed guidance, see the next section.

In Detail

This section provides the detailed steps and includes relevant screenshots from the system.
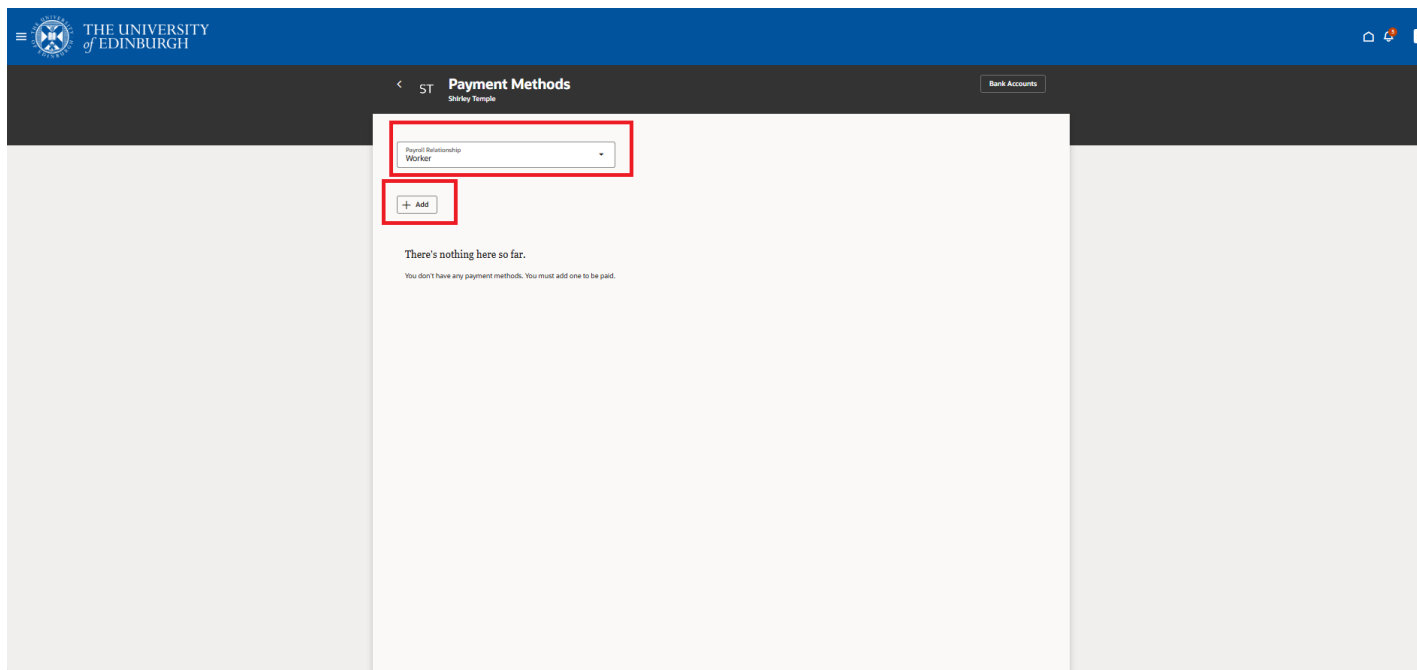
Adding your bank details

1. From the Homepage, open the Me section and click the Pay tile.

2. Click on **Payment Methods tile**

3. On the **Payment Methods** page ensure the Payroll Relationship is 'Worker' and then click **+Add**

4. Complete the **required fields:**

- If you are presented with a payroll relationship field, select the "Worker" option

- Details -Add a recognisable name for your bank account

- Payment Type – BACS

- Select New Account (existing account holds anything you might have held previously)

- Account Number

- Account Holder (name)

- Sort Code

- Bank Code – Can be ignored

Then **click Create**

New Payment Method

Details

What do you want to call this paymen...	Payment Type
Required	BACS ▼

Bank Details

Select an account

◉ New Account   ○ Existing Account

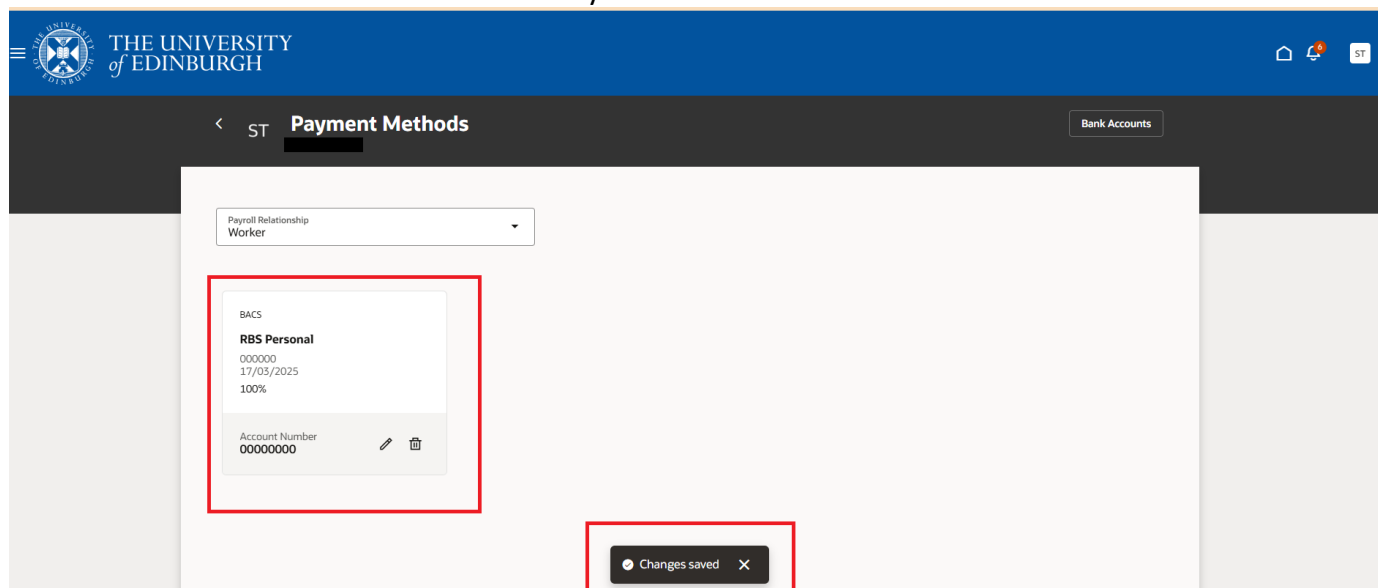| Account Number	Account Holder
Required	

Bank Code	Sort Code

Cancel   **Create**

5. Your bank details will be shown in a summary tile

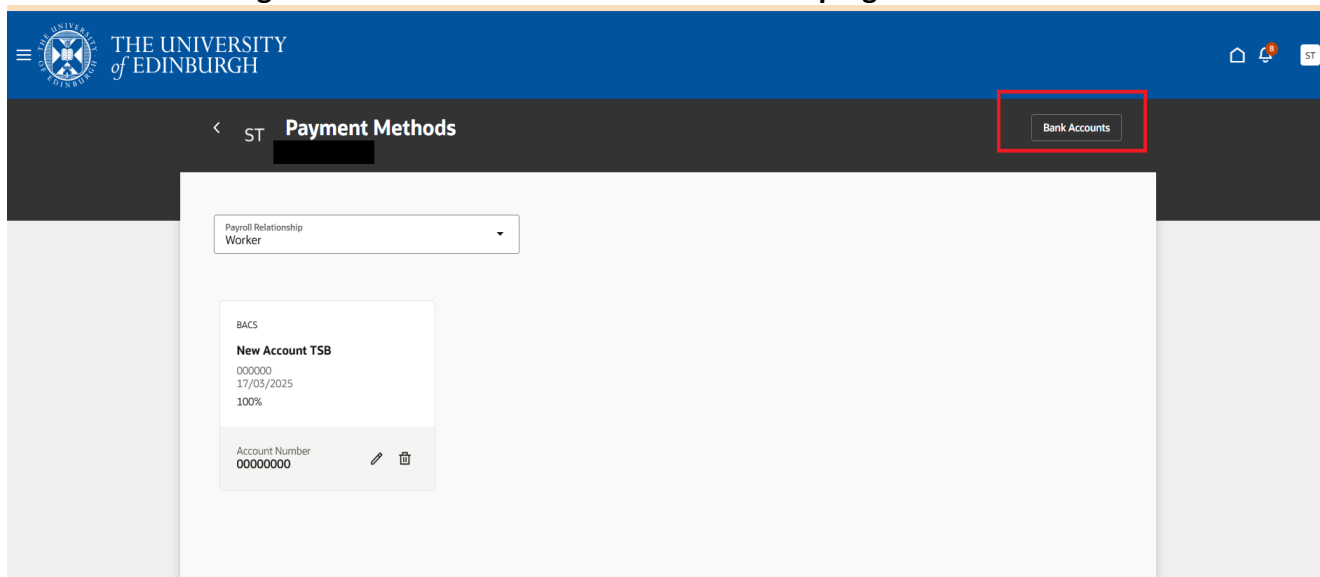## Changing your bank details

To change your bank details this is a two-step process.

Follow steps 1, 2 and 3 above, then

1. Click on the pencil icon next to the bank account you want to make inactive
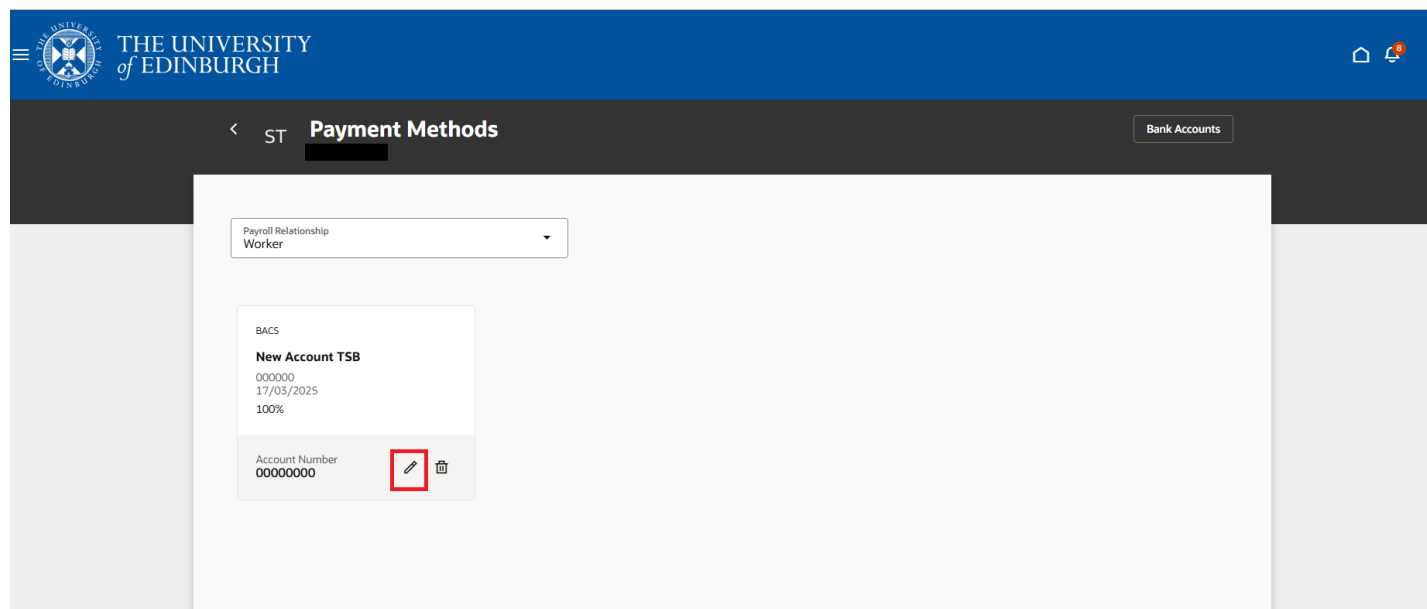
2. **Select New Account and** ccomplete the required fields:

- If you are presented with a payroll relationship field, select the "Worker" option
- Details -**Update this** and add a recognisable name for your bank account
- Payment Type – BACS
- Select New Account (existing account holds anything you might have held previously)
- Account Number
- Account Holder (name)
- Sort Code
- Bank Code – Can be ignored

Then **click Update**

3. You will see a warning message which is a reminder to follow the next step:

4. You must now **navigate** to the **Bank Accounts screen at the top right of the screen**
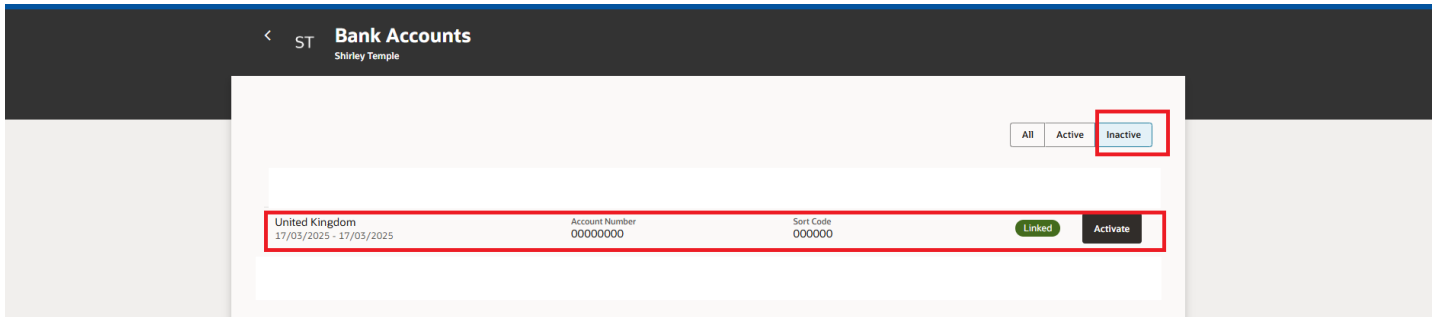

5. **Make your old account inactive.** Select **Inactivate** next to the account you are no longer using. Note you can only have one linked and active bank account at a time, i.e. you can only be paid to one account.
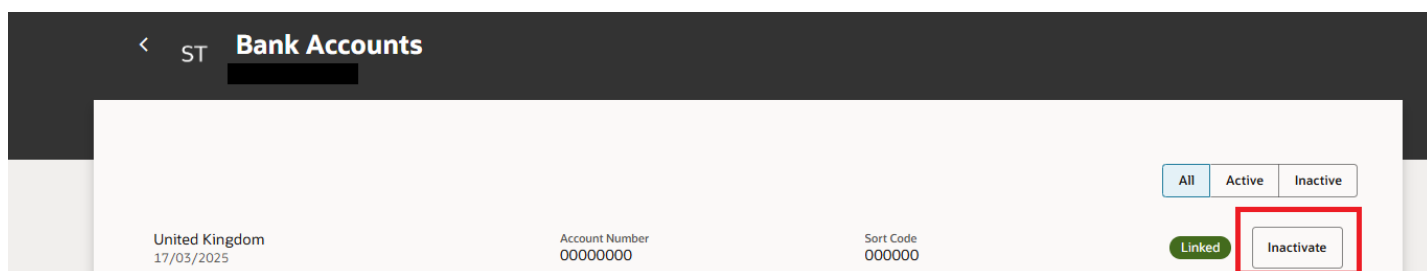
6. Your bank details will be **updated overnight**, use the filters within **Bank Accounts** to view active and inactive accounts
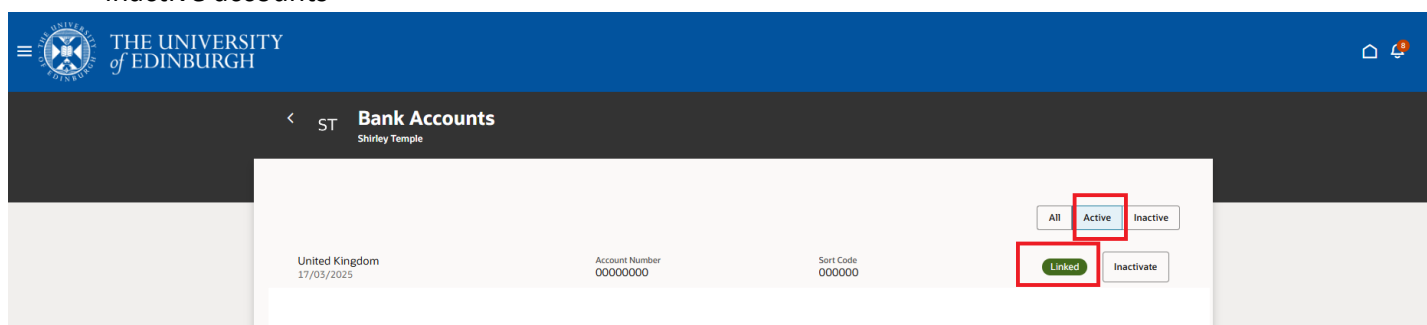
Version History

Version	Date	Description	Approved By
0.1	N/A	Draft	
1.0	December 2022		
2.0	24/3/25	Updated to reflect 25A Redwood changes and launch of Journeys.	ME

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.