



People and Money system

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Employee Guide- How to Add or Change Bank Details



Employee

Estimated time to complete: 4 minutes

In Brief...



Adding your bank details

This is a simple overview of the process. 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 click **+Add** next to bank details
4. Enter the new bank information and click **Save** 
5. Enter the **My Payment Methods** and click **Save**

Changing your bank details

This is a simple overview of the process. Please note this is a **two-step** process.

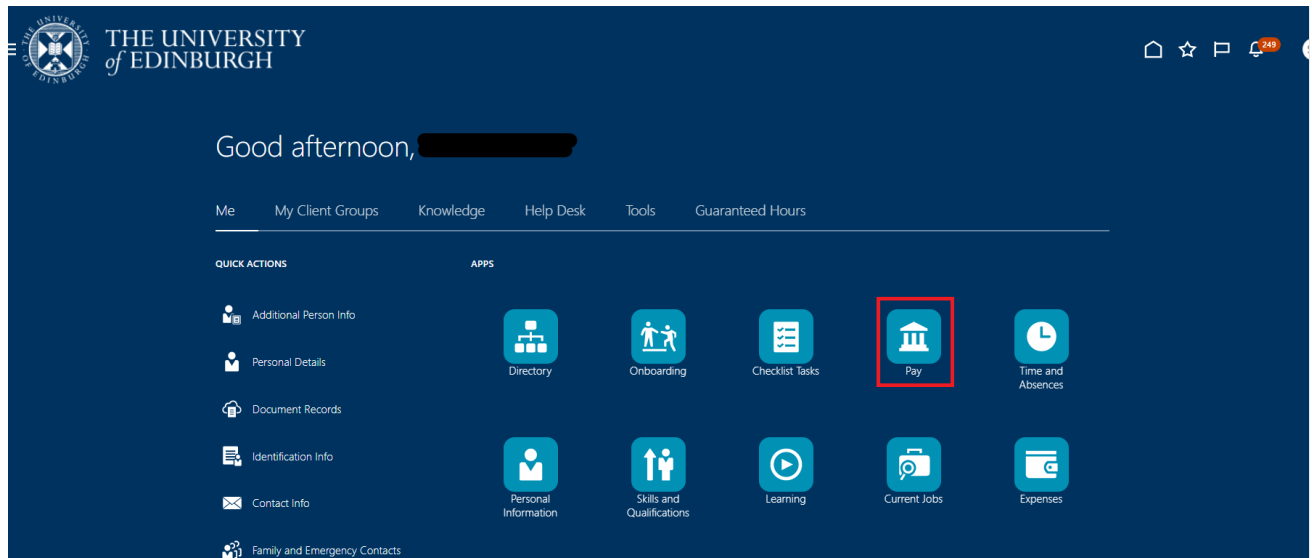
1. From the Homepage, Me section click the  Pay tile
2. Click on **Payment Methods**.
3. On the **My Payment Methods** page click **+Add** next to bank details
4. Enter the new bank information and click **Save** 
5. Enter the **My Payment Methods** and click **Save**
6. **Set old account to inactive** – Click on the pencil icon next to the old account and untick the active box

For detailed guidance, see the next section.

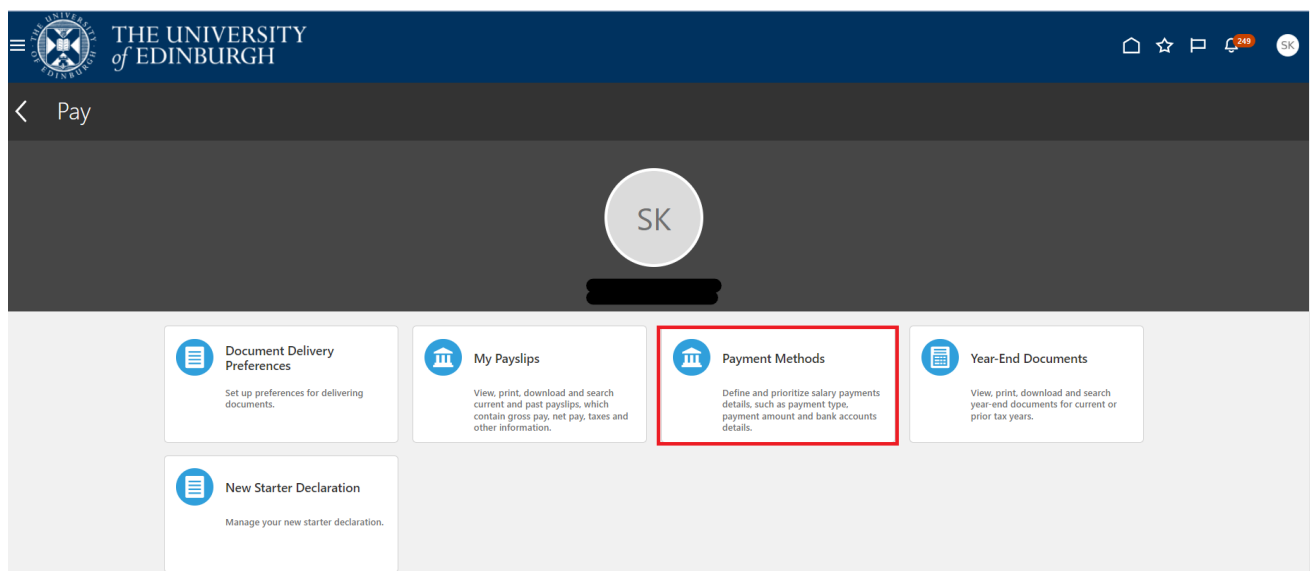
In Detail...

Adding your bank details

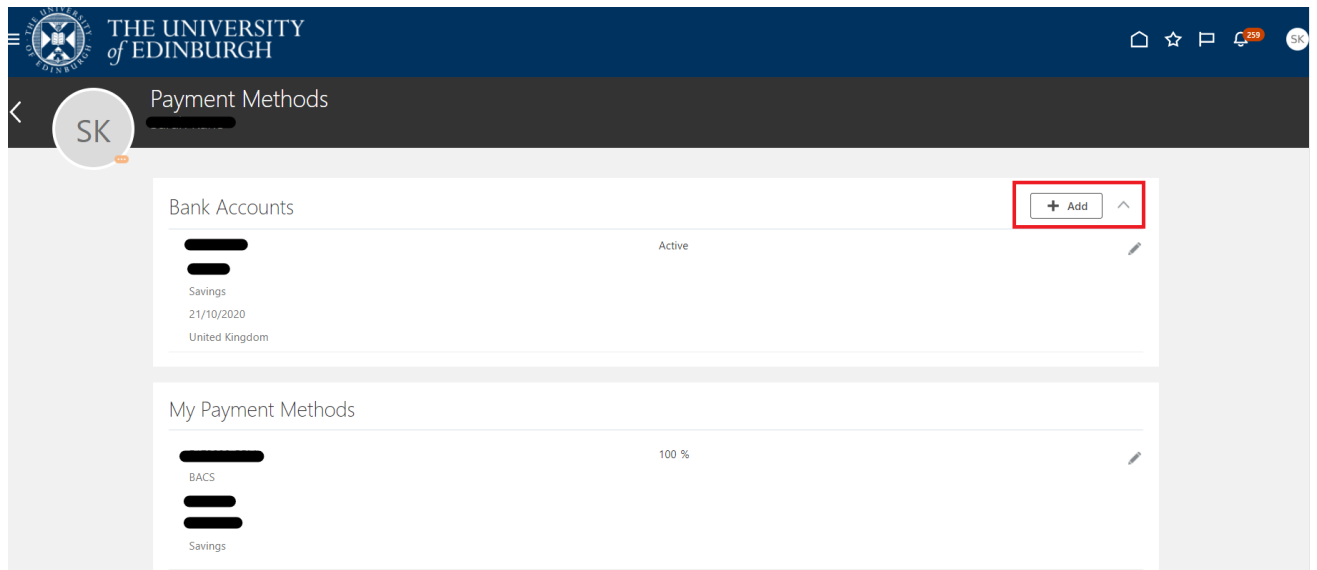
1. From the Homepage, open the Me section and click the Pay tile.



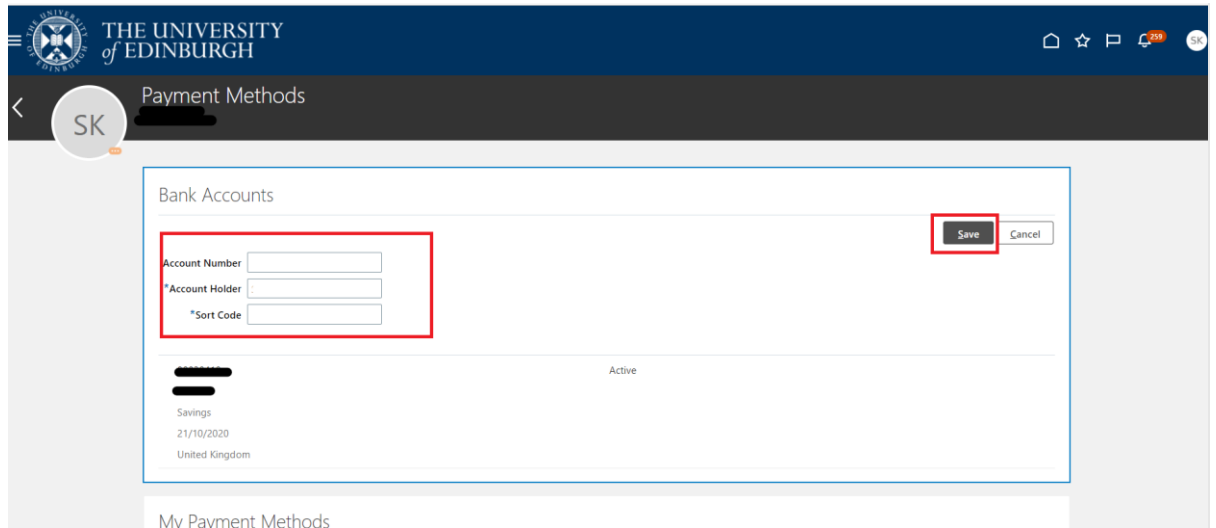
2. Click on **Payment Methods** tile



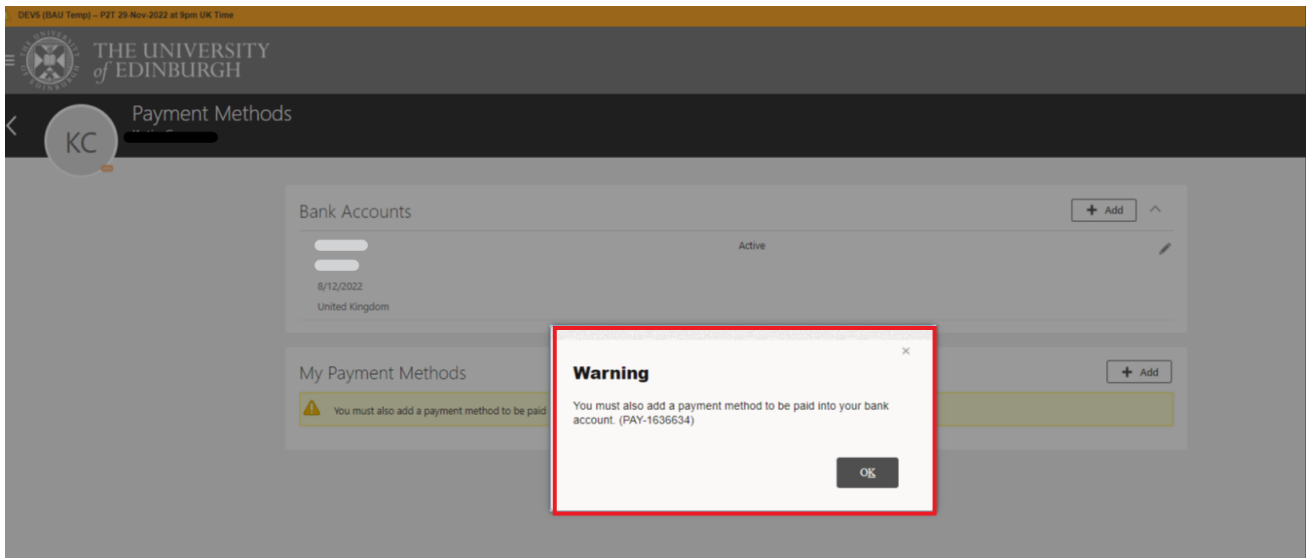
3. On the **Payment Methods** page click '+Add' next to Bank Accounts



4. Enter the new bank information as follows:
 - a. **Account Number**
 - b. **Your name in the Account Holder field**
 - c. **Sort Code**
 - d. Then click **Save**

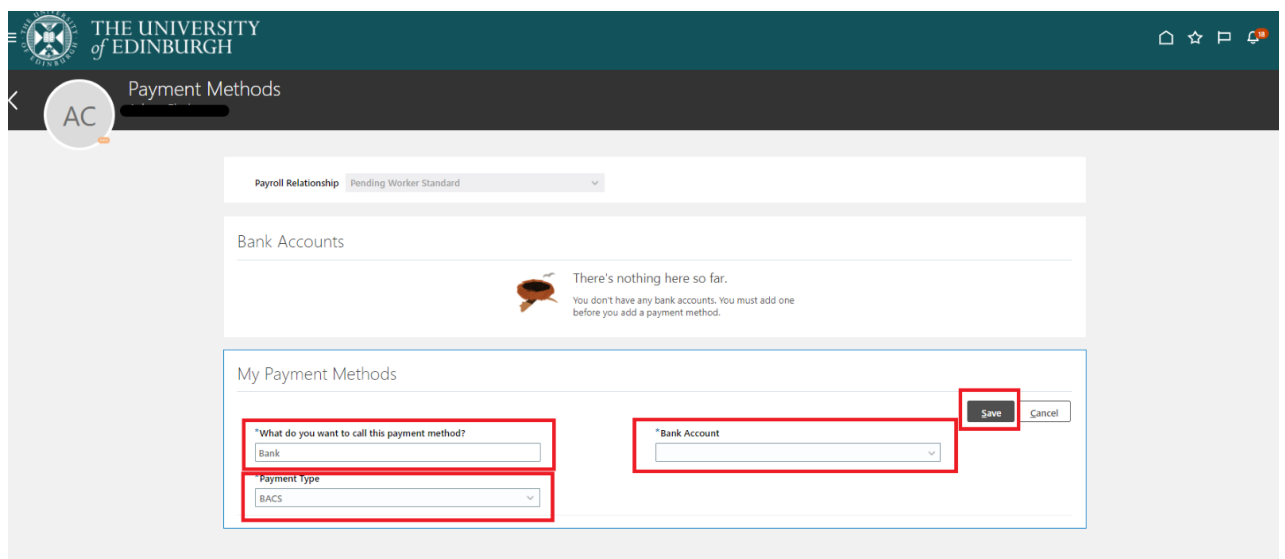


5. You will then receive a warning message reminding you to add a **Payment Method** – this must be completed, follow step 6 below.



6. Click "+Add" on the **My Payment Methods** section
- In the field "What do you want to call this payment method?" add the name of your bank.
 - Ensure the payment type is set to BACS (it should be already).
 - Ensure the bank account is your preferred payment account. If blank, select from the drop down.

Then Click Save.

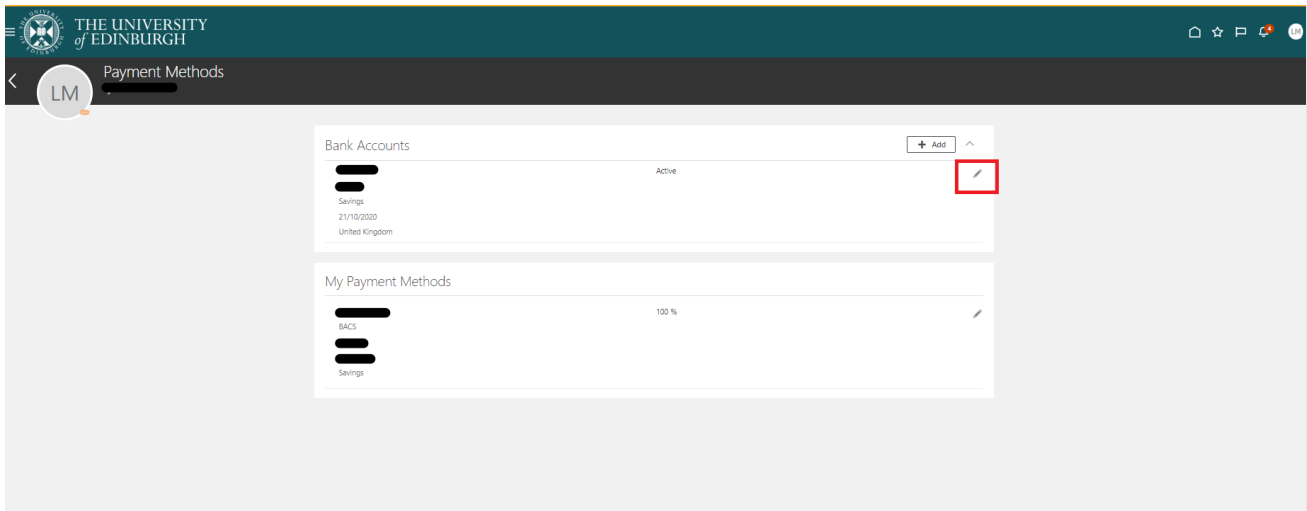


Changing your bank details

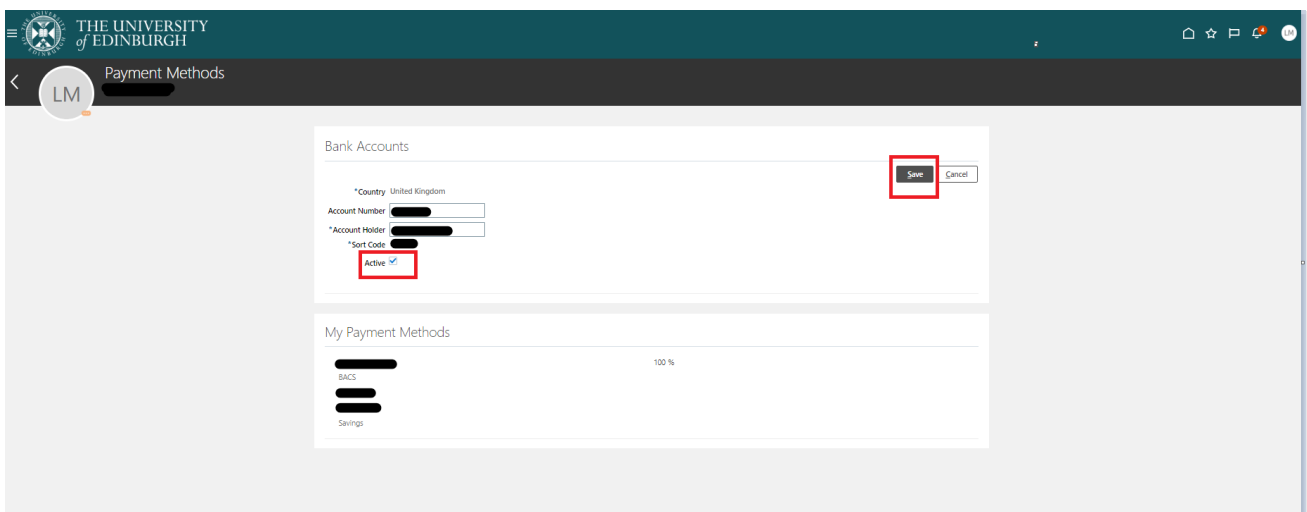
Follow the steps 1 to 6 as above then

1. If you are changing your bank details **you must now make your old account inactive.**

Click on the pencil icon next to the bank account you want to make inactive



2. Untick the 'Active' box, then click **Save**.



3. Your bank details will be updated overnight and the previous account will then show as inactive.