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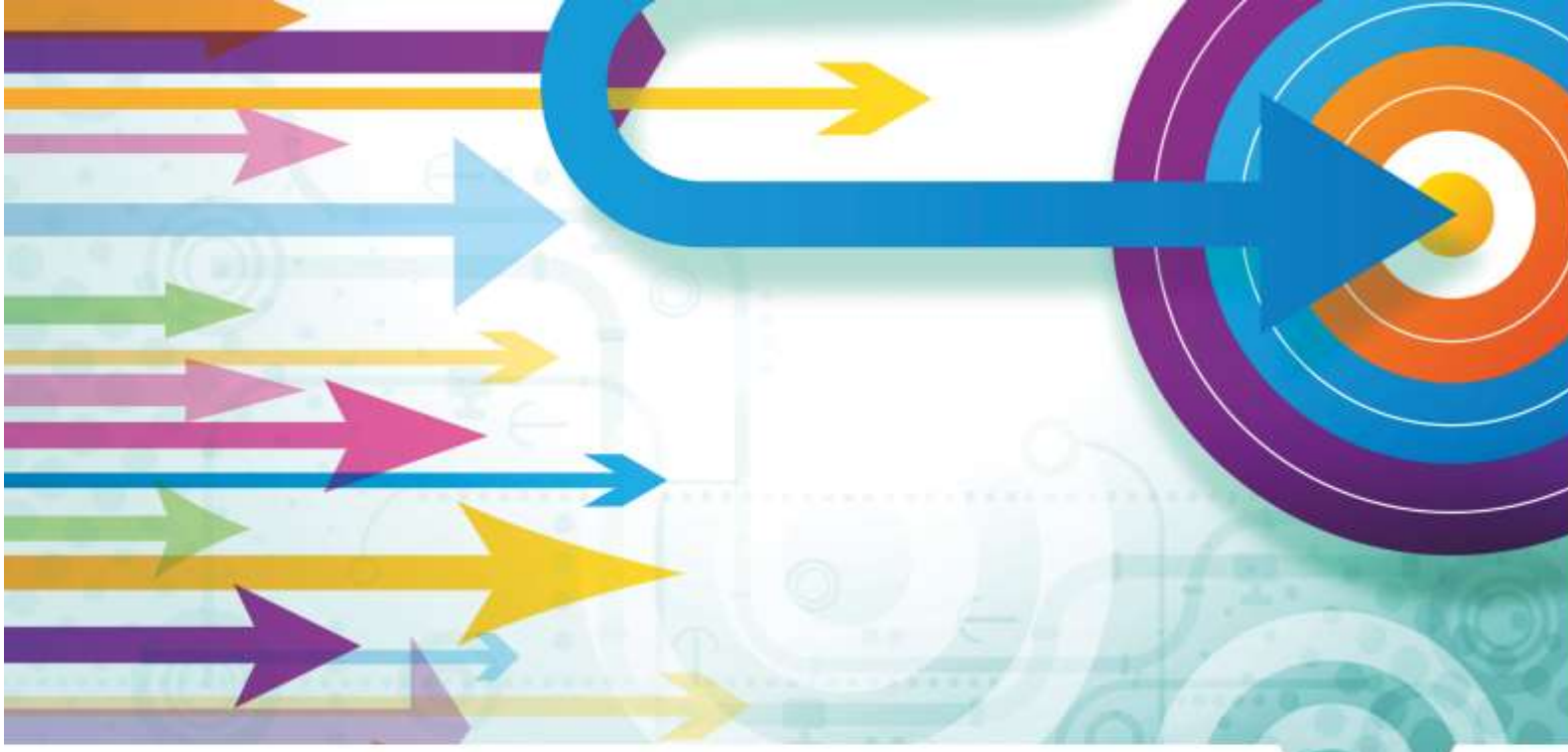
How to…

Update bank details for Sessional Teachers in SuccessFactors



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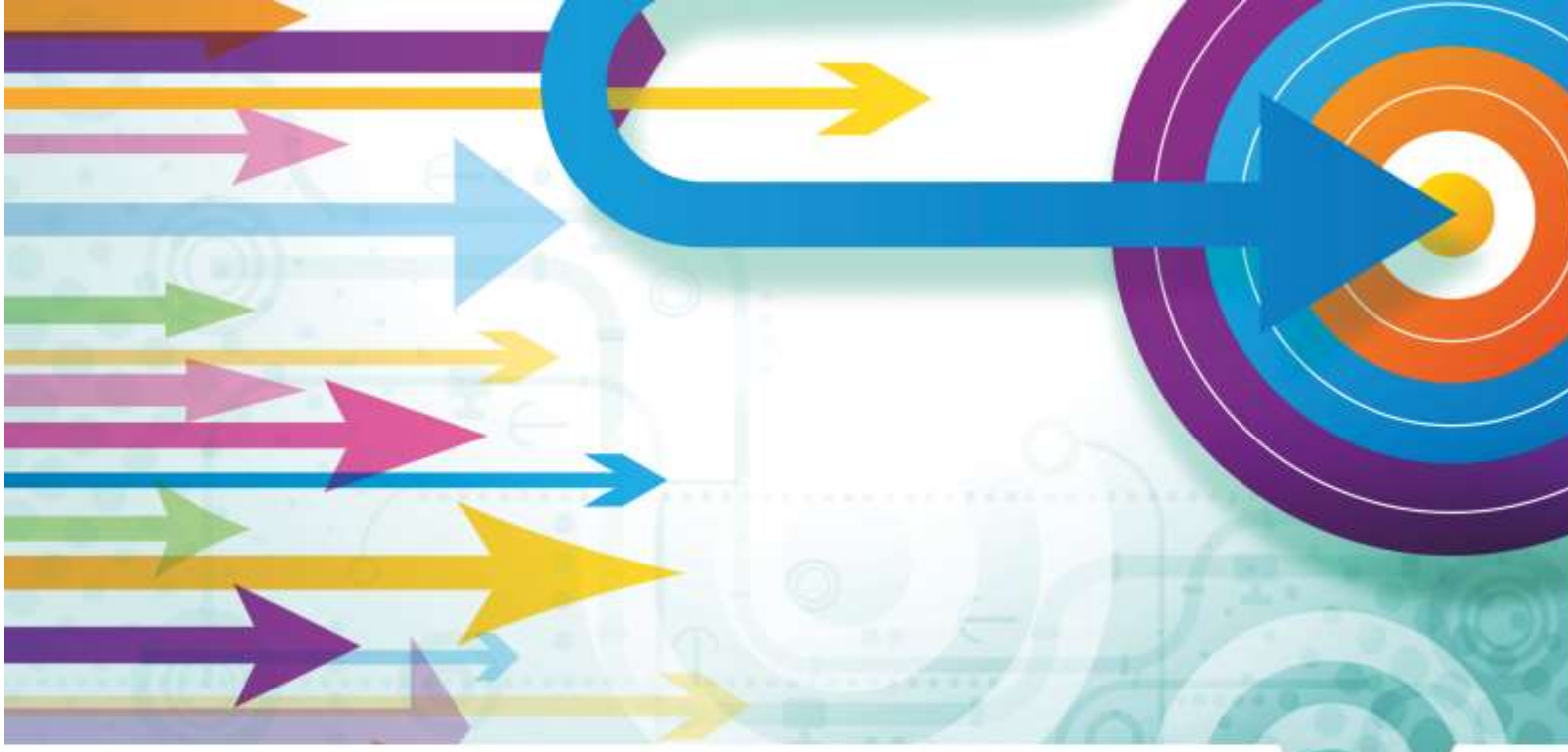
This guide applies only to individuals holding a sessional teacher assignment in SuccessFactors.

This guide details how individuals who hold a sessional teacher assignment should update their bank details in SuccessFactors.

This guide should be used in conjunction with the process map for a change of bank details, which can be found on the HR web pages.

If you hold variable assignments or a salaried appointment in addition to your sessional teacher assignment, you will be able to update other personal details in SuccessFactors yourself on these assignments/contracts. Details of how to update other personal details on such assignments/contracts can be found in the 'How to… Update Personal Details (inc. bank details) in SuccessFactors' guide.

Please note: However, for your sessional teacher assignment you should *only update your bank details in SuccessFactors.*



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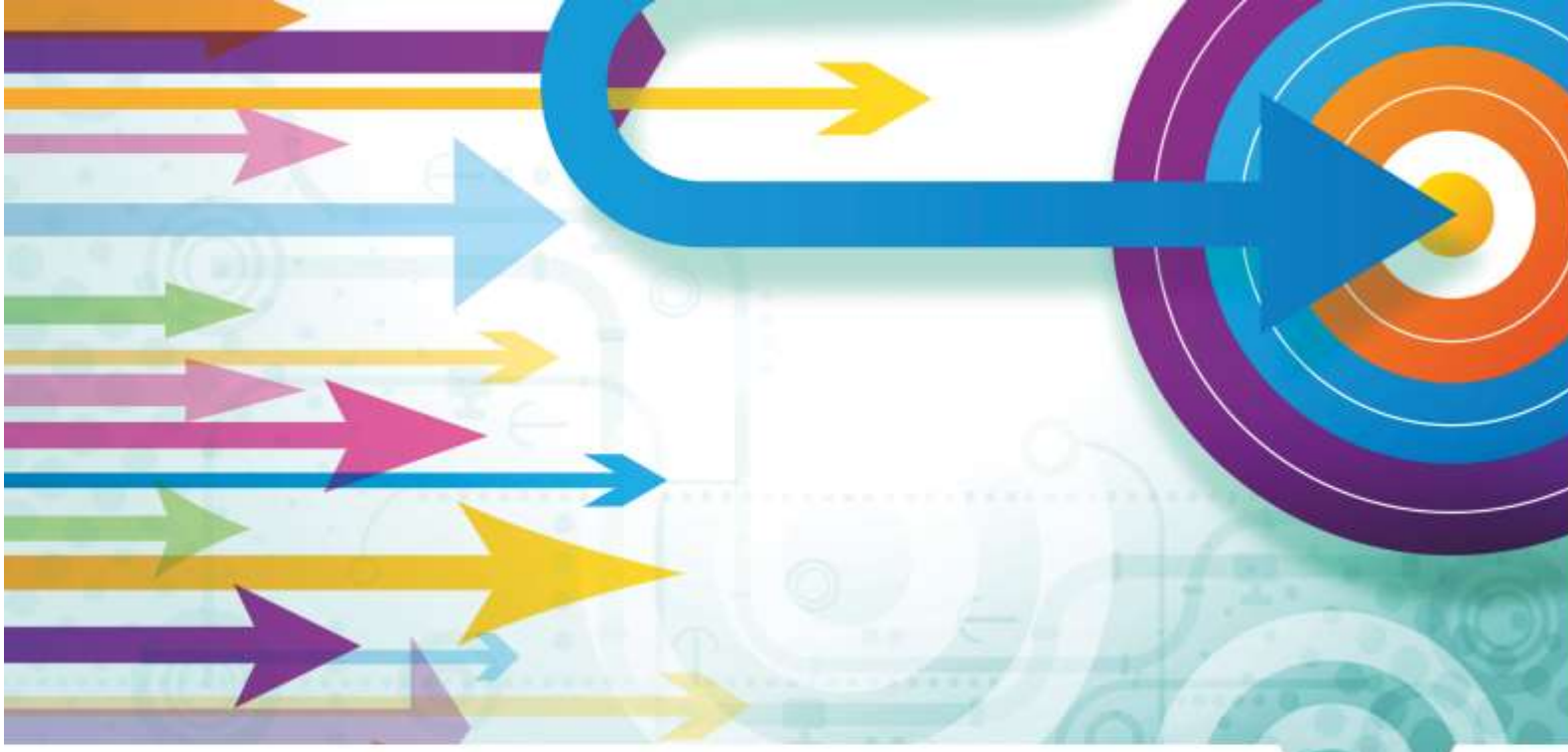
Version History

Version	Date Published	Authored By	Summary of Key Changes
1.0	27/09/19	Brigitte Hatfield	N/A – first publication
1.1	15/11/19	Brigitte Hatfield	Change in advice on changing bank details



Section A – Sessional Teacher Guidance

Introduction

Individuals working for or associated with the University who have a person profile in SuccessFactors are responsible for keeping certain information about themselves up-to-date within the system. Where an individual holds more than one assignment or contract with the University, they may need to update SuccessFactors with any changes to their personal details on all of their assignments/contracts.

As a sessional teacher, your personal details are maintained within a separate database by the STP team and therefore any changes to your details will ordinarily be managed by the STP team following existing processes. The only exception to this is any change to your bank details as they are not held in the STP database. Therefore, SuccessFactors provides the key point of reference for the University's payroll department to ensure that you are paid into the correct bank account.

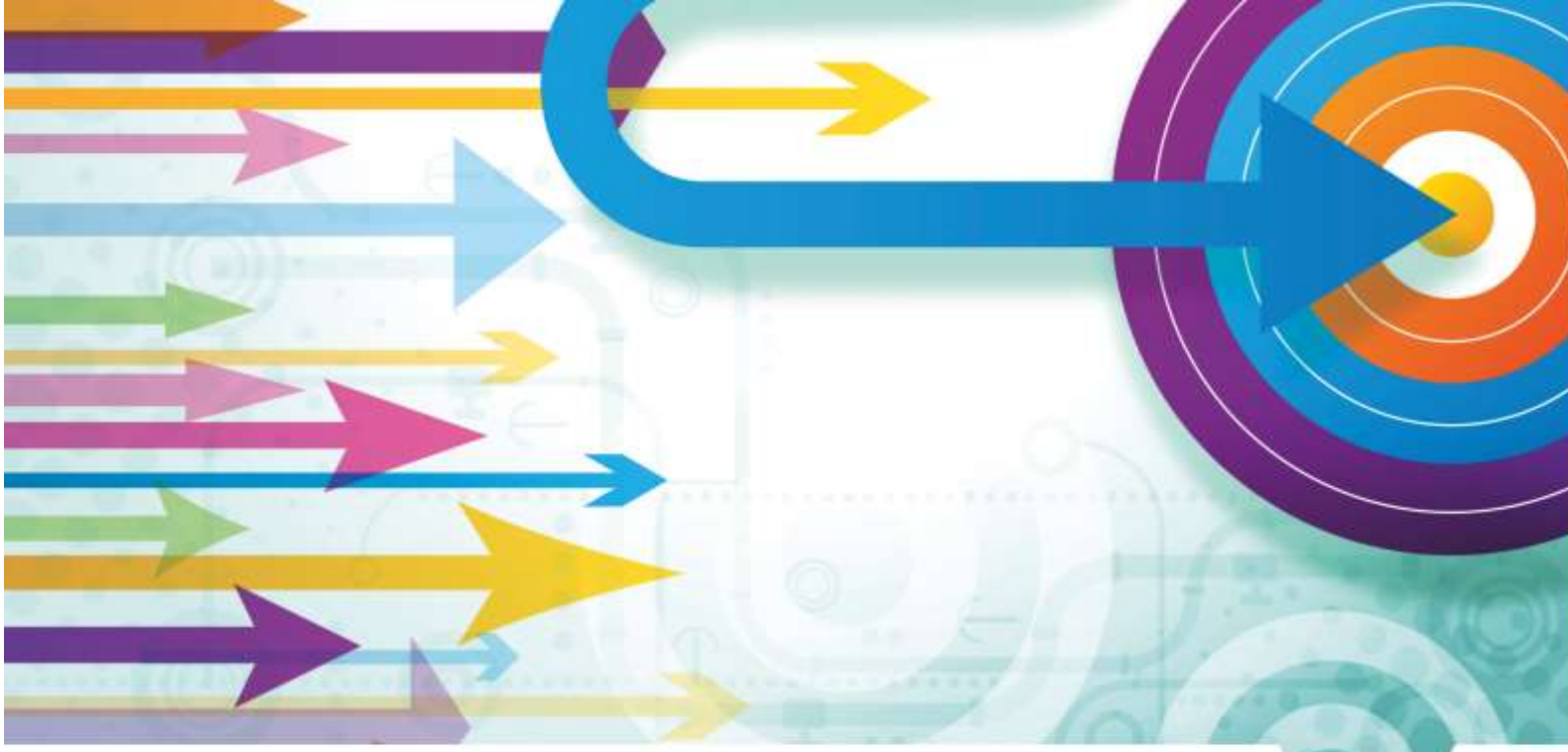
This section explains how you should update your bank details on your STP assignment.

Updating your Bank Details

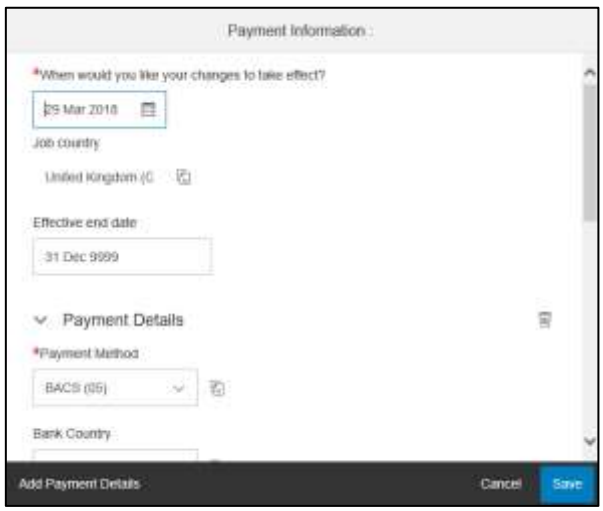
1. Log in to SuccessFactors.

2. On your home screen, click on the **'My Profile'** tile (found in the **'My Info'** section).

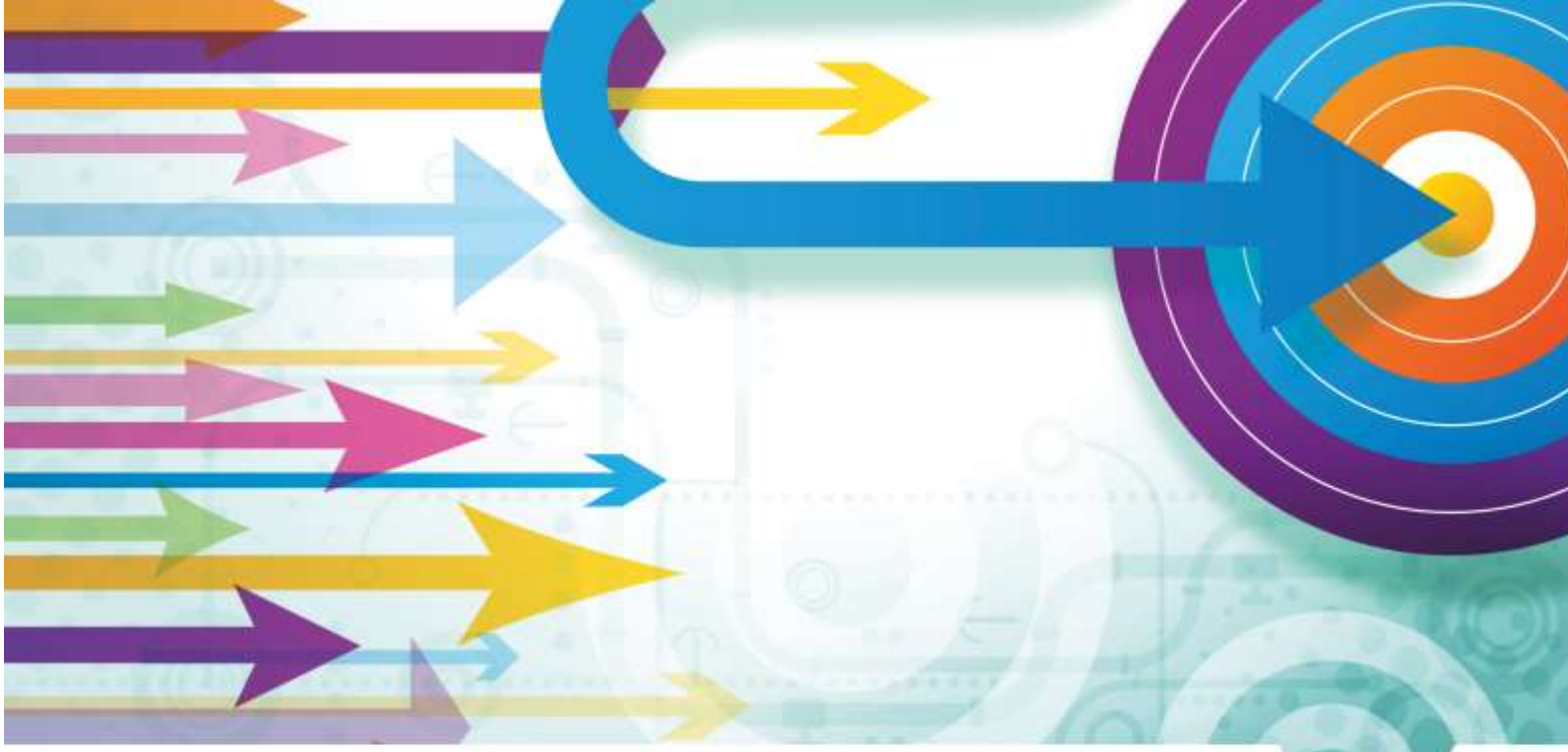
3. Click on the **'Bank Details'** tab within your employee profile, or scroll down to this section.



4. Click on the pencil icon. The following pop up screen will appear:



You will be asked to select/enter the date you would like your changes to take effect from and the date will be defaulted to today's date.



Note: You **must** change this date to the date you started working at the University if you did not provide bank details when accepting your offer of work and this is the first set of bank details being added to your record. Do not be concerned if you didn't open your bank account until after your start date with the University – this won't cause any issues with your bank – it will just ensure that our payroll system has bank details for the whole time you have worked with us and can make payments to you effectively.

If you are changing your existing bank details, please select the date from which you would like your amendment to take effect. However, you should be aware of the cut-off dates for updating information that impacts on payroll processing. If you miss the cut-off date for a particular month, your existing bank details will be used for that month and your new bank details will be used the following month. Please also note that your salary can only be paid into one bank account in any given month so if you change your details part way through a month but before the cut-off date, your whole salary for that month will be paid into your new account. **You should not close down your old bank account until you have received payment into your new account.**

Tip: If you click on the calendar in any field requiring a date, a pop-up calendar will appear on screen for you to find the appropriate date. When you click on the appropriate date, the field will be populated for you. Alternatively, you can enter the date manually in the format shown within the field (DD/MM/YYYY).

5. If you wish to amend a typographical error only, click in the field(s) requiring an update. Select the value needed from the dropdown menu or delete the current values and type in the new ones, as applicable. Skip to step 11 below.

   If you are completely changing your bank details, click on the rubbish bin icon to and follow the steps below. You will also need to click on this icon if you are adding your bank details for the first time and need to delete the placeholder information in your record (i.e. your profile will show a payment method of 'No

automatic payments' to indicate that we don't yet have UK bank details that we can use for payments to you; this will need to be deleted before you can add your UK bank details).

6. If you have used the rubbish bin icon, click on **'Add Payment Details'** in the bottom left hand corner of the pop-up window.

7. For **'Payment method'**, select **'BACS'**. BACS is a widely-used service which enables the University and other organisations to make electronic payments directly into a bank or building society account.

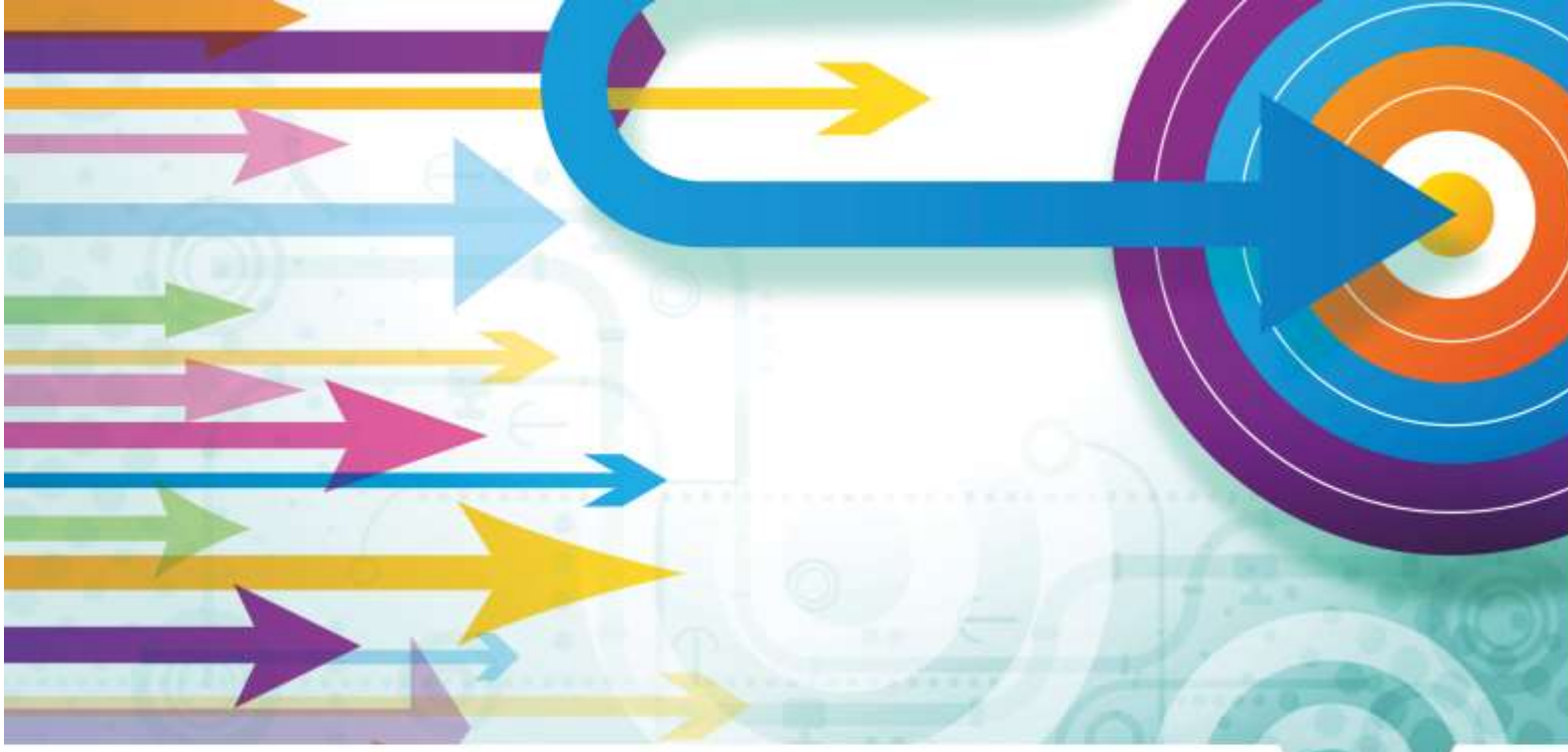
   Note: The option of **'No Automatic Payments'** must only be used by you if your salary is to be paid into a foreign bank account and only when you have submitted a foreign bank account details form to the HR Expenses team. The Bank Country field will auto-populate to 'United Kingdom' and must not be changed. If you have an account from another country, you must fill in the foreign bank account details form instead of entering your details into SuccessFactors.

8. Do not complete any other fields yet. Scroll down to the **'Bank'** field and enter your sort code. This will filter the results to the correct bank branch; click on the correct entry when it appears. This will result in the **'Sort Code'** field being prefilled for you.

9. Scroll back up in the pop-up window to complete the **'Account Owner'** name and the **'Account Number'** fields. You only need to complete the **'Building Society Roll Number'** field if you have a building society account. You do not need to complete the **'Business Identifier Code'** field.

10. Click on **'Save'** in the bottom right hand corner. A message will appear briefly on screen confirming that the changes have been made successfully.

11. You will receive an email confirming that changes have been made to your bank account details. Your updated details will be live in SuccessFactors from the effective date that you specified. The updated details will also be transferred automatically to the University's payroll system (where required), although there may be a short delay in this happening if the payroll system is locked for editing during the monthly payrun process.



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Note: If you make changes to your bank details after the monthly cut-off date and when the payroll system is locked for editing, your salary instalment for the current month will be paid into your existing bank account. The new bank account details will be used from the following month.

12. If you hold more than one contract/assignment, you will need to update your bank details on each of your other contracts/assignments. To do this, you will see the following symbol to the right of your main search box in the top right hand corner of your home screen:

Click on the person icon and you will see a pop up window that gives you the option to switch between contracts/assignments. Once you have switched to another contract/assignment, you will need to repeat the above process from step 2 onwards. Please ensure you do this for each contract/assignment.