

Onboarding – Add/Update bank account details in CAPS

Introduction

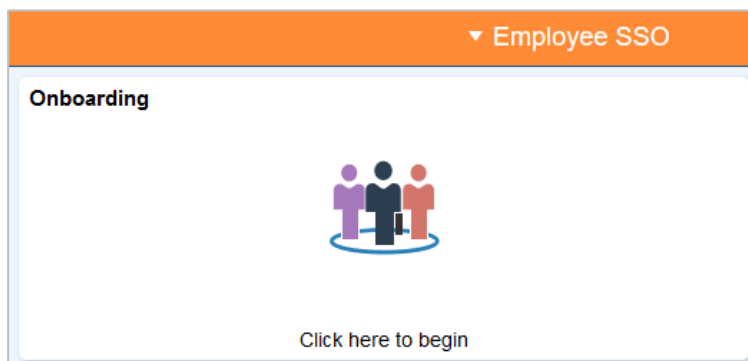
This guide describes how to add or update Personal Bank Details in the Onboarding form. Where information already exists in the system, it will be pre-populated in the form. Therefore you can simply confirm the details and move to the next section. This guide is to assist with adding new bank details.

Procedure

Add New Details

Log in to SSO

1. Click on the **Onboarding** tile.



2. Click on **Personal Details** and select **Personal Bank Accounts**.

Welcome ○ Visited
Personal Details ○ Visited
Name ○ Visited
Addresses ○ Not Started
Contact Details ○ Not Started
Disability ○ Visited
Citizenship/Passport Details ○ Visited
Visa Details ○ Not Started
Personal Bank Accounts ○ Visited

3. Enter your bank account details

Personal Bank Accounts
Casual 8
This page is used to add or update your bank account details. At least one bank account must be recorded here to enable payment of your salary.

Instructions

- To change your current bank account override your existing BSB and bank account number with your new details. When you select SAVE the distribution below will automatically update
- To add an additional bank account Select Add a New Account and enter the BSB, Account Number and Account Name – then select Add a New Distribution below, complete the distribution row and then select SAVE
- To remove a bank account first delete the Payment Distribution below then select SAVE. The bank details will automatically be removed after you've saved and exited the page.

*BSB	*Account Number	Bank Name	*Account Name
941200	123	Bank of Cypress - Marrickville Branch	Casual 8

4. If you want to have your pay distributed to more than one account, click on **Add a New Account** and enter the account details.

*BSB	*Account Number	Bank Name	*Account Name
941200	123	Bank of Cypress - Marrickville Branch	Casual 8
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

5. Navigate to the **Payment Distribution** box.

Select the account number that you would like you pay to go to.

If you would like your pay to be distributed across multiple accounts, Click **Add a New Distribution**.

Select the account to add from the **Account Number** drop down list. Enter how you would like the distribution allocated, **Percentage** or a **Fixed Amount**.

Click **Save**.

Note: If you have more than one engagement with the university, you will be required to enter distribution details for each.

Payment Distribution

Business Title: Casual Employee (Prof Staff)
 Activity: CC May UAT testing
 Department: Human Resources
 Supervisor: Sharon Johnson
 Record: 0 Contract Number: 0001

Distribution Order	Account Number	Bank Name	Account Name	Percentage	Fixed Amount	Default	Partial Allowed	
1	123	Bank of Cypress - Marrickville Branch	Casual 8			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Delete
2						<input type="checkbox"/>	<input type="checkbox"/>	Delete

Buttons: Add a New Distribution, Save, Cancel

Update Existing Details

To change your current bank account simply override your existing BSB and bank account number with your new details in the Personal Bank Accounts section. When you select SAVE the Payment Distribution below will automatically update

*BSB	*Account Number	Bank Name	*Account Name
085050	123	National Australia Bank Ltd - NAB, 134 HUTT ST, ADEL	Banking Test Account

Follow on screen instructions for further details.

Delete Existing Details

To remove a bank account first delete the Payment Distribution below then select SAVE. The bank details will automatically be removed from the Personal Bank Account section after you've saved and exited the page.

Note: you are unable to delete all Payment Distribution details.

Follow on screen instructions for further details.

Contact Us

For further support or questions, please contact the HR Service Centre on +61 8 8313 1111 or hrservicecentre@adelaide.edu.au