Employee self-service – update banking details

Introduction

The purpose of the quick reference guide is to assist VCAA casual employees in viewing and updating your personal bank account details and pay distribution details using Employee Self-Service (ESS)

Prior to adding a new bank account, ensure that you have details of the BSB, account number and account name.

To be effective for the current pay, distribution adjustments must be completed **by 4 pm Friday, the week before payday**. Adjustments entered after this time will apply in the next pay fortnight.

There are two parts to setting up banking details. Firstly, creating a new bank account and, secondly, allocating a distribution amount to that account. **All relevant steps must be completed successfully** to correctly set up a new bank account and direct pay into that account.

At the time of this guide, you will need to be on a trusted network such as the VCAA or department office location or on the VPN, to be able to make any changes to bank details via employee self-service.
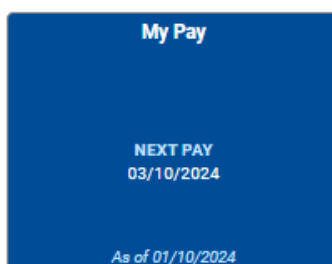
Quick Steps

Step 1: login to eduPay

- Login to eduPay using your user ID (education email address) and password provided.
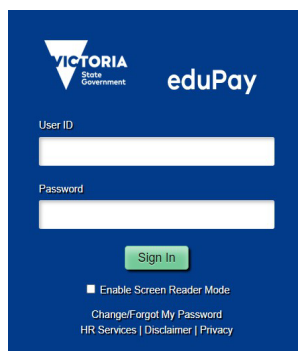
Step 2: Navigate to My Pay

- Employee homepage appears. Locate the *My Pay* tile.
- Click the *My Pay* tile

Step 3: Navigate to Banking

- Click the **Banking** tile to begin the process

- The details of your current bank account details and payment distribution details will appear
- If you have selected to have your salary payments distributed into multiple bank accounts of either different amount or percentage, this page will list the details of the distributions
- If you have multiple roles in the department, this page will also list the distribution details for the different roles

Banking

Bank Accounts

Bank Name/Branch Name	Bank ID/BSB	Account Number	Account Type	Status
Commonwealth Bank of Australia	CBA	XXXX	Regular	Active

Payment Distributions
Currently, you have multiple jobs - Please select the job for this transaction
*Job Title/Pay Entity   Show All Engagement

Job Title/Pay Entity	Bank Name/Branch Name	Account Number	Amount / Percent / Deposit Order	Status
VCAA Casual VCAA-Performance & Lang Oral	Commonwealth Bank of Australia	XXXX	1	Active
Teacher Department of Education	Commonwealth Bank of Australia	XXXX	1	Active

Step 4: Add new bank account details

- To add new bank account details, click the '+' button on top of the bank accounts list.

Banking

Bank Accounts

Bank Name/Branch Name	Bank ID/BSB	Account Number	Account Type	Status
Commonwealth Bank of Australia	CBA	XXXX	Regular	Active

- A pop-up will appear to enter new bank details

- Select the Bank ID by clicking on the look-up function

Account Type	Regular
*Bank ID	[search]
*Account Number	
*Account Name	

- A list of bank IDs and bank names will appear

Cancel   Lookup

Search for: Bank ID
∨ Search Criteria   Show Operators

Country Code AUS
Bank ID
(begins with)
Bank Name
(begins with)

        Search   Clear

∨ Search Results

100 rows

Bank ID	Bank Name
ABS	ABS Building Society Ltd
ADC	Australian Defence Credit Union Ltd
ADL	Adelaide Bank Limited
ADV	St.George Bank (Advance Bank)
AMB	AMB Sydney Mutual Bank
AMP	AMP Bank Limited
ANZ	ANZ Banking Group Limited
APO	Australia Post (Money Orders)
ARA	Arab Bank Australia Limited
ASL	Australian Settlements Limited
AUB	IMB Limited (Aust Unity B.Soc)
AWB	Auswide Bank
BAA	Bank Australia
BAE	Bass & Equitable Building
BAL	Bank of America NT & SA
BAY	Wide Bay Australia Ltd
BBA	Beyond Bank Australia
BBL	Bendigo Bank Limited

- You can also use the *Search Criteria* to look up your bank ID or bank name
- *Note: your bank may have changed names or have a different trading name, e.g. Credit Union Australia may trade as Great Southern Bank, the bank ID in eduPay would be CUA*
- To search by bank name, you can enter the first word of the bank name and click **Search**
- The *Search Results* will be listed
- Click on the relevant bank ID or bank name to select

∨ Search Criteria   Show Operators

Country Code AUS
Bank ID
(begins with)
Bank Name
(begins with)   National

        Search   Clear

∨ Search Results

1 row

Bank ID	Bank Name
NAB	National Australia Bank Ltd

- Once the bank ID is selected, the BSB field will appear
- Enter the BSB number or you can use the look-up function for all available BSB under the bank ID selected and click on the relevant BSB

- Once BSB is selected, enter your *Account Number,* you will be asked to re-type your account number to confirm
- Enter your *Account Name*
- **Please ensure your BSB and Account Number are accurate.**
- You can also attach your account confirmation by click **Add Attachment**, if you choose to.
- Once all details have been entered, click **Save** on the top right-hand side of the pop-up box.

- Your new bank details are now saved and will appear in the list of **Bank Accounts.**
- Repeat **Step 4** where additional bank accounts are required

Step 6: Updating Payment distributions

- Once your new bank account details have been added, the updating payment distributions step **must** be completed
- Payment distribution is where you allocate the amount or percentage of money that is to be paid into the account(s) each pay
- If you have multiple engagements or jobs or roles in the department, the page will show you all your engagements or roles:

- To update the payment distributions, you must first select the role you wish to update, using the drop-down menu ***Job Title/Pay Entity***
- When you select using the drop-down menu, the role will highlight blue. Click on the job title

- If you would like to remove the existing payment distribution details and add a new one, you will first need to make existing payment distribution details inactive.
- Click the existing and active payment distribution details which will highlight blue when you hover on the details

- A pop-up window will appear with the current active payment distribution details

- Change the **Status** to *Inactive* by selecting using the drop-down menu and click **Save**

- A pop-up notification will appear to confirm that you wish to continue to make this payment details inactive. To confirm, click **OK**

> This will Inactive the Payment Distribution.
> This action may result in clearing the payment distribution details. Do you wish to continue?
>
> **OK**   **Cancel**

- Once the existing has been made inactive, you can now add your new payment details, by clicking the '+' button on the top left-hand corner of the **Payment Distribution** table

Payment Distributions
Currently, you have multiple jobs - Please select the job for this transaction
*Job Title/Pay Entity   VCAA Casual - VCAA-Performance & Lang Oral ⌄

Job Title/Pay Entity	Bank Name/Branch Name
VCAA Casual	Commonwealth Bank of Australia
VCAA-Performance & Lang Oral	

- A pop-up will appear to enter or select your new distribution details. Choose your new bank account by selecting in the drop-down menu in **Bank Account**. You will see that the *Priority list for this payment details is now 1 as you have made the previous details inactive

Cancel   **Payment Distribution**   Save
* Indicates required field

Distribution Details

Status	Active ⌄
Default Election	Yes
Payment Method	Bank Transfer
Bank Account	⌄
Use for any Remaining Pay	- National Australia Bank Ltd
Percent	- Commonwealth Bank of Australia
Amount	
*Priority	1
Partial Allowed	Yes

- Then click **Save**
- If you have multiple bank accounts and you would like to distribute your pay into multiple bank accounts, you have the option to distribute a percentage of your pay or a specific amount of your pay to your multiple bank accounts.
- To set up this option (multi payment distribution), the initial account/details must be set up as *Yes* to **Use for any Remaining Pay.** This is your ***Priority** **1** and will ensure that any remaining amount of your pay will go to the selected bank account.

Use for any Remaining Pay   Yes

- You can then repeat the process to add new bank account and set them up as payment distributions. In the pop-up window for **Payment Distribution,** select the additional bank account and you will see that **Use for any Remaining Pay** is now **No** and *Priority is now **2**

Use for any Remaining Pay	No
Percent	
Amount	
*Priority	2
Partial Allowed	Yes

- Enter the **Percent _or_ Amount** you would like for your pay to go into your additional bank account. Then click **Save**

Use for any Remaining Pay [No]

Percent [ ]

Amount [ ]

*Priority [2]

Partial Allowed [Yes]

- Once save, your multiple payment distribution details will appear on the list

Payment Distributions
Currently, you have multiple jobs - Please select the job for this transaction
*Job Title/Pay Entity [VCAA Casual - VCAA-Performance & Lang Oral ▾]

Job Title/Pay Entity	Bank Name/Branch Name	Account Number	Amount / Percent / Deposit Order	Status	
VCAA Casual VCAA-Performance & Lang Oral	National Australia Bank Ltd		1	Active	›
VCAA Casual VCAA-Performance & Lang Oral	Commonwealth Bank of Australia		200.00 2	Active	›

- Repeat the add new bank account details and additional payment distribution details if you have further multiple payment distribution to set up

Step 7: Inactivate previous bank account details

You may have closed a previous bank account and may want to make the details inactive in eduPay. If you have multiple roles in the department, you must ensure that none of the roles still have this previous bank account details linked to your payment distribution details.

- Check that the previous bank account details are not linked to the **Payment Distributions** in any of your roles.
- If any of role's payment distribution is still linked to the previous bank account, click distribution details

Payment Distributions
Currently, you have multiple jobs - Please select the job for this transaction
*Job Title/Pay Entity [Teacher - Department of Education ▾]

Job Title/Pay Entity	Bank Name/Branch Name	Account Number	Amount / Percent / Deposit Order	Status	
Teacher Department of Education	Commonwealth Bank of Australia		1	Active	›

- Change the **Status** to _Inactive_ by selecting using the drop-down menu and click **Save**

Cancel   Payment Distribution   Save
* indicates required field

Distribution Details
ⓘ

Status [Active ▾]
Default Election   Active
Payment Method   Inactive

- Under the **Bank Accounts** list, click on the relevant bank account that you are going to make inactive

Bank Accounts

Bank Name/Branch Name	Bank ID/BSB	Account Number	Account Type	Status	
National Australia Bank Ltd	NAB		Regular	Active	›
Commonwealth Bank of Australia	CBA		Regular	Active	›

- Change the **Status** to _Inactive_ by selecting using the drop-down menu and click **Save**

- There is <u>no</u> pop-up notification to confirm that you wish to continue to make any bank account details inactive. *Please ensure that the change is correct*. You will need to re-enter your bank account details if incorrectly made inactive.