University of Massachusetts Lowell

Managing My Bank Accounts

Step	Action
1.	Begin by navigating to the **Bank Accounts Summary** page. Click the **Self Service** link. ▷ Self Service
2.	Click the **Campus Finances** link.
3.	Click the **Manage My Bank Accounts** link.
4.	The **Bank Account Summary** page is used to review, modify and update your direct deposit bank account information. You want to add another bank account.
5.	Click the **Add Account** button. *Note:* Your bank *must* be a USA bank. ADD ACCOUNT
6.	The **Add Bank Account Details** page is used to enter your bank details information.
7.	Enter the desired information into the **Nickname** field. For this example, enter a valid value e.g. "**People's Bank**".
8.	Click the **Account Type** list. ▼
9.	Select the type of account that you are adding. You can use either a checking or a savings account. For this example, click the **Checking** list item. Checking
10.	You must provide the routing and account information from your bank so that your direct deposit is correctly refunded to you. You are responsible for providing accurate account information.
11.	You can get this information from your personal checks. If you are not sure how to read this information, click the **View Sample Check** link. View Sample Check
12.	Area 1 refers to the bank **Routing Number** and Area 2 refers to your bank **Account Number**.
13.	To return to the **Bank Details** page, click the **Return** link. Return
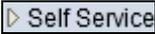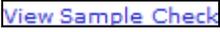
Step	Action
14.	Click the **Look up Routing Number** button. *Note:* If you know your bank routing number, you can enter it in the **Routing Number** field.
15.	You can search for the **Routing Number** by using your bank name. Enter the name of your bank, into the **Bank Name** field. For this example, enter a valid value e.g. "**People**".
16.	Click the **Look Up** button.
17.	The search has returned several choices. Verify which one is correct. If you are not sure, you will need to reference your check or call your bank. For this example, click the **231379115** link.
18.	Enter your bank account number into the **Account Number** field. For this example, enter a valid value e.g. "**5554443322**".
19.	*Note:* You must enter numeric characters only into the **Account Number** field. If you enter any non-numeric characters, your refund deposit will be REJECTED.
20.	Enter your bank account number again, into the **Confirm Account Number** field. For this example, enter a valid value e.g. "**5554443322**".
21.	Enter the bank account holder's name, into the **Account Holder** field. For this example, enter a valid value e.g. "**Jane Doe**".
22.	Click the **Next** button.
23.	The **Results** page shows that you have successfully added the new bank account.
24.	You want to modify your **Direct Deposit** choice. Click the **Modify Direct Deposit** button.
25.	Click the **Modify Direct Deposit** button.
26.	The **Modify Direct Deposit** page shows the direct deposit distrubtion information.
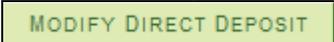
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27.	Only one bank account can be designated at a time. If you want to select a different account, click the **Bank Account Nickname** list. wells fargo-3344 ▼
28.	Select the bank account from your list. In this example, click the **people's bank-3322** list item. people's bank-3322
29.	Click the **Submit** button. SUBMIT
30.	The **Results** page shows that your new bank account has been designated.
31.	If you want to view a summary, click the **Go To Direct Deposit Summary** button. GO TO DIRECT DEPOSIT SUMMARY
32.	Your **Bank Account Summary** has been updated and you now have two accounts listed.
33.	Congratultions! You have successfully managed your bank accounts. **End of Procedure.**