

Instructions to set-up bank information in
Self-Service for Student Account refunds,
reimbursements and payments
(all non-payroll payments)

This authorization will remain in effect while you are at Southwestern University. It is your responsibility to update this information immediately if your bank information changes.

BEFORE YOU BEGIN:

- You will need the routing number for your financial institution and your account number. Your online banking website might provide this information.
- Your debit card number is typically NOT your account number.

Contact Stephanie Brooks in the SU Business Office at brookss@southwestern.edu or 512-863-1408 with questions about this document.

THE FOLLOWING INSTRUCTIONS ARE TO SET UP OR CHANGE YOUR DIRECT DEPOSIT INFORMATION.

Select Banking Information from the Self-Service Home page:

The screenshot shows the Southwestern University Self-Service Home page. The header includes the university logo and the text "SOUTHWESTERN UNIVERSITY". Below the header, a welcome message reads "Hello, Welcome to Colleague Self-Service! Choose a category to get started." The main content area is a grid of service tiles. A yellow arrow points to the "Banking Information" tile, which is described as "Here you can view and update your banking information." Other tiles include Student Finance, Financial Aid, Tax Information, Student Planning, Employee, Grades, Course Catalog, Academic Attendance, Graduation Overview, and Advising.

Select "Add an Account" to enter a new deposit account:

The screenshot shows the "Banking Information" page. The breadcrumb trail is "Financial Information > Banking Information". The page title is "Banking Information". Under the "Active Accounts" section, there is a "+ Add an Account" button. Below this, there is a "Refunds, Reimbursements & Payments" section with a "View All" button. A blue information banner at the bottom states: "You have no active refund/reimbursement account. Your entire refund/reimbursement will be paid by paper check." A yellow arrow points to the "+ Add an Account" button.


Select Activate: to turn on the “Refund, Reimbursement & Payment Deposit” option

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New Deposit Add a Bank Account

Bank Account Usage

Refund, Reimbursement & Payment Deposit Activate 

Leave the Effective Date as is and select “Next”:

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New Deposit Add a Bank Account

Bank Account Usage

Refund, Reimbursement & Payment Deposit Activate

Effective Date

Complete the account details information and agree to the Terms and Conditions:

If you get an error message after entering the routing number, contact Stephanie Brooks in the SU Business Office at brookss@southwestern.edu or 512-863-1408.

Edit Bank Account Details

New Account

Account Nickname
New Account

Country of Bank
United States

Routing Number *
View sample check image

Bank Account Number *
View sample check image

Re-enter Bank Account Number *
View sample check image

Account Type
Checking

Terms and Conditions
I hereby authorize Southwestern University to initiate credit entries and debit entries or adjustments only if necessary to the extent any prior credit entries may have been incorrect to the following financial institutions and accounts listed below.

I agree to the terms and conditions

Back Submit



Click "Submit" to save.

After the Information is submitted:


- 1. An email notification will be sent to your SU email address.**
- 2. You will then be returned to the Banking Information page.**
- 3. Your new account will indicate “Not Verified” until the Business Office processes the information (every 2-3 days). It will then indicate “Verified” after the process is run.**

Banking Information

Active Accounts + Add an Account

Refunds, Reimbursements & Payments	Verification	View All
New Account	Not Verified 	

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THANK YOU FOR CHOOSING DIRECT DEPOSIT!