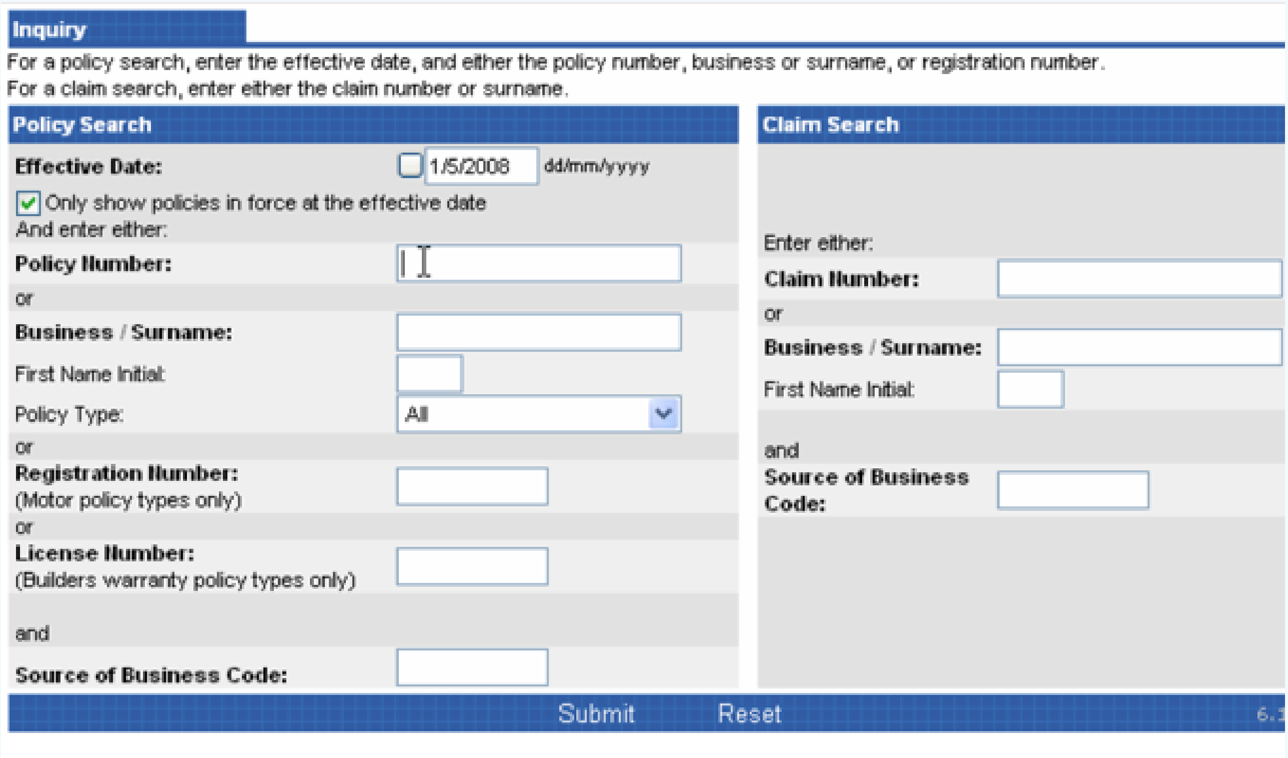
# Changing client bank details & updating direct debit authorisation

## Stage 1. Login to c.change and navigate to inquiry screen

- Login to **c.change**
- From **WriteNow** tab, select **Find a Policy**


## Stage 2. Enter the policy number

- Key in **Policy Number**
- Select **Submit**

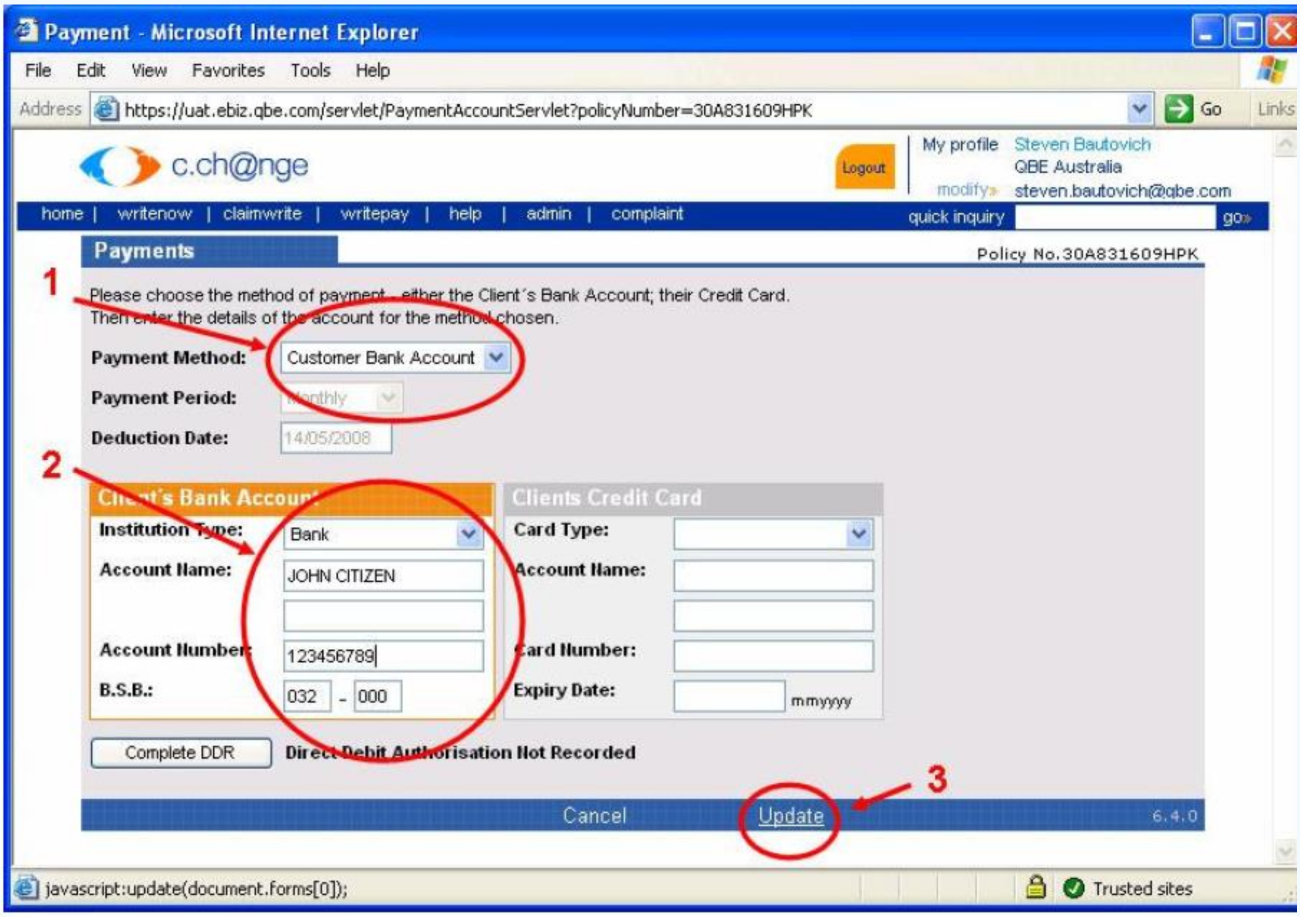


## Stage 3. Navigate to the payments screen

- Select **Policy Options**
- Click on **Client Bank Account/Credit Card**

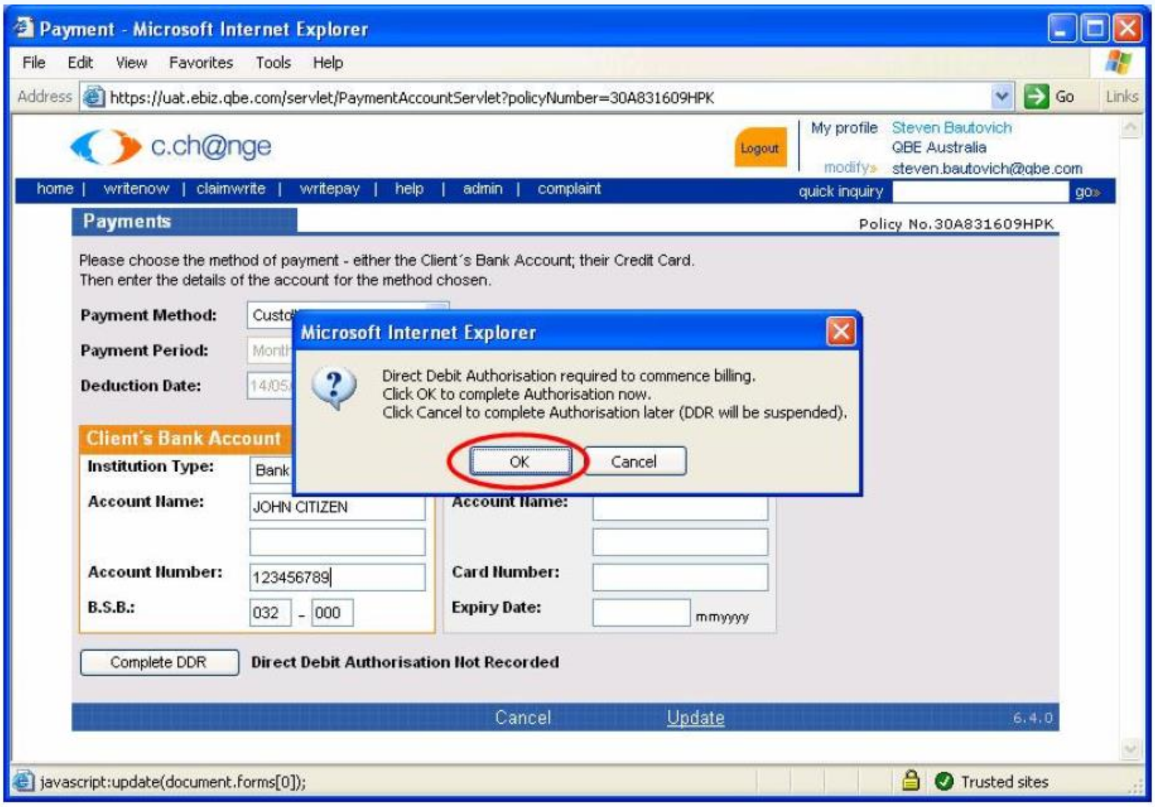

## Stage 4. Enter new bank account / credit card information

- Select **Payment Method**, as required (i.e. bank account or credit card)
- Update **Client's Bank Account** details, as required
- Click on **Update**



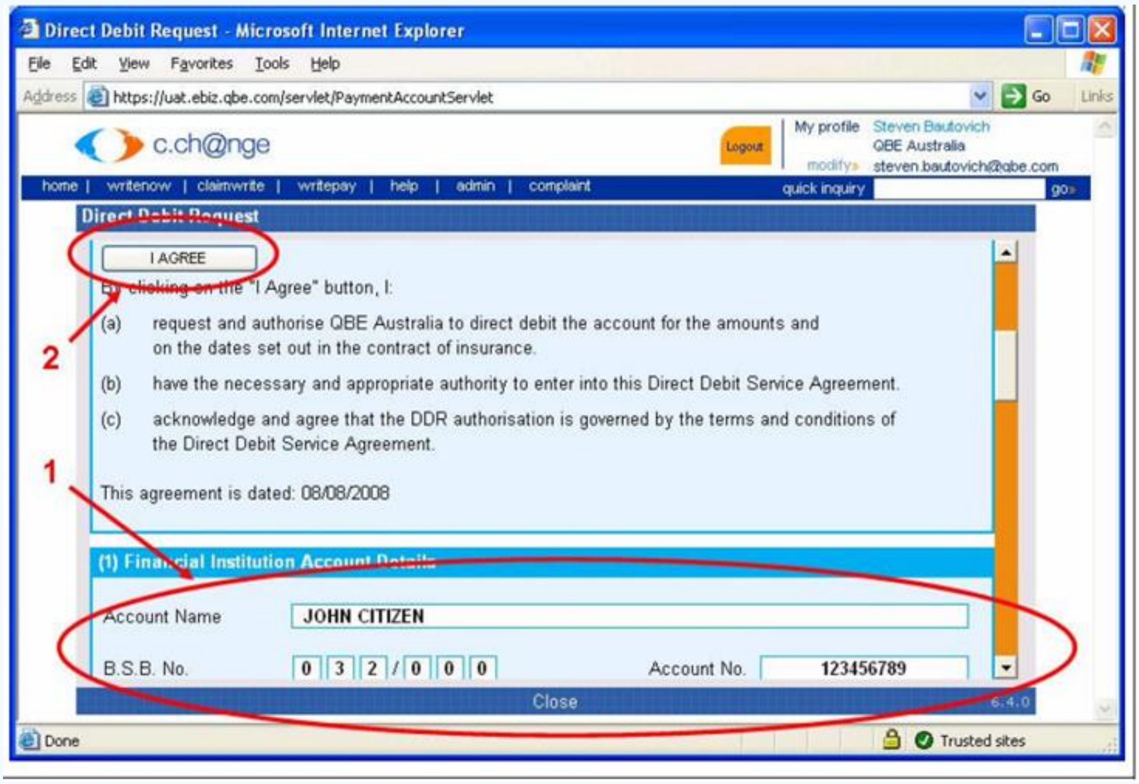
## Stage 5. Confirm that you want to complete the direct debit authorisation

- If the bank details have been changed a prompt will be displayed
- To complete the direct debit authorisation (DDR), click **OK**
- If you click cancel at this point, the DDR will be suspended until you complete the authorisation - to complete later, click "**Complete DDR**" and resume from stage 6 below



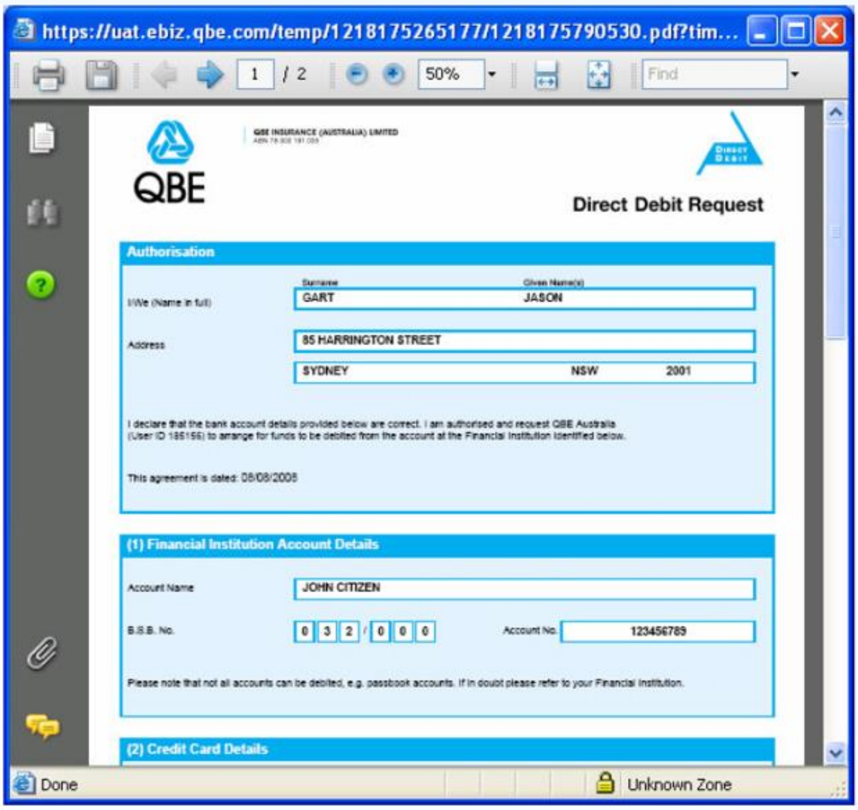

## Stage 6. Check the new details and confirm that you agree

- **Check** the bank account information you've entered is correct before finalising
- To confirm the online authorisation: click "**I agree**"



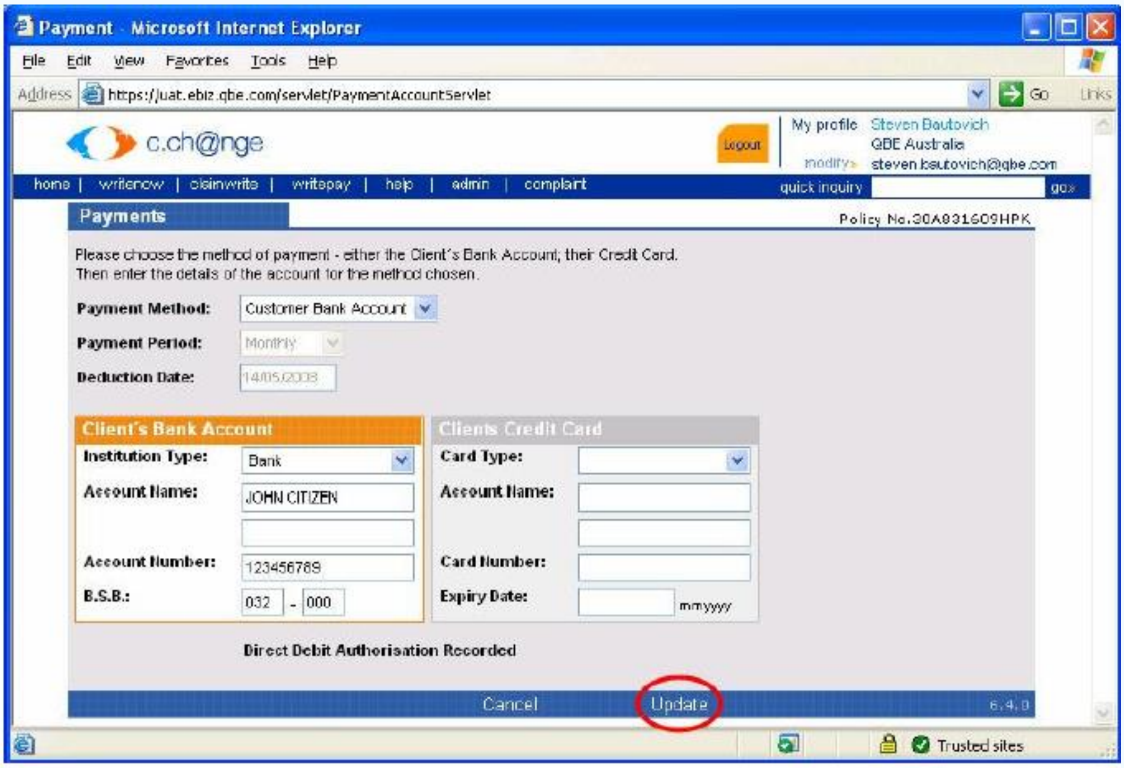
## Stage 7. Options to print and/or save an electronic copy of the authority

- The completed DDR will display for printing
- An electronic version can be saved for future verification of the online authority, or to email to the client for their records
- This file had an added benefit in that it also includes a copy of the direct debit service agreement that should be supplied to a client whenever they take out an instalment policy




## Stage 8. Finalise your changes

- After completion of the DDR click on "**Update**" to finalise the authorisation
- **If you do not complete this final step the changes will not be saved**



## Stage 9. Confirmation

- You will receive confirmation once the new bank details have been saved