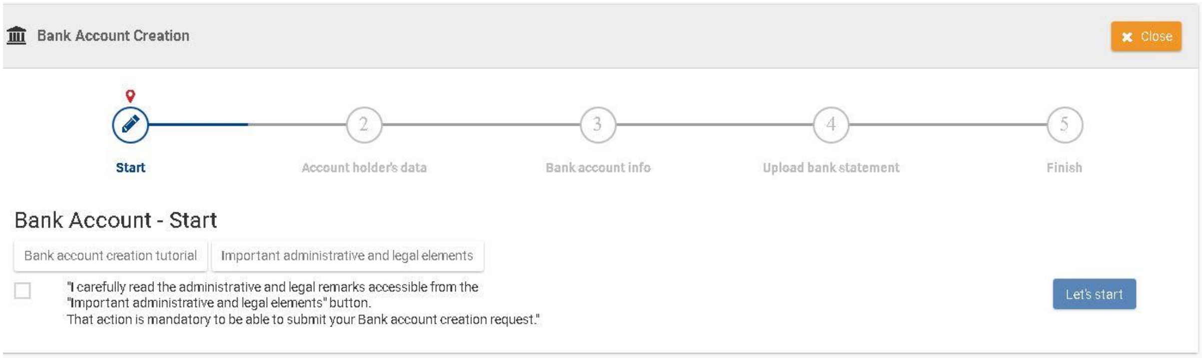
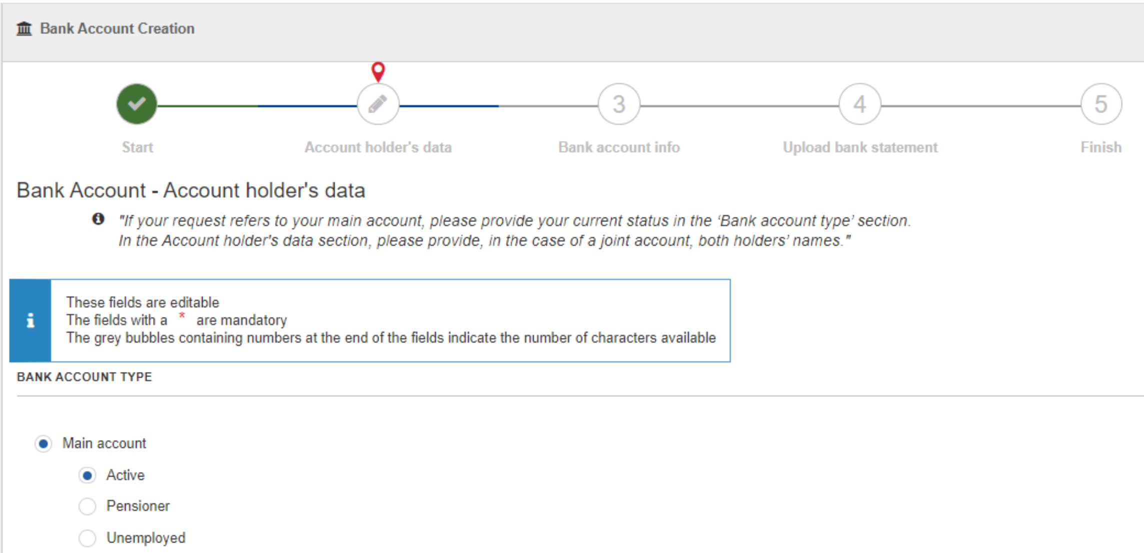
BA creation tutorial

1. Once you click on the “Request Bank account” button, a wizard will guide you through the 5 steps of the process. At the first step “Start”, you need to read the administrative and legal remarks and to confirm that you have done so.



2. Click on "Let’s start" to proceed with creating the new bank account. You will reach step 2: “the account holder’s data”.

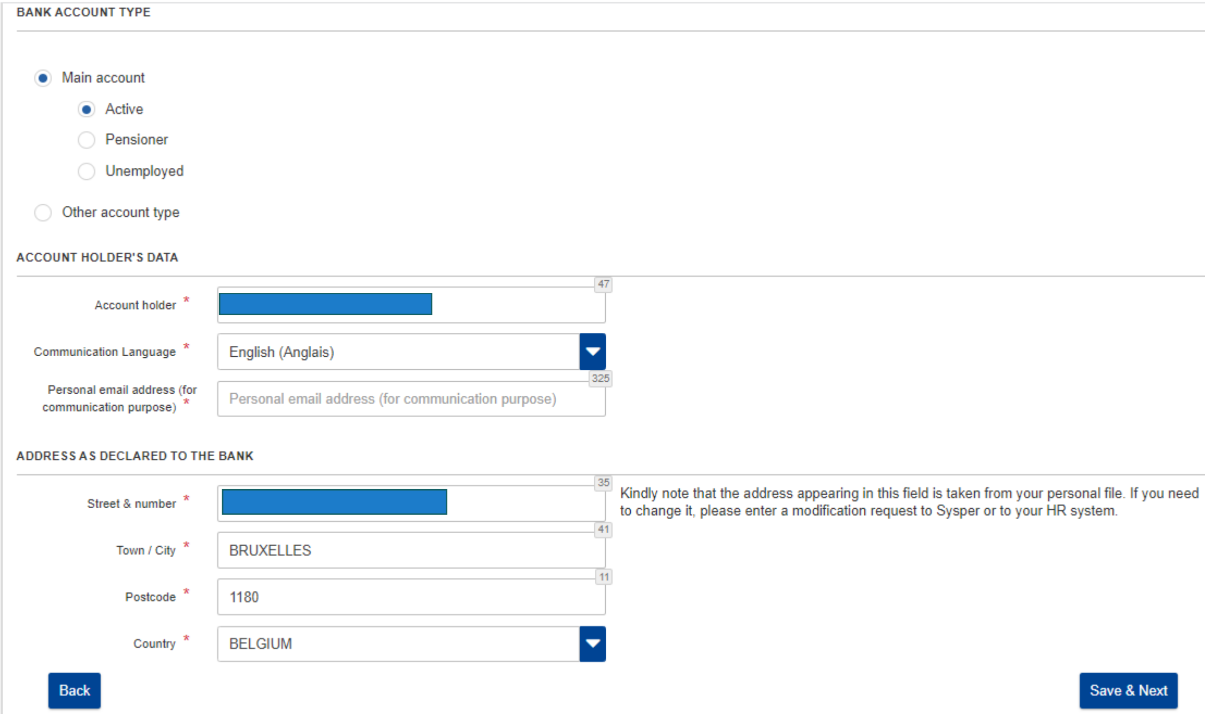


Please note that your main account must correspond to one of the options below:

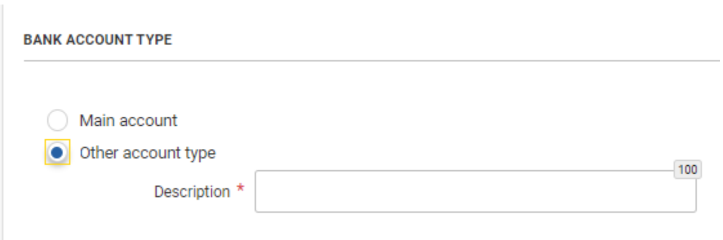
Active: if you are currently working for the European Institutions
Pensioner: if you are a pensioner
Unemployed: if you are unemployed

The account must be in your name. If it is a joint account, you must provide both account holders’ names in the “account holder” field.

The Account holder name, Communication Language, Personal email address and your private address are automatically filled in with your personal data already available in the EC systems (if any). You can update these data if necessary.

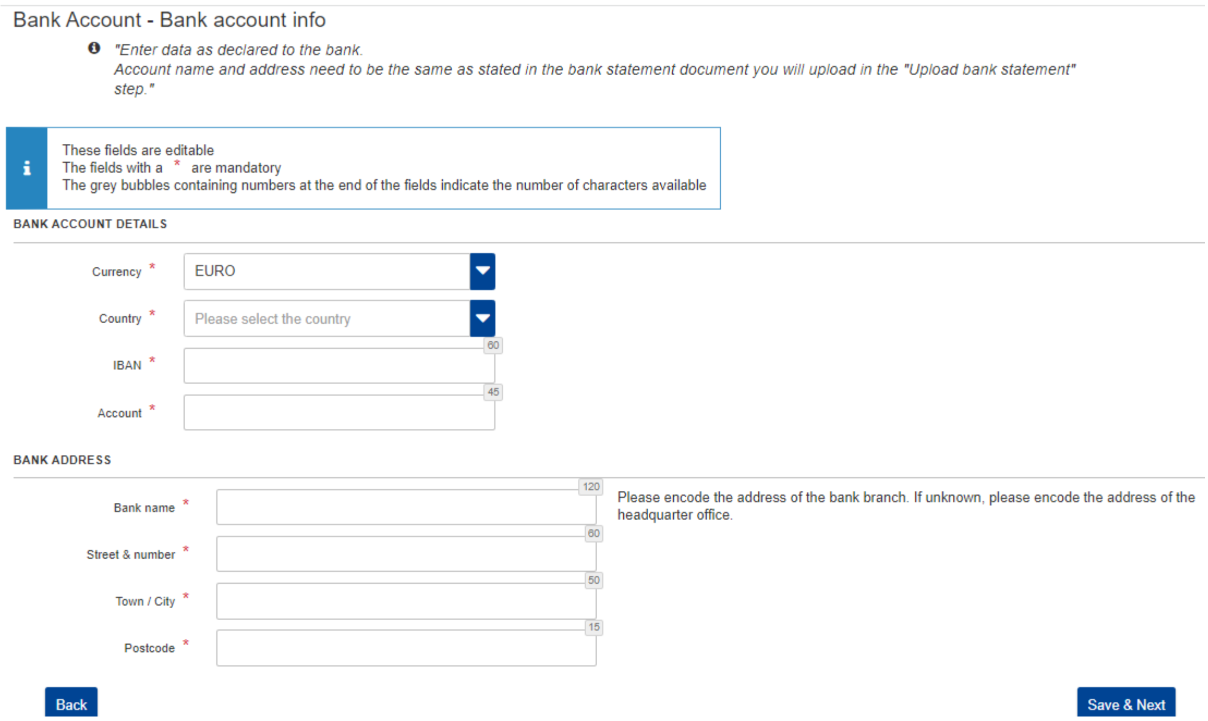


If you select “Other account type”, you will have to describe the type of bank account you wish to create.



3. Fill all the empty fields then click on "Save & Next"

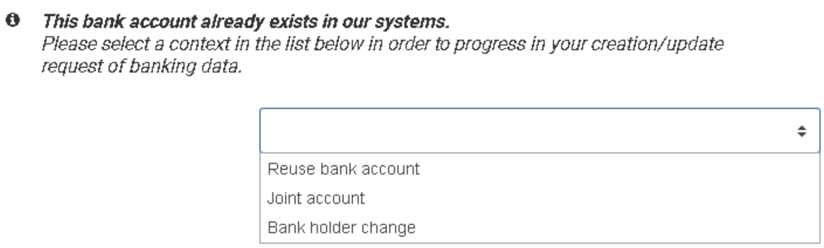
4. Do the same for Step 3: "Bank account information". Then..."Save & Next". Fill in the IBAN code (Internal Bank Account Number) if it exists in the country where your bank is established. Example: Your IBAN could be BE03 3030 1010 2020.



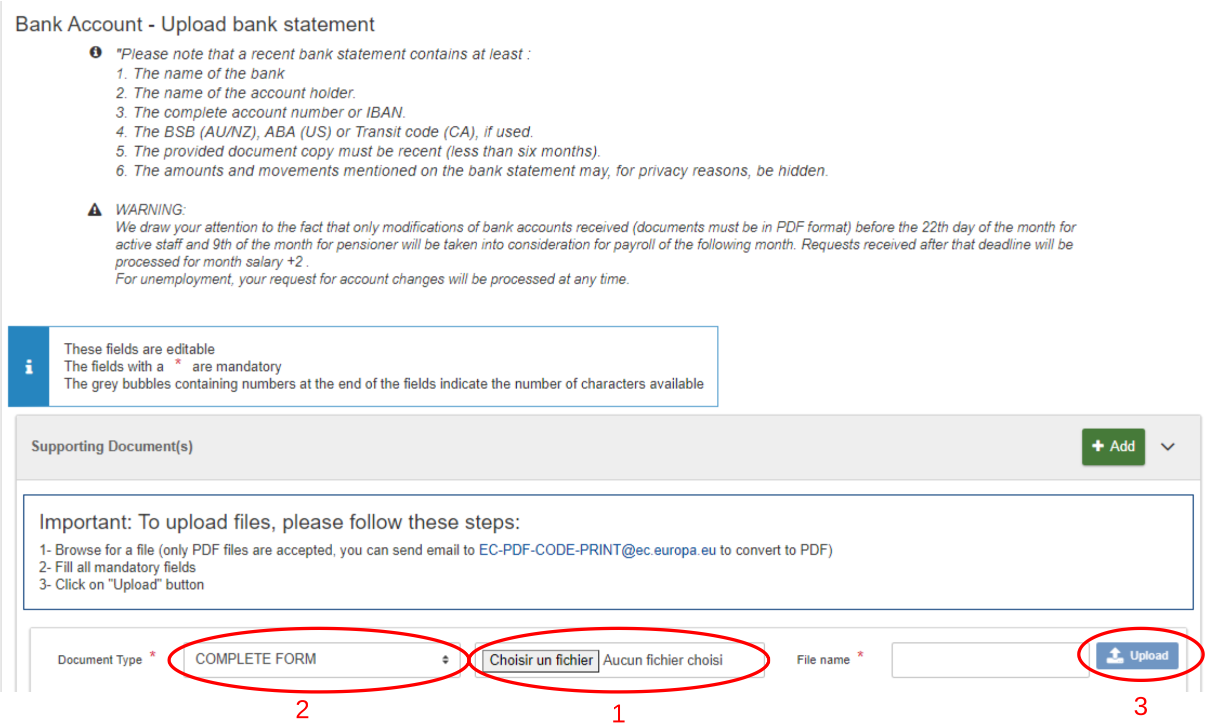
Please note that the system will check the following elements:

- The IBAN format based on the IBAN rules in your country.
- If the IBAN you selected is already registered in our systems, a contextual option will appear. This will allow you to explain why you need to reuse it by selecting the option corresponding to your needs:

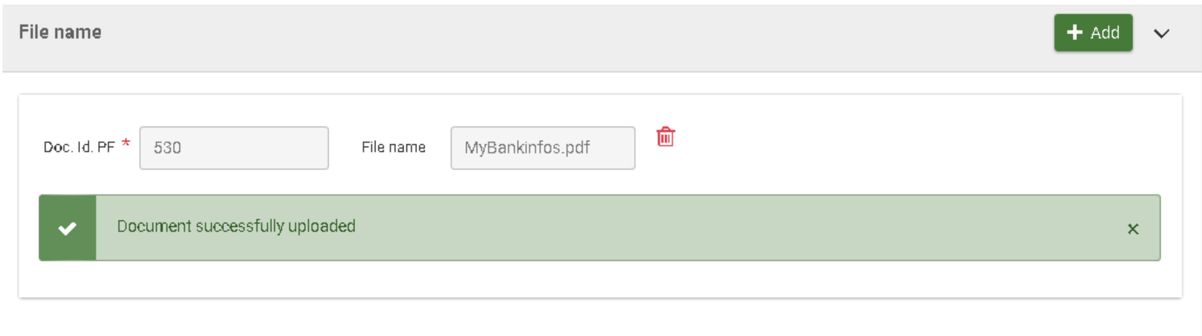
o Reuse of a bank account.
o A joint account.
o A bank holder change:



5. Upload the required documents (PDF format, no more than 2 documents) by clicking on the Upload button.

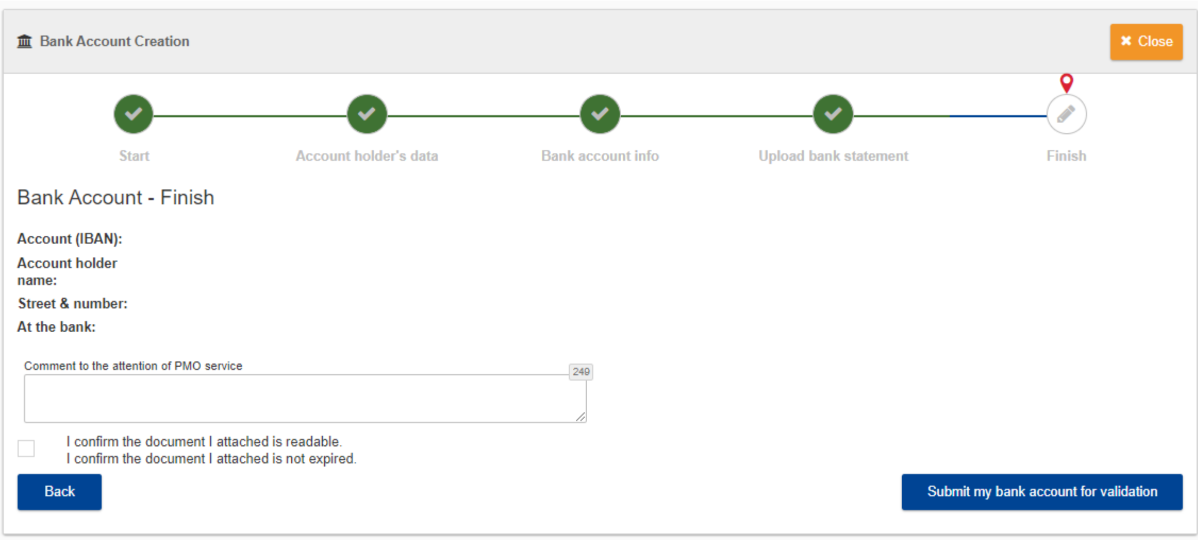


If the operation is a success, you will receive a green message of the following type:



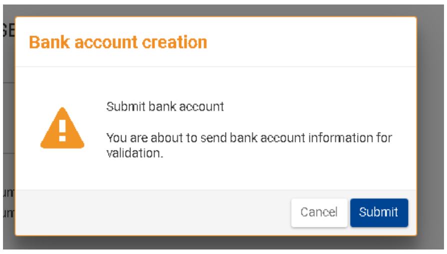
If it fails, you will receive a red warning.

6. Click on "Save & Next" to reach the final step. Here you can read the summary and write an optional comment.



7. Check the last mandatory checkbox and click on "Submit my bank account for validation" button. Please ensure to tick the checkbox “I confirm the document I attached is readable”

8. A last warning will ask you to confirm the sending.



9. Your request to create a new bank account has now been submitted to the PMO office. You will receive a mail notification when its status changes.