

How to remove a user online

This functionality means anyone with administrator permissions can request the removal of an individual from the organisation's account using Online Banking.



You can quickly and easily update individuals associated with the organisation. There is no need to print off a form and get it wet signed.



The functionality can be used by any organisation with standard signing rules, as long as the change doesn't invalidate the banking mandate.



The changes will apply across all accounts for the organisation.

Please note:

Organisations with non-standard signing rules, sole traders, and partnerships will need to use the account management form to remove a user, found here:

www.unity.co.uk/update-your-account-details



Making the change

Administrators can remove users on the 'People' tab within an account.

- 1 To start the process, find the name of the person you want to remove and click the 'bin' icon button at the end of the line.

unity trust bank

Accounts
Payments
Authorisation
Beneficiaries
Account management
Help and support

People connected to this account

Person	Status	Last log in	View	Submit	Authorise	Admin	Signatory	
Unity Union								
Mr Michael Barker	Active	21/04/26 14:35	✓	✗	✓	✗	✓	
Mrs Carole Banks	Revoked	27/04/22 10:03	✓	✗	✓	✗	✓	
Mr Andy Faraday	Active	27/03/26 14:23	✓	✗	✓	✗	✓	

- 2 This will bring up the removal screen.
Please enter the reason for the removal and check the information shown.

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People / Remove individual
Remove Mr Michael Barker

Mr Michael Barker

Status: Active Last log in: 21/04/26 14:35 View: ✓ Yes Submit: ✗ No Authorise: ✓ Yes Administrator: ✗ No Signatory: ✓ Yes

Remove all access
Completing this action will remove all access to your accounts for the selected individual.
Please use our [account management form](#) if you don't want to remove an individual entirely but would like to change their permissions, such as withdrawing online banking access or signatory status.

Why do you want to remove this person?
Other

Then, click the 'Remove individual' button.

To make sure you don't delete anyone by accident, you'll need to confirm that you wish to proceed.

Please review the following before proceeding
Once approved, we will remove access to all accounts for the organisation Unity Union.

Please note
The process to remove individuals from any Corporate Purchasing Card, Encashment facility or BACS facility may take up to 20 working days from approval.

☒ Remove individual ☐ Cancel

Are you sure?
This action cannot be undone. Please confirm you are happy to proceed.

☒ Yes, proceed ☐ Cancel

You will then see confirmation that the request has passed through for processing.

Request confirmation

3

You will then see confirmation that the request is awaiting authorisation before processing.

The confirmation screen will also show your organisation's correspondence details. Please check these are correct as this is where statements and documents will be sent.

The screenshot shows the Unity Trust Bank interface. On the left is a navigation menu with links: Accounts, Payments, Authorisation (highlighted with a blue circle and the number 1), Beneficiaries, Account management, and Help and support. Below the menu is the user profile for Josephine Smith, Unity Union, with links for My details, My messages, and Log out. The main content area has a green header bar with the text 'People / Remove individual' and 'Remove Mr Michael Barker'. Below this is a green box with a checkmark icon and the text 'Removal request is awaiting authorisation' and 'The request to remove Mr Michael Barker from the organisation Unity Union and all its accounts is awaiting authorisation.' Below this is an 'Important' section with a warning icon and text: 'Please check the correspondence details that we hold for your organisation. If the details are incorrect, please update them by following the instructions below.' This is followed by a section titled 'Organisation correspondence details' with two columns of information: 'Addressee' (Ms Kathy Rice-Oxford), 'Email address' (No primary contact email address registered), 'Correspondence address' (Unity Union, Four Brindleyplace, Birmingham, Unity Kingdom, B1 2JB), and 'Contact number' (1111111111). Below this is a section titled 'How to change your organisation's correspondence details' with three bullet points: 'Go to our [account maintenance form](#) and select 'Update key contact'', 'Complete the requested information', and 'Get the submission form signed in accordance with your mandate and send it to us'. At the bottom of this section is a blue box with an information icon and the text 'Coming soon' and 'We're working on allowing you to change your organisation's correspondence details from within online banking and having those changes approved online in accordance with your mandate. We'll let you know when this feature is available.' Below this is a green button labeled 'Back to account'. At the very bottom of the page are four links: [Terms and conditions](#), [Privacy notice](#), [Accessibility](#), and [Cookie policy](#).

If your correspondence details need updating, please follow these steps:

- Go to our account management form and select 'Update key contact'
- Complete the requested information
- Get the submission form signed in accordance with your mandate and send it to us

Authorisation functionality overview



Authorised users can also make changes to the Bank mandate.



This is available to signatories. Please be aware, mandate changes need to be approved in line with the Bank mandate, not Online Banking authorisation rules.



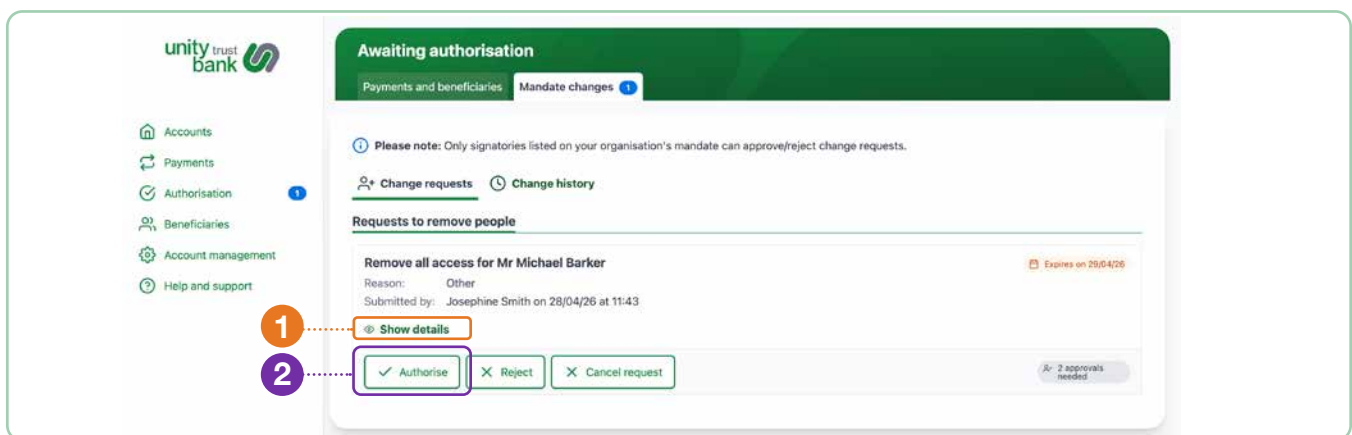
Signatories on the mandate will see an additional tab within Authorisation. This will show any mandate changes that need to be authorised.



The number shown on the side bar against Authorisation will be a count of outstanding payment requests and mandate requests.



All requests will need to be signed by the required number of signatories on the mandate to be fully authorised.



1

Authorisers can expand requests, which will show the current access levels the individual has.

Request clearly shows how many approvals are needed, who submitted the request and any approvals already given.

2

When clicking on 'Authorise', a pop up appears, asking for your password to confirm approval.

3

Banner appears when the request has been authorised.

