



Add and update bank account

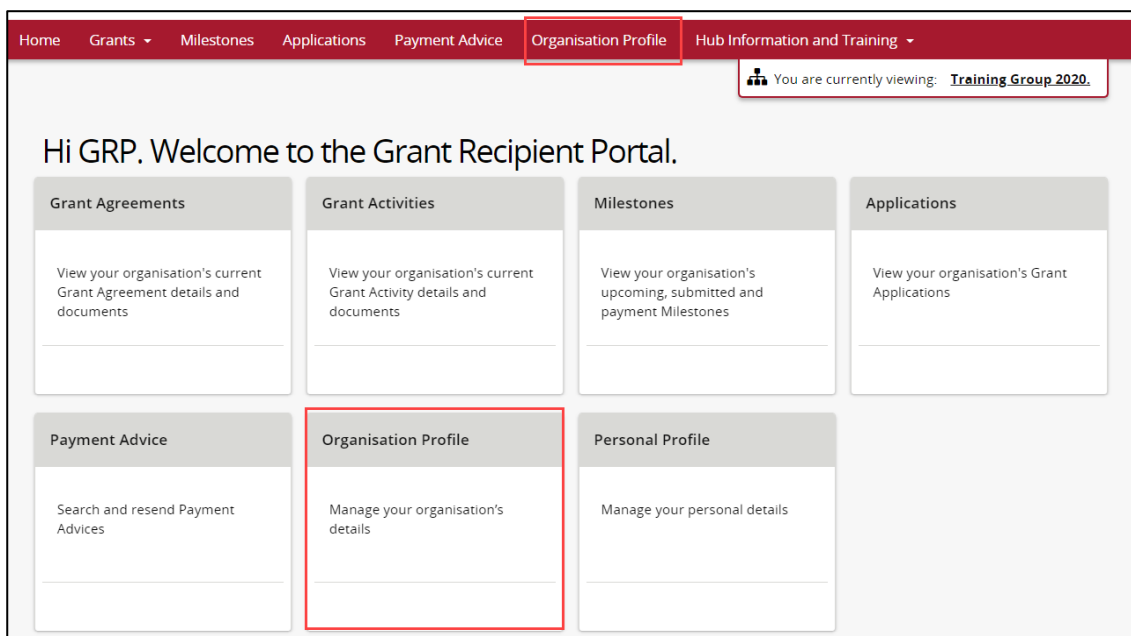
Process on how to add and update bank account details in the Grant Recipient Portal

Portal access required: Administrator.

The portal enables grant recipients to view and request changes to their bank account details. This task card describes the process for viewing and making changes to bank account details.

Navigating to bank accounts

From the Home screen select the **Organisation Profile** tile or select the **Organisation Profile** link from the navigation menu.



Select **Bank accounts** from the Organisation profile menu.

You are here: Home / Organisation Profile

Organisation profile menu

- Organisation details
- Postal address
- Staff
- Bank accounts**

Organisation details

Organisation details can be updated if you are an Administrator

[Update](#)

Organisation ID: 4-DQTB8NB	Organisation name: Training Group 2020	Legal name: Training Group 2020
ABN: 36342015855	Business address: Sir Keith Campbell Centre 15 Bowes St P	Phone: 02 0000 0000
General email: tg2020test@test.dss.gov.au	Financial email: TG2020Test@test.dss.gov.au	Web address:

Updating a bank account name

A list of bank accounts will display. On this page, a filtering option is available to view:

1. All Bank Accounts
2. Active Banks Accounts
3. Unapproved Bank Accounts
4. Inactive Bank Accounts.

You are here: Home / Organisation Profile

Organisation profile menu

- Organisation details
- Postal address
- Staff
- Bank accounts**

Bank accounts

Filter: 1. All Bank Accounts [Apply Filter](#)

[Request bank account](#)

Account number	Status	End Date
20146907	Active	

Select the **View** button to display additional information about the bank account.

You are here: Home / Organisation Profile

Organisation profile menu

- Organisation details
- Postal address
- Staff
- Bank accounts**

Bank accounts

[Request bank account](#)

Account name	BSB	Account number	Status
Org Name Account	325185		Active

[View](#)



The bank account details screen will display. To update the Account name select **Update**.

Note: The existing BSB and Account number cannot be changed. If a change is required to these fields a new bank account must be requested.

You are here: Home / Organisation Profile

Organisation profile menu

- Organisation details
- Postal address
- Staff
- Bank accounts**

Bank account details

* required

Account details

Account name:	BSB:	Account number:
Org Name Account	325185	

Update

The mandatory fields marked with an asterisk (*) must be populated at all times. Once the Account name has been changed, select **Save and return**.

Update bank account details

* required

Account name:*	BSB:	Account number:
Org Name Account	325185	

[Discard changes and return](#) **Save and return**

Add bank account to Grant Activities

To view or update Grant Activities linked to an existing bank account, select **View** against the appropriate bank account.

You are here: Home / Organisation Profile

Organisation profile menu

- Organisation details
- Postal address
- Staff
- Bank accounts**

Bank accounts

Request bank account

Account name	BSB	Account number	Status	
▶ Second Account	325185		Active	View
▶ Org Name Account	325185		Active	View

This will display the Grant Activities linked to the chosen bank account, select **Add Grant Activity**.

You are here: [Home](#) / [Organisation Profile](#)

Organisation profile menu

- Organisation details
- Postal address
- Staff
- Bank accounts**

Bank account details * required

Account details

Account name: BSB: Account number:

Second Account: 325185

Update

Grant Activities linked to this bank account

Grant Activities listed below are currently linked to this bank account.

Add Grant Activity

No Records Found

The Link Grant Activities to bank account screen will display.

You are here: [Home](#) / [Organisation Profile](#)

Organisation profile menu

- Organisation details
- Postal address
- Staff
- Bank accounts**

Link Grant Activities to bank account

Account name: Second Account BSB: 325185
Account number:

Grant Activities available for linking

- Select one or more Grant Activities below to link to the bank account above.
- For each Grant Activity you select the existing bank account will be replaced by the bank account above.
- Linking a bank account to multiple Grant Activities may take a few minutes to process.

<input type="checkbox"/>	Activity ID	Activity name	Program name	Existing account name	Existing BSB / account number
<input type="checkbox"/>	4-DVO1955	Training Activity	Financial Crisis and Material Aid - Food Relief	Org Name Account	325185 / <input type="text"/>
<input type="checkbox"/>	4-DQXUL81	Activity Training Title	Financial Crisis and Material Aid - Food Relief	Org Name Account	325185 / <input type="text"/>

[Discard changes and return](#) **Link selected Grant Activities**

Select the **checkbox** against the appropriate Grant Activities and select **Link selected Grant Activities** to link the bank account.

Note: To choose all Grant Activities, select the **checkbox** to the left of Activity ID.

Link Grant Activities to bank account

Account name: Second Account BSB: 325185
Account number:

Grant Activities available for linking

- Select one or more Grant Activities below to link to the bank account above.
- For each Grant Activity you select the existing bank account will be replaced by the bank account above.
- Linking a bank account to multiple Grant Activities may take a few minutes to process.

<input type="checkbox"/>	Activity ID	Activity name	Program name	Existing account name	Existing BSB / account number
<input type="checkbox"/>	4-DVO1955	Training Activity	Financial Crisis and Material Aid - Food Relief	Org Name Account	325185 / <input type="text"/>
<input type="checkbox"/>	4-DQXUL81	Activity Training Title	Financial Crisis and Material Aid - Food Relief	Org Name Account	325185 / <input type="text"/>

[Discard changes and return](#) **Link selected Grant Activities**



A confirmation page will display. Select **Submit** to finalise the update.

Update bank account links

Please review the Grant Activities you wish to link to this bank account.

Account name: Second Account

BSB: 325185

Account number:

Grant Activities to be linked

Activity ID	Activity name	Program name
4- E4IAJG5	Client Agency Support	Financial Crisis and Material Aid - Food Relief

Back

Discard changes and return

Submit

Add a bank account

In the Bank accounts screen select **Request bank account** to add new account details.

You are here: Home / Organisation Profile

Organisation profile menu

Organisation details

Postal address

Staff

Bank accounts

Bank accounts

Request bank account

Account name	BSB	Account number	Status	
▶ Second Account	325185	<input type="text"/>	Active	View
▶ Org Name Account	325185	<input type="text"/>	Active	View

The Request bank account screen will display. Complete the Account name, BSB and Account number and select **Continue**.

You are here: Home / Organisation Profile

Request bank account

* required

Step 1 of 4: Bank account details

Account name:*

BSB:*

Account number:*

Training Group

123656

Discard changes and return

Continue



Proof of bank account details will be required. Select **Add file** to select a file from your computer.

You are here: [Home](#) / [Organisation Profile](#)

Request bank account

Step 2 of 4: Attach proof of bank account

To add a bank account you need to provide proof of the account details. You can provide one of the following verification documents (maximum 10Mb):

- Copy of a bank statement containing the BSB, account number and account name
- Copy of a bank details page from the organisation Grant Agreement

Add file

The file will attach. To **View** or **Delete** a file, select **Actions**.

You are here: [Home](#) / [Organisation Profile](#)

Request bank account

Step 2 of 4: Attach proof of bank account

To add a bank account you need to provide proof of the account details. You can provide one of the following verification documents (maximum 10Mb):

- Copy of a bank statement containing the BSB, account number and account name
- Copy of a bank details page from the organisation Grant Agreement

Add file

File name	Type	Size(kb)	Last uploaded by	Last uploaded date/time
D20 1365861 Task Card - add-and-update-bank-account - BB	DOCX	1,341		10/12/2020 10:14:56 AM

Back

Discard changes and return

Actions

View file

Delete file

Select **Continue** to proceed to next step.

Request bank account

Step 2 of 4: Attach proof of bank account

To add a bank account you need to provide proof of the account details. You can provide one of the following verification documents (maximum 10Mb):

- Copy of a bank statement containing the BSB, account number and account name
- Copy of a bank details page from the organisation Grant Agreement

Add file

File name	Type	Size(kb)	Last uploaded by	Last uploaded date/time
D20 1365861 Task Card - add-and-update-bank-account - BB	DOCX	1,341		10/12/2020 10:14:56 AM

Back

Discard changes and return

Continue

6 | Community Grants Hub

GRP – Add and update bank account details

Select the **checkbox** against the Activities that should be linked to the new bank account and select **Continue** to proceed to the next step.

You are here: [Home](#) / [Organisation Profile](#)

Request bank account

Step 3 of 4: Link bank account to Grant Activities

- Select one or more Grant Activities below to link to the new bank account.
- For each Grant Activity you select, the existing bank account will be replaced by the new bank account.
- Linking a bank account to multiple Grant Activities may take a few minutes to process.

New bank account details

Account name: Training Account 01 BSB: 062784 Account number: 325657894

<input type="checkbox"/>	Activity ID	Activity name	Program name	Existing account name	Existing BSB / account number
<input checked="" type="checkbox"/>	4-SYAK00H	Family Fun Training	3. Building Disability Sector Capacity and Service Provider Readiness	US21932 - Auto T29HC	062923
<input type="checkbox"/>	4-SYAK54V	Activity for GovGas Variation 055(2L1q3zT)	1. Building Community Capacity and Engagement	US21932 - Auto T29HC	062923
<input type="checkbox"/>	4-SYH42D0	Activity for GRS AWP Milestone - kxsfy2Ts	3. Building Disability Sector Capacity and Service Provider Readiness	US21932 - Auto T29HC	062923
<input type="checkbox"/>	4-SYAD2F1D	PSFormalVariationActivity_U0fsg	1. Building Community Capacity and Engagement	US21932 - Auto T29HC	062923
<input type="checkbox"/>	4-SY9RL23	PSFormalVariationActivity_4WwZ	1. Building Community Capacity and Engagement	US21932 - Auto T29HC	062923
<input type="checkbox"/>	4-SY9E4WV	PSFormalVariationActivity_Y9B3	1. Building Community Capacity and Engagement	US21932 - Auto T29HC	062923
<input type="checkbox"/>	4-SY9EG21	PSFormalVariationActivity_jbnuJ	1. Building Community Capacity and Engagement	US21932 - Auto T29HC	062923
<input type="checkbox"/>	4-SY9PZL7	PSFormalVariationActivity_J8Lu	1. Building Community Capacity and Engagement	US21932 - Auto T29HC	062923
<input type="checkbox"/>	4-SY9EG09	PSFormalVariationActivity_Vpn9	1. Building Community Capacity and Engagement	US21932 - Auto T29HC	062923
<input type="checkbox"/>	4-SY9E4PF	PSFormalVariationActivity_NuN	1. Building Community Capacity and Engagement	US21932 - Auto T29HC	062923

1 - 10 of 18

[Back](#) [Discard changes and return](#) [Continue](#)

To finalise the new bank account, review the new bank account details and select **Submit**.

You are here: [Home](#) / [Organisation Profile](#)

Request bank account

Step 4 of 4: Review and submit

New bank account details

Account name: New Account 1 BSB: 123456 Account number:

Proof of bank account

File name	Type	Size(kb)	Last uploaded by	Last uploaded date/time
Milestones Task Card	DOCX	1,155	Chris BEAT	2/10/2018 10:50:20 AM

Grant Activities linked to bank account (1)

Activity ID	Activity name	Program name
4-49ALF4C	Family Fun Activity	Financial Crisis and Material Aid - Food Relief

[Back](#) [Discard changes and return](#) [Submit](#)

The new bank account details have been submitted to the Community Grants Hub for review and approval. If further information about this change is needed, contact the Funding Arrangement Manager listed on the Grant Agreement.



Need help?

For further assistance, contact the Grant Recipient Portal Helpdesk:

Email: GRP.Helpdesk@communitygrants.gov.au

Phone: 1800 020 283 (Option 5)

Operating Hours: 8:30 am and 5:30 pm (AEST/AEDT) Monday to Friday, excluding public holidays.