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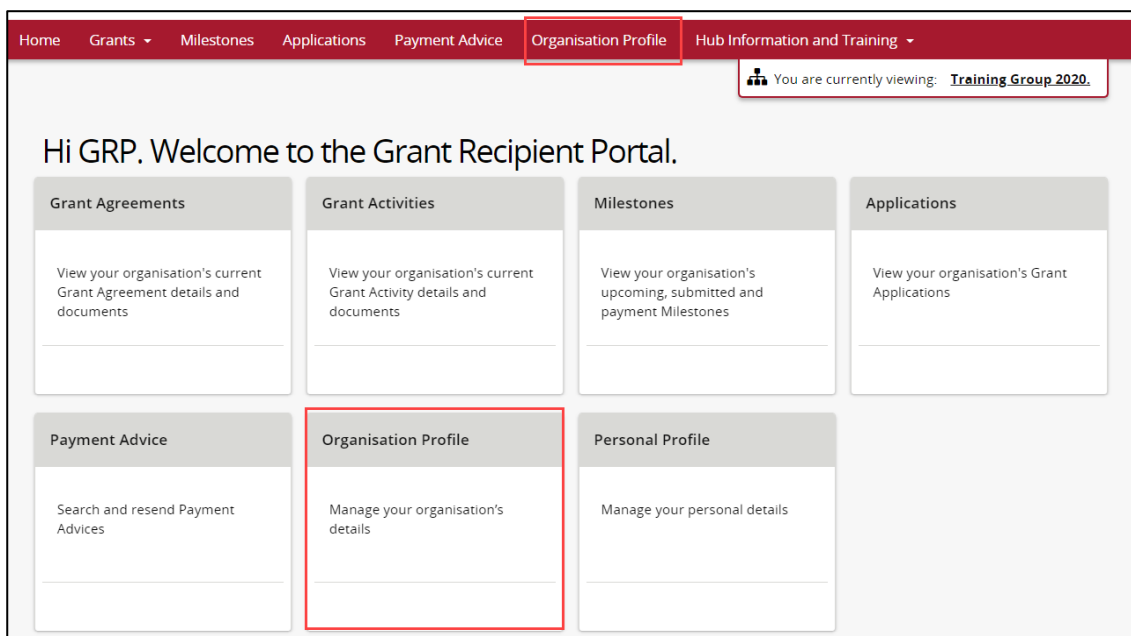
Process on how to add and update bank account details in the Grant Recipient Portal

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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.

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.

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

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.

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

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

The Link Grant Activities to bank account screen will display.

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.

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

Add a bank account

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

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

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

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

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

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

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