# Update Bank Account Information

Grant Recipient Portal Task Card

**Portal Access required**: Administrator

The Grant Recipient Portal (Portal) enables grant recipients to view, add and request changes to their bank account information.

This task card describes the process of viewing, adding and making changes to bank account details.

# Navigating to bank accounts

| **Step** | **Action** |
| --- | --- |
|  | From the Home screen, select the **Organisation Profile** tile. Alternatively, select the **Organisation Profile** link from the Navigation menu.  This screenshot is of the Home page for the Grant Recipient Portal. It shows tiles for different areas of the Portal such as Grant Agreements, Grant Activities, Milestones, Applications, Payment Advice, Organisation Profile, Personal Profile and Acceptances. The Organisation Profile is highlighed. |
|  | The Organisation Profile screen will display. Select **Bank accounts** from the Organisation profile menu to display a list of the Organisation’s bank accounts. Select **View** to display additional information about a particular bank account.  This screenshot is of the Bank Accounts screen within the Grant Recipient Portal. This page shows the list of Bank accounts associated with the organisation including account name, BSB, Account number, status and End date. The Bank Accounts and view buttons are highlighted. |
|  | The Bank account details screen will display. This screen also includes details of Grant Activities linked to this bank account.  This screenshot is of the Bank Account Details screen within the Grant Recipient Portal. This page shows the account details including activitities linked to this bank account. |

# Updating a bank account name

| **Step** | **Action** |
| --- | --- |
|  | From the Bank accounts screen, select **View** to display additional information about the bank account.  This screenshot is of the bank account linked to the grant. The View button is highlighted. |
|  | 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.  Screenshot of Bank Account details. The Update button is highlighted. |
|  | The mandatory fields marked with an asterisk must be populated at all times. Once the Account name has been changed, select **Save and return**.  The screenshot shows the Update bank account screen in the Grant Recipient Portal. The save and return button is highlighted. |

# Add bank account to Grant Activities

| **Step** | **Action** |
| --- | --- |
|  | To view or update Grant Activities linked to an existing bank account, select **View** against the appropriate bank account.  This screenshot shows the bank accounts that are linked to your grant activities. The View button is highlighted. |
|  | This will display the Grant Activities linked to the chosen bank account, select **Add Grant Activity**.  This screenshot shows the Bank account details screen and how to link grant activities to your bank account. The Add Grant Activity button is highlighted. |
|  | The Link Grant Activities to bank account screen will display.  This screenshot shows the grant activities available to link to your bank account |
|  | 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.  This screenshot shows how you link and save bank accounts to grant activities. The Link selected Grant Activities button is highlighted. |
|  | A confirmation page will display. Select **Submit** to finalise the update.  This screenshot shows the confirmation screen to update links between bank accounts and grant activities. The Submit button is highlighted. |

# Add a Bank Account

| **Step** | **Action** |
| --- | --- |
|  | In the Bank accounts screen select **Request bank account** to add new bank account details.  Screenshot showing the bank accounts screen. The Request bank account button is highlighted. |
|  | The Request bank account screen will display. Complete the Account name, BSB and Account number and select **Continue**.  Screenshot showing the request bank account screen step 1 of 4 Bank account details. The Account name, bsb and account number fields are highlighted as well as the Continue button. |
|  | Proof of bank account details will be required. Select **Add file** to attach a file from your computer.  Screenshot of the request bank account screen - step 2 of 4. Attach proof of bank account. The Add file button is highlighted. |
|  | The file will attach. To **View** or **Delete** a file, select **Actions and the required step**.  Screenshot of the actions drop down with view file and delete file options highlighted |
|  | Select **Continue** to proceed to next step.  Screenshot shows the confirmation page with bank account details. The Continue button is highlighted. |
|  | Select the **checkbox** against the Activities that should be linked to the new bank account and select **Continue** to proceed to the next step.  This screenshot shows a list of  your grant activities so you can select those activities and link them to your organisation's bank account - step 3 of 4 Link bank account to grant activities. The Continue button is highlighted. |
|  | To finalise the new bank account, review the new bank account details and select **Submit**.  Screenshot of the request bank account screen. Step 4 of 4 - Review and submit. The Submit button is highlighted. |
|  | 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](mailto:GRP.Helpdesk@communitygrants.gov.au)

**Phone**: 1800 020 283 (Option 5)

**Operating Hours:** Monday to Friday 9:00am – 5:00pm (AEST/AEDT)