Update Bank Account Information
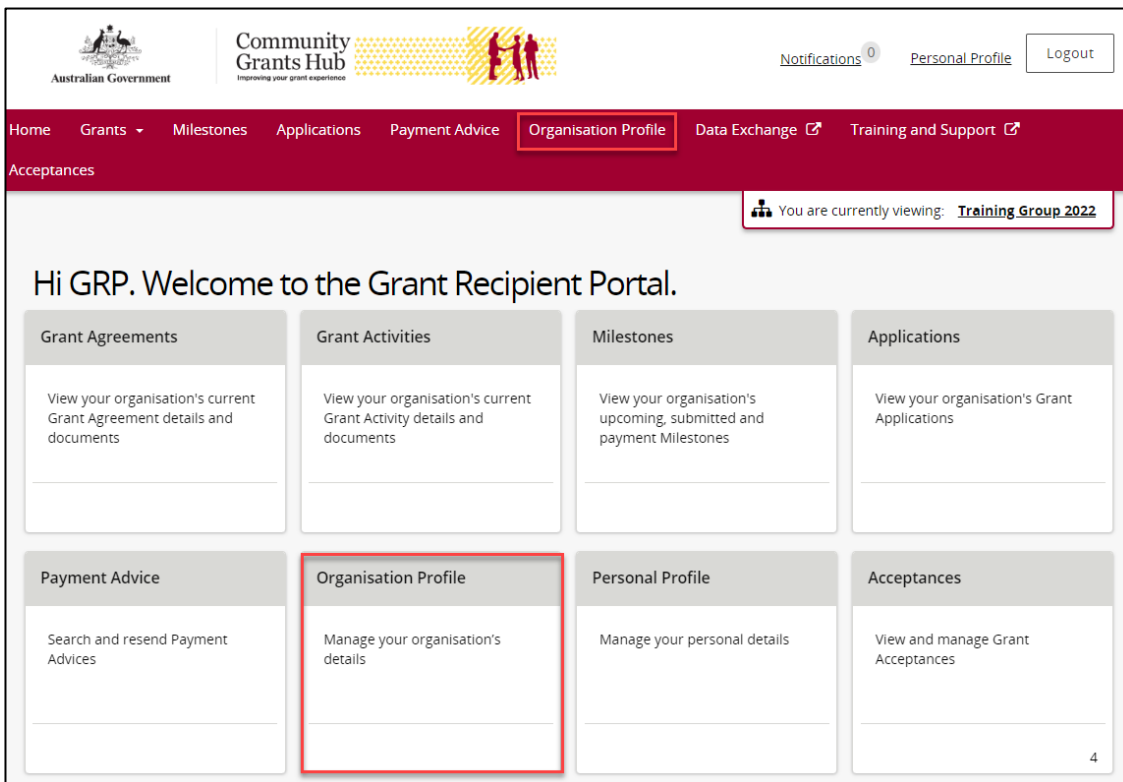
Grant Recipient Portal Task Card

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

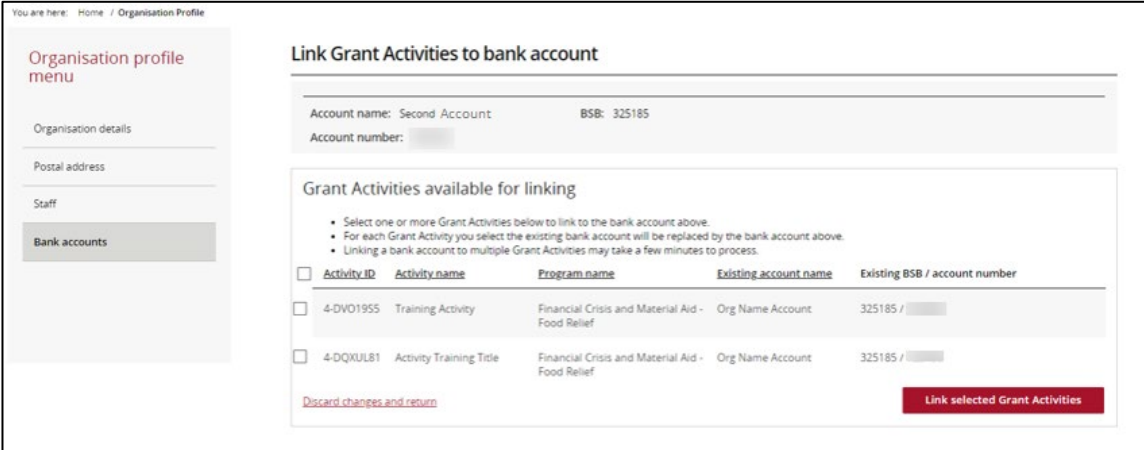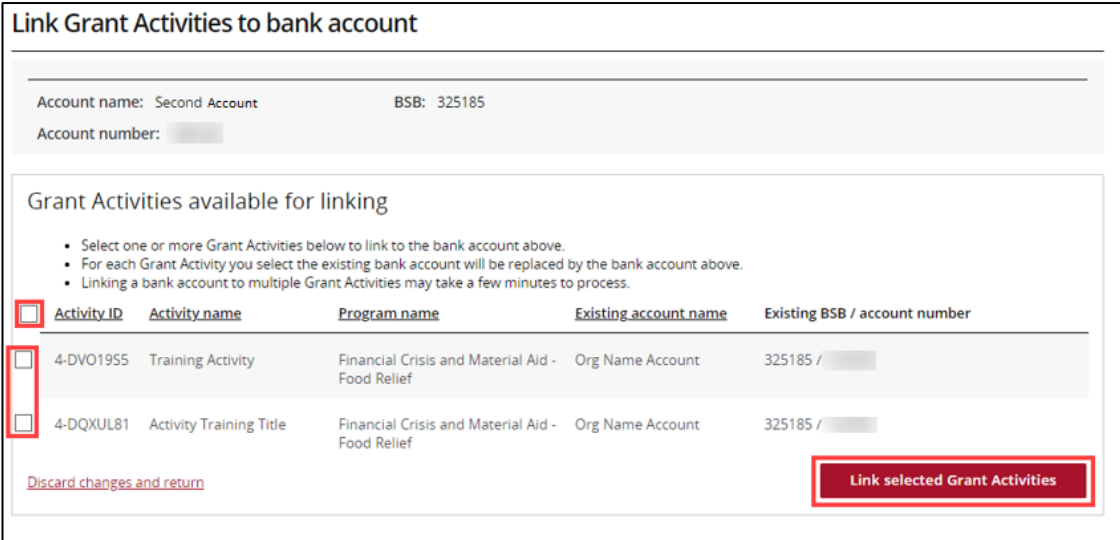| Step	Action
1	From the Home screen, select the **Organisation Profile** tile. Alternatively, select the **Organisation Profile** link from the Navigation menu.

Step	Action
2	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.
3	The Bank account details screen will display. This screen also includes details of Grant Activities linked to this bank account.

Updating a bank account name

Step	Action
4	From the Bank accounts screen, select **View** to display additional information about the bank account.

Step	Action
5	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.
6	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

Step	Action
7	To view or update Grant Activities linked to an existing bank account, select **View** against the appropriate bank account.
8	This will display the Grant Activities linked to the chosen bank account, select **Add Grant Activity**.

Step	Action
9	The Link Grant Activities to bank account screen will display.
10	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.

Step	Action
11	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
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4-E4IAJG5	Client Agency Support	Financial Crisis and Material Aid - Food Relief	 Back Discard changes and return **Submit**

Add a Bank Account

Step	Action
12	In the Bank accounts screen select **Request bank account** to add new bank 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	
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Second Account	325185		Active	View
Org Name Account	325185		Active	View	

Step	Action
13	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:* Discard changes and return **Continue**
14	Proof of bank account details will be required. Select **Add file** to attach 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**
15	The file will attach. To **View** or **Delete** a file, select **Actions and the required step**. 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 Actions▾ View file Back Discard changes and return Delete file

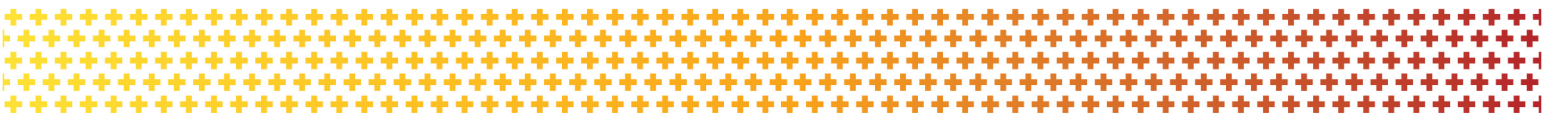| Step	Action

16	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	

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D20 1365861 Task Card - add-and-update-bank-account - BB	DOCX	1,341		10/12/2020 10:14:56 AM	[Actions▾]	 [Back] Discard changes and return [Continue]

17	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 Group 2020 BSB: 123456 Account number: ▢
	
	|
		Activity ID	Activity name	Program name	Existing account name	Existing BSB /account number

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☐	3-QR71XN	CatholicCare	Assistance with Care and Housing for the Aged	CENTACARE MAINT ACC	062784 /
☐	4-3YUR7A	Family Law Services	Children's Contact Services	CENTACARE MAINT ACC	062784 /
☐	4-3Z0UKK	Family Law Services	Family Relationship Centres	CENTACARE MAINT ACC	062784 /
☐	4-3Z87CP	Family Law Services	Family Dispute Resolution	CENTACARE MAINT ACC	062784 /
☐	4-3ZAYFV	Family Law Services	Family Law Counselling	CENTACARE MAINT ACC	062784 /
☐	4-3VGH8R	FaRS	Family and Relationship Services	CENTACARE MAINT ACC	062784 /
☐	4-1MF7BPJ	Helping Children with Autism	Early Intervention	CENTACARE MAINT ACC	062784 /
☐	4-24XQ6IU	Assistance with Care and Housing	Assistance with Care and Housing	CENTACARE MAINT ACC	062784 /
☐	4-24XQ6K1	Flexible Respite - Care Relationships and Carer Support	Flexible Respite	CENTACARE MAINT ACC	062784 /
☐	4-24XQ6L8	Social Support Individual - Community and Home Support	Social Support - Individual	CENTACARE MAINT ACC	062784 /	 ◄ 1 - 10 of 12 ► [Back] Discard changes and return [Continue]

Step	Action
18	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: BSB: Account number: New Account 1 123456 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
19	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: Monday to Friday 9:00am – 5:00pm (AEST/AEDT)