



Update Bank Account Information

Task Card

The Grant Recipient Portal (GRP) allows administrators to:

- View bank account details
- Update a bank account name
- Link bank accounts to grant activities
- Request a new bank account

This guide explains how to manage your organisation's bank account information in the portal.

Access Required: Administrator

Quick Links

[Update a Bank Account Name](#)

[Link a Bank Account to Grant Activities](#)

[Request a New Bank Account](#)

[Need help?](#)

View Bank Accounts

From the Home page:

- Select the **Organisation Profile** tile, or
- Select **Organisation Profile** from the navigation menu.







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 [Personal Profile](#)
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[Organisation Profile](#)
[Data Exchange](#)
[Training and Support](#)

Acceptances

 You are currently viewing: **Training Group 2022**

Hi GRP. Welcome to the Grant Recipient Portal.

Grant Agreements
 View your organisation's current Grant Agreement details and documents

Grant Activities
 View your organisation's current Grant Activity details and documents

Milestones
 View your organisation's upcoming, submitted and payment Milestones

Applications
 View your organisation's Grant Applications

Payment Advice
 Search and resend Payment Advices

Organisation Profile
 Manage your organisation's details

Personal Profile
 Manage your personal details

Acceptances
 View and manage Grant Acceptances

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In the Organisation Profile menu:

1. Select **Bank accounts**.
2. The list of your organisation's bank accounts will display.
3. Select **View** to see details of a bank account.

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

Organisation profile menu
[Organisation details](#)
[Postal address](#)
[Staff](#)
[Bank accounts](#)
[Acceptance administration](#)

Bank accounts

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

[Request bank account](#)

Account name	BSB	Account number	Status	End Date
Training22	325185	654321	Active	View

The **Bank account details** page shows:

- Account information
- Grant activities linked to the account

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Organisation profile menu
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Bank account details * require

Account details

Account name: Training22
 BSB: 325185
 Account number: 654321

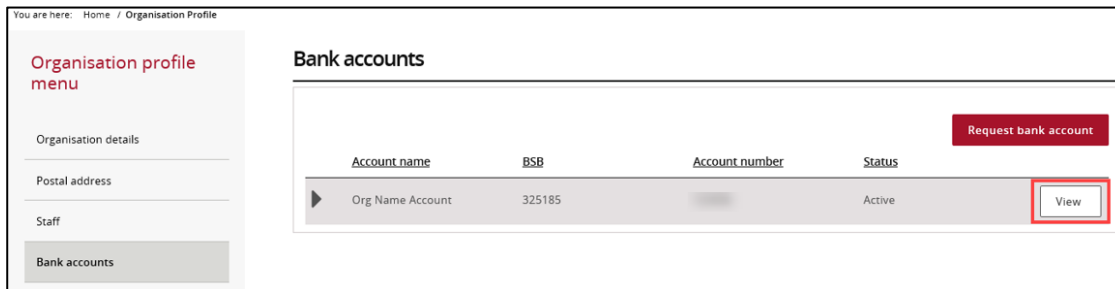
[Update](#)

Grant Activities linked to this bank account
 Grant Activities listed below are currently linked to this bank account.
 [Add Grant Activity](#)

Activity ID	Activity name ^	Program name	Department
4-H070FPW	Activity Training Title	Financial Crisis and Material Aid - Emergency Relief	FaHCSIA

Update a Bank Account Name

From the **Bank accounts** page, select **View** next to the account you want to update.



You are here: Home / Organisation Profile

Organisation profile menu

- Organisation details
- Postal address
- Staff
- Bank accounts

Bank accounts

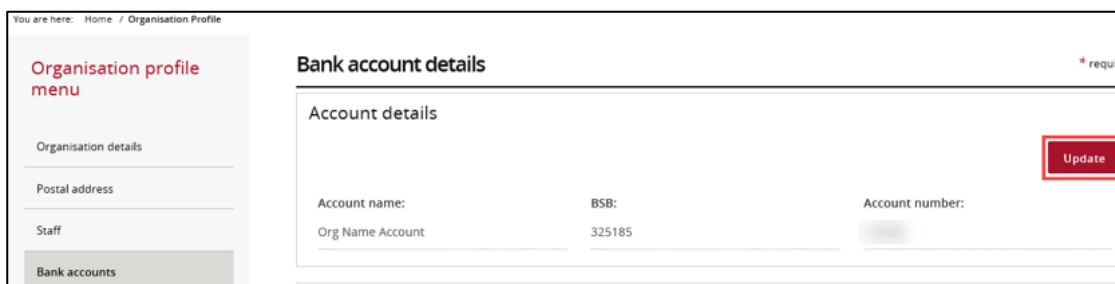
Request bank account

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

On the Bank account details page, select Update.

Important: You can only change the account name. The BSB and account number cannot be changed. If these details need to change, you must request a new bank account.

Navigate to Bank Accounts



You are here: Home / Organisation Profile

Organisation profile menu

- Organisation details
- Postal address
- Staff
- Bank accounts

Bank account details

* required

Account details

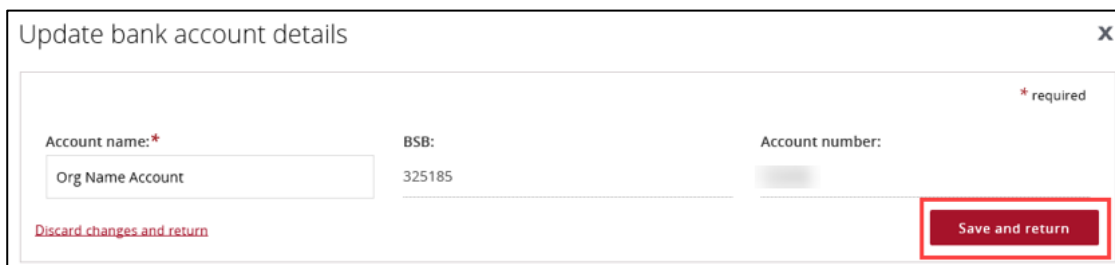
Account name: Org Name Account

BSB: 325185

Account number:

[Update](#)

1. Update the account name.
2. Complete any required fields marked with an asterisk (*).
3. Select **Save and return**.



Update bank account details

* required

Account name:* Org Name Account

BSB: 325185

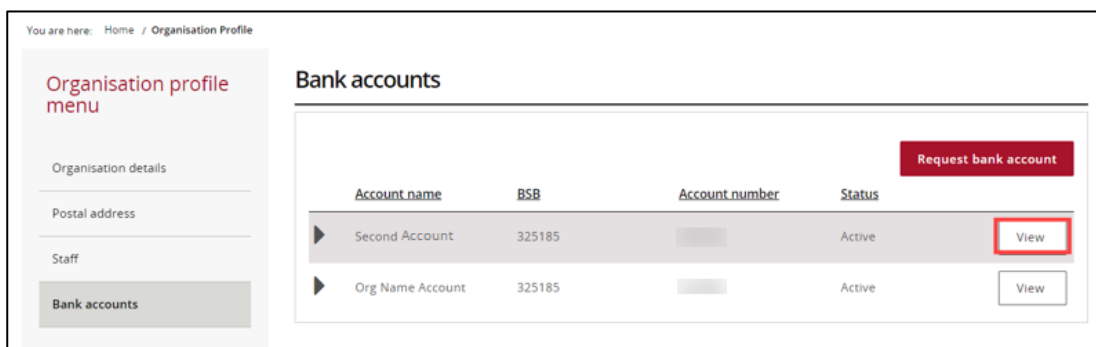
Account number:

[Discard changes and return](#)

[Save and return](#)

Link a Bank Account to Grant Activities

From the **Bank accounts** page, select **View** next to the relevant bank account.



You are here: Home / Organisation Profile

Organisation profile menu

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Bank accounts

Request bank account

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

On the **Bank account details** page, select **Add Grant Activity**.

You are here: Home / Organisation Profile

Organisation profile menu
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Postal address
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Bank accounts

Bank account details * required

Account details

Account name: Second Account BSB: 325185 Account number:

Grant Activities linked to this bank account

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

No Records Found

The **Link Grant Activities to bank account** page displays activities that can be linked to this account.

You are here: Home / Organisation Profile

Organisation profile menu
Organisation details
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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.

☐	Activity ID	Activity name	Program name	Existing account name	Existing BSB / account number
☐	4-DVO1955	Training Activity	Financial Crisis and Material Aid - Food Relief	Org Name Account	325185 /
☐	4-DQXUL81	Activity Training Title	Financial Crisis and Material Aid - Food Relief	Org Name Account	325185 /

[Discard changes and return](#)

1. Select the checkbox next to each activity you want to link.
2. Select **Link selected Grant Activities**.

Tip: To select all activities, use the checkbox next to **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.

☐	Activity ID	Activity name	Program name	Existing account name	Existing BSB / account number
☐	4-DVO1955	Training Activity	Financial Crisis and Material Aid - Food Relief	Org Name Account	325185 /
☐	4-DQXUL81	Activity Training Title	Financial Crisis and Material Aid - Food Relief	Org Name Account	325185 /

[Discard changes and return](#)

Review the information and select **Submit** to complete 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

[Discard changes and return](#)

Request a New Bank Account

On the **Bank accounts** page, select **Request bank account**.

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Organisation profile menu

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

Bank accounts

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

Complete the following fields:

- Account name
- BSB
- Account number

Select **Continue**.

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Request bank account * required

Step 1 of 4: Bank account details

Account name:*

BSB:*

Account number:*

[Discard changes and return](#)

You must provide evidence of the bank account details.

Select **Add file** and upload a supporting document.

Examples may include:

- A bank statement showing the account name, BSB and account number
- Bank account details included in a grant agreement

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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



After uploading a file, select **Actions** to:

- View the file
- Delete the file

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Request bank account

Step 2 of 4: Attach proof of bank account

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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 Delete file

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



Select **Continue** to proceed.

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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
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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

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Select the activities that will use the new bank account.

Select **Continue**.

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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
☒ 3-0RT1XN	CatholicCare	Assistance with Care and Housing for the Aged	CENTACARE MAINT ACC	062784 /
☐ 4-3YU8TA	Family Law Services	Children's Contact Services	CENTACARE MAINT ACC	062784 /
☐ 4-3Z0UKX	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 /
☐ 4-24XD6UJ	Assistance with Care and Housing	Assistance with Care and Housing	CENTACARE MAINT ACC	062784 /
☐ 4-24XD6K1	Flexible Respite - Care Relationships and Carer Support	Flexible Respite	CENTACARE MAINT ACC	062784 /
☐ 4-24XD6L8	Social Support Individual - Community and Home Support	Social Support - Individual	CENTACARE MAINT ACC	062784 /

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Review:

- Bank account details
- Uploaded evidence
- Linked grant activities

If everything is correct, select **Submit**.

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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

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

Grant Activities linked to bank account (1)

<u>Activity id</u>	<u>Activity name</u>	<u>Program name</u>
4-49ALF4C	Family Fun Activity	Financial Crisis and Material Aid - Food Relief

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Your request will be sent to the Community Grants Hub for review and approval.

If more information is needed, contact the **Funding Arrangement Manager** listed in your Grant Agreement.

Need help?

For further assistance with the Grant Recipient Portal, please contact the Community Grants Hub at GRP.helpdesk@communitygrants.gov.au.