



# Update Bank Account Information

## Grant Recipient Portal Task Card

**Portal Access required:** Administrator

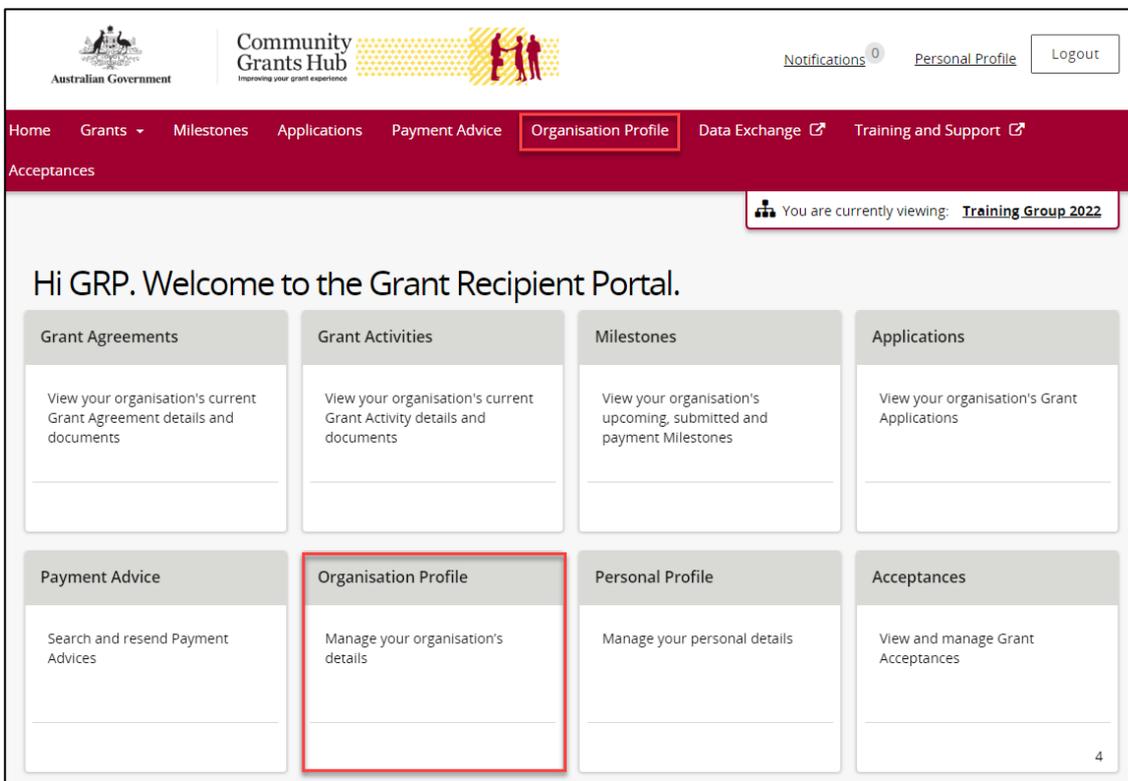
The Grant Recipient Portal (Portal) enables grant recipients to view, add and request changes to their bank account information.

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

## Navigating to bank accounts

### Step 1

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



The screenshot shows the Grant Recipient Portal (GRP) interface. At the top, there is a header with the Australian Government logo, the Community Grants Hub logo, and navigation links for Notifications (0), Personal Profile, and Logout. Below the header is a navigation menu with links for Home, Grants, Milestones, Applications, Payment Advice, Organisation Profile (highlighted with a red box), Data Exchange, and Training and Support. The main content area displays a welcome message: "Hi GRP. Welcome to the Grant Recipient Portal." Below this, there are eight tiles arranged in a 2x4 grid. The tiles are: Grant Agreements, Grant Activities, Milestones, Applications, Payment Advice, Organisation Profile (highlighted with a red box), Personal Profile, and Acceptances. The Organisation Profile tile contains the text "Manage your organisation's details".

## Step 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.

The screenshot shows the 'Organisation profile menu' on the left with 'Bank accounts' highlighted. The main content area is titled 'Bank accounts' and features a filter dropdown set to '1. All Bank Accounts' and an 'Apply Filter' button. A table lists bank accounts with columns for Account name, BSB, Account number, Status, and End Date. A 'Request bank account' button is in the top right, and a 'View' button is highlighted in a red box next to the first row.

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

## Step 3

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

The screenshot shows the 'Bank account details' screen. It includes 'Account details' with fields for Account name, BSB, and Account number, and an 'Update' button. Below is a section for 'Grant Activities linked to this bank account' with an 'Add Grant Activity' button. A table lists linked activities with columns for Activity ID, Activity name, Program name, and Department.

Activity ID	Activity name	Program name	Department
4-H070FFW	Activity Training Title	Financial Crisis and Material Aid - Emergency Relief	FAHCSIA

## Updating a bank account name

## Step 4

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

The screenshot shows the 'Bank accounts' screen with a table listing bank accounts. The 'View' button next to the first row is highlighted in a red box.

Account name	BSB	Account number	Status
Org Name Account	325185		Active

### Step 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.

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

### Step 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**.

Update bank account details

Account name: \* BSB: Account number: \* required

Org Name Account 325185

Discard changes and return Save and return

## Add bank account to Grant Activities

### Step 7

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 <span>View</span>
▶ Org Name Account	325185		Active <span>View</span>

### Step 8

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

**Update**

Account name:       BSB:       Account number:

### Grant Activities linked to this bank account

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

**Add Grant Activity**

*No Records Found*

### Step 9

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:       BSB:   
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" value=""/>
<input type="checkbox"/>	4-DQXUL81	Activity Training Title	Financial Crisis and Material Aid - Food Relief	Org Name Account	325185 / <input type="text" value=""/>

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

### Step 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.

**Link Grant Activities to bank account**

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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-DVO19S5	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**

### Step 11

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

**Update bank account links**

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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](#)                      **Submit**

## Add a Bank Account

### Step 12

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

The screenshot shows the 'Bank accounts' screen. On the left is a sidebar with 'Organisation profile menu' and 'Bank accounts' selected. The main content area has a table with the following data:

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

A red box highlights the 'Request bank account' button in the top right corner of the table area.

### Step 13

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

The screenshot shows the 'Request bank account' form. It has three input fields: 'Account name:\*', 'BSB:\*', and 'Account number:\*'. A red box highlights these three fields. At the bottom right, there is a red 'Continue' button. Below the input fields, there is a link that says 'Discard changes and return'.

### Step 14

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

The screenshot shows the 'Request bank account' form at 'Step 2 of 4: Attach proof of bank account'. It contains the following text:

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

A red box highlights the 'Add file' button in the bottom right corner.

## Step 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

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	<a href="#">Add file</a> <b>Actions</b> <a href="#">View file</a> <a href="#">Delete file</a>

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

## Step 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

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	<a href="#">Add file</a> <b>Actions</b>

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

## Step 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: [REDACTED]

<input type="checkbox"/>	Activity ID	Activity name	Program name	Existing account name	Existing BSB /account number
<input checked="" type="checkbox"/>	3-0RT1XN	CatholicCare	Assistance with Care and Housing for the Aged	CENTACARE MAINT ACC	061784 / [REDACTED]
<input type="checkbox"/>	4-3YUR7A	Family Law Services	Children's Contact Services	CENTACARE MAINT ACC	061784 / [REDACTED]
<input type="checkbox"/>	4-3ZDUVK	Family Law Services	Family Relationship Centres	CENTACARE MAINT ACC	061784 / [REDACTED]
<input type="checkbox"/>	4-3ZT7CP	Family Law Services	Family Dispute Resolution	CENTACARE MAINT ACC	061784 / [REDACTED]
<input type="checkbox"/>	4-3ZAVPV	Family Law Services	Family Law Counselling	CENTACARE MAINT ACC	061784 / [REDACTED]
<input type="checkbox"/>	4-3VGH8R	FaRS	Family and Relationship Services	CENTACARE MAINT ACC	061784 / [REDACTED]
<input type="checkbox"/>	4-1MF7BPJ	Helping Children with Autism	Early Intervention	CENTACARE MAINT ACC	061784 / [REDACTED]
<input type="checkbox"/>	4-241Q6UJ	Assistance with Care and Housing	Assistance with Care and Housing	CENTACARE MAINT ACC	061784 / [REDACTED]
<input type="checkbox"/>	4-241Q6K1	Flexible Respite - Care Relationships and Carer Support	Flexible Respite	CENTACARE MAINT ACC	061784 / [REDACTED]
<input type="checkbox"/>	4-241Q6L8	Social Support Individual - Community and Home Support	Social Support - Individual	CENTACARE MAINT ACC	061784 / [REDACTED]

1 - 10 of 12

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

## Step 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: New Account 1      BSB: 123456      Account number: [REDACTED]

**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](#)

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### Step 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](mailto:GRP.Helpdesk@communitygrants.gov.au)

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

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