



Task card

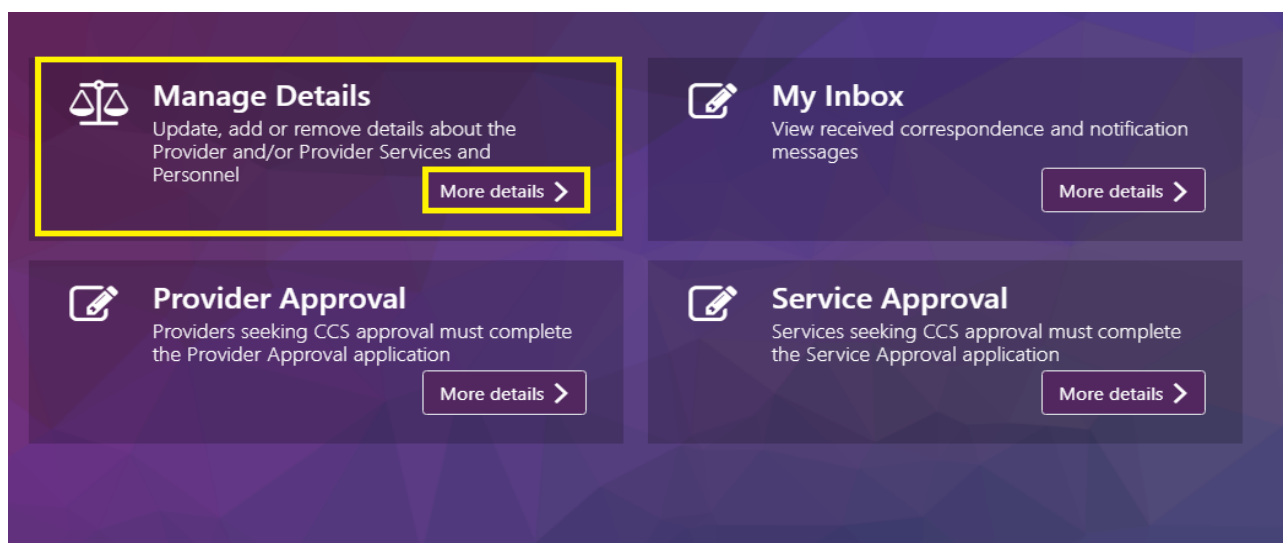
How to view and update organisation details in the Provider Entry Point

Note: Only certain special characters can be used in the PEP:

- full stop (.)
- comma (,)
- hyphen (-)
- slashes (/ , \)
- apostrophe (').

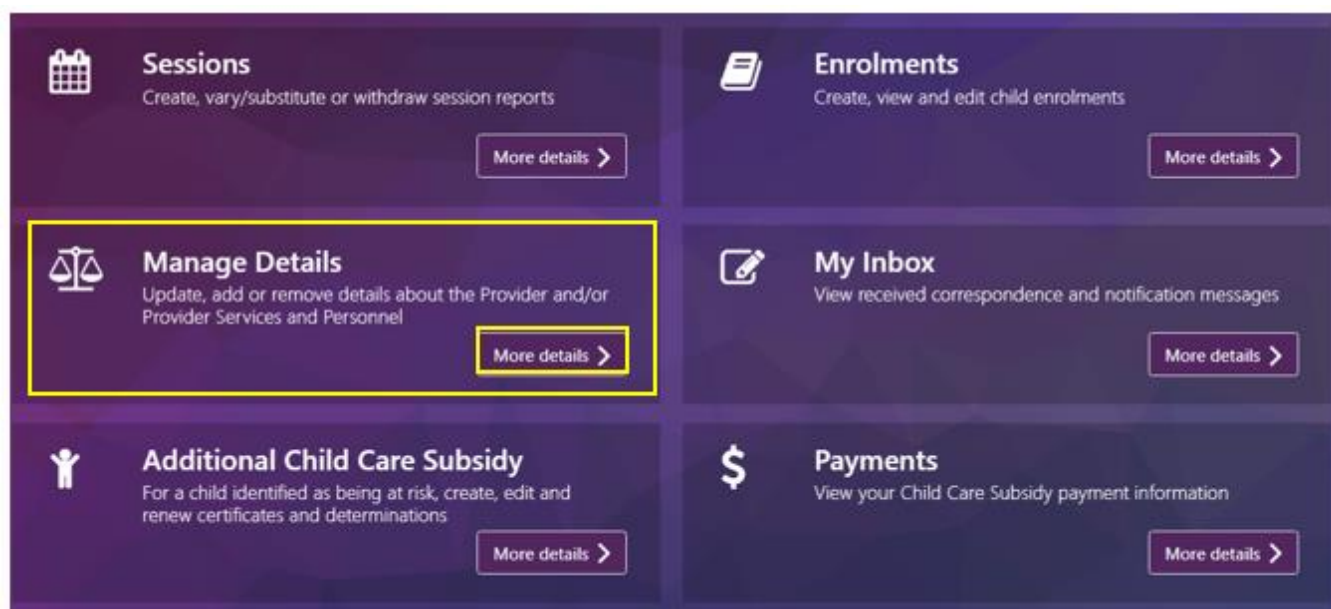
All other special characters will cause an error in the system.

1(a) Updating Details (Provider in context)



If you are a Provider, select 'More details' in the 'Manage Details' box of the Provider Entry Point (PEP).

1(b) Updating Details (Service in context)



If you are a Service, select 'More details' in the 'Manage Details' box of the PEP.

1(c) Updating Details (Provider and Service in context)

The screenshot shows a web interface with a dark blue background and a light blue geometric pattern. The interface is divided into three main sections: 'Provider Details', 'Personnel Details', and 'Circumstances and Notifications'. The 'Provider Details' section is highlighted with a yellow border and contains four buttons: 'Provider name', 'Contact details', 'Financial details', and 'Address Details'. The 'Personnel Details' section contains three buttons: 'Manage Personnel', 'Add personnel', and 'Return Home'. The 'Circumstances and Notifications' section contains four buttons: 'Cancellation of approved request', 'Notification matters affecting approval', 'Bankruptcy, insolvency or liquidation', and 'Charitable/Not for Profit'. At the bottom of the page, there are links for 'Privacy Policy' and 'Contact Us'.

Provider Details

- Provider name
- Contact details
- Financial details
- Address Details

Personnel Details

- Manage Personnel
- Add personnel
- Return Home

Circumstances and Notifications

- Cancellation of approved request
- Notification matters affecting approval
- Bankruptcy, insolvency or liquidation
- Charitable/Not for Profit

[Privacy Policy](#) | [Contact Us](#)

Provider Details: Select the information you wish to update:

- Provider name
- Contact details
- Financial details
- Address details

2(a) Update name details

The screenshot shows a web form titled 'Manage Details / Provider Name' with a sub-header 'Change of Provider Name'. It contains a text input for 'Full Name of Provider:', a date picker for 'Date of event:' showing '23/05/2018', and a section 'Evidence Required' with a red 'Required' label and the text 'Evidence of Provider name change'. An 'Upload' button with a plus icon is highlighted with a yellow box. At the bottom right are 'Cancel' and 'Submit' buttons.

- **Full name of provider:** Insert the new details here.
- **Evidence required:** If evidence is required, it will be displayed here.
- **Upload:** Select this to upload and attach the required evidence.

2(b) Update name details – select your document

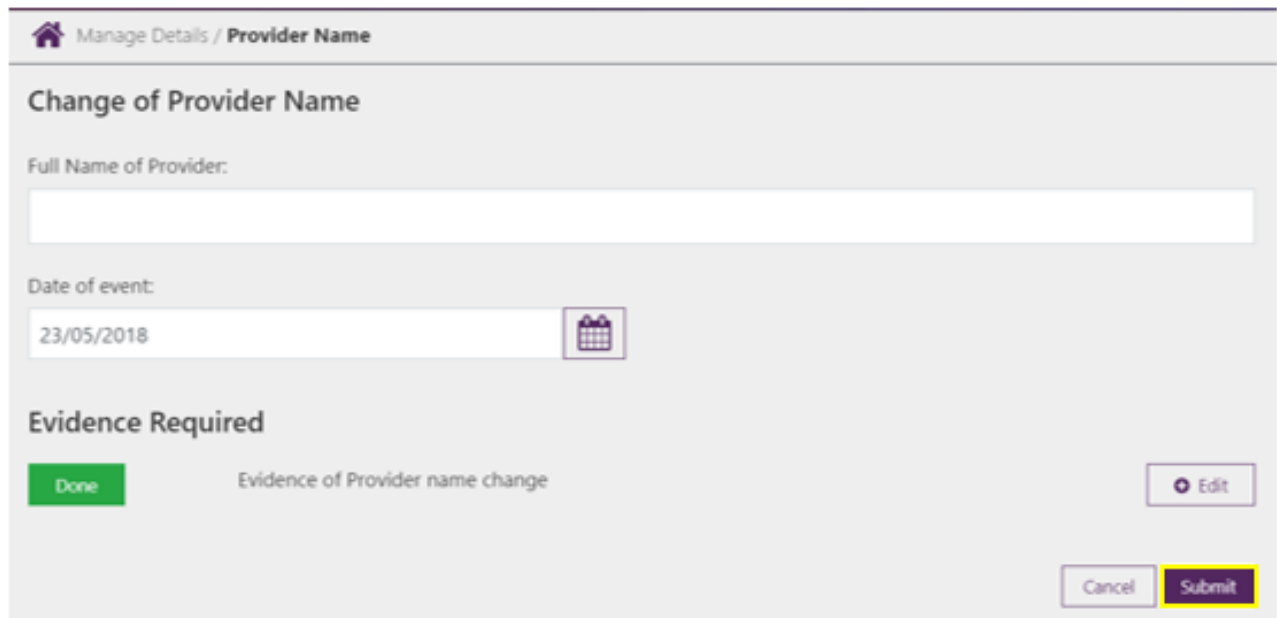
The screenshot shows a web form titled 'Manage Details / Provider Name' with a sub-header 'Select your document'. It displays 'Document type: Evidence of Provider name change' and lists accepted formats: PDF, PNG, TIFF, JPG. It also states 'Total file size cannot exceed 10MB' and 'Please ensure all pages are in a single file.' Below this is a table with three columns: Status, Document name, and Action. The first row shows a green checkmark in Status, a text input in Document name, and a trash icon in Action. Below the table is a large yellow-outlined box with the text 'Choose a file'. A 'Back' button is at the bottom right.

Status	Document name	Action
✓	<input type="text"/>	

- **Status:** The status will update when evidence has been successfully added.

- **Choose a file:** Select and follow the prompts to attach evidence.

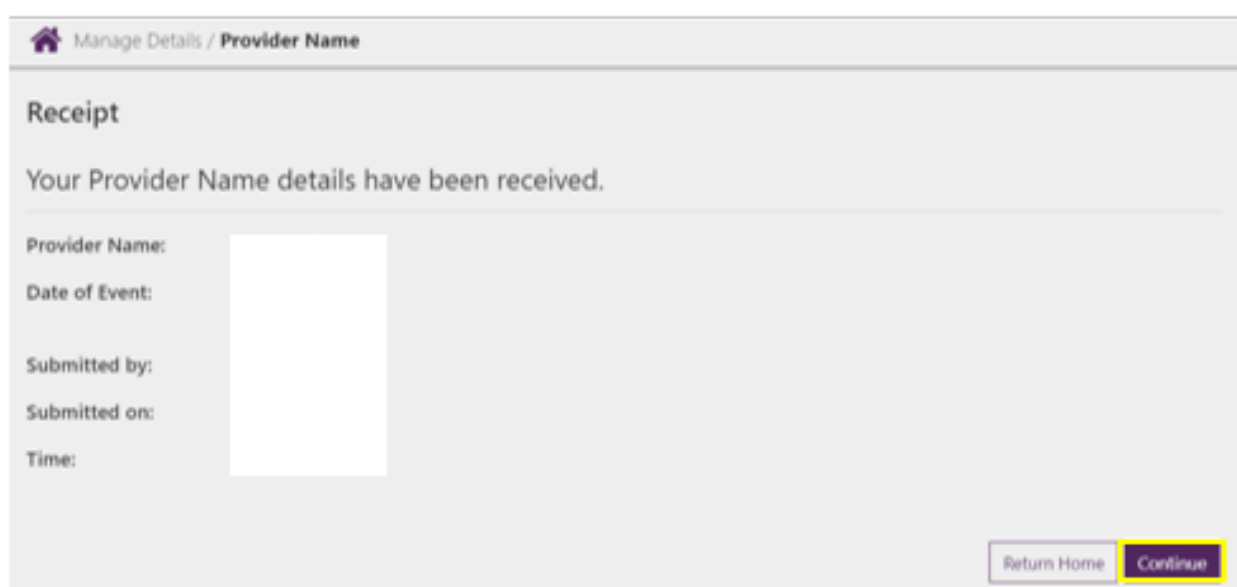
2(c) Update name details – edit evidence



The screenshot shows a web form titled 'Change of Provider Name' under the heading 'Manage Details / Provider Name'. It contains a text input for 'Full Name of Provider:', a date input for 'Date of event:' with the value '23/05/2018' and a calendar icon, and a section titled 'Evidence Required'. In the evidence section, there is a green 'Done' button, the text 'Evidence of Provider name change', and a purple 'Edit' button. At the bottom right, there are 'Cancel' and 'Submit' buttons, with 'Submit' highlighted in yellow.

- **Edit:** Select 'Edit' if you need to change the evidence provided.
- **Submit:** Select 'Submit' to confirm changes.

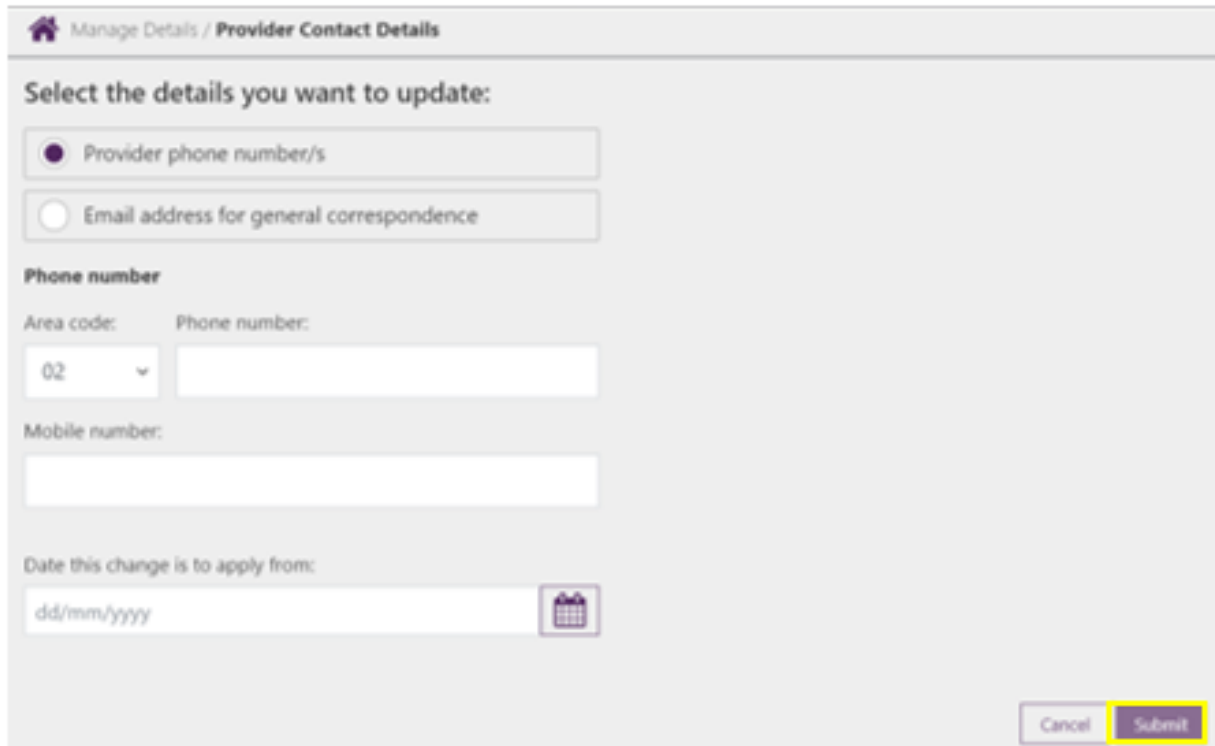
2(d) Update name details – receipt



The screenshot shows a web form titled 'Receipt' under the heading 'Manage Details / Provider Name'. It displays the message 'Your Provider Name details have been received.' followed by a list of fields: 'Provider Name:', 'Date of Event:', 'Submitted by:', 'Submitted on:', and 'Time:'. These fields are grouped together in a white box. At the bottom right, there are 'Return Home' and 'Continue' buttons, with 'Continue' highlighted in yellow.

Receipt: A receipt will present upon submission.

3(a) Update contact details



Manage Details / Provider Contact Details

Select the details you want to update:

☒ Provider phone number/s

☐ Email address for general correspondence

Phone number

Area code: Phone number:

02

Mobile number:

Date this change is to apply from:

dd/mm/yyyy

Cancel Submit

- **Select the details you want to update:** Select the relevant change you want to make and follow prompts to update information. You can choose the following options:
 - Provider phone number/s
 - Email address for general correspondence
- **Submit:** Select 'submit' to confirm changes. A receipt will be generated confirming the changes have been applied.

4(a) Update financial details

Manage Details / **Provider Financial Details**

Change of Bank Account Details

BSB Account Number

Account Name:

Date of previous event: 18/06/2018
Date of current event: 03/07/2018

Apply this change to:

☐ All Services ☒ Selected Services

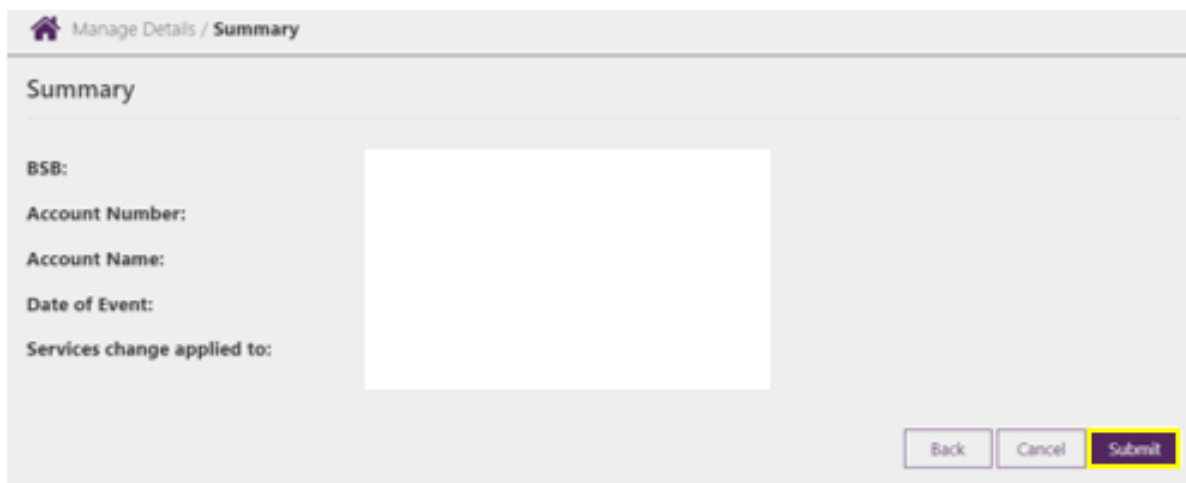
Approved Services

Select the Services that the change of bank details will be applied:

Name of approved service	Service ID	Select
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>

- **Date of current event:** Note that a change of bank account can only apply from the current date.
- **Apply this change to:** If you are a Provider select where you want the change applied to. Note that the following questions will not display if you are a Service.
- **Name of approved service:** If you are a Provider and 'Selected Services' is chosen, you will need to confirm which service/s you want to apply the changes to. You can do this by searching for a service individually or by choosing from the list presented and ticking the box on the right.

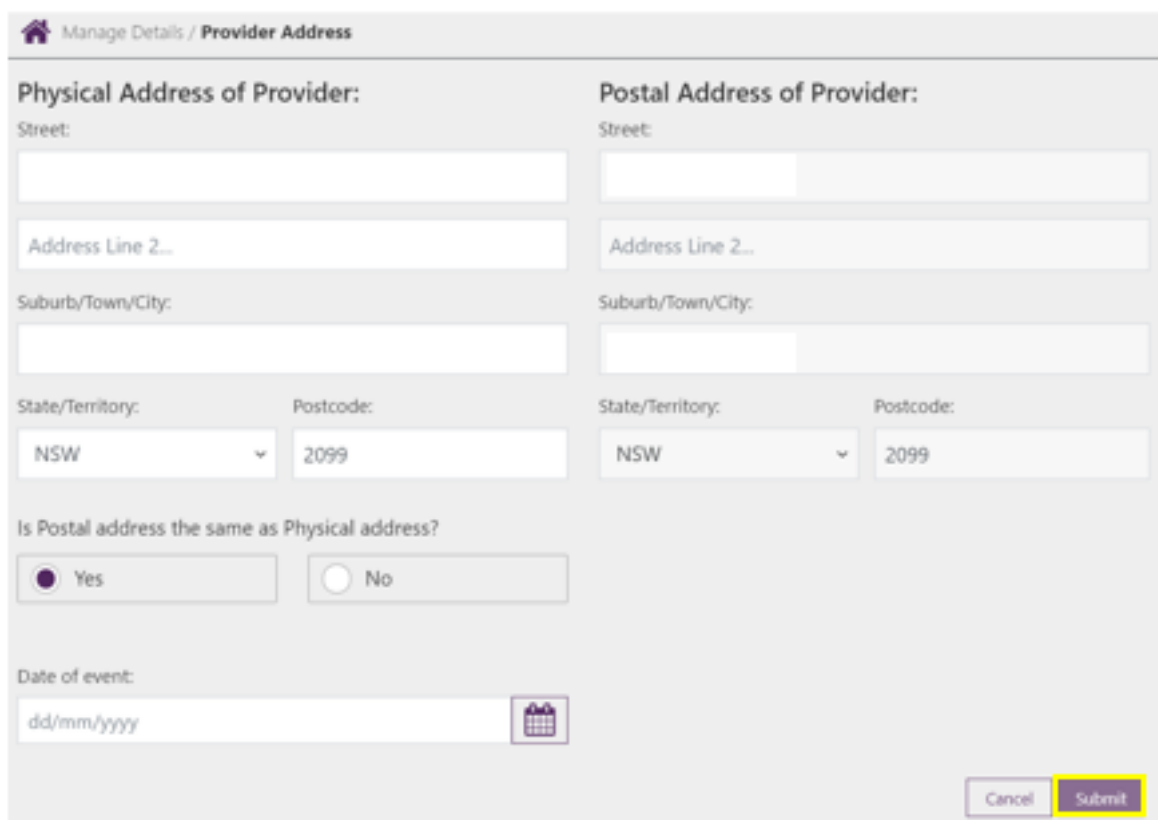
4(a) Update financial details – Summary



The screenshot shows a web form titled 'Manage Details / Summary'. The form has a header bar with a house icon and the text 'Manage Details / Summary'. Below the header, the word 'Summary' is displayed. The form contains several labels on the left: 'BSB:', 'Account Number:', 'Account Name:', 'Date of Event:', and 'Services change applied to:'. To the right of these labels is a large white rectangular area, likely a placeholder for a screenshot or document. At the bottom right of the form, there are three buttons: 'Back', 'Cancel', and 'Submit'. The 'Submit' button is highlighted with a yellow border.

Submit: Select 'submit' to confirm the change. A receipt will be generated confirming the changes have been applied.

5(a) Update address details



The screenshot shows a web form titled 'Manage Details / Provider Address'. The form has a header bar with a house icon and the text 'Manage Details / Provider Address'. Below the header, the form is divided into two main sections: 'Physical Address of Provider:' and 'Postal Address of Provider:'. Each section contains the following fields: 'Street:', 'Address Line 2...', 'Suburb/Town/City:', 'State/Territory:' (a dropdown menu), and 'Postcode:'. Below these sections, there is a question 'Is Postal address the same as Physical address?' with two radio button options: 'Yes' (selected) and 'No'. At the bottom left, there is a 'Date of event:' field with a placeholder 'dd/mm/yyyy' and a calendar icon. At the bottom right, there are two buttons: 'Cancel' and 'Submit'. The 'Submit' button is highlighted with a yellow border.

Submit: Select 'submit' to confirm changes. A receipt will be generated confirming the changes have been applied.