

Bendigo Bank Not-for-profit

Salary Packaging Portal User Guide

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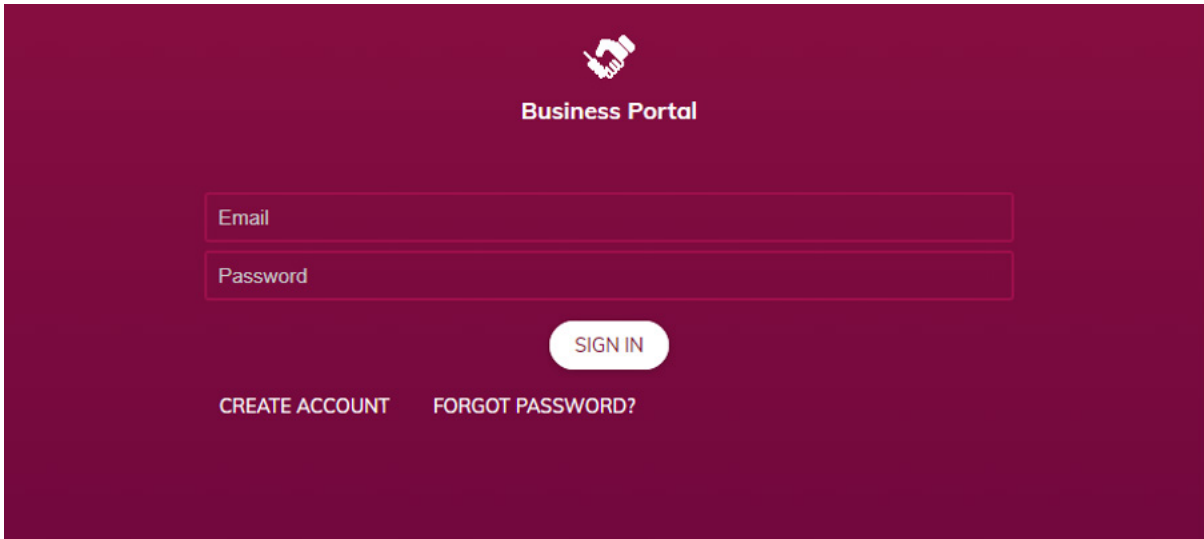
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Employer portal

Creating your account

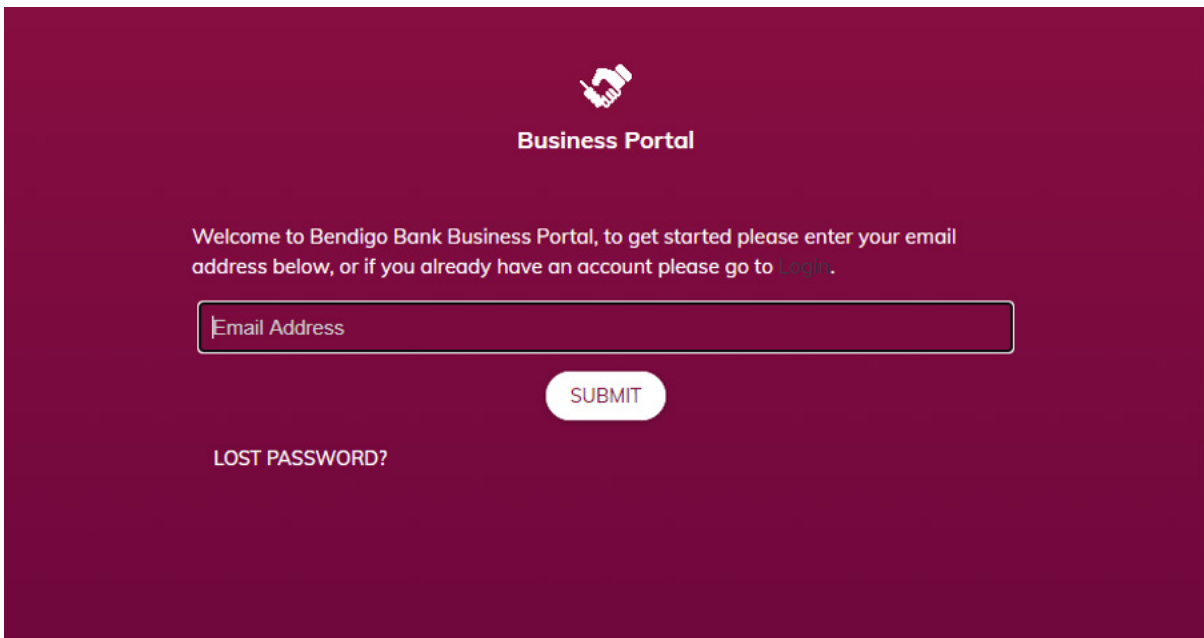
Please note: the portal works on most web browsers however Chrome and Firefox are preferred.

After receiving your welcome email, you will need to follow the link to create an account.



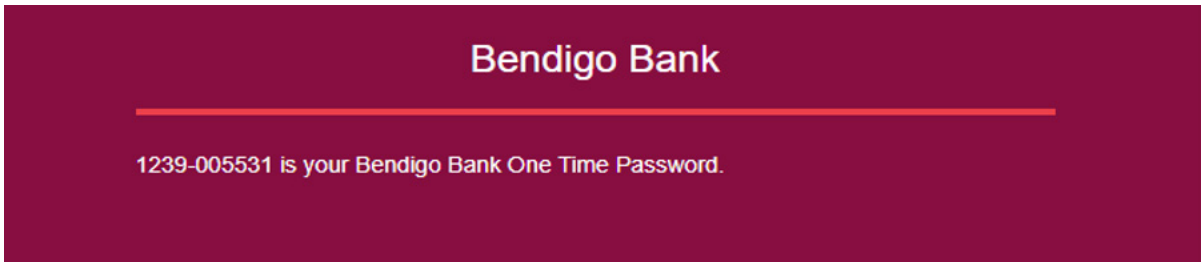
The screenshot shows the 'Business Portal' login interface. At the top center is a logo of two hands shaking, with the text 'Business Portal' below it. There are two input fields: 'Email' and 'Password'. Below these fields is a 'SIGN IN' button. At the bottom, there are two links: 'CREATE ACCOUNT' and 'FORGOT PASSWORD?'.

Click 'create account' and on the next screen enter your email address.

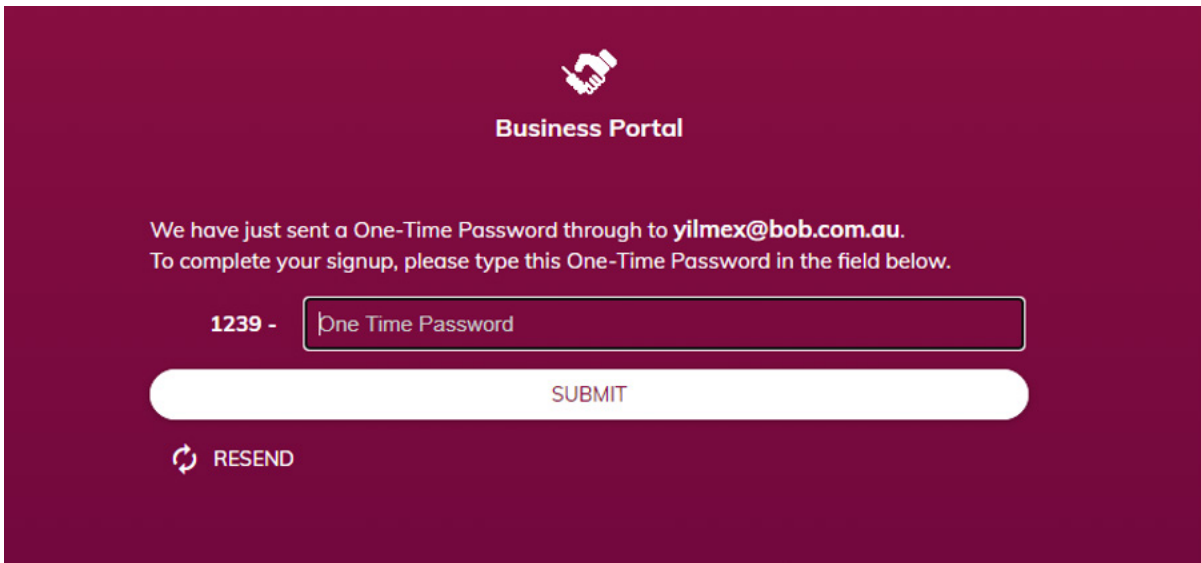


The screenshot shows the 'Business Portal' account creation screen. At the top center is the same logo of two hands shaking, with the text 'Business Portal' below it. Below the logo is a welcome message: 'Welcome to Bendigo Bank Business Portal, to get started please enter your email address below, or if you already have an account please go to [login](#).' There is a single input field labeled 'Email Address'. Below the field is a 'SUBMIT' button. At the bottom, there is a link: 'LOST PASSWORD?'.

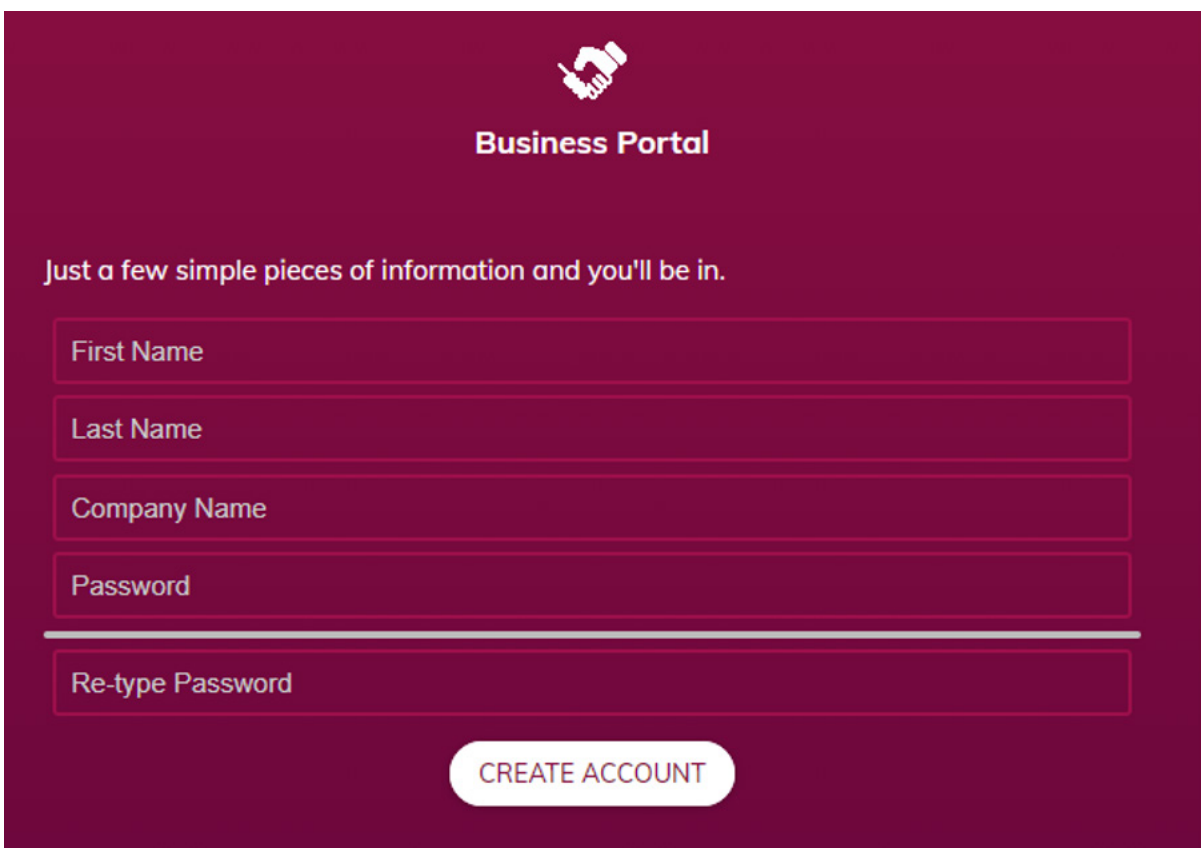
You will receive an email from the portal with a one-time password.

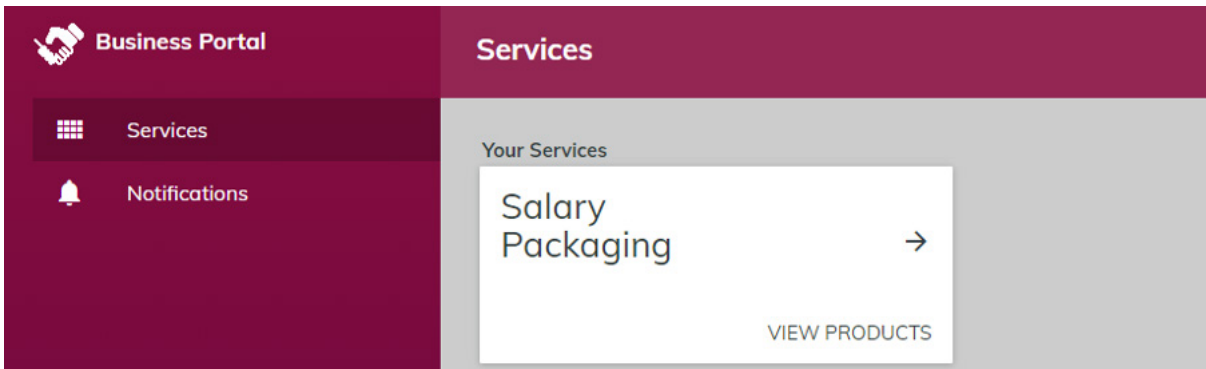


Enter this password on the screen to move to the next step.

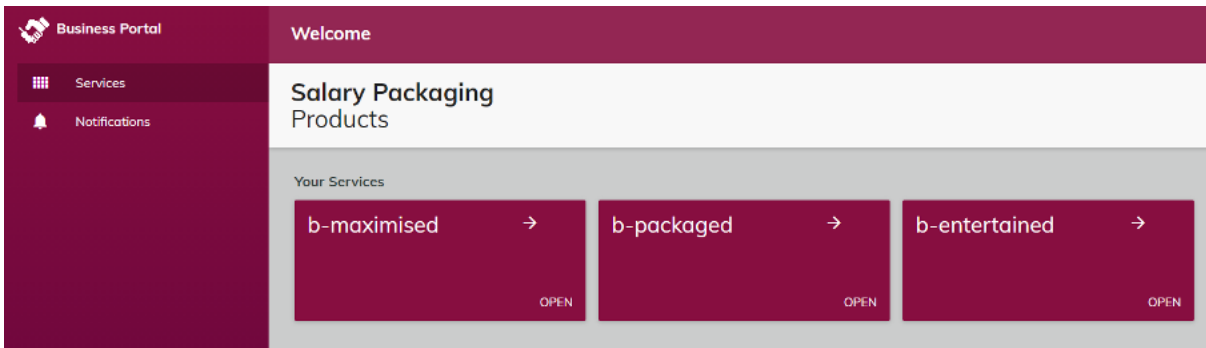


Please enter your personal details and company name to create your user account.

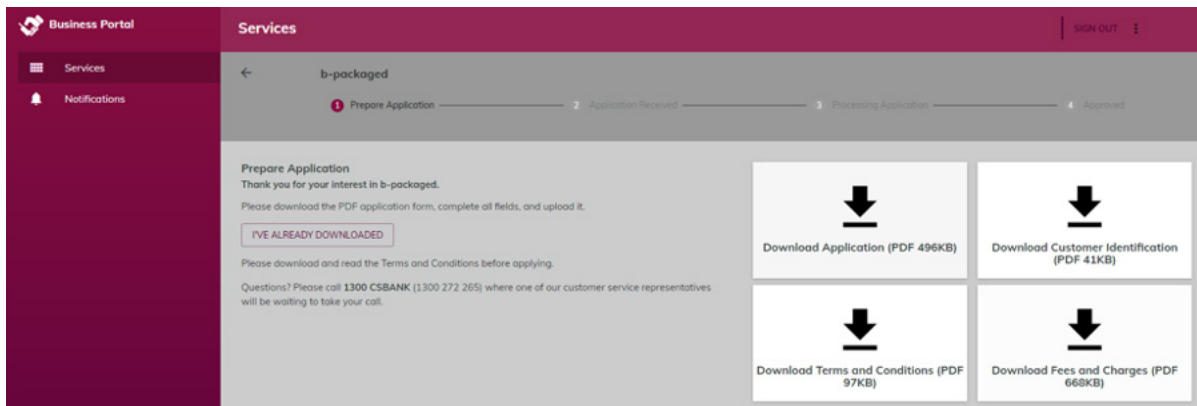




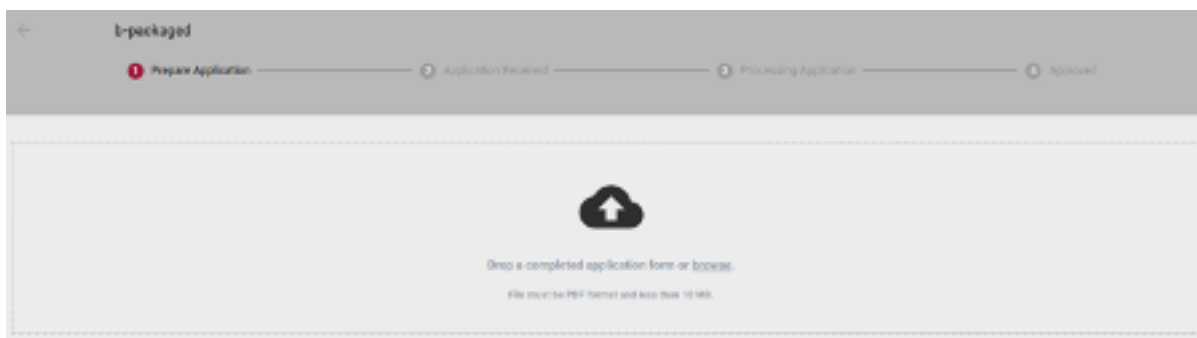
Next, click the product you are applying for. Please note at this point in time you are only able to select one product at a time in the portal.



On the next screen you will be presented with the forms required to apply for a salary packaging facility, along with the relevant terms and conditions documents. You will need to download the presented form/s for completion and a copy of the terms and conditions documents for your information. If you have already been provided a copy of the application form by one of our representatives simply click 'I've already downloaded' to progress to the next stage.



Please complete the application form in full and collect certified identification for all parties to the account. Then upload the completed and signed form to the portal along with any identification and supporting documentation.

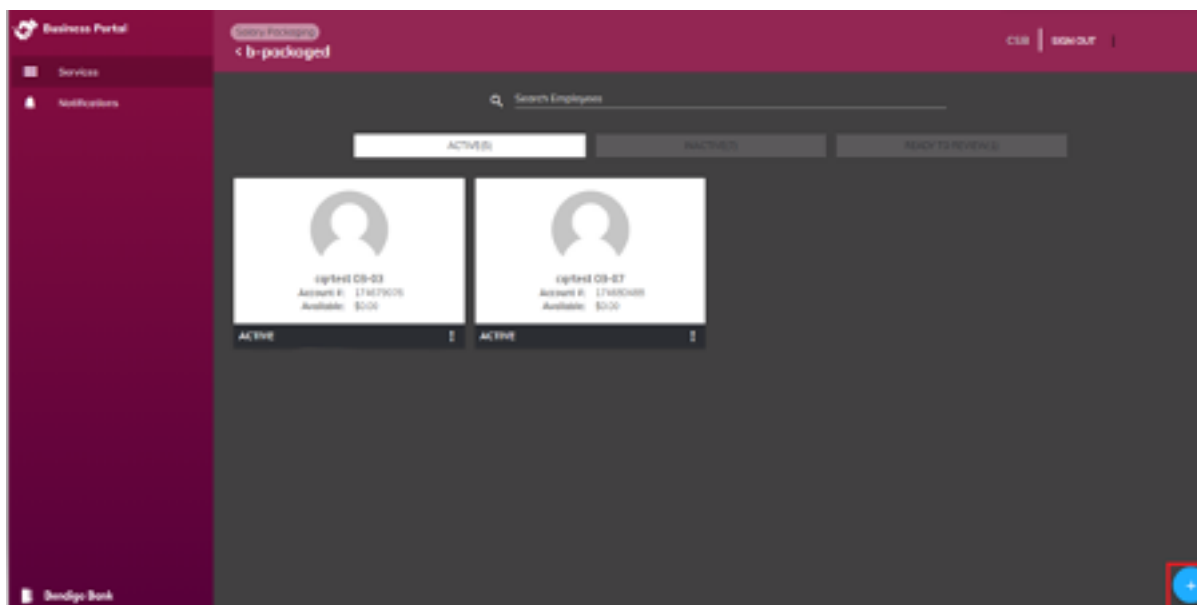


If you require any assistance with the forms or have any questions, please call us on 1300 272 265 to speak to one of our customer service representatives.

Your application will now be reviewed and processed by our team. If we require any additional information we will be in touch, otherwise you will receive an email confirming your application is complete.

Inviting employees to your facility

Once you have been informed your facility is up and running, you can invite employees to the product by clicking '+' in the bottom right of the screen.



You will be prompted to enter the employee's first and last name. This will prepopulate their email address using the default email server format used to create your portal account. If this is incorrect you can change it by using the 'email format' drop-down.

Individual invite

1

First Name	Last Name	Email Address

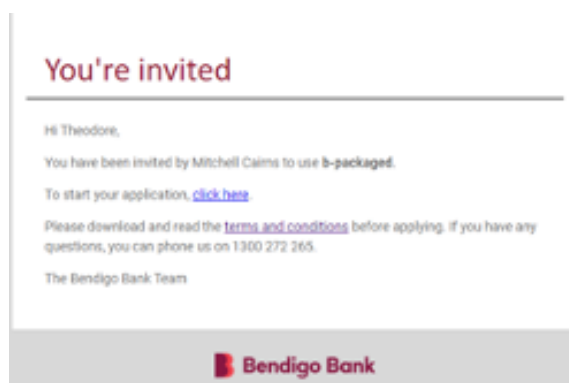
ADD ANOTHER

Default Email Server: **csbanking.com.au**

Default Email Format: **charlie.smith@email.com**

Multiple employees can be added at once by selecting 'add another', or one employee may be added at a time. Alternatively, you can download an Excel template and enter multiple employees' details. This template can then be uploaded to the portal to complete a bulk upload of employee invites.

Once all required employees have been added, select 'next' to progress to the next screen. This will generate an email, as shown below, for the employee/s. Each email contains a unique link to facilitate their account opening.



For more information on the employee process, please refer to section 2 of this user guide.

Once an employee has completed the application process in the portal, you, and the authorised portal users, will receive the below email.

Application Complete

Hi Mitchell,

Theodore Test has just completed their **b-packaged** application.

Please review their application in Business Portal by [clicking here](#).

Select the link in the email to review the application. From here you will have the option to approve the application or request further information to support the application.

The screenshot shows a user interface for reviewing an application. At the top, there is a grey box titled "Application History" containing three entries: "June 5, 2020 - invited by Mitchell Coirns", "June 5, 2020 - Theodore Test started application", and "June 5, 2020 - Theodore Test completed signup". Below this is a section titled "Application" with a sub-section "Members". A card for "Theodore Test" is displayed, showing "Identity Check: Passed" in green. The address is listed as "12 Test Street, Testville, 2500, NSW". At the bottom right of the interface, there are two buttons: "REQUEST MORE INFO" and "APPROVE".

If the application is ready for approval, simply click 'Approve'. The system will generate an account and card that will be sent directly to the employee's nominated address.

Should more information be required, please select 'Request More Info'. A message can be added in the pop-up window to advise the employee of the additional information requirements. The employee will receive an email notification of the request and will have the ability to reply with the requested information. Once all required information has been received and the application is ready for approval, simply click 'Approve' to generate the account and card.

Adding additional portal users

If you would like to add an additional portal to your account, please complete a Customer and Account Alterations form (IG122) which is available on our website bendigobank.com.au or by calling us on 1300 272 265.

This form will need to be completed with the additional portal users' details and signed by one of the authorised portal users. Certified identification will also need to be provided.

Once completed and signed, please post the original to PO Box 585 Corrimal, NSW 2518 for processing.

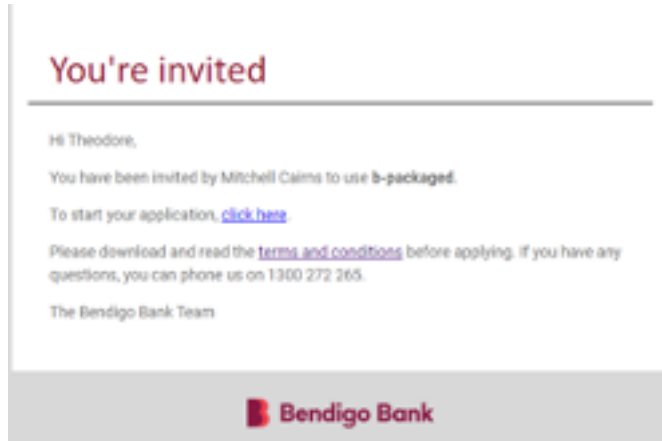
If you require assistance completing the form or have any questions, please call us directly for assistance.

Employee portal

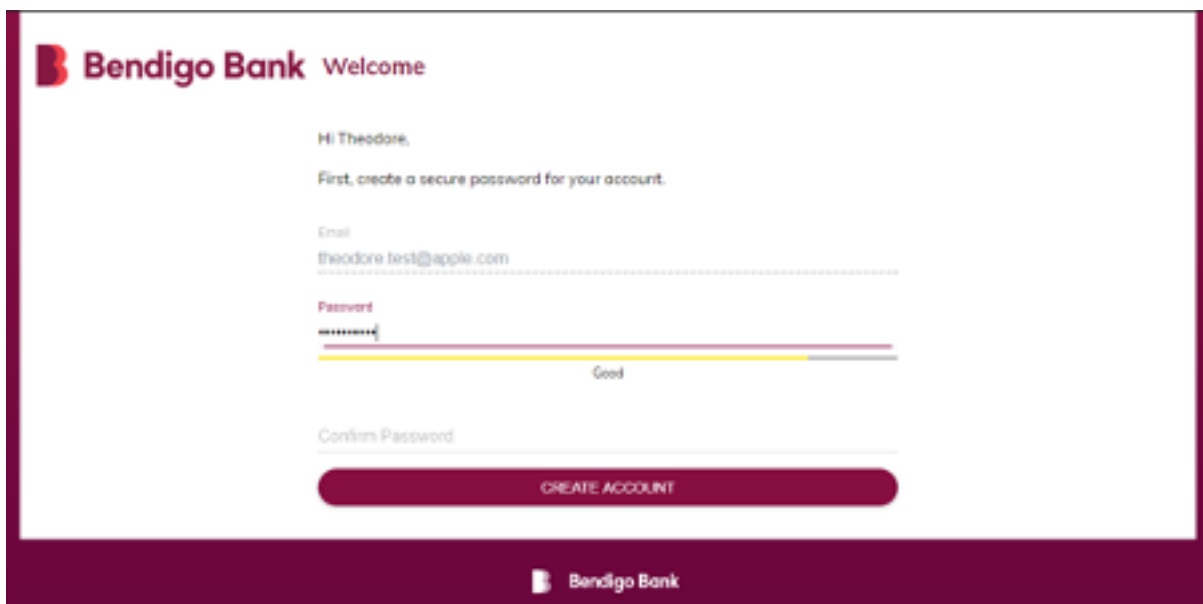
Creating your account

Please note: the portal works on most web browsers however Chrome and Firefox are preferred.

Once you receive your 'invitation to apply' email, click the link included to begin the process.



You will be directed to a sign-up page for the online portal. To access the portal, you will need to create a password and account.



You will be required to enter your personal information into each field in the presented screens. It is important these details are captured correctly as this information communicates with the bank's systems.

CARD HOLDER 1
Full legal name

First name
Theodore

Middle name

Surname
Test

DOB Day Month Year
08 11 Jan 1992

Occupation
Bank Worker

Preferred contact number
0411 222333

Residential address
12 Test Street

Suburb
Testville


Postcode
2500

State
NSW

I have lived here for more than 12 months

My postal and residential addresses are the same

NEXT

 Bendigo Bank

Once all required fields have been completed, you will be presented with an electronic identification verification to complete. To facilitate electronic verification, we will require information from your Australian Drivers' Licence, passport and/or Medicare card.

You will need to enter your identification details and select 'run identity check' to complete the electronic verification.

Bendigo Bank b-packaged
NEW APPLICATION LOGOUT

Cardholder verification > Step 2 of 4

Please provide one type of identification for each cardholder listed on your account.

THEODORE TEST

Id Type
DRIVERS LICENSE

State of Issue
NSW

License Number
7777777

Expiry
Day: **01** Month: **Jan** Year: **2024**

+ ADD ANOTHER ID

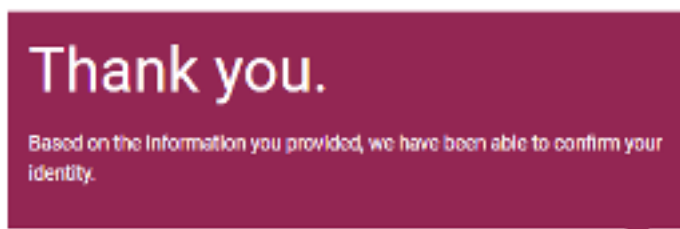
Only one ID is required however, applications with two or more IDs on file tend to process faster.

I confirm that I am authorised to provide the personal details presented and I consent to my information being checked with the document issuer or official record holder for the purpose of confirming my identity. I have read the [Electronic Verification Terms and Conditions](#) and also consent to my information being used to verify my identity against personal information held by a credit reporting agency.

RUN IDENTITY CHECK

BACK **NEXT**

The system will process the electronic verification and return a result of 'pass' or 'fail'. If you pass the check, you will be advised via a pop-up message, as shown below, that we have been able to confirm your identity.



If an electronic verification check fails, first review the information entered to ensure it is accurate. If it is correct, then add an additional form of identification and retry the identity check. If you are still unsuccessful in passing the electronic verification check, please contact the Salary Packaging Specialist Team directly on 1300 272 265 for further advice.

If you are unable to be electronically identified, we will revert to manual processes which involves collecting certified identification and completing a b-packaged and b-entertained Employee Application Form prior to the account being opened.

If you have passed electronic verification, click 'Next'. This will take you to our privacy and acknowledgement screens. You will need to review and agree/consent to these disclosures.

Acknowledgement 1:

Please provide a verbal password. This password will be used to help identify you over the phone when talking to Bendigo Bank. Please treat this as you would any other password.

If you have forgotten your password we are unable to provide any prompts to assist you and you will be asked additional security questions.

verbal password

We treat your personal information with the highest level of respect and will only collect data about you when needed to perform necessary business functions.

Please review our privacy policy for the fine print.

[REVIEW PRIVACY POLICY](#)

I do not wish to receive marketing material from Bendigo and Adelaide Bank Ltd

I have read the privacy disclosure.

[BACK](#) [NEXT](#)

Acknowledgement 2:

Please read and agree to the following statements.

I certify that all the information provided in this application is true and correct. By signing below I/we acknowledge my/our acceptance of the Privacy Disclosure and acknowledge that the authorised signatory and I, as the holder of a Payment Card will have 'No Withdrawals' e-banking access and that this access will be restricted to the above transactions only. Furthermore, I acknowledge that in order to activate my/our 'No Withdrawal' e-banking access I need to contact 1300 236 344 once the account is open.

I acknowledge and agree to be bound by the Cardholder's Terms and Conditions of use, a copy of which has been provided to me prior to completing this application form.

I also acknowledge the right of Bendigo and Adelaide Bank Limited to provide my personal information and information regarding the account, in relation to which I hold a payment card, to my employer.

Theodore agrees.

[BACK](#) [SUBMIT](#)

When you have completed the acceptance of disclosures, the application is sent back to your employer for approval (as noted in the employer section above). You will not need to complete any further information at this point.

Once your application has been approved by your employer, you will receive a welcome email.

Adding additional cardholders

If you would like to add an additional cardholder to your account, please complete a Customer and Account Alterations form (IG122) which is available on our website bendigobank.com.au or by calling us on 1300 272 265.

This form will need to be completed with the additional cardholder's details and signed by one of the authorised portal users. Certified identification will also need to be provided.

Once completed and signed, please post the original to PO Box 585 Corrimal, NSW 2518 for processing.

If you require assistance completing the form or have any questions, please call us directly for assistance.

Periodical payments

To help get the most from your salary packaging funds, we can set up a periodical payment for bills, mortgage repayments, rent, school fees and more.

If you would like to set up a periodical payment, please complete a b-packaged Periodical Payment Authority Form (OA481a) which is available on our website (Bendigobank.com.au/notforprofit) or by calling us on 1300 272 265.

The first time you complete this form, please provide a photocopy of the same identification document used to open your account through the portal. We will retain this on file to verify your signature each time you provide us with a signed form.

This form needs to be completed with the payment details, amount and frequency you are requesting. Once completed and signed, please scan the form and your identification through to salarypackaging@bendigobank.com.au for processing.

If your signature changes, please let us know and we can arrange for a Signature Capture Form to be provided to you to record your new signature.

Once a payment has been set up, ongoing maintenance such as amount changes, date changes or cancelling a payment can be completed over the phone with us.

Contact us

Call **1300 272 265**

Email salarypackaging@bendigobank.com.au

bendigobank.com.au/notforprofit
