



PORTAL - MANAGING ACCOUNT DETAILS

Needing to set up Direct Debit via the portal?

Adding Direct Debit Details

1. Sign in to the Web Portal
2. Select the Families Screen
3. Select the 3 dot menu next to Payment Account(s)
4. Select Edit from the drop-down menu
5. Ensure your Payment method is set to Direct Debit
6. Select your Payment type eg. Card or Bank

The screenshot displays the 'Family Summary' page for 'Kendall Kirkland' and 'Kara Kirkland'. The page is divided into several sections:

- Guardian(s):** Lists Kyle Kirkland (Mother) and Kevin Kirkland (Father) with their contact information and status icons.
- Child(ren):** Lists Kyle Kirkland (On Wait List), Kendall Kirkland (Active), and Kara Kirkland (Inactive).
- Nominee(s):** Lists Jamie Kirkland (Uncle).
- E-mail History:** Shows a list of system emails regarding invoices and wait-list applications.
- CWA Agreement:** Shows a pending agreement for Kendall Kirkland.
- Medical Conditions:** Lists health and immunisation information for Kyle, Kendall, and Kara Kirkland.
- Payment Account(s):** Shows the payment method for Kyle Kirkland as 'Direct Debit'. A dropdown menu is open, highlighting the 'Edit' option (marked with a green '4'). A yellow warning box states: 'Direct debit details are incomplete. Please provide Card/Bank details to process direct debits online.'
- Declaration:** Shows the status as 'Pending'.



PORTAL - MANAGING ACCOUNT DETAILS

Needing to add a Credit Card via the portal?

Adding Credit Card Details

1. Check your Payment method is Set to Direct Debit
2. Select Card
3. Add in your Credit Card details
4. Tick the Acknowledgement
5. Set the Transaction Start Date
6. Tick your preferred Transaction Day
7. Select Save

The screenshot shows the 'Edit - Payment Account' form with the following fields and callouts:

- 1**: Payment Method dropdown menu (set to Direct Debit)
- 2**: Debit From radio buttons (Card selected, Bank unselected)
- 3**: Card Holder Name text input (Kylie Kirkland)
- 4**: Acknowledgement checkbox (checked) with associated text: "There is a cost involved in processing Direct Debit transactions. will be charged \$1 transaction cost and 1.8% surcharge."
- 5**: Transaction Start Date text input (31 May 2021)
- 6**: Preferred Transaction Day radio buttons (Thu selected)
- 7**: Restrict below guardian(s) from accessing information of this payment account. checkbox (unchecked)

Buttons: Cancel, Save

Note: This may not be an option for you as it the Service chooses to have this enabled or not. If it is not available for you to select, you will need contact your Child Care Service for further information on their settings.



PORTAL - MANAGING ACCOUNT DETAILS

Needing to add Bank Account details via the portal?

Adding in Bank Account Details

1. Check your payment method is Set to Direct Debit
2. Select Bank
3. Add in your Credit Card details
4. Tick the Acknowledgement
5. Set the Transaction Start Date
6. Tick your preferred Transaction Day
7. Select Save

To assist you further with this process see the Guardian University video: [How to manage Direct Debit Details](#)

Edit - Payment Account [X]

Suburb * State * Postcode *

Payment Details

Payment Method *

Debit From *

Account Name *

BSB * Account Number *

There is a cost involved in processing Direct Debit transactions. A \$1 transaction cost will be charged.

I/We Kylie Kirkland authorise Quickpay Pty Ltd (ACN 108 135 146) to debit any amount it may lawfully charge through the Bulk Electronic Clearing System to the account held at the financial institution identified above subject to the [terms and conditions](#) of the Direct Debit Request Service Agreement set out in the direct debit agreement and in accordance with the information and instructions contained in Schedules A,B,C,D and E

Transaction Start Date Transaction End Date

Payment Type
Gap Fees

Preferred Transaction Day

Other Details

Make this account as default payment account.
 Restrict below guardian(s) from accessing information on this payment account.

Note: This may not be an option for you as it the Service chooses to have this enabled or not. If it is not available for you to select, you will need contact your Child Care Service for further information on their settings.



PORTAL - MANAGING FAMILY INFORMATION

Managing Family Information is easy in Xap!

Managing your Family Information

1. Visit the family summary page
2. To edit a section, click on the three dots or pencil icon located on the right-hand side
3. Click on **edit** from the drop-down menu
4. Make the relevant changes in the **pop-up menu**
5. Select **Save**

Edit - Guardian ✕

Guardian Details

A Guardian includes parent of the child and/or a person with parental responsibilities for the child under a decision or court order. Parental responsibility is a term defined under section 61C of the Family Law Act 1975, which means "all the duties, powers, responsibilities and authority which, by law, parents have in relation to children."

Family
Anderson Tom

Guardian Details

First Name * Last Name *

Known As Date of Birth * 📅

Make this default name

CRN 🚫

This is a Primary Guardian in the family

Contact Details

Email Address *

Mobile Number Phone Number

Work Number

Home Address *

Suburb * State * Postcode *