

# Online Services Portal how-to guide

The City of Swan is proud to launch our Online Services Portal, making it easier for you to manage your rates.

This how-to guide will walk you through processes related to your annual rates, such as:

- Check or pay your outstanding balance
- Set up direct debit or a self-managed payment plan (payment arrangement)
- Download your rate notice
- Update your postal address or contact details
- View all previous years' transactions.

Some customers (where applicable) will also be able to view their past and current animal registrations or infringements.

## Contents

- 1. Register your details .....3
  - 1.1 Customer name and activation key.....3
  - 1.2 Online Services Terms of Use .....3
  - 1.3 Create a password .....4
- 2. Sign into the Online Services Portal .....5
- 3. Using the Online Services Portal .....6
- 4. Edit your contact details .....7
- 5. View rate notices and manage payments.....8
  - 5.1 Create a direct debit.....9
  - 5.2 Confirm your direct debit .....11
  - 5.3 Create a payment arrangement .....14
- 6. View your rate notice .....17
  - 6.1 View your current and previous notices.....18



## 1. Register your details

The City of Swan (the City) recently sent sent your 2023/24 rate notice with an activation key inviting you to register for our new Online Services Portal.

If you did not receive your rate notice, or you're having trouble locating it, please call Rating Services on 9267 9160.

### 1.1 Customer name and activation key

The QR code or the link provided in your rate notice will direct you to the activation page. Please insert the details you were provided with in your rate notice, including your customer name, surname and activation key.

Please ensure you include your full name as it appears on your rate notice. Please do not include the title (i.e. Mr or Mrs). Create a username that is easy to remember (we recommend using your email address).

Click **Next**.

### 1.2 Online Services Terms of Use

You will be directed to City of Swan Online Services Terms of Use. **Please read carefully.** To proceed, please tick **I accept the Online Services Terms of Use.**

Home Bookings Payments Property Searches

**Submit Registration (Automated)**

Please nominate a password for use when logging into the system and confirm the password as requested, then click the Submit button to lodge your details.  
Your password is case sensitive and must:

- Be at least 10 characters long
- Have at least 1 uppercase character
- Have at least 1 lowercase character
- Have at least 1 number
- Have at least 1 of the following symbols: !@#\$%^&\*()\_.,:;|'=""
- Have no more than 2 repeated characters

Username

Password

Confirm Password

[Previous](#) [Submit](#)

### 1.3 Create a password

Your password **must**:

- Be at least 10 characters long
- Have at least one uppercase character
- Have at least one lowercase character
- Have at least one number
- Have at least one special character from the following symbols: !@#\$%^&\*()\_.,:;|'=""
- Have no more than two repeated characters (two of the same character next to each other, e.g. ee or 33).

Click **Submit**.

**Your Registration has been successfully completed**

✓ Your registration as a new user has been completed and you have now been automatically logged in with those details. Next time you log in you need to use the username and password that you have just registered with. If you have any questions please contact the Customer Services Centre.

Customer name	Patricia Anthony Kennedy
Activation Key	000000
Email address	rhianmarke@icloud.com
Confirm email address	rhianmarke@icloud.com
Username	PatriciaK

You will need to sign out, then sign back in to finish activating your account.

Now you are good to go!

A confirmation email will be sent to your nominated email address.

**Please save this email in case you forget your username.**

## 2. Sign into the Online Services Portal

The link you received in your confirmation email will take you to the sign-in page of the Online Services Portal. Please select **Sign In** in the top right hand corner and then please **enter your username and password**.

Home Bookings Payments Property Searches

[SIGN IN](#) [CITY'S WEBSITE](#)

 city of swan

Home Bookings Payments Property Searches



**Make a payment**

Pay rates, infringements, applications and renewals. Make a payment using our secure payment gateway.



**Request or report it**

Spotted something in our community needing attention? [View available customer requests.](#)



**Register your animal**

Just got a new cat or dog, or moved to the area? Learn about how to [register your pet.](#)

### 3. Using the Online Services Portal

After you log into the Online Services Portal, you will be automatically directed to the **My Home** page. From here, you can access your rates account information, plus some other City of Swan services if they relate to you, such as animal registrations and infringement details.

**Mr Test Ratepayer**

Postal address  
4 The St, MIDDLE SWAN WA 6056

Email address  
someone@mail.au

Communication preference  
Email

[Edit contact details](#)

[Refresh](#)

Customer Type	Description	Pending balance
Ratepayer	111170 (B) - Current 4 The Street, MIDDLE SWAN WA 6056 (Rates)	\$158.18
Ratepayer	151153 (B) - Current 30 Test Way, MIDDLE SWAN WA 6056 (Rates)	\$2684.19

**Animals**

Customer Type	Description
Owner	Reference: 226009, Name: Klara, Disc: 17717, Period: 2100, Class: Sterilised Dog & M/Chip - Lifetime
Owner	Reference: 228807, Name: Kite, Disc: 1123, Period: 2101, Class: Sterilised Cat & M/Chip - Lifetime
Owner	Reference: 20028, Name: Jingle, Disc: 1944, Period: 2101, Class: Sterilised Cat & M/Chip - Lifetime

[Load more](#)

- View More Details
- Rate notices
- Create a Payment Arrangement
- Create a Direct Debit
- Pay Now (\$0.19)
- Refresh

To get back to the **My Home** page at any time, just select **My Home** from the main menu, or find it under **My Account** as shown below.

My Account

- My Home
- Rates
- Edit contact details
- View contact details

Customer type Description

### 4. Edit your contact details

From the homepage, you will also be able to edit your personal details. If you own multiple properties, and wish to advise of a different postal address for each property please let us know by emailing swan@swan.wa.gov.au.

Please carefully check your **postal address** on the left hand side. This will show your current record.

To update any incorrect details, click **Edit contact details**.

Home My Account

**Mr Test Ratepayer**

Postal address  
4 The St, MIDDLE SWAN WA 6056

Email address  
someone@mail.au

Communication preference  
Email

[Edit contact details](#)

[Refresh](#)

**Rates**

Customer Type

Ratepayer

Ratepayer

**Animals**

**Required field**

Update your contact details

Contact details

Please update your details below.  
If you are changing your name details (personal or company), you will need to provide proof of the name change (e.g. Marriage Certificate, Change of Name Certificate, Certificate of Registration, etc.) to the City (this can be done via Email, Post or In Person).

Given name(s)

Last name/Company name

Email address

Please note: If you own multiple properties, and wish to advise of a different postal address for each property please let us know by emailing swan@swan.wa.gov.au. Please be sure to include the new postal address for each property you want to update next to the corresponding Rate Reference Number and Rateable Property Address.

Postal address

At least one of these numbers must be entered.

Mobile phone number

Landline phone number

Haven't made any changes? [Return to My Home](#)

If you've made changes, please click the 'Next' button to submit your changes.

[Next](#)

Click **Return to My Home** button if you do not need to make any changes. If you have updated your details, please click **Next**.

It may take up to 10 days for your details to be updated in the City's system. You will receive another email confirmation once your details have been updated.

⚠ If you are changing your name, you will need to email proof of the name change (e.g. marriage certificate, change of name certificate) to swan@swan.wa.gov.au. These documents do not need to be certified. They can be lodged via email, post or in-person. If further information is required, we will contact you.

## 5. View rate notices and manage payments

Mr Test Ratepayer

Postal address  
4 The St, MIDDLE SWAN WA 6056

Email address  
someone@mail.au

Communication preference  
Email

Edit contact details

Refresh

Customer Type	Description	Pending balance
Ratepayer	111170 (0) - Current 4 The Street, MIDDLE SWAN WA 6056 (Rates)	\$158.18
Ratepayer	151153 (8) - Current 30 Test Way, MIDDLE SWAN WA 6056 (Rates)	

Animals

Customer Type	Description
Owner	Reference: 226809, Name: Klara, Disc: 17717, Period: 2100, Class: Sterilised Dog & M/Chip - Lifetime
Owner	Reference: 228807, Name: Kita, Disc: 1123, Period: 2101, Class: Sterilised Cat & M/Chip - Lifetime
Owner	Reference: 20028, Name: Jingle, Disc: 1944, Period: 2101, Class: Sterilised Cat & M/Chip - Lifetime

View More Details

Rate notices

Create a Payment Arrangement

Create a Direct Debit

Pay Now (\$158.18)

Refresh

From the homepage, click ☰ to either view your rate notices, create a payment arrangement, create a direct debit, or pay your rates.

Please note, you can alter any payment amount at the payment screen when you choose to **Pay Now**. This may be useful if you're paying by instalments and want to pay your next instalment amount.

Click 📄 to expand your property details.

## 5.1 Create a direct debit

From the homepage (as pictured), click ☰ to create a direct debit.

In this screen, you will be able to view your rateable property details for your direct debit, and request a new direct debit.

Mr Test Ratepayer

Postal address  
4 The St, MIDDLE SWAN WA 6056

Email address  
someone@mail.au

Communication preference  
Email

Edit contact details

Refresh

Customer Type	Description	Pending balance
Ratepayer	111170 (0) - Current 4 The Street, MIDDLE SWAN WA 6056 (Rates)	\$158.18
Ratepayer	151153 (8) - Current 30 Test Way, MIDDLE SWAN WA 6056 (Rates)	\$2684.19

Animals

Customer Type	Description
Owner	Reference: 226809, Name: Klara, Disc: 17717, Period: 2100, Class: Sterilised Dog & M/Chip - Lifetime
Owner	Reference: 228807, Name: Kita, Disc: 1123, Period: 2101, Class: Sterilised Cat & M/Chip - Lifetime
Owner	Reference: 20028, Name: Jingle, Disc: 1944, Period: 2101, Class: Sterilised Cat & M/Chip - Lifetime

View More Details

Rate notices

Create a Payment Arrangement

Create a Direct Debit

Pay Now (\$0.19)

Refresh

Load more

Please read the **Rates Direct Debit Terms and Conditions** carefully before you continue.

Select the date you want your direct debit agreement to start. **Note**, this is the effective date of the agreement, not the first payment due date.

**Request a new Direct Debit**

The City offers a Direct Debit to make it convenient for you to pay your rates in the following ways:

- on a weekly or fortnightly basis

Once you've set up your Direct Debit, it's really important that you do not default on your payments and make sure you have sufficient funds in your account on the scheduled payment due dates.

Please Note: Terms and conditions apply, please read the Rates Direct Debit Terms and Conditions [📄](#)

- Direct debits are not available from credit cards.
- Direct debits need to be set up each financial year.
- Applicable penalty interest will accrue until the account is paid in full.
- Your Direct Debit will not automatically include penalty interest. The City will recalculate your final payment to include all penalty interest accrued to date. We will deduct any final outstanding balance from your account inclusive of all penalty interest accrued to date.

You will receive a confirmation in writing of the Direct Debit payment plan, and you can also view your details from the My Home page under My Account.

\* Required field

Schedule Type	Weekly/fortnightly direct debits
Effective Date *	19/05/2023

[Previous](#) [Next](#)

Click **Next**.

**5.2 Confirm your direct debit**

If you haven't already, please read the **Rates Direct Debit Terms and Conditions** before you continue.

Please choose the frequency of your direct debit payment (weekly or fortnightly). The funds will be deducted from your account on a **Friday**, depending on your chosen frequency.

⚠ Day of week cannot be changed to another day of the week.

**Periodic Direct Debit Request**

The City offers a Direct Debit to help you spread out the cost of your rate payments over a fortnightly or weekly basis. Once this is in place, it's really important that you have sufficient funds in your nominated account to make the payments on as per your payment schedule.

Please note: Terms and conditions apply, please read the Rates Direct Debit Terms and Conditions [📄](#)

- direct debits are undertaken on Fridays only
- direct debits are not available from credit cards
- direct debits need to be renewed each financial year
- applicable penalty interest will accrue until the account is paid in full
- your payment plan will not automatically include the penalty interest. If wish to pay off the interest by the end of this financial year, you will need to check your balance and make a final payment at the end of the rating period.
- Direct Debits are calculated to be paid off **before 30 June** each financial year.

You will receive a confirmation in writing of your direct debit payment plan, and you can also view your details from the My Home page under My Account.

\* Required field

Schedule Type	Weekly/fortnightly direct debits
Effective Date	17/06/2023
Payment Type	Automatically calculated (to clear outstanding balance).
Frequency *	Weekly
Day Of Week *	Friday

[Previous](#) [Next](#)

Click **Next**.

Please enter your bank details for your direct debit.

Bank Account Details

Please enter the bank account details for the Direct Debit below. If your account number is less than 6 digits, please put 0's before the account number, e.g. 1234 should be entered as 001234.

BSB *	
Account Number *	
Account Name *	

Previous
Next

Click **Next**.

Please review your Direct Debit details

**You are about to submit your Direct Debit application**

Please review the details below carefully. If you have no changes, please click the 'Next' button to submit your application. If you already have a payment arrangement in place, please contact Rating Services on 08 9267 9160 to cancel it.

Schedule Type	Weekly/fortnightly direct debits
Payment Type	Automatically calculated (to clear outstanding balance).
Effective Date	17/06/2023
Frequency	Weekly
Day Of Week	Friday
Total Outstanding	\$2,391.90
Amount of payment	\$2,391.90
BSB	013147
Account Number	123456
Account Name	Jay Citizen

Sequence	Payment Date	Payment Amount
1	23/06/2023	\$2,391.90

Please make sure you read and understand the Rates Direct Debit Terms and Conditions before submitting your application. Click Next to submit your application to set up your Rates Direct Debit.

I agree to the Rates Direct Debit Terms & Conditions

Previous
Next

Please review carefully, and tick **I agree to the Rates Direct Debit Terms and Conditions**.

If you need to make changes, please click **Previous**; otherwise click **Next** to submit your application.

Your direct debit has been submitted successfully!

Direct Debit Request Submission

Home   My Account   Payments   Property Searches

**Your Direct Debit submission has been submitted successfully**

An email confirmation showing your Direct Debit payment plan has been sent. Your first Direct Debit amount will be deducted based on the dates shown in the payment schedule. It is your responsibility to make sure you have sufficient funds in your nominated account on the scheduled payment due dates.

Direct Debit Transaction Reference      E0DR30

[Click to Print This Page](#)

Rates property details

A confirmation email will be sent to you with your direct debit payment plan.

If you need to change or cancel your direct debit, please call Rating Services on 9267 9160. **This cannot be done online.**

### 5.3 Create a payment arrangement

From the homepage, click  to create a payment arrangement.

1. Choose a date you want your payment arrangement to commence, as well as an end date. The start date you choose is the date from which the agreement is effective, not the first payment date.
2. Choose the frequency of your payments — monthly, fortnightly or weekly — and the day of the week for funds to be paid.
3. After you choose your repayment frequency (weekly/fortnightly/monthly), you must select **Calculate Schedule** and it will calculate your payment amount. Payment amounts can be changed, provided it totals the full amount to be paid by June 30 this financial year.

Please review your schedule.

Payment frequency	Weekly
Day of week	Monday
Start date	16/05/2023
End date	30/06/2023
Calculated payment amount	\$1,674.79
Total Rates amount	\$10,048.71
Total outstanding	\$10,048.71

Sequence	Payment Date	Payment Amount
1	22/05/2023	<input type="text" value="1674.70"/>
2	20/06/2023	<input type="text" value="1674.70"/>
3	5/08/2023	<input type="text" value="1674.70"/>
4	12/06/2023	<input type="text" value="1674.79"/>
5	10/06/2023	<input type="text" value="1674.70"/>
6	26/06/2023	<input type="text" value="1674.78"/>

If you need to make changes to your payment schedule, please click **Previous**; otherwise click **Next** to continue.

You are about to submit your payment arrangement. Please review your arrangement, and read the **Rates Payment Arrangement Terms and Conditions** carefully.

**Confirm your Payment Arrangement**

You are about to submit your Payment Arrangement. Please review the details below carefully. If you are happy with your arrangement details, please click the 'Next' button to submit your application. If you already have a Direct Debit in place, please contact Rating Services on 9267 9160 to cancel your existing Direct Debit agreement.

Payment frequency	Weekly
Day of week	Monday
Start date	16/05/2023
End date	30/06/2023
Calculated payment amount	\$1,674.79
Total Rates amount	\$10,048.71
Total outstanding	\$10,048.71

Sequence	Payment Date	Payment Amount
1	22/05/2023	\$1,674.79
2	29/05/2023	\$1,674.79
3	5/06/2023	\$1,674.79
4	12/06/2023	\$1,674.79
5	19/06/2023	\$1,674.79
6	26/06/2023	\$1,674.79

Please make sure you read and understand the Rates Payment Arrangements Terms and Conditions before submitting your application. Click the Next button to submit your Payment Arrangement.

I agree to the City of Swan Payment Arrangements Terms and Conditions

Previous
Next

If you need to make changes, please click **Previous**; or if you're happy with your schedule, please click **Next** to proceed with your submission.

**Payment Arrangement Submission**

✓

**Your Payment Arrangement has been submitted**

Your Payment Arrangement has been submitted. A confirmation email has been sent to you. It's really important that you make payments as per your payment schedule. If you can't make your payments, please contact Rating Services ASAP on 08 9267 9160 to discuss alternative options.

Payment Arrangement Transaction Reference: ETP09

[Click to Print This Page](#)

Rates Property Details

Your payment arrangement has been successfully submitted. You will shortly receive a confirmation email.

## 6. View your rate notice

From the homepage (pictured), click to view your current rate notices.

Home
My Account
Payments
Property Searches

**Mr Test Ratepayer**

Postal address  
4 The St, MIDDLE SWAN WA 6056

Email address  
someone@mail.au

Communication preference  
Email

[Edit contact details](#)

[Refresh](#)

**Rates**

Customer Type	Description	Pending balance
Ratepayer	111170 (0) - Current 4 The Street, MIDDLE SWAN WA 6056 (Rates)	\$158.18
Ratepayer	151153 (0) - Current 30 Test Way, MIDDLE SWAN WA 6056 (Rates)	

**Animals**

Customer Type	Description
Owner	Reference: 226009, Name: Klara, Disc: 17717, Period: 2100, Class: Sterilised Dog & M/Chip - Lifetime
Owner	Reference: 228007, Name: Kite, Disc: 1123, Period: 2101, Class: Sterilised Cat & M/Chip - Lifetime
Owner	Reference: 20028, Name: Jingle, Disc: 1944, Period: 2101, Class: Sterilised Cat & M/Chip - Lifetime

View More Details

**Rate notices**

View Rate notices, Statements and other

Create a Payment Arrangement

Create a Direct Debit

Pay Now (\$158.18)

Refresh

To view and download your current rate notice, click on **View Document** under the Link column.

Home
My Account
Payments
Property Searches

**Rate notices**

Property Reference Number: [redacted]

Property address: [redacted]

Outstanding balance: [redacted]

Ratepayer names: [redacted]

Ratepayer mailing address: [redacted]

Attachment Type	Description	Link
Rates Notice	2022/2023 Rates Notice	<a href="#">View attachment</a>

Previous

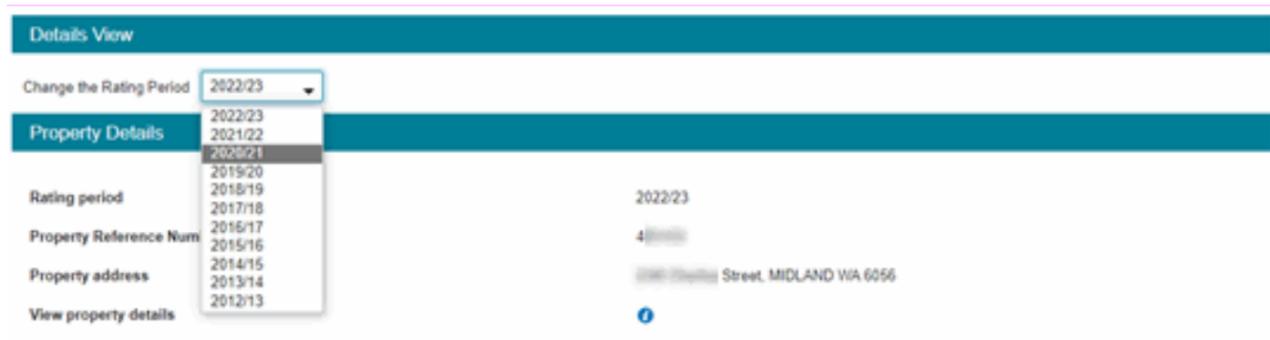
Your 2022/23 rate notice are available to view now, and your 2023/24 rate notice will be available to view from July 2023.

### 6.1 View your current and previous notices

From the home homepage (as pictured), click on  to and select **View More Details**.

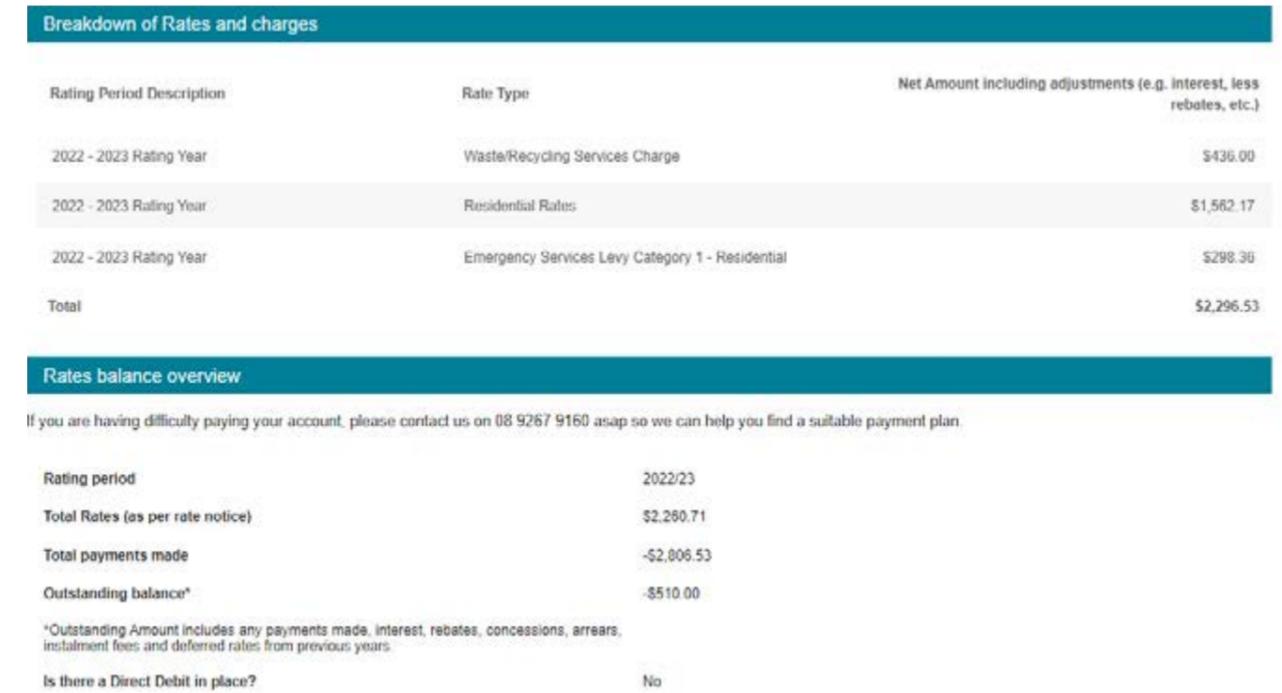


Select the **rating period** you would like to view under **Details View**.



You will only be able to view the rating periods for the period of time you have owned the property. You will not be able to view rating periods under previous property ownership.

View a breakdown of your rates and charges, and an overview of your balance for each rating period.



You're all set up and ready to go.

You can view your rates portal anytime. For further information, please visit [swan.wa.gov.au/OnlineServices](http://swan.wa.gov.au/OnlineServices)

If you have any questions or feedback, please contact Rating Services on **9267 9160**.