



Create and manage outlets

Task card

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KEY HIGHLIGHTS

- Any sensitive information, such as a person's home address or a protected location such as a refuge should not be recorded or included in an outlet's name or address.
- You can't create a new outlet that has an identical name and locality as an existing outlet, or edit an outlet to mirror an existing outlet's name and locality.
- Each outlet must be assigned the program activity(s) that it delivers.
- Program activities are pre-loaded from your grant agreement. You can't select a program your organisation is not funded to deliver.
- Your program activity start and end date is also pre-loaded from your grant agreement.
- Creation of outlet requests should occur before the close of a reporting period.
- The Data Exchange helpdesk may take up to 10 business days to approve an outlet.
- The use of * & % # @ should **not** be included in the outlet free text fields.

What is an outlet?

The Data Exchange Protocols describe an outlet as “the physical location from where a service is primarily being delivered”.

An **outlet** identifies the location where a service took place, or where staff travelled from to deliver a service. Each outlet can have different staff, service information and contact details.

Post office boxes **can't** be used as an outlet address in place of a physical location.

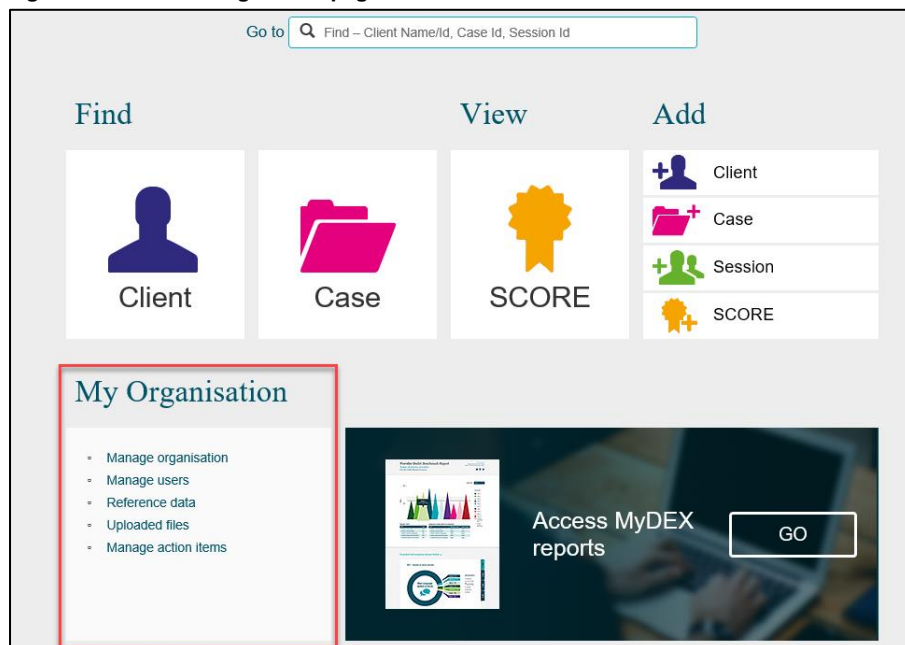
Where a service is mobile in nature, delivered at a client's home or sensitive location (such as a refuge), record the outlet as the nearest administrative premises where staff are based.

How to manage your outlets

Access the Manage organisation screen

From the Data Exchange web-based portal home page, select **Manage organisation** found in the **My Organisation** menu. Refer to figure 1.

Figure 1 - Data Exchange home page



The **Manage organisation** screen will display with the following information. Refer to figure 2:

1. Your **Organisation Details**, which are pre-loaded from your grant agreement.
2. Your organisation's current **Partnership Approach** status.
3. **Outlets** you have created. If this is the first time you have accessed the web-based portal, no outlets will be listed until you create them. Refer to the [Add an outlet](#) section in this document for guidance.
4. **Program activities** your organisation is funded to deliver, which are pre-loaded from your grant agreement. This section includes the following columns:
 - Start date
 - End date
 - Status: The default for status is Active.
 - Active – the program activity is a current grant and can be reported on
 - Expired – the program activity is not a current grant and can't be reported on (tick the **Show all** box to display)
 - Ended by lead (only visible to delivery partners) – the program activity has been ended by the lead organisation and can't be reported on (tick the **Show all** box to display).
 - Notification – a notification bell icon will display if a handshake request is submitted

You are able to **search** for and filter your outlets using the Name, Address, State and Program activity name fields as referred to in Figure 2 item 3.

Figure 2 - Manage organisation screen

The screenshot shows the 'Manage organisation' screen. At the top, there is a breadcrumb 'Home > Manage organisation' and a title 'Manage organisation'. A button 'EDIT ORGANISATION DETAILS' is in the top right. Below the title, there is a section 'Organisation Details' (callout 1) containing fields for 'Preferred organisation name' (Delivery Org), 'Partnership Approach agreement' (No), 'ABN' (91929395544 - callout 2), 'Source Organisation ID' (DEX-000014), and 'Source Organisation name' (Delivery Org). Below this is a section 'Outlets (3)' (callout 3) with a '+ ADD OUTLET' button (callout 4) and a search bar. The search bar has fields for 'Name', 'Address', 'State' (a dropdown), and 'Program activity', with 'SEARCH' and 'Clear' buttons. Below the search bar is a table of outlets. At the bottom is a section 'Program activities (5)' (callout 4) with a 'Show All' checkbox and a table of activities. A '< BACK' button is at the bottom left.

Home > Manage organisation

Manage organisation

[EDIT ORGANISATION DETAILS](#)

1 Organisation Details

Preferred organisation name: Delivery Org

Partnership Approach agreement: No

ABN: 91929395544

Source Organisation ID: DEX-000014

Source Organisation name: Delivery Org

3 Outlets (3)

[+ ADD OUTLET](#)

Name: Address: State: Program activity:

[SEARCH](#) [Clear](#)

Outlet name	Address	Created Date
Catchment Team	71 Athelstan Rd CAMBERWELL VIC 3124	03/08/2018
Bay Area Services	12 Avenue Athol CANTERBURY VIC 3126	03/08/2018
Text outlet	Department Of Social Services 71 Athlon Dr GREENWAY ACT 2900	13/08/2018

4 Program activities (5)

[Show All](#)

Program activity	Start date	End date	Status	Notification
Care Relationships and Career Support	08/01/2016	08/12/2019	Active	
Commonwealth Financial Counselling and Financial Capability	08/01/2016	08/12/2019	Active	
Community and Home Support	08/01/2016	08/12/2019	Active	
Community and Home Support (for Community Organisation)	01/07/2017	30/06/2021	Active	
Financial Crisis and Material Aid - Emergency Relief	08/01/2016	08/12/2019	Active	

[< BACK](#)

Add an outlet

At the **Manage organisation** screen, select **+ADD OUTLET**. Refer to figure 2.

When creating an outlet name and address, **DO NOT** include any sensitive information such as a person's home address or a protected location like a refuge. If you deliver services to clients' homes, use the staff's administrative office address as the outlet.

To create an outlet for a refuge, record the record the outlet as the nearest administrative premises where staff are based, or use an address of a non-identifiable public place nearby, such as a post office, police station or shopping centre.

The **Add outlet – (Organisation name)** screen will display. Refer Figure 3.

Figure 3 - Data Exchange Add outlet – (Organisation name) screen

Add outlet - Community Organisation

All fields marked with an asterisk (*) are required.

Outlet details

Outlet name: *

Outlet address

Address line 1: * Street number and street name e.g. 123 Example St

Address line 2:

Suburb/Town: *

State: * ▼

Postcode: *

[Cancel](#)

* Mandatory Field

Enter the name and address of your outlet. This name will be displayed when creating cases and within your reports.

NOTE: The use of special characters such as * & % # @ should **not** be included in the free text fields.

Go to the [Program Specific Guidance](#) for outlet naming conventions for your program activity.

The Data Exchange uses third-party software to validate the outlet address. If the details do not match, select a valid address from the list that will display.

Complete all the required fields, then select **SAVE**.

You should not create duplicate outlets that have an identical name and address (suburb, state, postcode combination) as an existing outlet for your organisation.

If you create or edit an outlet using an existing name and address, an error will display advising you to modify the outlet name or address before you complete the outlet creation or update process.

Requests for the creation of outlet(s) must be submitted at least 10 days before the close of a reporting period. Delays in creating outlets will impact your ability to upload data.

Organisation Administrators outlets must be attached to a program activity before they are submitted to the Data Exchange helpdesk for approval.

Add a program activity

Each outlet must be assigned the program activity(s) that it delivers. You will not be able to record data at the case and session level until this step is completed.

To add a program activity, select the outlet name hyperlink found in the **Manage organisation** screen located under the **Outlets** heading. Refer to figure 4.

Figure 4 - Manage organisation screen

The screenshot shows the 'Manage organisation' screen. At the top right is a button 'EDIT ORGANISATION DETAILS'. Below the heading 'Organisation Details', the following information is displayed: Preferred organisation name: Community Care, Partnership Approach agreement: Yes, ABN: 11005906054, Source Organisation ID: 4-13UI4P, and Source Organisation name: Community Organisation. Below this is the 'Outlets (30)' section, which includes a search bar with fields for Name, Address, State, and Program activity, and a '+ ADD OUTLET' button. A table lists six outlets, with the first one, 'Local Highschool', highlighted by a red box. The table columns are Outlet name, Address, and Created Date.

Outlet name	Address	Created Date
Local Highschool	1 Mort Street CITY ACT 2601	17/06/2014
Sydney	123 Goulburn Street SYDNEY NSW 2000	17/06/2014
Community Centre	Level 2 100 Queen Street HOBART TAS 3000	17/06/2014
Adelaide	15 George Court ADELAIDE SA 5000	17/06/2014
Brisbane (Red Hill)	Lot 13, 1 Jones Street RED HILL QLD 4059	17/06/2014
Darwin	100 Smith Street DARWIN CITY NT 0800	17/06/2014

The **Outlet details** screen will display. Refer to figure 5.

Figure 5 - Outlet details screen

The screenshot shows the 'Outlet details' screen. At the top right are buttons 'DELETE OUTLET' and 'EDIT OUTLET DETAILS'. Below the heading 'Outlet', the 'Outlet name' is 'Local Highschool'. Below the heading 'Address', the following information is displayed: Address line 1: 1 Mort Street, Address line 2: (empty), Suburb/Town: CITY, State: ACT, and Postcode: 2601. Below this is the 'Activities delivered by outlet (4)' section, which includes a '+ ADD ACTIVITY' button highlighted by a red box. A table lists two activities, with columns for Program activity, Start date, End date, Status, Edit, and Delete.

Program activity	Start date	End date	Status	Edit	Delete
Children's Contact Services	01/07/2014	30/06/2017	Approved		
Family Relationship Advice Line	01/07/2014	30/06/2017	Approved		

Select **ADD ACTIVITY**.

The **Add activity** screen will display. Refer to figure 6.

Figure 6 - Add activity screen

1. Select a **program activity** from the drop down box.

Program activities are pre-loaded from your grant agreement. You can't select a program your organisation is not funded to deliver.

2. Review and edit (if required) the **start** and **end date**.

3. Select **SAVE**.

Start and end date information

The **end date** for a program activity is automatically populated with the end date value from your grant agreement you have been funded to deliver.

The Data Exchange is able to identify any date changes to your organisation's program activity and automatically apply the updates to your outlet activity date. This automated process means Organisation Administrators don't need to manually change outlet dates when an extension to funding is granted. For example, if a program activity was extended for six months, the date would automatically update both the organisation and outlet dates for that program.

At times, you may need to amend the end date against an outlet. For example, an outlet may only operate for a short time and you want to ensure that no data can be entered against that outlet once it's no longer active. You would manually amend the end date to stop any data reported against that outlet after the set date.

More information is in the [How to manually update program activity start and end dates section](#) in this document.

Date changes will only automatically take effect on outlets that already have a **matching end date** to the program activity. For example, if the program activity ends on 21/12/2017 but the outlet activity end date is 30/11/2017, the outlet date will not change after an extension to the program funding. However, if the outlet and activity end date matches the program end date at 31/12/2017, then the outlet end date will automatically update to reflect the extension to program funding.

Once saved, the outlet and program activity(s) will be automatically forwarded to the Data Exchange helpdesk for approval within 10 business days. The Data Exchange helpdesk will notify you when approval occurs.

Once approved, the outlet and its program activities will display in the appropriate drop-down menus in the Data Exchange web-based portal: creating cases.

Repeat these steps for any other program activities delivered from the same outlet. Notification will be sent to the Data Exchange helpdesk for approval each time a program activity is matched to an outlet.

Repeat these steps for each outlet location you create.

Bulk upload of outlets

Organisations can create their outlets via a bulk upload process. Information on how to do this is available in the [Reference Data](#) learning module on the website. The reference data file is downloadable within the web-based portal under 'My Organisation'. Go to the [Upload methods task card](#) for more information.

Approval of outlet creation requests via bulk uploads can be delayed by the size of the upload and larger uploads may take longer than 10 business days to approve.

Editing and maintaining outlets

An outlet name and address can be edited across any reporting period. These changes trigger the re-approval process for an outlet, which the Data Exchange helpdesk will approve within 10 business days.

Date changes will only automatically apply to outlets that have a **matching end date** to the program activity.

To update an outlet's name or address:

Go to the **Outlet Details** screen and select **EDIT OUTLET DETAILS**.

The **Edit Outlet Details** screen will display. Refer to figure 7.

Figure 7 – Edit Outlet details screen

Edit Outlet details

All fields marked with an asterisk (*) are required.

Outlet

Outlet name: * Local Highschool

Address

Address line 1: * 1 Mort St
Street number and street name e.g. 123 Example St

Address line 2:

Suburb/Town: * CITY

State: * ACT

Postcode: * 2601

[Cancel](#) **SAVE**

* Mandatory Fields

Amend the **Outlet name** and / or **address** details as required, then select **SAVE**.

NOTE: The use of * & % # @ should **not** be used in the free text fields.

An outlet can't be deleted once it has data recorded against it in any reporting period.

How to manually update program activity start and end dates

If you need to update the program activity **start** and **end dates** for a particular outlet, an Organisation Administrator must update the outlet information within the Data Exchange web-based portal before you can continue entering data.

Please note: you cannot amend the program activity outlet end date beyond the end date specified in your grant agreement.

Step 1 – Check the start and end date

Your program activity **start** and **end date** is pre-populated from your grant agreement. Check that these dates match your organisation's signed grant agreement. Refer to figure 8.

Figure 8 – Start and End dates

The screenshot displays the 'Outlets (3)' section at the top, featuring a search bar with fields for Name, Address, State, and Program activity, along with a 'SEARCH' button and a 'Clear' link. Below this is a table of outlets:

Outlet name	Address	Created Date
Catchment Team	71 Athelstan Rd CAMBERWELL VIC 3124	03/06/2016
Bay Area Services	12 Avenue Athol CANTERBURY VIC 3126	03/06/2016
Test outlet	Department Of Social Services 71 Athlon Dr GREENWAY ACT 2900	13/06/2016

Below the outlets section is the 'Program activities (5)' section, which includes a 'Show All' checkbox and a table of activities:

Program activity	Start date	End date	Status	Notification
Care Relationships and Career Support	06/01/2016	06/12/2019	Active	
Commonwealth Financial Counselling and Financial Capability	06/01/2016	06/12/2019	Active	
Community and Home Support	06/01/2016	06/12/2019	Active	
Community and Home Support (for Community Organisation)	01/07/2017	30/06/2021	Active	
Financial Crisis and Material Aid - Emergency Relief	06/01/2016	06/12/2019	Active	

A red box highlights the 'Start date' and 'End date' columns in the Program activities table. At the bottom left, there is a '< BACK' button.

Step 2 – Select the outlet

Select the **hyperlink** of the outlet that needs to be updated. This example below highlights the outlet at Sydney. Refer to figure 9.

Figure 9 – Select the required outlet

Manage organisation

[EDIT ORGANISATION DETAILS](#)

Organisation Details

Preferred organisation name: Community Care
Partnership Approach agreement: Yes
ABN: 11005906054
Source Organisation ID: 4-13UI4P
Source Organisation name: Community Organisation

Outlets (30)

[+ ADD OUTLET](#)

Name: Address: State: Program activity: [SEARCH](#) [Clear](#)

Outlet name ↕	Address	Created Date ↕
Local Highschool	1 Mort Street CITY ACT 2601	17/06/2014
Sydney	123 Goulburn Street SYDNEY NSW 2000	17/06/2014
Community Centre	Level 2 100 Queen Street HOBART TAS 3000	17/06/2014
Adelaide	15 George Court ADELAIDE SA 5000	17/06/2014

The **Outlet details** screen will display. Refer to figure 10.

Figure 10 – Outlet details screen

Outlet details

[DELETE OUTLET](#) [EDIT OUTLET DETAILS](#)

Outlet

Outlet name: Sydney

Address

Address line 1: 123 Goulburn Street
Address line 2:
Suburb/Town: SYDNEY
State: NSW
Postcode: 2000

Activities delivered by outlet (12)

[+ ADD ACTIVITY](#)

Program activity ↕	Start date ↕	End date ↕	Status ↕	Edit	Delete
Children's Contact Services	01/07/2014	31/06/2017	Ready for approval		
Family Law Counselling	01/07/2014	30/06/2017	Approved		
Family Dispute Resolution	01/07/2014	30/06/2017	Approved		

Step 3 – Amend the start and end dates

To edit the **start** and **end dates**, select found under the **Activities delivered by outlet** heading for the relevant program activity. Refer to figure 11.

Figure 44 Activities delivered by outlet section

Activities delivered by outlet (12)

ADD ACTIVITY

Program activity ↕	Start date ↕	End date ↕	Status ↕	Edit	Delete	
 Children's Contact Services	01/07/2014	30/06/2017	Approved			
 Family Law Counselling	01/07/2014	30/06/2017	Approved			
 Family Dispute Resolution	01/07/2014	30/06/2017	Approved			

The **Edit activity** screen will display. Refer to figure 12.

Amend the **start** and **end dates** as required, then select **SAVE**.

Figure 12 – Edit activity screen

Home > Manage organisation > Outlet details: Sydney > Edit activity

Edit activity

All fields marked with an asterisk (*) are required.

Activity details

Program activity: Children's Contact Services

Start date: * 01/07/2014 dd/mm/yyyy

End date: * 31/08/2017 dd/mm/yyyy

[Cancel](#) **SAVE**

The outlet **Status** will now display as **Ready for approval**. Refer to figure 13.

Figure 13 – Ready for approval status

Program activity	Start date	End date	Status	Edit	Delete
Children's Contact Services	01/07/2014	31/08/2017	Ready for approval		
Family Law Counselling	01/07/2014	30/06/2017	Approved		
Family Dispute Resolution	01/07/2014	30/06/2017	Approved		
Supporting Children after Separation Programme	01/07/2014	30/06/2017	Approved		

Step 4 – Ready for approval

Amending your **start** and/or **end dates** triggers an automated approval request to the Data Exchange helpdesk. Please note that this approval process is subject to normal Data Exchange helpdesk processing times.

Once approved, you will be able to continue entering data against the program activities that are updated.

More information can be found in the [Data Exchange Protocols](#) and the [Training page](#) on the website.

For technical support contact the Data Exchange helpdesk by email dssdataexchange.helpdesk@dss.gov.au or phone 1800 020 283 between 08.30am - 5.30pm (AEST/AEDT) Monday to Friday.