**The Data Exchange Protocols**

**Part 2**

**Using the Data Exchange** **An Easy Read guide**

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| A group of people. There is a woman at the front of the group, she is holding a card that says "we". | The Australian Government Department of Social Services (DSS) wrote this guide. When you see the word ‘we’, it means DSS. |
| Easy read logo | We have written this guide in an easy to read way.  We use pictures to explain some ideas. |
| Normal, Bold | We have written some words in **bold**. This means the letters are:   * thicker * darker. |
| Word list icon | We explain what these words mean.  There is a list of all these words on page 42. |
| Summary icon | This Easy Read guide is a summary of another document.  This means it only includes the most important ideas. |
| Two women look at a laptop together | You can find the other document on our website at [**dex.dss.gov.au/**](https://dex.dss.gov.au/) |

**How to use this guide**

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| A woman is helping a man read a document. | You can ask for help to read this guide.  A friend, family member or support person may be able to help you. |
| The covers of four parts of the guide. | This guide has 4 parts:   * Part 1 – What is the Data Exchange? * Part 2 – Using the Data Exchange * Part 3 – The Partnership Approach * Part 4 – Recording client outcomes in the Data Exchange. |
| A man holds a clipboard with part 1 of the guide on it. | This is Part 2 – What is the Data Exchange? |
| Woman explaining document to man | You might like to read 1 part at a time. |
| Woman looking at computer | You also might like to read parts of this guide while you look at the Data Exchange online. |
|  | If you have any questions, you can contact us. Our contact details are on page 40. |

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|  |  |
| --- | --- |
| A man pointing at a clipboard with words on it | There are certain words we use in the Data Exchange. |
| A woman with her hand raised pointing at "words". | Your organisation might use different words |
| A man holding a clipboard that says our wordsŽ. There is also an exclamation mark. | It’s important to use our words when you use the Data Exchange. |
| A man holds a clipboard with part 1 of the guide on it. | We talk about all these words in Part 1 – What is the Data Exchange? |
| Word list icon | You’ll also find a list of all these words on page 41. |

# Words we use in the Data Exchange

# Using the Data Exchange

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| --- | --- | --- | --- | --- |
| A man pointing to a computer system. | | If your organisation gets a grant to help people and communities, you will be asked to use the Data Exchange. | | |
| Computer icon that says portalŽ on it. | | We have a web-based portal for organisations to use. | | |
| Man typing on a computer. There is a client and service icon. | | You can use the web-based portal to:   * create client records * look at your client records * manage the services your clients use. | | |
| Computer with client records of it. | | Some organisations even decide to use the Data Exchange as their **client records system**. | | |
| Man typing on a computer. | | A client records system is a system an organisation uses to collect and store personal information about their clients.  They might use software.  Their system might be online. |
| Woman pointing at clipboard with a To doŽ list on it. | | There are things your organisation must do before you can start using the Data Exchange. |
| Woman pointing at a report and calendar icon. | | You should do them as early as possible in the reporting period. |

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| **Did you know?**  The Data Exchange has a training area where you can learn how to use the system. There are videos online to help you learn. We explain this in more detail on page 40. |

| 7 | To get started, your organisation must follow these 7 steps. |
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### Step 1: Digital Identity

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| Computer with client records of it. | You need a Digital Identity to use the Data Exchange. |
| Man pointing at MyGov ID. | myGovID is the Australian Government’s Digital Identity. |
| Montage of two icons. The first is a business. The second is an organisation. | myGovID is the tool the government uses to identify:   * businesses * organisations |
| Website address icon | You can apply for it online at  [**www.mygovid.gov.au/**](https://www.mygovid.gov.au/) |
| Computer icon that says RAMŽ with a software icon. | Once you have a myGovID, you can use a software tool called a Relationship Authorisation Manager (RAM). |
| Man pointing at himself with his other hand raise. There is an arrow pointing at an organisation. | RAM links you to:   * your organisation * the Government systems your organisation uses. |

### Step 2: Ask for access to the system

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| Woman typing on a computer sending a user access request. | Send a **User Access Request** to the Data Exchange Helpdesk. |
| Man with his hand raised asking to become a data exchange user. | A User Access Request is how you ask us if you can become a Data Exchange user. |

### Step 3: Enter your details

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| --- | --- |
| Organisation and a set up icon. | Go into the Data Exchange and set up your organisation. |

### Step 4: Tell us about your outlets

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| --- | --- |
| Outlet icon with a plus sign. | Create any outlets – the places clients go to use your organisation’s services. |

### Step 5: Tell us about the activities you do

| Calendar with a program activity icon there is also a plus sign. | Add **program activities** to the outlets you have created. |
| --- | --- |
| Man pointing out a program. | Program activities are all the services:   * your organisation offers * clients can choose from. |

### Step 6: Tell us about any other organisations you work with

|  |  |
| --- | --- |
| Delivery truck with a plus sign. | Add the details for any delivery partners you need to add. |
| Two women shaking hands. | Delivery partners are other organisations you work with to provide help and services for your clients. |

### Step 7: Create extra users if you need to

| Person with a plus sign icon. | Create any extra users you need to add. |
| --- | --- |

|  |  |
| --- | --- |
| Woman pointing at a user access request form. | At least 1 person from each organisation will need to complete and submit a Data Exchange User Access Request Form. |
| Person with a gear icon. | This person will have Administrator access to the Data Exchange. |
| Admin icon with an arrow pointing at a woman. | This person might leave your organisation 1 day.  You must give someone else Administrator access to the Data Exchange |
| Man typing on a computer. | The form is on the Data Exchange website. |
| Quick start guide and some documents icon. | You can find helpful information on our website, including:   * a Quick Start Guide * training materials. |
| Two women look at a laptop together | [**dex.dss.gov.au/**](https://dex.dss.gov.au/) |

# Entering data

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| --- | --- |
| Woman thinking about the data exchange. | There are different ways to record data in the Data Exchange. |
| Man explaining a document to a woman. | We explain these ways in more detail on the following pages. |
| Woman pointing at three choices: A, B and C. | You should:   * choose the way that works best for your organisation * use that way each time if you can. |
| Information icon. | There is more information about each of these ways on our website. |
| Two women look at a laptop together | [**dex.dss.gov.au/**](https://dex.dss.gov.au/) |

## Transfer data from one system to another

|  |  |  |  |
| --- | --- | --- | --- |
| Woman pointing out a computer with client records on it. | | Some organisations have a client management system. | |
| Two computers sharing information. | | If you have a client management system, you might be able to share the data with us. | |
| One computer transferring information to another computer. | | You might be able to transfer data from 1 system to another. | |
| A woman typing on a computer with an arrow pointing to the data exchange system. | | This means you might be able to move your data over to the Data Exchange. | |
| Computer with a tick, an equals sign and a data exchange icon with a tick. | | Your system needs to match what the Data Exchange needs. | |
| Gear icon with a tick. | | We call this our technical specifications. | |
| Woman typing on a laptop thinking about a change symbol. | | You might need to make some small changes so the system works. | |
| Man with his finger raised. | | But you should only need to do this once. | |
| Two women look at a laptop together | | There is information about the Data Exchange’s technical specifications on our website.  [**dex.dss.gov.au/**](https://dex.dss.gov.au/) | |

## Upload a lot of files at 1 time

|  |  |
| --- | --- |
| XML icon | Some organisations might use a type of file called XML. |
| Computer with client records on it pointing to an XML icon. | The client management system may export this type of file. |
| XML icon with an arrow pointing to a computer system icon. | This means that your organisation might be able to send XML files to the Data Exchange. |
| 3 XML icons with an arrow pointing to the right | If you can do this, you might be able to send us a lot of files at 1 time. |
| Woman typing on a laptop thinking about a change icon | You might need to make some small changes so the system works. |
| Man with his finger raised | But you should only need to do this once. |
| Two women look at a laptop together | There is information about the Data Exchange’s technical specifications on our website.  [**dex.dss.gov.au/**](https://dex.dss.gov.au/) |

## Use the web-based portal to enter data

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| --- | --- |
| Portal icon | Some organisations will use the web-based portal to enter data. |
| Man explaining document to woman. | We explain what the web-based portal is on page 6. |
| Information icon with an arrow pointing at a computer system icon | If you use the web-based portal, you can put data straight into the Data Exchange. |
| Typing on a computer | You can type the data straight in during an open reporting period. |

# Creating a client record

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| Client record card with arrow pointing to a computer system icon | Client level data is the information about clients that we put into the Data Exchange. |
|  | The client level data we collect includes the person’s: |
| Man pointing at himself with his other hand raised pointing at the words first nameŽ | * first or given name |
| Family of 5 with surnameŽ above them | * family name or surname |
| Calendar and birthday cake icon | * date of birth |
| House and location marker icon | * suburb, state and postcode. |

|  |  |
| --- | --- |
| Gender symbols with arrow pointing to computer system icon | We also collect data about a client’s gender in the Data Exchange. |
| Girl thinking about gender symbols | You can tell us if they:   * are male or female * identify in another way. |
|  | We also collect data about whether a client is from: |
| Aboriginal and Torres Straight Islander flags | * an Aboriginal or Torres Strait Islander community |
| Large group of multicultural people | * a culturally and linguistically diverse (CALD) community. |
| Montage of 2 images - a woman pointing at herself and a woman waving, saying helloŽ in French | If a client is from a CALD community, you can also record the:   * country they were born in * language they speak at home. |

|  |  |
| --- | --- |
| Client record card icon | Once you enter all this data for a client, it creates a client record. |
| Man with his finger raised | You only need to create a client record once. |
| Calendar icon with a tick on it above a computer system icon. | You can go into the Data Exchange and update it at any time. |

## Clients with disability

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| Woman pointing at herself with her other hand raised. There is also a disability and health icon above her. | It’s important for organisations and funding agencies to know if clients who use their services have:   * a disability or an impairment * a health condition. |
| Woman explaining document to a man. | It’s important to know if clients have a disability so we can make sure they get the help and services they need. |
| Man with his hand raised. | You must ask your clients if they have a:   * disability * impairment * health condition. |
| Disability icon with two circles that say A and B. | In the Data Exchange, we group disabilities and impairments into broad categories. |
| Man explaining a document to a woman. | We explain the types of disability and impairments that belong to each category on the following pages. |
| Man pointing at 1 of 3 disability icons. | Your clients might have a disability or impairment from more than 1 category. |

## Intellectual or learning disability

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| Man thinking about a brain, book and tools and a light bulb icon. | If you have an intellectual or learning disability, it can affect the way you:   * think * learn new skills * understand new ideas.   . |

## Psychiatric disability

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| A woman comforting another woman. | If you have a psychiatric disability, it can affect your mental health. |
| Montage of 6 icons. The first is a brain with a puzzle. The second is a brain with arrows pointing out of it. The third is a happy and sad face. The fourth is a sad person. The fifth is a person hugging their stomach and a grocery bag. The last is a brain with an electric symbol. | A psychiatric disability might include:   * Autism Spectrum Disorder * attention deficit hyperactivity disorder (ADHD) * bipolar – your mood changes in a big way * depression – you feel bad all the time and like it will not end * eating disorders – you have problems with food, eating and the way you see your own body * epilepsy – there are changes to electrical activity inside your brain. |

## Sensory or speech disability

| Montage of 2 images: a blind person wearing sunglasses and a man with a hearing aid. | If you have a sensory disability or impairment, it affects one or more of your senses, such as your:   * sight * hearing |
| --- | --- |
| Woman receiving speech therapy. | If you have a speech disability, it affects how well you can:   * speak * communicate. |

## Physical disability

| Group of 3 icons - a person with a walker, a person with a clutch and a person in a wheelchair. | If you have a physical disability or impairment, it affects how well you can:   * use parts of your body * move * get around. |
| --- | --- |

# Keeping client records safe

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| --- | --- |
| Montage of 2 icons - A shield with a thumbs up and a shield with a lock. | The Data Exchange was designed to make sure a client’s personal information will be:   * safe * protected. |
| Montage of 2 icons - A Privacy Act and the Australian Privacy Principles. | The Data Exchange follows the rules in the:   * law that applies – the Privacy Act 1988 * Australian Privacy Principles. |
| Montage of 3 images. The first is a man pointing at himself and his other hand pointing at the word first nameŽ. The second is a family of 5 with the word SurnameŽ above them. The last is a house and a location marker icon. | Personal information is a client’s:   * First name * Last name * First and second lines of their street address |
| Consent icon. | You must get consent from your clients to collect and store their personal information in the Data Exchange. |
| Man with both thumbs up. | If someone gives you their consent, they say it is ok for you to do something. | |
| DSS Standard Notification icon. | If you want to use the Data Exchange to store personal information on a client’s record, you need to include the *DSS Standard Notification* when you get their consent. | |
|  | You can find the *DSS Standard Notification* on page 46. | |
| Consent icon pointing to a computer system. | You must record whether you have their consent in the Data Exchange. | |
|  | If you don’t want to include the DSS Standard Notification, the consent form you use must tell your clients that: | |
| Computer system | * the Data Exchange is a computer system used by DSS | |
| Woman holding a card with a computer system icon. | * your organisation uses the Data Exchange to collect and store information about their clients | |
| Computer with client records on it. | * you will store your client’s personal information in the Data Exchange | |
| Woman pointing at herself with her other hand raised. | * only your organisation will be able to see your clients’ personal information | |
| Man pointing at himself with his other hand pointing at an information and protection icon. | * your clients’ personal information will be protected | |
| A personal information icon, some information is covered up. | * DSS uses data from the Data Exchange in reports but takes out personal details about clients when they do this | |
| A woman reading a folder that says DSS Privacy PolicyŽ. | * they can read the DSS Privacy Policy for more information. | |

## Using data in the Data Exchange

|  |  |
| --- | --- |
| A woman pointing at herself with her other hand raised. There is also a computer system and information icon. | Only your organisation can use data about your clients from the Data Exchange. |
| A montage of 2 images. The first is a personal information icon with crosses over it. The second is a person with an arrow pointing at an information icon. | If we are going to use the data in any way, we make sure it doesn’t:   * show any information that can identify a person * link them to the data. |
| A person with a question mark. | This is called de-identifying information. |
| Key icon that says SLKŽ with some numbers on it. | We use Statistical Linkage Keys (SLK) to de-identify personal information. |
| Montage of 3 images. The first is a woman pointing to herself with the word nameŽ above her. The second is a man thinking about a calendar and birthday cake icon. The last is a set of gender icons. | An SLK is a code made up of:   * letters from a client’s name * numbers from the client’s date of birth * the client’s gender. |
| 3 key icons labelled SLKŽ and some different numbers on them. | The Data Exchange gives each client record its own identification code.  No other client record will have the same code. |
| Woman pointing at herself with her other hand pointing at a document icon. There is also an arrow pointing to a computer system icon. | We use the SLK codes.  Organisations only use SLK codes when they are submitting data as 1 large file or sending the data directly from their system into the Data Exchange. |
| Client record card with letters and numbers on it. | The Data Exchange gives each client record a unique ID.  It can only have:   * letters * numbers. |
| A woman using a computer thinking about adding a client record card to a computer system. | You can enter an ID for each client record.  Or the Data Exchange can create an ID for your client records. |

|  | The ID should: |
| --- | --- |
| Personal information icon with crosses on it. | * not include any personal information about the client |
| ID: XXX 123 | * Just be a code made up of   + numbers   + letters. |

## Data you must collect

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| --- | --- |
| Woman pointing at a clipboard that has a an information icon on it. There is also a computer system icon above her. | There is some data you must:   * collect * record in the Data Exchange. |
| Woman pointing at exclamation mark and a checkbox with a tick in it. | We call this data **priority requirements**. |
| Montage of 4 images - a client; a man in a meeting with a woman, there is a service icon above them; an outlets icon, two men in a meeting there is a clock icon above them. | Our priority requirements include data about:   * clients * services * outlets * sessions. |

# Entering data about programs and activities

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| A client record icon with an arrow. The arrow points at a program activities icon. | | Once you have created a client record, you must link it to the programs and activities the client takes part in. | |
|  | | The first step is to enter the case details, which include: | |
| A case ID icon | | * a case ID – a special code just for that case | |
| A personal information icon, some information is covered up. | | It is important the case ID does not include any personal information about the client. | |
| a program activities icon and a case ID icon | | * the activity the case is part of | |
| An outlet building icon. | | * the outlet – the place where organisations deliver services to clients. | |
| A woman points at a clipboard with records on it. | | * records for 1 or more clients who took part. | |
|  | | The next step is to enter the session details, which include: | |
| Two men in a meeting there is a clock icon above them. There is also an ID number. | | * a session ID – a special code just for that session | |
| A personal information icon, some information is covered up. | | It is important the session ID does not include any personal information about the client. | |
| A calendar icon, the date is blank. | | * the date of the session | |
| A service icon with a question mark in a circle | | * the type of service | |
| A man has his hand raised. He points at himself with the other hand. There is a  question mark in a circle. | | * which clients took part | |
| A group of clients. | | * how many clients took part. | |

# Recording extra data

| A woman points at a clipboard she holds with an information icon on it. There is a plus sign. | Some programs require organisations to collect extra data. We call this the Partnership Approach data. |
| --- | --- |
|  | There are examples of programs that organisations need to collect extra data for on the following pages. |

## Commonwealth Home Support Programme

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| --- | --- | --- | --- |
| Commonwealth Home Support Programme icon | | The Commonwealth Home Support Programme is funded by the government. | |
| A young woman supports a much older woman. | | It allows older people to receive care at home. | |
|  | | If a client uses this funding, the extra data you need to include is: | |
| A house icon, a circle with a question mark. | | * the type of home the client lives in | |
| A woman has her hand raised. She points at herself with the other hand. There is a  house icon and 2 people icons. | | * who the client lives with | |
| a Veterans Affairs card icon | | * if the client has a Veteran’s Affairs card – a card for people who have worked for Australia’s defence forces | |
| A woman has her hand on a man's shoulder to show him support. | | * if the client has a carer | |
| A woman listens while the man sitting beside her talks. She writes notes. | | * how much support the client uses | |
| A man thinks. There is a dollar sign in a circle. | | * what fees the clients were charged. | |

## Family Law Services

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Montage of 2 images - a man and a woman with there backs to each other, a family iocn with a gavel icon. | | | | Some people use the family law system if:   * they are getting a divorce * the court is deciding who will look after their children. |
|  | | | | If a client is using family law services, the extra data you can include is: | | |
| agreement icon | | | | * if there is an agreement between the parents about looking after the children | | |
| A calendar icon, the date is blank. | | | | * what date the agreement was reached | | |
| A woman is smiling, there is a law icon. | | | | * if someone who knows and understands the law helped with the agreement | | |
| a Section 60(l) certificate icon | | | | * if there is a Section 60(l) certificate about the family’s work to fix the problems they are having | | |
| A calendar icon, the date is blank. | * the date the Section 60(l) certificate was issued | | | | | |
| A man thinks. There is a dollar sign in a circle. | * what fees the clients were charged. | | | | | |

## Financial Wellbeing and Capability

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| --- | --- |
| A woman looks into her wallet. There is a dollar sign in a circle and a cog icon. | The Financial Wellbeing and Capability program teaches people skills to manage their money better. |
| A training icon - there is a person icon pointing at a dollar sign in a circle and a cog icon. Three people icons watch. | If a client uses this program, you need to include  data about the training they have had in managing their money. |

## National Disability Advocacy Program

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| --- | --- |
| A man has his hand raised. There is a rights icon and a megaphone icon. | The National Disability Advocacy Program (NDAP) gives people with a disability support to speak  up about:   * their rights * the issues that are important to them. |
| A woman holds a clipboard with a list of reasons on it. | If a client uses this program, you need to include the reason they use the advocacy service. |

# Getting help to use the Data Exchange

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| --- | --- | --- | --- |
| Two women look at a laptop together | | You can find training materials for the Data Exchange on our website.  **[dex.dss.gov.au/](https://dex.dss.gov.au/)** | |
| A woman uses a computer | | The training is self-guided – you do it on your own. | |
| Task card icons | | We have task cards. | |
| A task card icon with tasks | | The task cards take you through things you need to do in the web-portal step by step. | |
| A man uses a computer. There are book icons and a lightbulb icon. | | We also have e-Learning modules. | |
| A video icon | | e-Learning modules are training videos you can watch. | |
| A woman stands behind a help desk. She holds a clipboard with a Data Exchange icon on it. | | The Data Exchange Helpdesk can give you technical support. | |
|  | | You can contact the Data Exchange Helpdesk by: | |
| Email icon | | * email   [**dssdataexchange.helpdesk@dss.gov.au**](mailto:dssdataexchange.helpdesk@dss.gov.au) | |
| Phone icon | | * by phone   **1800 020 283.** | |

# Word list

|  |  |
| --- | --- |
| A man pointing at himself with his other hand raised. There is a service and a folder icon above him. | **Case**  When a client takes part in 1 or more sessions of the same service, we call it a case.  We also call it a case when a group of clients use the same service. |
| A man with his hand raised with one finger up. | **Client**  A client is a person who uses a service.  They use the service so they can reach a goal. |
| A box of client records | **Client level data**  Client level data is the information organisations collect about each client. |
| Icon of a computer screen with client records. | **Client records system**  A client records system is a system an organisation uses to collect and store personal information about their clients.  They might use software.  Their system might be online. |
| A man gives two thumbs up | **Consent**  If someone gives you their consent, they say it is ok for you to do something. |

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| A truck icon with a plus sign | **Delivery partners**  Delivery partners are other organisations you work with to provide supports and services to your clients. |
| Domains icon - connected shapes, some have flags on them. | **Domains**  Domains are important areas that are all related to the main topic. |
| Woman giving a grant to another woman. There is a funding agency icon. | **Grant**  A grant is a payment from the government or a funding agency for important work that can help others. |
| A woman is helping a man and a woman who speak a different language. | **Interpreter**  An interpreter is someone who:   * speaks the language you speak * can help you understand what someone says when they speak a different language. |
| A man holding a card that says goal. Above him is the circle that says measurable outcome. | **Measurable outcome**  In the Data Exchange, we measure if a client reaches their goals.  We call this a measurable outcome. |

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| An outlet building icon. | **Outlet**  An outlet is the place where organisations deliver services to clients. |
| Woman pointing at exclamation mark and a checkbox with a tick in it. | **Priority requirements**  There is some data you must:   * collect * record in the Data Exchange. |
| Man pointing out a program. | **Program activities**  Program activities are all the services:   * your organisation offers * clients can choose from. |
| A report icon and a calendar icon | **Reporting period**  We make reports about a reporting period. There are 2 reporting periods each year:   * 1 January – 30 June * 1 July – 31 December.   Both reporting periods last for 6 months. |
| A man in a meeting with a woman. There is a service icon above them. | **Service**  We call it a service when a client gets support from an organisation. |
| Two men in a meeting there is a clock icon above them. | **Session**  Each time a client uses a service, we call it a session. |
| Man with his hand raised asking to become a data exchange user. | **User Access Request**  A User Access Request is how you ask us if you can become a Data Exchange user. |

# The DSS Standard Notification

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| --- | --- |
|  | The *DSS Standard Notification* says: |
| DSS Standard Notification icon. | “The information that we collect from you on this form includes your personal information. Your personal information is protected by law, including by the Commonwealth Privacy Act |
| A computer system with gears on the screen. | Our use of the Data Exchange (DEX)  The client record system that we are using is an IT system called the ‘Data Exchange’. This system is hosted by the Australian Government Department of Social Services (DSS). Your personal information that is stored by DSS on the Data Exchange will only be disclosed to us for the purposes of managing your case.  DSS will only collect your personal information with your consent  Your client record can be set up to include your name and address. This assists us to manage your record, but will require DSS to collect personal information about you.  You are not required to provide your name and address to DSS. If you do not consent to the collection of your personal information, this will not affect the services provided to you. You can ask for this information to be removed by DSS at any time. |
| A personal information icon, some information is covered up. | How DSS uses and discloses personal information in DEX  DSS uses your information in the Data Exchange to produce information for policy development, grants program administration, and research and evaluation purposes. DSS also shares data with organisations and agencies for reporting and research purposes. DSS de-identifies all data before use or disclosure so that it cannot be used to re-identify you.  . |
| privacy policy icon | Further information  For more information about how DSS will manage your personal information, including how you can request access or correction of your personal information or make a privacy complaint, see the **privacy policy** published on the DSS website.” |
| Information icon from the Information Access Group logo | The Information Access Group created this Easy Read document using stock photography and custom images. The images may not be reused without permission. For any enquiries about the images, please visit [**www.informationaccessgroup.com**](http://www.informationaccessgroup.com/). Quote job number 3490. |