Data Exchange – Quick Start Guide

The Data Exchange (DEX) is the Department of Social Services' approach to program performance reporting. It provides flexible ways to submit performance information to the department. In return, the Data Exchange delivers two-way data sharing between funding agencies and organisations in a range of engaging reports.

Follow these steps to access the Data Exchange and reports.

Access training materials

Task cards and e-Learning modules are available on the Resources page of the Data Exchange website. These resources help you to get started on the Data Exchange, the different steps in adding data and link you to the required forms. There are also webinars and instructional videos to help you.

The Data Exchange Protocols is a support manual on how to apply the requirements of the Data Exchange. The Program Specific Guidance provides guidance for each program that uses the Data Exchange.

The Log into the Data Exchange web-based portal task card will help you to access the Data Exchange web-based portal

Create your Digital ID

The Australian Government Digital ID system is the Department of Social Services preferred, secure way to log in to the DEX portal. Digital ID is a safe, secure and convenient way to prove who you are online.

myID is the Australian Government's Digital ID app.

To access the DEX portal, you will need at least a Standard identity strength.

For information about Digital ID, please visit the Digital ID website.

For information about myID, and for instructions on set up, please visit the MyID website.

To discuss other options for accessing DEX, please email the Data Exchange Helpdesk.

Link your Digital ID to a business through Relationship Authorisation Manager (RAM) Onc you have set up your Digital ID, you will need to link it to your business using RAM.

How you link will depend on whether you are a:

Principal Authority: a person who is responsible for the business. A principal authority needs to link to the business first in RAM before others can be authorised to access online services on behalf of the business. To link the business as a principal authority, you require a Digital ID with a Strong identity strength.

Authorised user or administrator: someone who acts on behalf of a business. A principal authority or authorisation administrator will need to authorise you before you are able to access the DEX portal. You will require a Digital ID with a Standard identity strength to log into RAM and accept an authorisation request.

Decide on an upload method

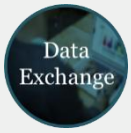
You can choose to upload your data in three different ways: system-to-system, bulk XML upload or manually via the DEX web-based portal.

If your organisation uses or intends to use system-to-system or bulk XML upload, technical specifications need to be sent to your IT vendor/specialist.

For further information regarding system-to-system transfers, refer to the Web services technical specifications.

For further information regarding bulk XML upload, refer to the Bulk file upload technical specifications.

A staging environment is available for testing before 'live' data is uploaded. Please contact the Helpdesk for further information and to arrange access to the staging environment if required.



Request access to the Data Exchange

Once you have set up your Digital ID and linked to your business in RAM, talk to your Organisation Administrator to arrange Data Exchange access.

If your organisation does not have an Organisation Administrator, you will need to complete a System User Access Request Form to request access. Once completed and approved by your manager, this form is sent to the Data Exchange Helpdesk. Access requests may take up to 10-business days for actioning upon receipt of a correctly completed form and you will be notified via email once your access has been created.

Organisation Administrators are able to set up accounts for other users within the organisation, including authorising others to be Organisation Administrators. Refer to the Add and edit a user task card for further information.

Create outlets

Once access to the Data Exchange has been granted, you can now set up your organisation and create outlets. Outlet requests require approval from the Data Exchange Helpdesk and should be submitted at least ten days before the close of a reporting period. Delays in creating outlets will impact your ability to upload data.

The Create and manage outlets task card provides instructions on this process.

Start entering data

Start creating your clients, cases and sessions as they occur within the reporting period. At least one session must be recorded as occurring within a reporting period for the case and associated clients to be counted in the reports.

There are two reporting periods per year which run from 1 July to 31 December and 1 January to 30 June, with a 30 day close off period to allow you to finalise your data. Once the close off period ends, no further changes can be made to the data.

We recommend you upload your data regularly to check for quality and errors and benefit from evaluating your service program.



Subscribe to keep updated

We recommend you subscribe to receive reminders, updates and events relating to the Data Exchange.



Funding Arrangement Manager (FAM)

Contact your Funding Arrangement Manager (FAM) or Commonwealth Representative if you have any questions regarding your DEX reporting requirements. Contact details for your FAM/Commonwealth Representative can be located on your grant agreement with the department.

For technical assistance with the Data Exchange, please contact the Helpdesk at dssdataexchange.helpdesk@dss.gov.au or via the online contact form