

## Getting onto the Data Exchange

This document explains how to set up an account to access the Data Exchange.

There are also a range of guidance materials and training resources available on the [Data Exchange website](#).

### Important note:

- Organisations **cannot** set up their access to the Data Exchange until DCJ has sent their TEI program activities to DSS. DSS must then add these to the Data Exchange.
- Your District contact will send you a letter when your organisation has been set up.

## What do I need to do before I can start using the Data Exchange?

Before you begin you need to:

- Set up a myGovID account
- Link your organisation in Relationship Authorisation Manager (RAM)
- Once linked, set up authorisations for other employees and users

### Set up myGovID

Follow these three steps to set up a myGovID:

1. Download the myGovID app. The app is compatible with the following devices
  - iOS 10 or later on Apple devices
  - Android 7.0 (Nougat) or later<sup>1</sup>.
2. Open the myGovID app and follow the prompts. You will need to enter your full name, date of birth and email address. We strongly suggest using a personal email, rather than a work email. This is because if you lose access to your work email, there is currently no way to change your email address in the myGovID app. This means you could be locked out of the myGovID app.
3. Add your identity documents. A Standard identity strength allows you to access all participating government online services. You'll need two

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<sup>1</sup> This excludes devices that use the Android Go operating systems, such as Android One.

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of the following Australian identity documents (your name must match in each):

- driver's licence or learner's permit
- passport
- birth certificate
- Medicare card.

Further information on setting up a myGovID can be found at the myGovID website: <https://www.mygovid.gov.au>

### **Important note:**

- myGovID is different to a myGov account.
- If you do not have the identity documents listed above, you will still be able to obtain a myGovID with Basic identity strength and log into the Data Exchange.
- If you enter the wrong details when logging into the myGovID app, you may be locked out. To re-log in, you can either wait 24 hours for the app to unlock. Alternatively, you can remove and reinstall the app on your device.
- There is a password reset function on the app if you forget your password.
- Solutions to common troubleshooting issues can be found at: <https://www.mygovid.gov.au/need-help>.

### **Link your organisation in Relationship Authorisation Manager**

Before you can get onto the Data Exchange, your organisation must be registered with Relationship Authorisation Manager (RAM).

The following browsers are compatible to use RAM:

- Internet Explorer version 9.0+
- Google Chrome version 39+
- Mozilla Firefox version 30+
- Safari version 5+.

The principal authority within your organisation needs to link your myGovID to your Australian business number (ABN) through RAM.

A principal authority is a person responsible for the organisation, such as a sole trader, eligible individual associate or primary person. See [Principal authority](#) for more information.

As the principal authority, you will automatically be granted all permissions associated with your business. For instructions on how to link your organisation in RAM see the [Relationship Authorisation Manager website](#).

## Set up authorisations for employees and others

Once your organisation is linked in RAM, the principal authority can set up authorisations in RAM for employees and others. You can set up employees as:

- an **Authorisation administrator** – a user who can create and manage authorisations for others
- an **Authorised user** – a user who can work on behalf of a business

All individuals must have a myGovID account.

See [Set up Authorisations](#) for more information.

### For employees and others

The principal authority will link your myGovID to your organisation, using RAM.

#### Step 1 - The principal authority emails you an authorisation code

The principal authority in your organisation will send you a RAM authorisation request via email which has an authorisation code

You have seven days to accept this authorisation before it expires. If it does expire, you need to contact the principal authority as they will need to issue a new authorisation request.

**Note:** Your name in the authorisation request must exactly match the name used in your myGovID account, otherwise you will receive an error code when linking in RAM.

#### Step 2 - Log on to RAM using your myGovID

- 1) Go to <https://authorisationmanager.gov.au/#/login> and click on Login with myGovID.
- 2) Enter myGovID log in details.

#### Step 3 - Enter the authorisation code and click submit

Enter the authorisation code from the email and click submit.

#### Step 4 - Accept the declaration

RAM will provide a summary of your access. You should see Data Exchange Portal under the Department of Social Services. Tick the box 'I understand and accept the declaration' and click "Accept".

Further information on setting up authorisations can be found at <https://info.authorisationmanager.gov.au/set-up-authorisations>.

## Accessing the Data Exchange for the first time

Once your organisation is set up in RAM and employees have accepted their authorisation, the organisation is now set up to access the Data Exchange.

### Account Activation

#### **Organisation's first user access:**

The first person accessing the Data Exchange on behalf of your organisation must complete a [User access request form](#).

The user access request form must be completed in full.

Once it is completed, use the 'Email Manager' button to send the form to your manager for approval.

The email sent to your manager contains a unique URL to access the form and approve it. This URL expires after 7 calendar days. If your manager does not action the request within the 7 days, the request for access will need to be resubmitted.

Once your manager approves the request form, they need to use the 'submit form' button to email the form to the Data Exchange Helpdesk.

You will receive a notification once your access has been approved.

Once your access has been approved, you will be your organisation's 'Organisation administrator'. This means you can set up your organisation's details, create and manage users, outlets, program activities and delivery partners.

#### **Important note:**

- When you complete the user access request form, the information in 'funding identifier' box should be a TEI program activity name (e.g. TEI Community Connections) or "Targeted Earlier Intervention". The Data Exchange Helpdesk does not accept alphanumeric codes.
- Once a request has been approved and received by the Helpdesk, there is no expiry on the request and this will be processed by the Helpdesk.
- Requests for access submitted to the Data Exchange Helpdesk may take up to 10 business days to process from the date it is approved/received.
- It is recommended that after the first person from your organisation accesses the Data Exchange they, as the organisation administrator, set up new users.

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- Each organisation needs at least one organisation administrator. If needed, you can set up other organisations administrators. [See the add and edit a user task card.](#)

### New Users account activation steps:

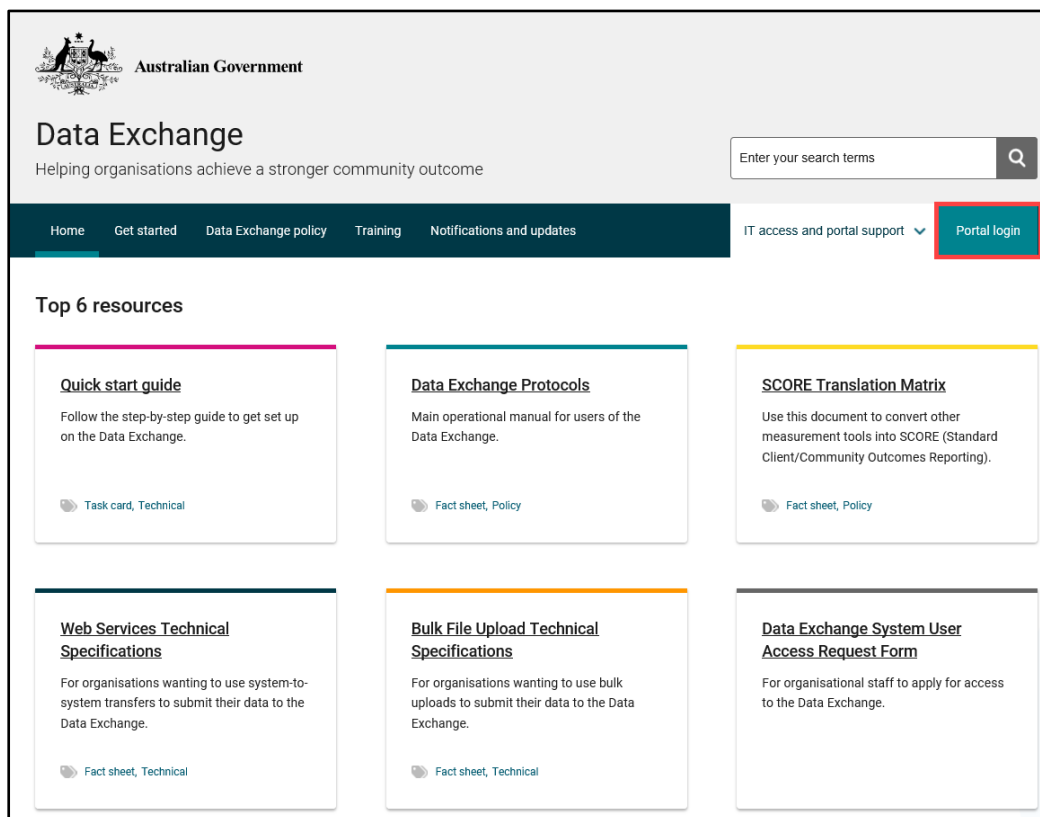
Organisation administrators must add new users to the Data Exchange. [See the add and edit a user task card.](#)

All new users accessing the Data Exchange for the first time must complete the following account activation steps:

### Step 1 - Log in to the Data Exchange

Select the **Log In** button on the [Data Exchange website](#) home page. Refer to Figure 1.

**Figure 1. The Data Exchange home page**

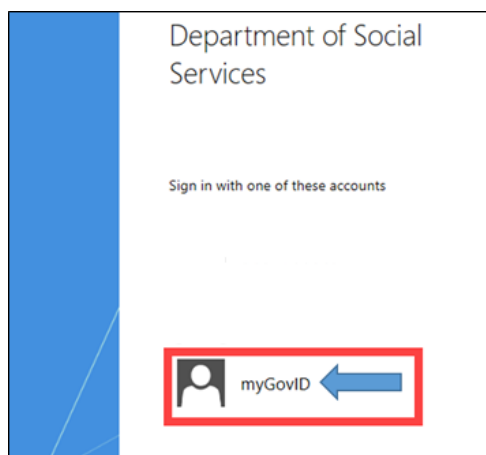


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### Step 2 – myGovID Login screen

The myGovID **Login** screen will display. Select **myGovID**. Refer to Figure 2.

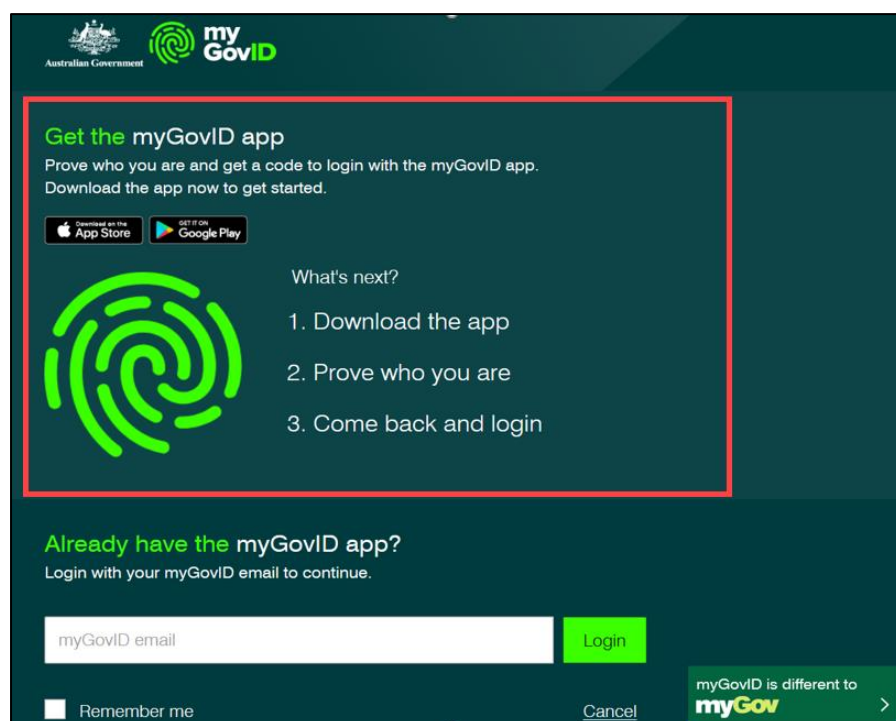
**Figure 2. myGovID login screen**



### Step 3 – Login for first time

The first time you log in you will need to enter your myGovID email address and a code.

You can also click the 'remember me' option if you are using a computer that you often use.

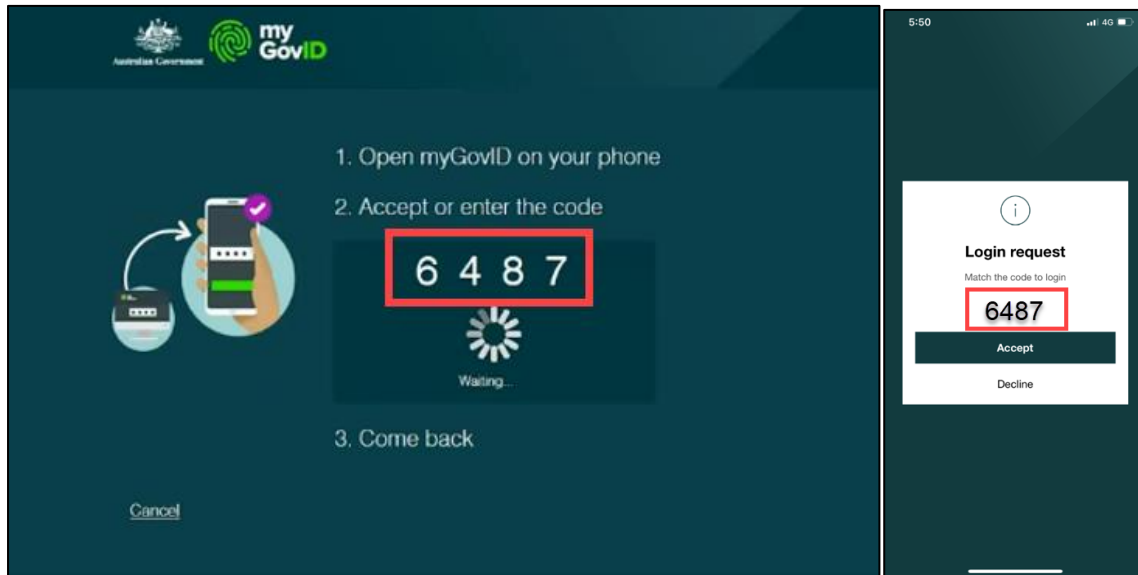


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### Step 4 – Accept the code

A code will appear on your phone and computer – if the codes match, accept or enter the code on your phone.

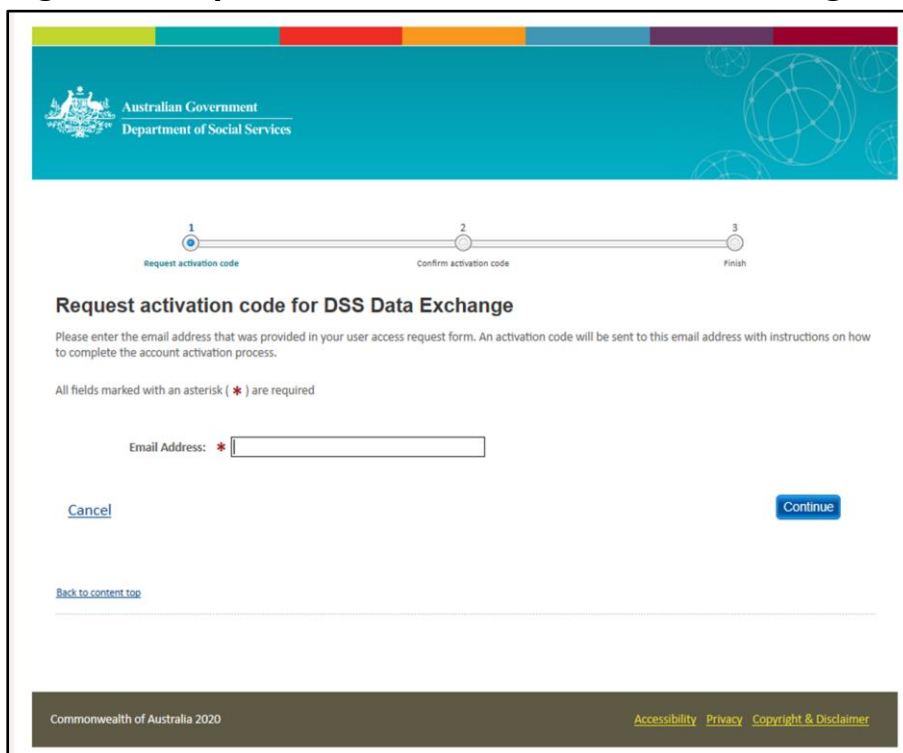
Please note: the code only lasts for 60 seconds.



### Step 5 – Request activation code

The Request activation code for the Data Exchange will display. Refer to Figure 3.

**Figure 3. Request activation code for Data Exchange screen**

The screenshot shows a web page titled 'Request activation code for DSS Data Exchange' from the Australian Government Department of Social Services. At the top, there is a progress indicator with three steps: 1. Request activation code (active), 2. Confirm activation code, and 3. Finish. Below the progress bar, the page title is followed by a paragraph: 'Please enter the email address that was provided in your user access request form. An activation code will be sent to this email address with instructions on how to complete the account activation process.' A note states: 'All fields marked with an asterisk ( \* ) are required'. There is a single text input field labeled 'Email Address: \*'. Below the input field are two buttons: 'Cancel' and 'Continue'. At the bottom left, there is a link 'Back to content top'. The footer contains 'Commonwealth of Australia 2020' and links for 'Accessibility', 'Privacy', and 'Copyright & Disclaimer'.

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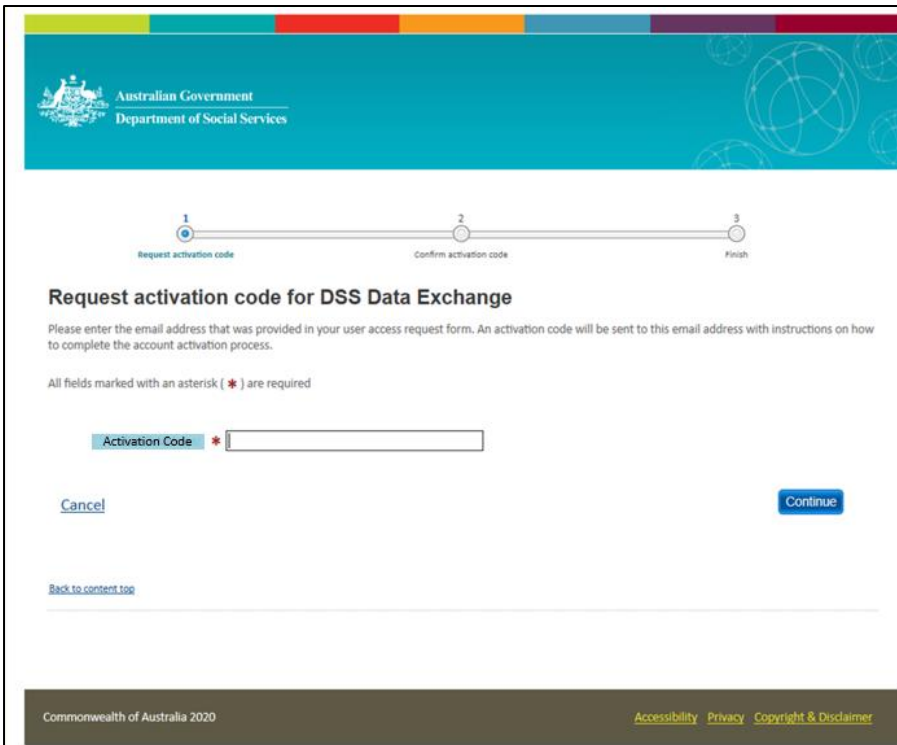
Type in your email address that **matches** your Data Exchange User Account and select **Continue**.

You will be sent an email containing an activation code.

### Step 6 – Confirm activation code

The Confirm activation code for Data Exchange screen will display. Refer to Figure 4.

**Figure 4. Confirm activation code screen**



The screenshot shows the 'Confirm activation code' screen for the DSS Data Exchange. At the top, there is a header for the Australian Government Department of Social Services. Below the header is a progress indicator with three steps: 1. Request activation code, 2. Confirm activation code (the current step), and 3. Finish. The main heading is 'Request activation code for DSS Data Exchange'. Below this, there is a paragraph of instructions: 'Please enter the email address that was provided in your user access request form. An activation code will be sent to this email address with instructions on how to complete the account activation process.' A note states 'All fields marked with an asterisk ( \* ) are required'. There is a text input field labeled 'Activation Code \*'. Below the input field are 'Cancel' and 'Continue' buttons. At the bottom left, there is a link 'Back to content top'. The footer contains 'Commonwealth of Australia 2020' and links for 'Accessibility', 'Privacy', and 'Copyright & Disclaimer'.

Enter the **activation code** contained in the email and select **Continue**.

### Step 7 – Finish screen

When you have confirmed your activation code the **Finish** screen will display. Refer to Figure 5.

This confirms that you have successfully completed the account activation process. Select the Go to Data Exchange link to access the portal. Refer to figure 5.



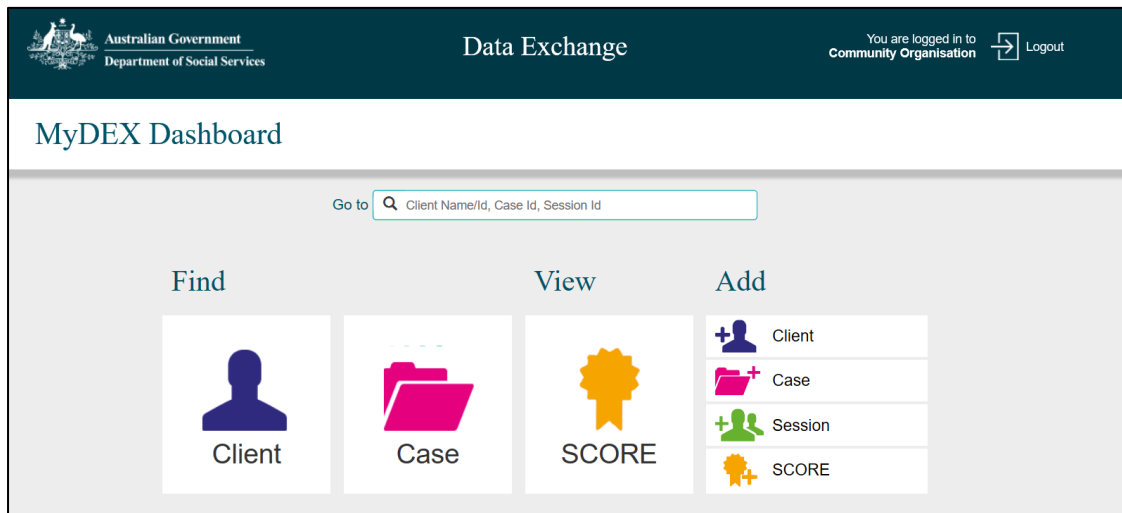
**Figure 5. Finish screen**



### Step 8 – Data Exchange home page

The Data Exchange **home page** will display (see Figure 6) and you are ready to start entering data.

**Figure 6. Data Exchange web-based portal home screen**



## Additional support and resources

If you receive an error message during the login process, please refer to the [myGovID and RAM Frequently Asked Questions](#) document.

Additional resources to help you set up access to the Data Exchange are listed below:

[myGovID and the Data Exchange](#)

[Log into the Data Exchange web-based portal](#)

[myGovID and the Targeted Earlier Intervention Program](#)

myGovID '[Need help?](#)' webpage

RAM '[Help](#)' webpage

## Who can I contact if there is an issue?

**For help with MyGovID and RAM:** call the support line on 1300 287 539

**For Data Exchange support:** contact [dssdataexchange.helpdesk@dss.gov.au](mailto:dssdataexchange.helpdesk@dss.gov.au) or 1800 020 283 (8.30am – 5.30pm Monday to Friday)

**For TEI specific questions:** talk to your local DCJ district contact or email [TEI@facns.nsw.gov.au](mailto:TEI@facns.nsw.gov.au).