

Department of Social Services (DSS) – Data Exchange (DEX)

Financial Wellbeing and Capability service type matrix

Programme activity	Intake/assessment	Information/advice/referral	Education and Skills training	Counselling	Advocacy/Support	Community Capacity building	Outreach	Mentoring/Peer Support	Access to money (loans)	Food Parcels & Food Vouchers	Material Goods	Health care assistance	Transport assistance	Utility bills assistance	Rent/Mortgage assistance	Facilitate Employment Pathways	Access to Money – Matched Savings	Access to Money – Business Loan	Business Planning
Financial crisis and material aid - emergency relief	Y	Y	Y	N	Y	Y	N	N	N	Y	Y	Y	Y	Y	Y	N	N	N	N
Commonwealth Financial counselling and financial capability	Y	Y	Y	Y	Y	Y	N	N	Y	N	N	N	N	N	N	N	N	N	N
Financial Capability - Cape York	Y	Y	Y	Y	Y	Y	N	N	Y	N	N	N	N	N	N	N	N	N	N
Financial counselling helpline	Y	Y	Y	Y	Y	Y	N	N	Y	N	N	N	N	N	N	N	N	N	N
Problem gambling	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Financial counselling and capability IM Hubs	Y	Y	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Financial Resilience	Y	Y	Y	N	Y	N	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y

Financial Wellbeing and Capability service type definitions

Service type:	Definition
Intake/assessment	Intake/ assessment is used where the sessions primary focus was the initial process of meeting with the client during which the organisation gathers information on the client's needs and matches them to services available within or outside the organisations programme offer and/or assesses a clients' eligibility for participation in a particular service. This is usually (but not limited to) the first session a client attends.
Information/advice/referral	Information/advice/referral is used where the sessions primary focus was the provision of standard advice/guidance or information in relation to a specific topic or where the service offered was primarily a referral to another service provided within or external to the organisation. Please note for Commonwealth Financial Counselling, "advice" does not refer to financial or legal advice.
Education and Skills training	Education and skills training is used where the primary focus of the session was to assist a client in learning or building knowledge about a topic or aimed at developing a skill, or enhancing a skill relevant to the client's circumstance. This includes assisting clients to access education and training including reengaging with the education system. For Community Development Financial Institutions (CDFIs) and Saver Plus this includes financial literacy training or money mentoring.
Counselling	Counselling should be used where a session is primarily aimed at working through a particular issue such as relationship concerns or financial concerns, is delivered by an industry recognised qualified staff member and is targeted to an individual or family.
Advocacy/Support	Advocacy/support should be used where the primary focus of the session was advocating on a clients' behalf to an entity such as a government body, or where support to the client was given in a particular circumstance such as a court appearance.
Community Capacity building	Community capacity building should be used where a sessions primary focus was the development of a communities skills/cohesion or understanding of a topic or subject. Community capacity activities' are delivered to a group of people rather than an individual
Outreach	Outreach should be used where a session is delivered in a locality away from the outlet recorded against the case such as an alternative site, park, home or other non-standard location.
Mentoring/Peer Support	Peer support / mentoring is the provision of specialised support, information and role-modelling. For Financial resilience mentoring includes business mentoring provided to vulnerable individuals throughout the development of a microenterprise, including after the establishment of a microenterprise.
Access to money (loans)	This category should be used where the sessions focus was primarily on providing financially vulnerable people with access to safe and affordable financial products including no interest loans, low interest loans or other appropriate loans, and matched savings that are not available through mainstream providers of financial services.
Food Parcels & Food Vouchers	This category should be used where the main focus of the session was the provision of material aid such as food items, food vouchers and supermarket vouchers.
Material Goods	This category should be used where the main focus of the session was the provision of non-food material aid, for example clothing, bedding and household items.
Health care assistance	This category should be used where the main focus of the session was the provision of health-related assistance, for example chemist vouchers or part payment of medical bills.
Transport assistance	This category should be used where the main focus of the session was assistance with transport-related costs, for example bus passes or petrol vouchers.

Service type:	Definition
Utility bills assistance	This category should be used where the main focus of the session was payment assistance with bills, for example gas, electricity or phone.
Rent/Mortgage assistance	This category should be used where the main focus of the session was payment assistance with rent or mortgage costs.
Facilitate Employment Pathway	This category should be used when the main focus of the session is to assist clients to become 'job ready' by building capabilities in employment and education and linking clients with mainstream employment.
Access to Money – Matched Savings	Access to Money – Matched Savings should be used where the sessions primary focus was on providing low income people with matched savings for educational purposes, following the completion of education sessions and a period of regular deposits.
Access to Money – Business Loan	This service type should be used where the primary focus of the sessions was on facilitating access to a business loan for microenterprise development for financially vulnerable people who may have difficulty accessing mainstream financial services.
Business Planning	This category should be used when the main focus of the session is to assist clients in developing a business plan, or with aspects of business planning