

# Organisation management

## Training videos - Other

Organisation records can be viewed and managed from the organisation management screen, accessed from the **Admin > Organisations menu**

This screen is only available to user accounts in the "PHN Admin" or "System Admin" roles.

System Admin users can create PHN, Hub/Satellite, and Service Provider organisations. PHN Admin users can only create Service Provider organisations.

## Create organisation

1. Click **New organisation**.
2. Fill out details as required, and save.

### Note

- If you are PHN Admin, it will automatically be created as a Service Provider type record.
- Service Provider records appear in the referral form's **Referral Outcome section**. Organisations marked as "Is PHN-funded" will appear in the list when "Other PHN-funded service" is selected for the Referral Outcome. Otherwise it will appear in the "Other service" list.
- It's very worthwhile to enter the Provider Type. This is useful for analysing where referrals are going to.

## Organisation Group

System Admin users can set the **Organisation Group** field. This controls certain configuration settings. The main setting is whether or not the IAR-DST can be skipped. Group names with "Centre" will remove the mandatory requirement for an IAR-DST to be done before the referral can be completed.

## Organisation settings

Some functions, fields, and workflows are customisable at the organisation level. The [Organisation settings](#) article has the full list of customisable settings.

## Adding a new Hub, Satellite or Centre

To add a new Hub/Satellite or Centre, email [pmhcis.support@nwmphn.org.au](mailto:pmhcis.support@nwmphn.org.au) with the following information: - Hub name - Short name (if applicable) - Organisation path - Phone number - Start date

## Edit organisation

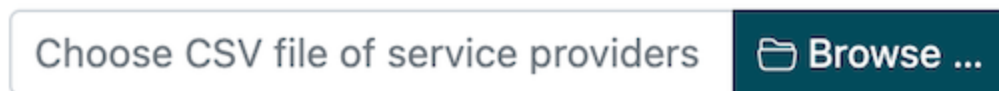
Find the organisation in the list and click on the row. It will open the Edit organisation screen.

## View Service Providers

By default, the Service Providers are filtered out from the list. This is because the list could be very long, and the PHN/Satellite records are assumed to be the most important. To include the Service Providers, toggle on the **Include Service Provider type** switch.

## Bulk insert Service Providers

At the bottom of the organisation management screen is a form to upload Service Providers in bulk.



A horizontal form with a light gray border. The left part is a text input field containing the placeholder text "Choose CSV file of service providers". The right part is a dark teal button with a white folder icon and the text "Browse ...".

[\(i\) File format specification](#)



A green rounded rectangular button with the text "Bulk insert providers" in white.

*Bulk insert form*

If you click on the "File format specification" link, it will expand to show you the specifications for the CSV file.

## Delete Service Provider

Service Provider records can be deleted, but only if they have never been selected for the Referral Outcome section on a referral. To delete, open up the organisation record and click the **Delete** button. The button won't appear if it has been used for a referral outcome.

 January 26, 2026 14:42:04