Employee’s guide to SSF

Southern Support Family

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SSF Employee Handbook

All About Southern Support Family

Southern Support Family is a leading home-based services provider who specialises in servicing the aged care and disability community in Australia. The most common services we offer to aged care and disability care participants are domestic duties, gardening, handyman work, cleaning, housekeeping, cooking/meal preparation, social support, shopping and transport assistance, administration and consumer technology support.

What locations do we service?

We operate in most major cities, and upon request we can also provide services for those participants who reside in non-metropolitan regions.

Our Mission

Empowering Lives with Exceptional Care and Maintenance Services.

Our Vision

Shaping the Future of Personal and Home Care Services through Innovation, Compassion, and Excellence.

Our Company Values

1. **POSITIVITY**: We see the positive side of every situation
2. **YES ATTITUDE**: We say “Yes!” every day because we believe we can do it!
3. **INTEGRITY**: We always act with integrity and honesty
4. **RESPECT**: We respect ourselves, each other and our differences!
5. **DRIVEN**: We are determined to take action and achieve!
6. **EMPOWERMENT**: We empower each other and ourselves to perform!
7. **UNITED**: We stand together, work together, and win together!
8. **CELEBRATION**: We celebrate and are grateful for everything!
9. **S.M.A.R.T**: Our goals are specific, measurable, achievable, and have a realistic timeframe
10. **COMMITTED**: We decide and commit 100% to succeed!

Our 5 Star Service Plan

SSF SERVICES SSF SOUTHERN SUPPORT FAMILY

OUR 5 STAR SERVICE PLAN

24/7 home service needs, call us anytime and from anywhere

★ RESPONSIVENESS ★ TIMELY ★ RESPECT ★ WE SAY YES ★ RELIABILITY

We don't just hear you; We will listen to you.

We get better every day so that you will get a better service each time you come to us!

Help us improve by giving us feedback anytime by contacting us!

FEEDBACK, SUGGESTIONS AND COMPLAINTS

Services Offered

1. **Domestic Assistance and General Cleaning**
   - ✓ Thorough cleaning of all home areas.
   - ✓ Flexible scheduling to fit your lifestyle.
   - ✓ Use of eco-friendly and safe cleaning products.
2. **Personal Care Assistance**
   - ✓ Aid in mobility and movement
   - ✓ Management of medication schedules
   - ✓ Providing companionship and emotional support.
   - ✓ Help with meal preparation and dietary needs.
3. **Social Support and Transport Assistance**
   - ✓ Reliable transportation for appointments and outings.
   - ✓ Assistance with mobility and navigating social settings
   - ✓ Encouraging and facilitating social engagement.
4. **Gutter or Window Cleaning**
   - ✓ Professional gutter and window cleaning.
   - ✓ Preventative maintenance for home exteriors.
   - ✓ Safe and efficient cleaning methods.
5. **Gardening and General Home Maintenance**
   - ✓ Routine gardening and landscape maintenance.
   - ✓ Home repair and upkeep services.
   - ✓ Custom solutions for home and garden care.
6. **Registered Nurse Services**
   - ✓ In-home clinical care and health monitoring.
   - ✓ Support with managing chronic conditions.
   - ✓ Post-operative and recovery assistance.

7. **Allied Health Services**
   - ✓ Customised therapeutic programs.
   - ✓ Multidisciplinary approach for comprehensive care.
   - ✓ Support for independence and daily living skills.
8. **Spring Cleaning or Deep Cleaning**
   - ✓ Thorough deep cleaning of the entire home.
   - ✓ Special attention to overlooked areas.
   - ✓ Use of high-quality cleaning products.
9. **Special Gardening and Tree Services**
   - ✓ Expert tree care and landscaping services.
   - ✓ Regular maintenance for garden health and aesthetics.
   - ✓ Customised solutions for every garden.
10. **Home Modifications**
    - ✓ Tailored modifications for enhanced accessibility.
    - ✓ Safety-focused alterations.
    - ✓ Professional and empathetic consultation and implementation.
11. **Trade Services**
    - ✓ A comprehensive range of trade services.
    - ✓ Skilled, reliable, and vetted professionals.
    - ✓ Quality and satisfaction are guaranteed.
12. **Respite Care**
    - ✓ Temporary care to relieve family caregivers.
    - ✓ Flexible scheduling for short or longer-term needs.
    - ✓ Professional, compassionate care for your loved one.

Stakeholders

In the context of an Australian aged care home-based service provider like SSF, the primary stakeholders include:

1. **SSF (Southern Support Family)**: Facilitates client requests, oversees service delivery, and ensures quality care is provided.
2. **SSF Support Workers**: Directly deliver care and support services to the aged care clients in their homes.
3. **Clients (Aged Care Recipients)**: Individuals receiving home-based care services, often elderly and requiring assistance with daily living activities.
4. **Family Members or Guardians**: Often involved in decision-making and care planning, ensuring that the client's needs and preferences are respected.
5. **Agency (Home Care Package Provider)**: Manages the client's home care packages and budgets, coordinating care services in alignment with the client's needs and preferences.
6. **Government (e.g., My Aged Care, Department of Health and Aged Care)**: Provides funding for the client's home care packages through government programs like My Aged Care, ensuring regulatory compliance and service standards are met.
7. **Accreditation and Regulatory Bodies**: Ensure that SSF and its support workers meet the required standards of care and compliance with Australian aged care regulations.

These stakeholders work together to provide comprehensive, coordinated care that meets the needs of aged care clients in their homes.

The Digital Workspace Hub

Given that the majority of our staff operate remotely, access to essential links utilized by our virtual team is crucial. You can find these resources in the Digital Workspace Hub here, which serves as a centralized collection of direct links, providing easy access to important spreadsheets, workbooks, webpages, and virtual meeting rooms to facilitate efficient collaboration.

Note: If you are unable to access the Digital Workspace Hub. Kindly reach out to a senior team member or the Leadership Team help assist you in gaining access to the Hub.

Company Policies

Confidentiality Policy

BACKGROUND

Employees acknowledge and agree that during the course of their employment they will have access to Confidential Information belonging to Company being The SSF Group Australia in this policy document. Employees must understand and agree to keep such Confidential Information confidential both during and after their employment on the terms and conditions set out in this policy.

1. DEFINITIONS

In this document:

Policy means this policy together with any schedules or any amendments made in accordance with this policy

Employees means a person legally employed by the company 'The SSF Group Australia' as defined by Fair Work Australia in the Federal Legislation.

Parties means the employer, its representatives and employees

Confidential Information is defined as information, regardless of the form or medium in which it is recorded or stored, which relates to all unpatented inventions, ideas, know-how, concepts, trade secrets, processes, techniques, software, technical data, products and all other intellectual property, financial and business information and all other commercially valuable Company information, including client, customer and business contacts, which the Company regards as confidential to it and all copies, notes and records and all related information generated by employees during the course of their employment. Confidential Information excludes, or as the case requires, ceases to include information which is, or becomes:

(a) available in the public domain or
(b) required to be disclosed by law

2. DISCLOSURE AND USE OF CONFIDENTIAL INFORMATION

2.1. Employees agree at all times during or after their employment with the Company:

(a) to refrain from directly or indirectly disclosing to a third-party Confidential Information except in the proper course of carrying out their duties
(b) to not make use of any Confidential Information except in the proper performance of their duties
(c) to keep confidential all Company Confidential Information and
(d) to comply with the terms of this policy unless otherwise required by applicable laws or regulations.

2.2. Employees must:

(a) notify the Company immediately if they become aware of a potential or actual breach of this policy or any unauthorised disclosure of Confidential Information

(b) immediately take all steps reasonably required to prevent or stop the potential or actual breach of this Policy or any unauthorised disclosure of Confidential Information and

(c) comply with any direction issued by the Company and provide any assistance reasonably requested from time to time regarding enforcement of this document or any unauthorised disclosure of Confidential Information.

3. SECURITY AND CONTROL

Employees must:

(a) establish and maintain effective security measures to safeguard the Company's Confidential Information from disclosure, access or use not authorised by the Company or under this policy

(b) unless otherwise directed under this policy keep Confidential Information under their control and

(c) take all reasonable steps to protect the Company's Confidential Information from misuse, loss and from unauthorised access, modification or disclosure.

4. ACKNOWLEDGEMENTS AND INDEMNITY

4.1. Employees must acknowledge that they are aware that any breach of any obligation in this policy may result in the Company suffering damage, and that an award of damages may be insufficient to compensate the Company for that breach. Accordingly, in addition to other remedies that may be available, the Company may seek and obtain injunctive relief against such a breach or a threatened breach.

4.2. Employees must acknowledge and agree that this policy is intended to be for the benefit of the Company and its business.

4.3. Employees must acknowledge and agree that the terms of this policy are in addition to and not in substitution for or derogation of any duty of confidence imposed upon the Parties generally at law, in equity or under any other policy, arrangement or understanding already in place between the Parties. Where any inconsistencies in those duties arise, the terms of this policy shall prevail.

4.4. Employees must indemnify the Company from and against any and all losses, damages, expenses and legal costs that the Company may sustain or incur as a result, whether directly or indirectly, of any breach of their obligations under this Policy.

5. INTELLECTUAL PROPERTY RIGHTS

Employees must understand and acknowledge that this policy does not transfer any interest in any intellectual property, and that the Company retains (and does not waive) any rights the Company may have in respect of patents, trademarks, copyright, moral rights or other intellectual property or proprietary rights.

6. RETURN OF CONFIDENTIAL INFORMATION

6.1. Upon the termination of an employee's employment and at any time requested by the Company Employees are required to cease using the Company's Confidential Information.

6.2. On receiving a notice pursuant to this clause, or upon the termination of an employee's employment, the employee's right to possess or use Confidential Information ceases and the employee must immediately:

(a) return all Confidential Information in their possession or control to the Company

(b) destroy and certify in writing to the Company the destruction of all Confidential Information in their possession or control

(c) destroy and permit the Company to witness the destruction of all Confidential Information in the possession or control or

(d) destroy all copies summaries, notes or reproductions of all Company Confidential Information in their possession or control.

7. **POST-TERMINATION OBLIGATIONS**

   The obligations of confidentiality under this policy continue to apply to the employee after the termination of their employment with the Company.

8. **WAIVER**

   The failure of the Company at any time to insist on performance of any provision of this document is not a waiver of its right at any later time to insist on performance of that or any other provision of this policy.

9. **GOVERNING LAW**

   This policy shall be governed by and construed in accordance with the laws of the state in which employees are employed. Employees must submit to the jurisdiction of the courts of that state.

10. **SEVERABILITY**

    The Parties acknowledge and agree that each clause of this policy is separate, severable, and reasonable. Should any clause or clauses be held to be unenforceable but would be enforceable if part of the wording of a clause or clauses is deleted, then the provisions contained in each clause shall apply under deletion of the particular words, so as to make the clause or clauses effective.

11. **VARIATION**

    No variation or modification of this policy shall be effective unless it is in writing, acknowledged and signed by the employee and the Company (or respective authorised representatives).

Information Technology Services and Security

File storage, disposal, reproduction and deletion processes

1. All OAC staff must safely store company owned properties (Intellectual properties) including but not limited to data, information, documents, client signatures, completed forms and agreements, invoices, supplier communication, voicemail messages etc in the company owned cloud storage systems being Dropbox, ServiceM8, BrightHR, Microsoft Teams (Sharepoint), and Google accounts owned by The SSF Group Australia.
2. The required frequency of filing and storage is daily.
3. Staff working from home whether it is company ordered, government ordered, or flexible working arrangements must only use the cloud storage systems available to them for storing and accessing all company owned files and information.
4. Staff who have been authorised to use their personal PCs must always file and store company owned intellectual properties into the approved applications and systems listed in clause (1).
5. Staff who have been authorised to use their personal PCs may also have their personal PCs subject to company instigated desktop audits upon a directive issued by senior management.
6. All PCs whether company owned or personally owned and authorized must have a comprehensive firewall protection, anti-virus, anti-malware, anti-phishing and licensed cybersecurity programs used whilst storing, using or handling company owned intellectual properties, data and information.
7. A self-audit must be conducted by all staff as users of company owned or personally owned PC’s. The below audit record log must be completed upon conducting a self-audit.

Date audit conducted	USER ID	Device Name	IP Address	MAC Address	Connection Type
4/07/2021	<SMIJOH>	< DESKTOP-JA9V8JA>	< 192.168.1.111>	< 00-23-24-7A-4C-C9>	<wired>

Link to: Instructions on how to conduct a self-audit on your company owned or your authorized personally owned PC's.

https://www.dropbox.com/s/2i77sqa9i5wpehh/Instructions-%20Self-Audit%20of%20ITS%20issued%20Devices.pdf?dl=0

8. This policy applies in accordance with the SSF employee confidentiality policy available via this link:

   https://www.dropbox.com/s/jyxu62za8o02kma/SSF%20Employee%20Confidentiality%20Policy. pdf?dl=0

IT and Computer Policy

i) Virus protection

To prevent the introduction of virus contamination into the software system, the following rules must be observed:

- unauthorised software including public domain software, magazine cover disks/CDs, applications, or internet downloads must not be used and
- all software must be virus checked using standard testing procedures before being used.

ii) Use of computer equipment

To control the use of the Employer's computer equipment and reduce the risk of contamination, the following rules will apply:

- the introduction of new software and applications must first of all be checked and authorised by management before general use will be permitted
- only authorised employees are permitted access to the Employer's computer equipment
- only software that is used for business applications may be used on the Employer's computer equipment
- no software may be brought onto or taken from the Employer's premises without prior authorization and
- unauthorised copying and/or removal of computer equipment and/or software will result in disciplinary action up to and including termination.

iii) Internet policy

The purpose of this policy is to provide a framework to ensure that the expectations and rules relating to the use of the internet while performing duties for the Employer are clear.

Authorised employees are encouraged to make use of the internet as part of their professional activities. This includes, but is not limited to, accessing the internet on Employer devices. Attention must be paid to ensuring that published information has relevance to normal professional activities before material is released in the Employer's name. Where personal views are expressed, a disclaimer stating that this is the case should be clearly added to all correspondence.

The availability and variety of information on the internet means that it can be used to obtain material reasonably considered to be offensive. The use of the internet to access and/or distribute any kind of offensive material, or material that is not work-related, leaves an individual liable to disciplinary action up to and including termination.

The Employer will not tolerate the use of the internet at work for unofficial or inappropriate purposes, including:

- accessing websites which put the Employer at risk of viruses, compromising copyright or intellectual property rights
- using Employer devices to access the internet for inappropriate or illegal purposes
- using social media in breach of the Employer’s social media policy
- accessing the Employer’s internet on personal devices
- connecting, posting or downloading any information unrelated to their employment and, in particular, pornographic or other offensive material and
- engaging in computer hacking and other related activities or attempting to disable or compromise the security of information contained on the Employer’s computers.

You are reminded that these activities may constitute a criminal offence.

iv) Email

The use of the work email system (work email) is encouraged as its appropriate use facilitates efficiency. Used correctly, it is a facility that is of assistance to the Employer.

However, inappropriate use causes a number of problems, including distractions, time wasting and legal claims. The policy sets out the Employer’s position on the correct use of work email.

Unauthorised or inappropriate use of work email may result in disciplinary action up to and including summary termination.

Work email is available for communication and matters directly concerned with the legitimate business of the Employer. Employees using work email should:

- comply with Employer communication standards
- only send emails to those to whom they are relevant
- not use email as a substitute for face-to-face communication or telephone contact
- not send inflammatory emails (i.e., emails that are abusive or may be perceived as abusive)
- be aware that hasty messages sent without proper consideration can cause upset, concern or misunderstanding
- if the email is confidential, ensure that the necessary steps are taken to protect confidentiality and
- be aware that offers or contracts transmitted by email are as legally binding on the Employer as those sent on paper.

The Employer will not tolerate the use of work email for unofficial or inappropriate purposes, including:

- any messages that could constitute bullying, harassment, or other detriment
- personal use (e.g., social invitations, personal messages, jokes, cartoons, chain letters or other private matters)
- on-line gambling
- accessing or transmitting pornography
- social media
- transmitting copyright information and/or any software available to the user or;
- posting confidential information about other employees, the Employer or its customers or suppliers.

v) Monitoring

The Employer considers any and all data created, stored or transmitted upon the systems (the Systems) as work product and as such, expressly reserves the right to monitor and review any data upon the Systems, including your usage and history, on an intermittent basis without notice.

In addition to this, the Employer has the right to protect its business interests and confidentiality. This includes the right to survey, audit and/or monitor the Systems, including but not limited to:

- monitoring sites users visit on the internet
- monitoring time spent on the internet
- reviewing material downloaded or uploaded and
- reviewing emails sent and received.

Information reports will be available to the Employer which can subsequently be used for matters such as system performance and availability, capacity planning, cost re-distribution and the identification of areas for personal development.

For the avoidance of doubt, the Employer reserve the right to monitor all internet and email activity by you for the purposes of ensuring compliance with the Employer's policies and procedures and for ensuring compliance with the relevant regulatory requirements and you hereby consent to such monitoring.

Information acquired through such monitoring may be used as evidence in disciplinary proceedings.

Any non-compliance with the company ITS filing and storage policy including breaching federal and state government legislations pursuant to sabotage, negligence causing loss or damage to a company, professional conduct would have the company instigate legal action in a civil tribunal order and even press criminal charges against the offender.

Telephone, Mobile, and Internet Policy

The SSF Group Australia ("the company") provides this policy to set out guidance relating to telephone, mobile and internet use by employees.

Inappropriate use of mobile, telephone and internet at work decreases productivity, causes security risks, distracts co-workers and colleagues, and can cause significant expense to a business. This policy is designed to set down minimum standards regarding mobile phone, telephone and internet use for all employees during their employment with the Company.

To the extent that this policy describes benefits and entitlements for employees, they are discretionary in nature and are also not intended to be contractual.

The terms and conditions of employment that are intended to be contractual are set out in an employee's written employment contract. The Company may unilaterally introduce, vary, remove or replace this policy at any time.

Telephone and Mobile Phone Use

The Company appreciates that staff may have a need to make and receive some personal telephone calls during work hours. However, unless in the case of an emergency, telephone and mobile phone use should never interfere with employees' work duties, including but not limited to the service of customers.

The following guidelines govern the use of telephones and mobile phones and the making and/or receiving of personal calls during work time:

- Personal calls should never take precedence over the service of customers and clients. Unless there is an emergency, all personal phone calls should be restricted to legitimate work breaks (for example, your meal break) or before or after the commencement of your shift;
- Any workplace telephones are provided for the conduct of the Company's business. Such telephones should not be used for personal calls except in the case of emergency, or where you have permission to make or receive personal calls by your manager. Any use of Company telephones for the conduct of any other business or for the financial gain of any other party is expressly prohibited;

- All personal calls during the performance of your work duties are only permitted for the purpose of personal safety and security in the interests of minimising disruption to work;
- Employees must not use Company telephones (including mobile phones) in any way that offends the law or as a device for delivery of offensive or objectionable communications. Offences of this nature may result in disciplinary action up to an including termination of employment;
- Where you are provided with a Company mobile phone it is provided solely for performance of your work duties unless the Company informs you otherwise. The Company will only pay for legitimate work calls and you may be required to pay for personal phone usage (unless you are informed otherwise).

Use of the Internet and Emails at Work

The Company acknowledges that employees may need to access and use the internet to carry out their duties and to send and receive emails. To provide employees with clear expectations as to what is and what is not an appropriate use of the internet and email at work, the following guidelines have been developed.

This policy applies to the use of the Company's internet and email services whilst employees are at work, and when employees access such services outside of work hours (for example when they take a Company laptop home or on a business trip or client visit).

This policy also applies to the use of personal equipment (e.g. mobile phones and personal computers) that are used to access Company systems or emails.

Please remember that your work emails are property of the Company, as are all programs and files used on the Company's internet and computer systems. You should therefore use all such systems and materials appropriately in accordance with your work duties and follow any directions given to you by the Company regarding their use.

On request you must provide all password and login details used in connection with your work duties to the Company. You must also return all Company equipment and materials (eg laptops, USB drives, Company data saved in other locations, etc) on request and upon termination of your employment.

As far as is reasonably possible, the Company will respect the privacy of individuals in the application and enforcement of this policy.

- Only use the internet and email for legitimate business purposes related to your job;
- Personal phones must not be used during paid work times without permission from the Company;
- Accessing social media, sending non-emergency text messages, playing games on personal phones during paid work times is strictly prohibited as this poses unprofessional conduct;
- Permission from your manager may be sought to use the Company internet in non-work time for study, research or other reasonable purposes;
- Do not use the Company internet or email for personal use. In particular, you should not access personal emails, or social media unless specific permission of your manager has been obtained;
- Do not use the Company internet or email for personal gain or the benefits of persons other than the Company;
- Do not use the Company internet or email to send defamatory, threatening, sexually explicit, offensive or obscene messages or images to other employees or to anyone outside the Company;
- Do not use the Company internet or email to send messages or images that are discriminatory (such as those which are racist or involve sexual harassment) to other employees or to anyone outside the Company;
- Do not use the Company internet or email in any way which involves sending or accessing material that is unlawful or illegal;
- Do not use the Company internet or email to download, upload, retrieve or send a sexually explicit, racist or otherwise discriminatory, illegal or unlawful, offensive or obscene material while you are on work premises

(even if using your personal equipment), or while using Company computers or systems inside or outside of work premises;
- Do not access without permission (hack) any computer, whether owned by the Company or by any other organisation;
- When you send emails or use the Company internet, do not disclose confidential information, unless this is necessary for the performance of your work duties;
- Do not delete information belonging to the Company from its computer systems without its permission;
- Do not use the Company internet or email for the creation of legal or contractual obligations that bind the Company unless specifically authorised to do so by your manager;
- Do not use the Company's systems, internet or wi-fi to connect to personal services (such as personal email services) during working hours using Company or personal equipment;
- Do not use another employee's computer or email to carry out any of the activities prohibited above.

A breach of this policy may result in disciplinary action up to and including termination of employment.

In addition, unlawful or illegal use of the Company's internet or email systems may constitute a civil or criminal offence for which you could be personally liable.

Company Sim Usage

As part of our ongoing efforts to streamline communication and ensure the responsible use of company resources, we would like to communicate the following guidelines regarding the usage of company-issued SIM cards.

SIM Card Use for phone calls:

- Calls using Company Issued SIM Cards:
  - Employees are encouraged to avoid using company-issued SIM cards for making voice calls (for exceptions, please read through this memo).
  - The primary purpose of company-issued SIM cards is for sending SMS only.
- Permission for Voice Calls:
  - In exceptional cases where a voice call is deemed necessary for work-related matters, employees must seek prior permission from the OACGU.
  - Written approval must be obtained before making any voice calls.
- Case Notes for Approved Voice Calls:
  - Employees making approved voice calls are required to maintain detailed case notes.
  - These notes should include the reason for the call and a summary of what transpired during the conversation.
- **Aircall App** as the Primary Tool:
  - The Aircall app remains the primary tool for making calls to workers and CMs in Australia (AU).
  - Employees are encouraged to use the Aircall app for efficient and centralized communication.
- Use of Company-Issued SIMs/Phones for Business Matters:
  - Company-issued SIM cards and phones should only be used for official business and work- related communication.
- Restriction on Personal Calls:
  - Personal calls using company-issued SIM cards or phones are not allowed.
  - Employees are expected to use their personal devices for personal calls (outside shift).

These guidelines are implemented to ensure the responsible and efficient use of company resources. It is essential that all employees adhere to these policies to maintain the integrity and security of our communication channels.

Any deviations from these guidelines should be communicated in advance and must have proper authorization from the OACGU. Failure to comply with these guidelines may result in disciplinary actions.

Conflict of Interest

All employees must ensure that they notify the Company in the event of an actual, potential, or perceived conflict between the Company's interests, their own interests, or another party's interests.

Conflicts may arise when two or more competing interests are involved which are inconsistent with, or diverge from the interests of another party, such as those of the Company or of the Company's customers.

Such conflicts may occur between an employee and the Company, between an employee and a customer, as well as between employees.

Any employee who breaches this policy or who coerces, encourages, or assists another person to breach this policy may be subject to disciplinary action.

1. **TYPES OF CONFLICTS**

A conflict may be actual, potential or perceived:

- Actual conflicts refer to an activity, transaction or interest that is currently causing a conflict of interest;
- Potential conflicts refer to an activity, transaction or interest that could give rise to an actual or perceived interest, either at the time it occurred or at some time in the future; and/or
- A perceived conflict occurs when an activity, transaction or interest could reasonably allow a third party to form the view that a conflict currently exists or may exist at some time in the future.

The above types of conflicts are not mutually exclusive and several different types of conflicts may exist at once. A conflict may still exist even when you or another party believes or strives not to be influenced by the conflicting interest or duty.

Some examples of where an actual, potential or perceived conflict may arise includes when:

- A manager hires an applicant who is a family member or friend;
- An employee enters into a purchasing, supply or another contract on behalf of the Company with another entity in which the employee holds a financial interest;
- A person is required to represent or serve the interests of 2 or more parties whose interests are in conflict;
- A person may be a shareholder or have a financial interest in a competing company;
- A board member has a duty to a company that conflicts with a duty to another company; or
- A person takes on an additional project or role that may lead to them breaching the obligations of their original project or role, such as confidentiality.

2. **IDENTIFYING, DECLARING AND REPORTING CONFLICTS**

Employees are required to actively consider whether any actual, potential or perceived conflict of interest arises in the course of your employment.

You must declare any conflicts that may affect you or another party that you are aware of to the Quality and Assurance Unit and provide an update as soon as reasonable if any relevant circumstances affecting a declared conflict change.

In the event that you feel uncomfortable disclosing an actual, potential or perceived conflict to the Quality and Assurance Unit , or where the disclosure relates to this person, please contact the Human Resources Management Team.

3. **REGISTER OF CONFLICTS**

The Quality and Assurance Unit is responsible for managing conflicts and recording declared conflicts into a register of conflicts. The Human Resources Management Team will also be responsible for managing and recording any disclosures made directly to them, where these cannot be disclosed to the Quality and Assurance Unit.

The following details regarding each disclosed conflict of interest should be included in the register:

- The duties and personal interests that give rise to the conflict;
- The circumstances which give rise to the conflict;
- When the conflict of interest arose, or in the case of a potential conflict of interest, when the conflict of interest is expected to arise;
- The names of all stakeholders who may be affected by the conflict of interest (such as clients, employees, managers); and
- Any proposed action taken to effectively manage the conflict.

4. PROCEDURE FOR MANAGING CONFLICTS

The Company and responsible persons will exercise their discretion in determining the appropriate action required to manage any disclosed conflict of interest.

Reasons for any management action taken, including any later changes to the proposed action taken will be provided.

Some of the factors that may be considered when determining appropriate management action include:

- Any available options to resolve the conflict of interest;
- The significance and consequence of the disclosed conflict's likely impact on the Company's business and reputation;
- The impact of the proposed management action on the employee and any other relevant parties;
- Any involvement by the employee in the decision-making process; and
- Whether another person is capable of carrying out the duties that conflict with the disclosed interest.

As a guide, action that may be taken to effectively manage the conflict of interest includes, but is not limited to, the following:

- No action taken – this may be appropriate where an assessment has been made that there is no actual, potential or perceived conflict of interest, or the disclosed conflict is very insignificant;
- Surrendering the conflicted interest – this may be appropriate where the disclosed interest may be resolved by surrendering it. For example, if you have received an inducement, you may be required to relinquish it;
- Relieving the employee of their duties – the conflict may be resolved by relieving the employee of the duty giving rise to the conflict. For example, decision-making responsibility related to the matter may be temporarily transferred to another person until the conflict of interest no longer exists; or
- Other action – action may be taken to reduce the risk around the conflict of interest without necessarily resolving the conflict where appropriate, such as:
    - Appointing an independent person to supervise the decision-making process;
    - Requiring the employee to leave the room while any relevant discussions take place, or restricting their access to information; or
    - Removing the employee's ability to participate in key or critical decisions.

Any relevant action taken should be continually monitored, and any action taken may be amended if the underlying circumstances giving rise to the conflict change.

If you are unsure about a conflict or have any questions about this policy, contact the Quality and Assurance Unit or Human Resources Management Team as appropriate.

Gifts and Donation

1. **INTRODUCTION**

The acceptance of gifts or donations can give rise to suspicion of inappropriate conduct, particularly if offered by individuals, customers, sales representatives or businesses that engage, or are hoping to engage our business.

Furthermore, the soliciting of items from individuals, customers, sales representatives or businesses that engage or are hoping to engage our business may place the Employer in a compromised position that detrimentally affects the reputation of the business and it profitability.

This policy establishes the fundamental principles of the soliciting, accepting and refusing of gifts and donations.

Where the Employer receives samples from sales representatives, they will remain company property and you must seek prior approval from management before taking the samples for personal use.

Breach of this policy may result in disciplinary action being taken against you.

2. **YOUR RESPONSIBILITIES**

As a strict rule, you should not accept or solicit gifts or donations from suppliers, sales representatives, customers, contractors or any other person you deal with in your capacity as an employee of the Employer.

Even if the value of the item offered to you is negligible, or if the item is presented as a promotional gift, you should comply with the procedure set out below.

3. **PROCEDURE**

If you are given a gift or donation of any sort by a business contact (i.e. sales representative, customer or supplier, whether actual or potential), you must disclose the fact of the gift/donation and its nature to your manager immediately.

Where appropriate, the Employer will require you to return the gift/donation to the donor with a polite note explaining the Employer’s policy.

In exceptional cases, for example, if the Employer decides that the gift was made as a token of the donor’s gratitude for a service carried out, the Employer may allow you to retain the gift/donation subject to management approval.

In the event that you are unsure of the appropriateness of a particular Gift or Donation you should contact management for further guidance.

Virtual Meetings Etiquette

Employees are expected to follow specific guidelines when they are working from home. Employees are still expected to be neatly presented and direct all their attention to their work duties whilst working at home.

Employees who work from home are expected to:

- Wear appropriate work attire.
- Turn on your camera at all times during company meetings and team huddles.
- Work on a well-lit area and ensure that you are visible on the screen.
- Choose an appropriate background to avoid distractions.
- Have a solid and well-functioning speaker and microphone.
- Limit background noise as much as possible.
- Be prepared for meetings to ensure you are not needing to go and find things during the meeting.
- Do not take screenshots of video meetings for privacy reasons.

- Request for the participants’ permission before recording the meeting.

Please note that breaches of this policy may result in disciplinary action.

Active Participation and Contribution in Critical Company Meetings and Trainings

This serves to remind all staff that full attention is being given in addition to actively participating in critical trainings being delivered by assigned personnel of The Group or invited stakeholders.

The following conduct during company meetings and trainings are unacceptable and is considered unprofessional:

- Engaging in a non-related activity during the meeting/training e.g. taking a phone call without asking for permission, using personal social media, sleeping or eating, being distracted by other events
- Taking excessive breaks during meetings and trainings, which cannot be justified
- Not responding to relevant instructions or cues when prompted during the meeting/ training
- Refusing to participate in the meeting/training as appropriate
- Generally disengaged, lost and clueless about the agenda being discussed due to being distracted

While we attempt to offer a flexible work from home arrangement for all of our head office staff to benefit from, it is also a privilege that may be removed or reduced in order for the business to receive the reciprocal and fair exchange of attention it requires from its staff members.

Therefore, any evidence of such misconduct will be dealt in accordance with our Zero Tolerance Policies on workplace performance and conduct.

Email Response Time and Notification

The SSF Group Australia (the Employer) would like to take this opportunity to advise you of this memorandum on response time as urgency is needed to ensure that we fill in request from agencies and clients faster than competition.

Response time expectation

As part of SSF’s 5Star service plan commitment to all our customers, Service coordinators are expected to respond to all agency emails based on their assigned Key Account’s as well as send out urgent notifications based on worker or client updates. In the absence of the KAM, the dedicated team lead for your region must take the initiative to either delegate or take over the Key account’s communications for the day.

Response time and notification requirements:

- New service request adhoc/ongoing: 10-15mins
- Follow up email to client for unavailable SW: within 1hr.
- 2nd follow up email to client for unavailable SW: within 2hrs.
- Cancellation/rescheduling of service request adhoc/ongoing: 10-15mins
- Over the weekend responses/new requests: responses should be within the first 15-20mins of their Monday shift.
- For workers cancelling service due to unforeseen reasons, we must immediately email / sms to notify agency / client of the circumstances and the availability of the replacement if there are any. This notification should only be within 15mins upon receipt of workers cancellation notification.

We can also expect changes on our response time requirements based on SSF business needs, the OAC Governance team will monitor response time and add in our daily audits and provide each one with necessary feedback which will be part of your performance review.

Professional Email Use

Email Etiquette and Policy: Signature Blocks

- Emails dispatched from The SSF Group Australia as a form of communication must be initiated and responded with a company approved signature block. The policy revolves around the requirement to have essential contact details and disclaimers displayed in order to support the recipient with referencing written communication and also for back tracing purposes.
- Signature blocks play the same significance as hand signing a written letter. Each individual staff member's signature is unique and facilitates clear and concise communication for the recipient so as to not cause confusion as to where the email was sent from.

Absence Protocol

In order to maintain business continuity and ensure uninterrupted service delivery, please adhere to the following absenteeism protocol checklist before proceeding on leave:

1. **File Leave on Bright HR (4 Weeks Prior)**: Kindly file your leave request on Bright HR at least four weeks prior to your intended leave dates. This allows sufficient time for your absence to be factored into team schedules and for necessary arrangements to be made.
2. **Notify OAC Governance and Your Team Leader**: It is crucial to inform the relevant staff about your upcoming leave. This ensures that administrative matters are properly managed and that your team is aware of your absence.
3. **Send Your Handover Document and Schedule a Briefing Session**: Prepare a comprehensive handover document outlining your ongoing tasks, projects, and any pending assignments. Additionally, schedule a briefing session with the relevant team members to provide guidance and clarity on your responsibilities before you leave.
4. **Turn on Auto-Responder on Outlook Email and Business WhatsApp**: Activate the auto- responder feature on your Outlook email and Business WhatsApp to inform colleagues and external contacts about your absence. Kindly follow the template below:

    Hi there,

    Thanks for reaching out!

    I am currently on leave. Please contact (02)7908 5366 between 09:00-18:00 or (03) 9961 0058 during afterhours if require urgent assistance.

    Alternatively you may email us on info@ssfservices.com.au.

To ensure that you have completed the requirements, kindly fill out this form before clocking off on the day prior to your leave date - Absence Protocol Checklist.

The management reserves the right to refuse the approval of leave requests based on the following reasons:

- If the notice does not meet the 4-week standard.

- If multiple leave requests are received from our staff, then priority will be on the staff who sent the request first.

In line with SSF's need to operate effectively in the event of an employee's unplanned absence, where documentation is insufficient or essential information has not been communicated through approved channels such as ServiceM8, Visual Care, Smartsheet, Outlook, MS Teams, or Business WhatsApp, employees are required to remain contactable to provide necessary updates to the team and management.

Holiday Leave

The following employees below should observe the corresponding holidays as agreed:

Full Name	Team	Holiday
Aadarshana Logeswaran	Accounts	Sri Lanka
Damian Ramanayake	Accounts	Sri Lanka
Leandro Barroza	Accounts	ACT
Marini Samaratunga	Accounts	VIC
Richard Miranda	Accounts	ACT
Niroshini Karunaratne	HR	NSW
Danish Ali	OAC-Connect Manager	ACT
Dinesh Priyadarshana	OAC Connect	ACT
Kimi Ding	OAC Connect	VIC
Renita Ramakrishnar	OAC Connect	Rostered
Reinfer Pietersz	Eastern Team Lead	Rostered
Angelica Caber	Operations - Eastern	NSW
Jhenny Dang	Operations - Eastern	NSW
Sumran Khan	Operations - Eastern	NSW
Rashmika Perera	Southern Team Lead	VIC
Cecilia Kang	Operations - Southern	VIC
Hasheem Khan	Operations - Southern	VIC
Imadh Marjan	Operations - Southern	VIC
Mehroze Kainat	Operations - Southern	VIC
Jasmine Alcantara	OAC-Governance	ACT

Please note that Holiday Leave is considered as a planned leave, thus it should be plotted and the management should be notified prior. Employees are expected to follow the guidelines below:

- Notify the OAC Governance Unit at least 4 weeks ahead to request to change a public holiday to a work day.
- Choosing an alternate day OFF has to be informed within 24 hours from the day of request notification.
- Alternate day OFF cannot be banked for future use and will be forfeited if notification period has expired.
- Vacation auto-responder must be turned on for the period you are on leave (Outlook, MS Teams, and WhatsApp Business).
- Discuss and send your handover report to the team and copy OAC Governance.

The management reserves the right to refuse the approval of requests if the notice does not meet the 4-week standard.

Due to the critical need of the company to operate effectively in the event of an employee being absent due to taking leave and the management find that the employee has not sufficiently documented or communicated any essential information via pre-approved means of communication and storage (e.g. ServiceM8, Visual Care, Dropbox, Smartsheet, OneDrive, Google Sheets, Outlook, MS Teams), employees will be required to be contactable to provide essential information and updates to the team and the management.

Duty Schedule

The Duty Schedule reporting serves to establish a consistent structure for day-to-day operations, supporting each team and its members in effective time management and ensuring workloads are organized efficiently.

Key principles for assessing duty schedule reports include the SMART goals concept, prioritization based on deadlines, time, and value for the business, equitable distribution of workload, and suitability of agenda items based on the member's designation and areas of accountability.

Methodology:

1. A Duty Schedule sheet will be created for each staff member on a monthly basis, with Monday as the week's beginning.
2. At the start of the day, staff should draft their agendas and tasks for the entire day.
3. The deadline for drafting Duty Schedules is 09:45 AM. These will be reviewed by the corresponding team leads and management.
4. Staff will consistently check their duty schedules and update the status of completed tasks accordingly.
5. Staff can plan their meetings, daily tasks, and pending tasks for the entire week.
6. Unaccomplished tasks are expected to be included in the next day's activities until completion.
7. The completed Duty Schedule for the day will serve as their End of Day Report.

Failure to include agendas in your Duty Schedule may lead to unproductivity and inefficiency. It is imperative that all team members adhere to these guidelines to ensure smooth operations and effective time management.

Note: An incomplete Duty Schedule indicates that no tasks have been accomplished for the day. Therefore, management reserves the right to declare that no service has been rendered by the respective staff member, and the shift date without a completed Duty Schedule may be excluded from the invoice until proof of service delivery is provided.

Insubordination

OAC employees are expected to embody the company values such as YES ATTITUDE and UNITED to maintain a collaborative work environment. Failure to demonstrate compliance and coordination to the team and management can be construed as misconduct or insubordination.

What is Insubordination?

Insubordination in the workplace refers to an intentional refusal to follow business or task related instructions such as but not limited to:

- Refused to follow directions from OAC-Governance, Team Leader, or POC
- Disrespect shown to higher-ups in the form of vulgar or mocking language as well as deliberately not responding on acknowledgement requests
- Directly questioning or mocking management decisions and communications
- Disobeying company policies and procedures
- Disrupting or delaying work progress
- Refusal to obey reasonable commands of a supervisor within assigned role and tasks
- Delegating tasks to a colleague of the same role even though the task was originally assigned to you.

- Deliberate poor performance at work to avoid additional tasks/responsibilities.
- Failing to show up for work without any timely notice based on company guidelines
- Sabotaging team, individual, or organizational activities

If such circumstances have been observed from an employee, necessary disciplinary actions along with a formal written warning or instant dismissal of the employee will be issued depending on the gravity of the situation. Please note that the OAC Governance Team will conduct thorough investigation to identify the main cause before implementing the necessary actions.

The management and the team will not instruct unreasonable orders to employees that will question work integrity, and it will always be a direction that will benefit the team, its employees, and the company.

Important Abbreviations and Terminologies to remember

Abbreviations/Terminologies	Full Form/Expansion
SR	Service Request
SIRS	Serious Incident Reporting Scheme
CALD	Culturally and Linguistically Diverse
CM	Care Manager
NOK	Next-of-Kin
PO	Purchase Order
SW	Support Worker
SC	Service Coordination
PCA	Personal Care Assistance
RN	Registered Nurse
DA	Domestic Assistance

Guide to Service Coordination

What is service coordination?

According to the Department of health in Victoria, the service coordination framework was developed as part of the Primary Care Partnership Strategy. It helps health service providers to work together to align practices, processes and systems so:

- people access the health services they need, no matter what service they go to first
- providers exchange the right information so consumers receive good care from the right providers at the right time
- people have their health and social needs identified early, preventing deterioration in health.
- Service coordination places consumers at the centre of service delivery. The idea is to maximise consumers' likelihood of accessing the services that they need.

Service coordination also enables organisations to remain independent of each other, while cooperating to give consumers a seamless and integrated response.[i]

SSF works with various different care providers and independent clients who all expect an efficient and reliable service.

As service coordinators at SSF we are expected to follow the **A. A. A. Process** in the delivery of a service:

Acknowledge:

This is the acknowledgement of the initial service request that comes from the care provider or independent client. This information can come from a text, social media apps or an email.

However, for new clients it is recommended that the Service request come through our emails for documentation purposes.

Ongoing services do not require an email for a service request but is recommended. All requests for new services must be recorded on the clients profile.

Accept:

Based on the information shared in the service request, find a suitable Support worker for the service.

The resources currently available for the OAC team to find a suitable worker is:

- Staff list
- VisualCare worker Map
- Indeed
- Hipages

*Note: For **Indeed** and **Hipages** access you must work with the **HR Department** in using those resources.*

The services a SW provides will be on the staff list along with the location. You are expected to contact the closest SWs in the area of service and check if they have capacity to assist in providing services to the client.

Before booking a service with available SW, make sure that:

The SW meets the clients preferences

The SW is aware of the tasks to completed. Information on this can be provided via the care plan or in the task of the initial service request.

The SW is comfortable with providing the service.

The SW is aware of the company's policies.

After the requirements above are met. You can share the SWs availability to the Agency or independent client.

Action:

When the SW is confirmed by the agency or independent client. You may proceed to book them in using the systems we currently use. We currently use the One Company – Two Systems Model.

If the service is ongoing for more than 4 hrs we will use VisualCare

If the service is adhoc, or a quoted job (Gardening, Handyman, & Tradie) it would be on SM8.

How to book a new client for services with SSF?

A service with SSF started with the **service request (SR)** from the care agency, or individual client. It can be received in various different methods via email, phone call, online from the website, in-person or with any other method of communication. For documentation purposes, the preferred method of communication is emails.

A service request typically consists of 6 elements:

1. Clients Name
2. Contact Details
3. Address
4. Service required/ Request Type(PCA or DA)
5. Preferences (Qualifications, Language, experience, age, and gender)
6. The Start date and frequency of the service

Assess the service request based on the information provided above and add the details to the service log so the team can assist with the service request and it is documented.

After the documentation is completed, use the **A.A.A process** to work on the service request.

Share the Support workers availability with the agency/client. Once confirmation is received via any method of communication. Proceed to book it in.

IMPORTANT NOTE: When confirmation is received, make sure the confirmation is received in writing preferably via email.

When a booking for a service is confirmed with new client, the clients details needs to be added to the list and client code created on the Initial staff/client list.

Forms Connections Initial Staff/Client Update

Grid View Filter Off Arial 10

Employ...	Role / Status	Commencement Date	Staff/Client ID	Full Name	Address	State / Suburb & Postcode	STATE/T...
Client			JUS-ABUFAT	Fatima Abunahia	[redacted]	Woodville SA 5011	
Client			TRI-PICRAN	Ranalto Picollo		Pakenham VIC 3810	
Client			BSL-JEFALI	Alice Jefferies		Moone Ponds VIC 3039	
Employee			ISMA001	Asmeida Ismail		Griffith	
Employee			DHAS001	Surinder Dhar		Keilor VIC 3036	
Client			VANQ001	VAN, Quoc			
Employee			ZHAV001	Vida Zhao			
Employee			SREN001	Neema Sree		Melbourne 3000	
Client			TRI-OMEHEN	Hendrik Van Omen		Ulverstone 7315	
Client			NUR-PERJAY	Jayasuriya Perera		Dandenong VIC 3175	
Client			HAP-JIREGO	Egon JIRGES		Melton South, VIC 3338	
Client			NUR-YAOSHU	Shu QIn Yao		Rosanna VIC 3084	
Employee			YANJ001	Jie Wen Yang		Airport West 3042	
Client			BSL-DIBMAR	Maria Dibenedetto		AVONDALE HEIGHTS, VIC, 3034	
Client			JUS-PERTER	Teresa Perrone		Port Melbourne, 3207 VIC	
Employee			MUOA001	Ashwai Mou		Hoppers Crossing 3029 VIC	
Client			BSL-HANBIN	Bing Hui Han		NORTH MELBOURNE, VIC, 3051	
Employee			PUDB001	Bina Pudasaini		Devonport, Tasmania, 7310	
Employee			GREA001	Allison Greene		MARYBOROUGH VIC 3465	
Employee			MILM001	Mildrener Onyacha		griffith	
Client			ANG-MORLOR	Lorraine Morgan		Greenacre	
Client			JUS-PAPELE	Electra Papaioannou		Bulleen VIC 3105	
Client			BSL-VATOUR	Ourania Vathis		Richmond VIC 3121	
Employee			NGUL002	Loi Van NGUYEN		ST Allban	
Employee			TRAT001	Thi Tri Tran		Sunshine VIC 3020	
Client			ANG-RIZFIL			Five Dock	

Figure 1 the Initial Staff/client list. The address details have been blacked out for privacy reasons.

How to create a client code?

Client code shown on the Staff/Client ID column on Figure 1.

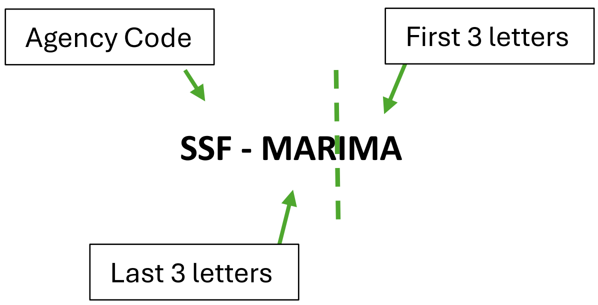
The Client code is made by using the Agency code by SSF followed by taking the first 3 letters of the last name and the first 3 letters of the first name. Example is shown below

Client Code Format

Client name: Imadh Marjan

Agency: Southern Support Family

Agency Code: SSF



After the creation of the client code, add the **clients name** (First name, Surname & Full name), **address** (address, Suburb & region), **contact details** and the **SSF Manager** (of the client). An Example is shown below:

Client ID	First Name	Surname	Full Name	Address	Suburb	State	Contact Number	Managed by
SSF-MARIMA	Imadh	Marjan	Imadh Marjan	84 Hotham Street, Preston VIC 3072	Preston VIC 3062	VIC	0491480064	Rashmika

Caseload Template

This is the caseload template here.

How to book a service in?

Currently, SSF uses 2 systems for booking services in. They are:

1. VisualCare
2. Service mate (SM8)

Rostering through VisualCare

If the client profile does not exist yet in the system. You will need to create it first before booking the service in.

On the home page of Visual care. Go to the client profiles.

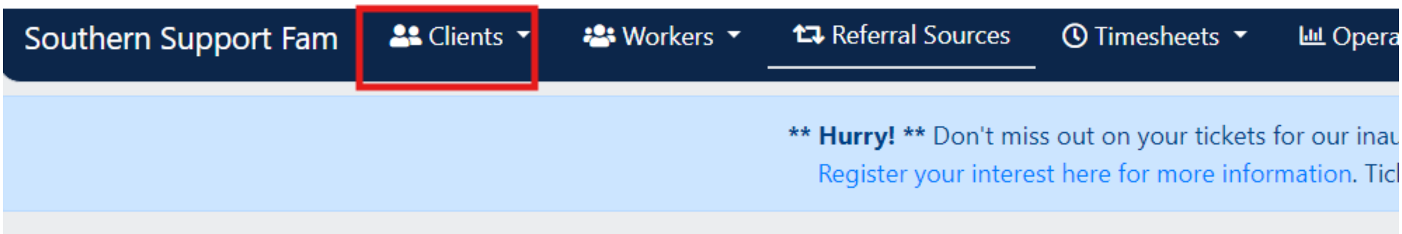


Figure 2 Home page of VisualCare

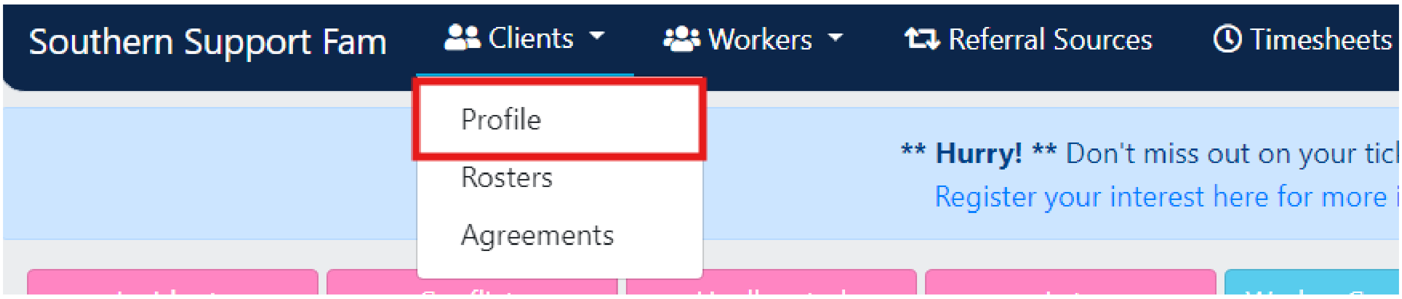


Figure 3

Once you are in the clients profile page, click the green button on the top left to add a client (shown in Figure 4).

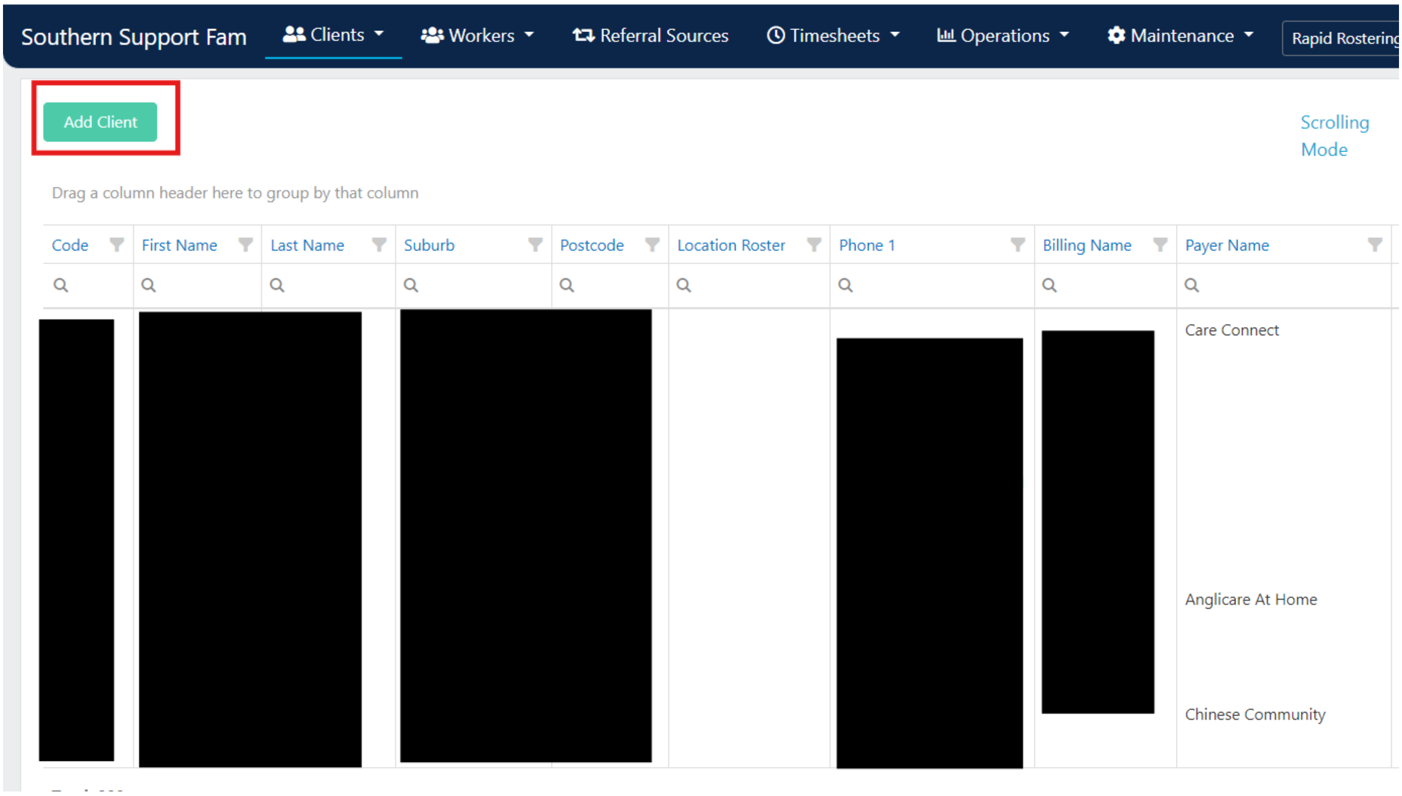


Figure 4

Afterwards you will be give a form to fill, you add the details you have. (shown in Figure 5)

*Note: The **first name** and **last name** are essential in creating the **client profile**. The rest you can add later.*

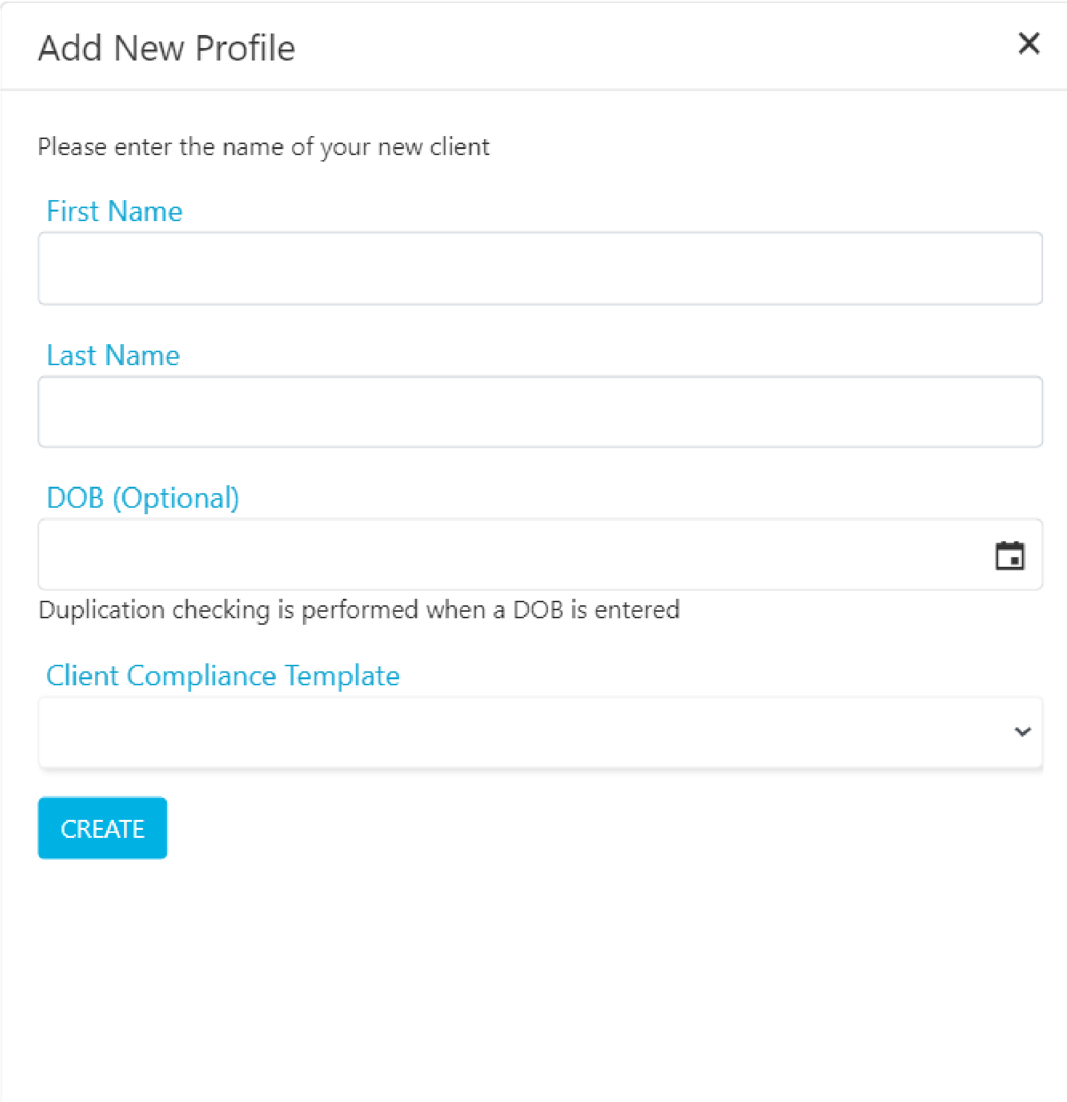


Figure 5 Add New Profile

You will then be bought to the client profile page after you have created it. (shown in Figure 6)

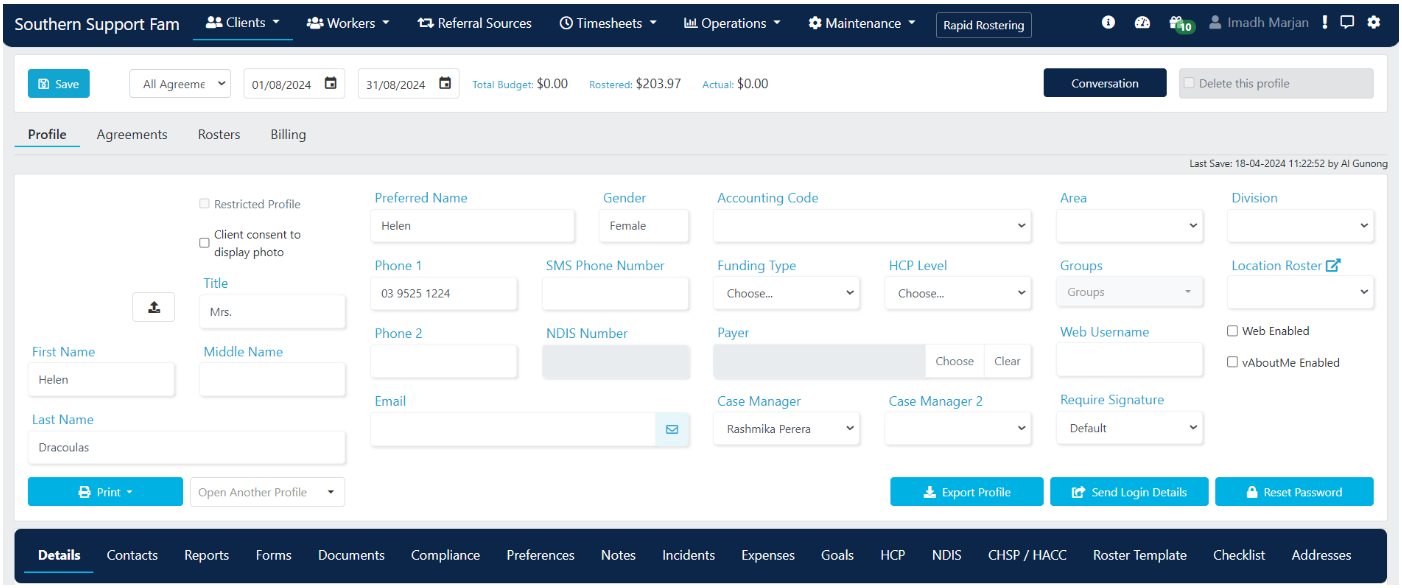


Figure 6 Client Profile Page

From here you will need to add a few more details before moving on.

Depending on the agency you work with you will need to add the SSF Regional number (Southern or Eastern). You add the numbers as shown on figure 7 because once added there the Support worker will be able to see it on their Vworker app. This will help them reach out for assistance if they need it during the shift.

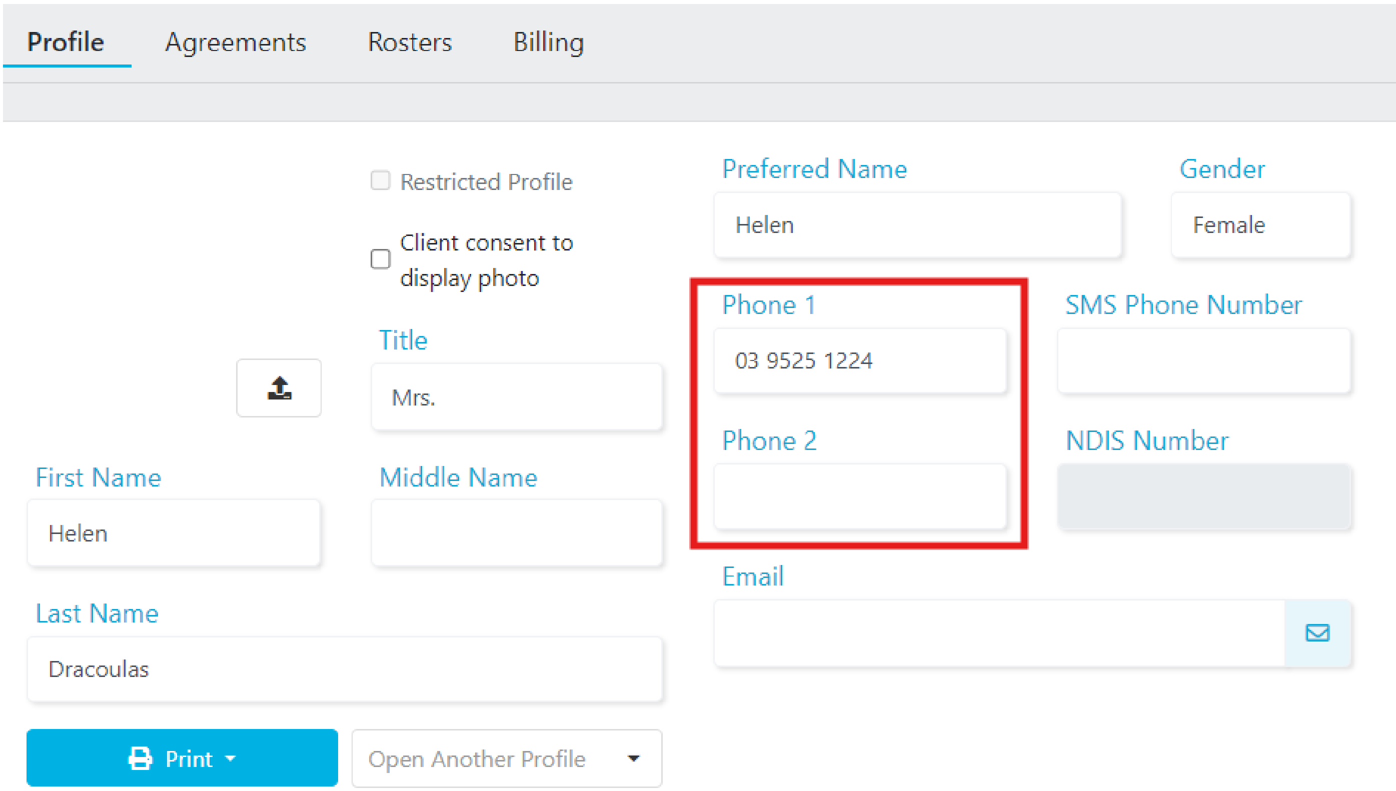


Figure 7

Don’t forget to add the correct case manager for the client as shown in Figure 8.

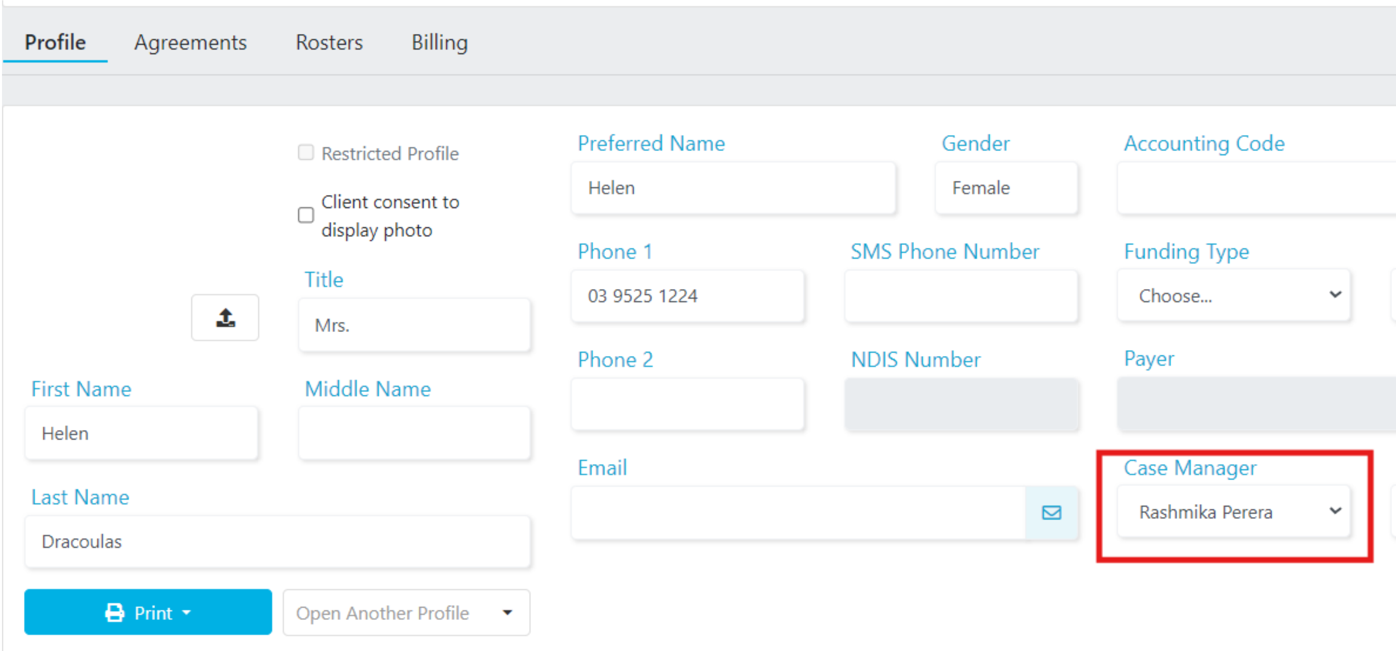


Figure 8 Case Manager Name

After the basic information of the client are filled kindly add the address details of the client onto on to this details section of the profile page.

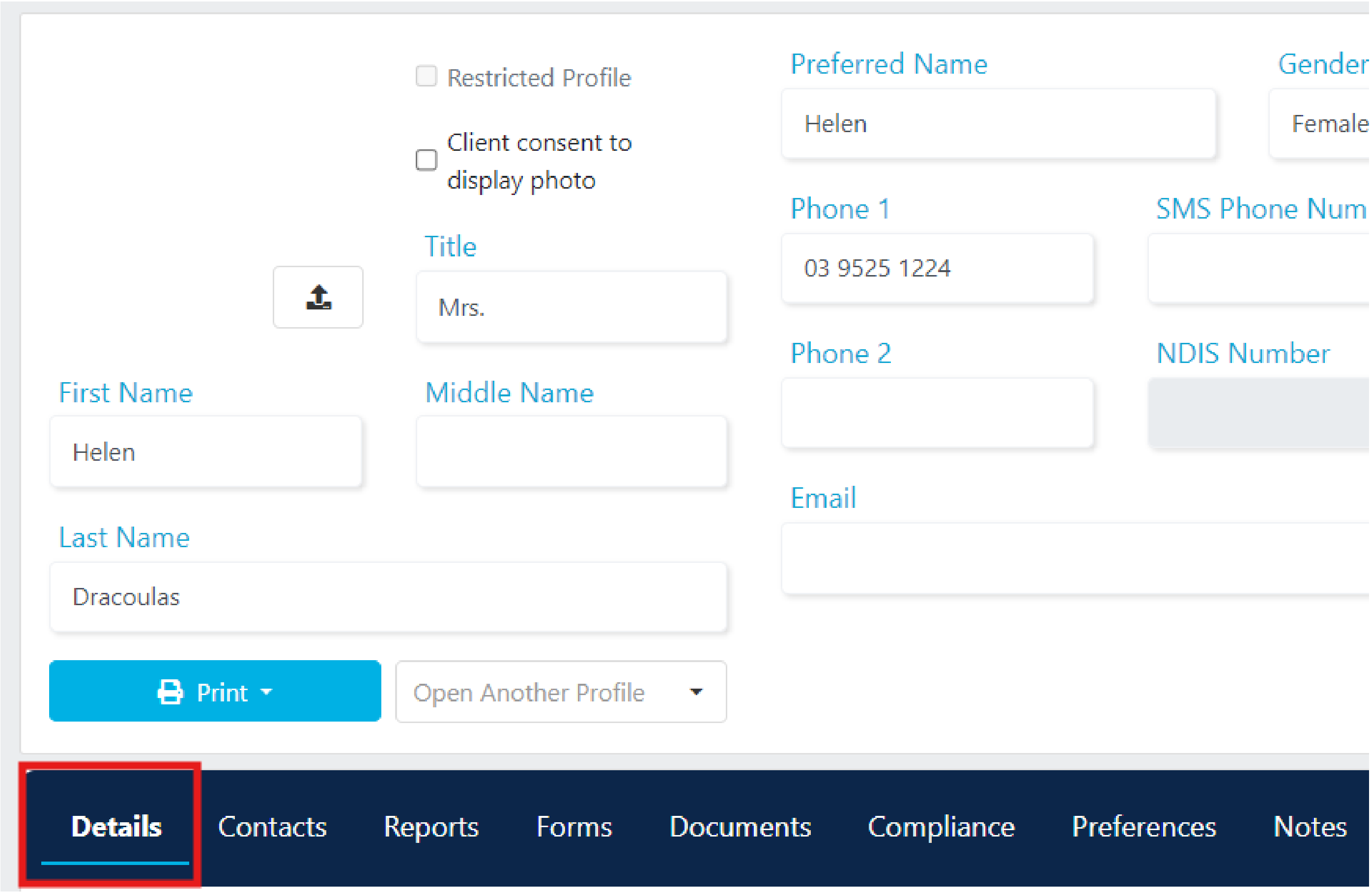


Figure 9 Details section of the profile page.

Add details as required.

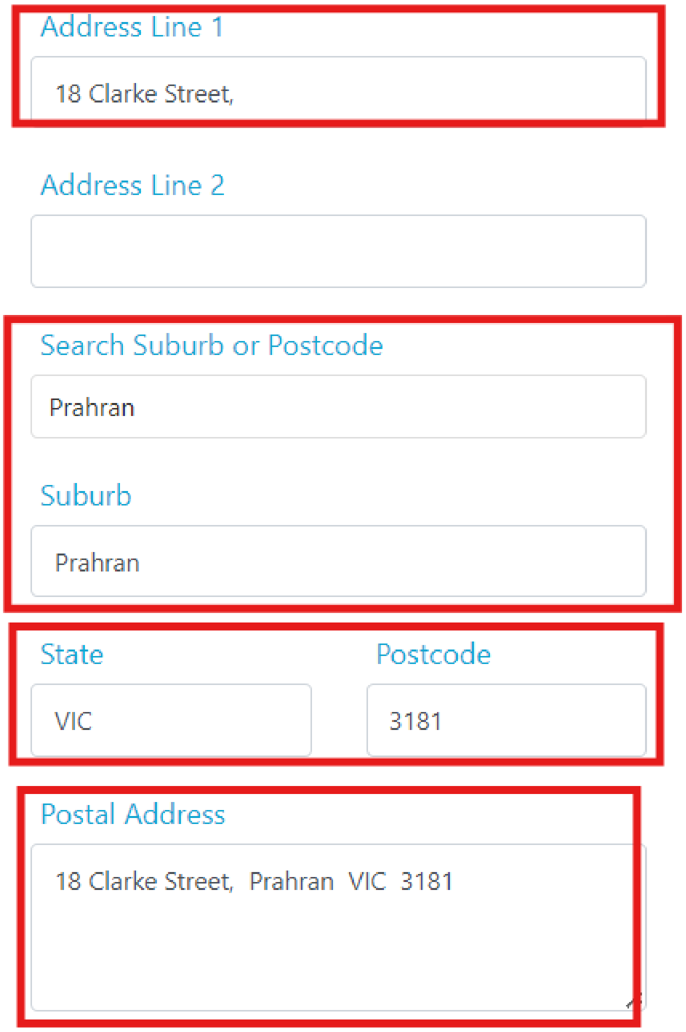


Figure 10 Address from the details section.

After these steps are completed, you are ready to begin rostering your worker. But before rostering a support worker for the client. A client agreement needs to be created.

On the clients profile page, go to the agreements tab.

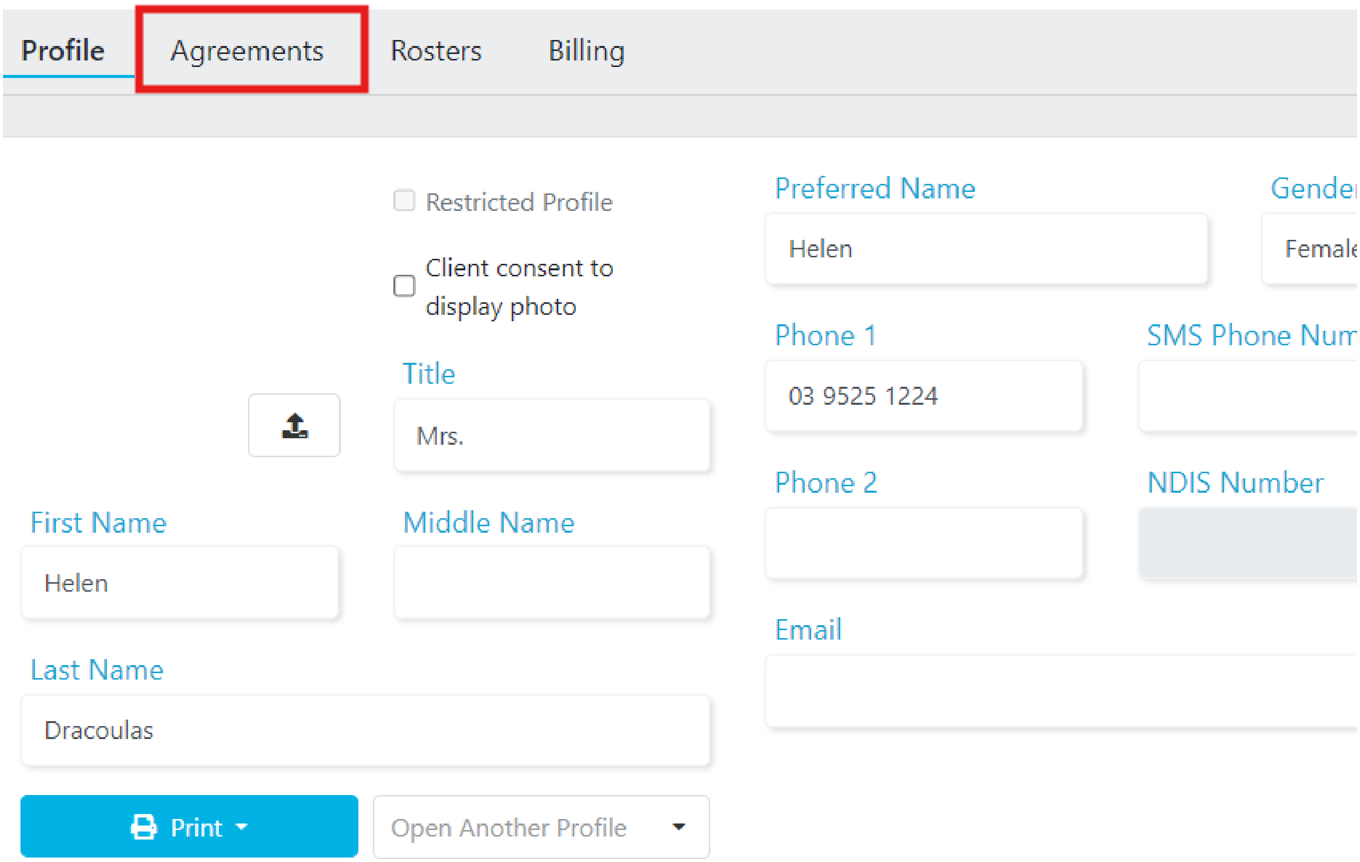


Figure 11 Agreement Tab selection.

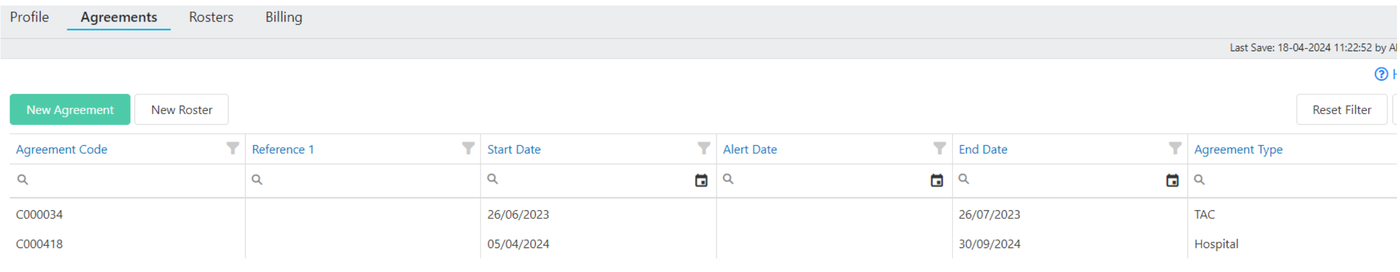


Figure 12 Agreement Tab

The clients' current agreements are highlighted in Figure 13. For the sake of this guide, we will show how to create another agreement so you can make one for yourself!

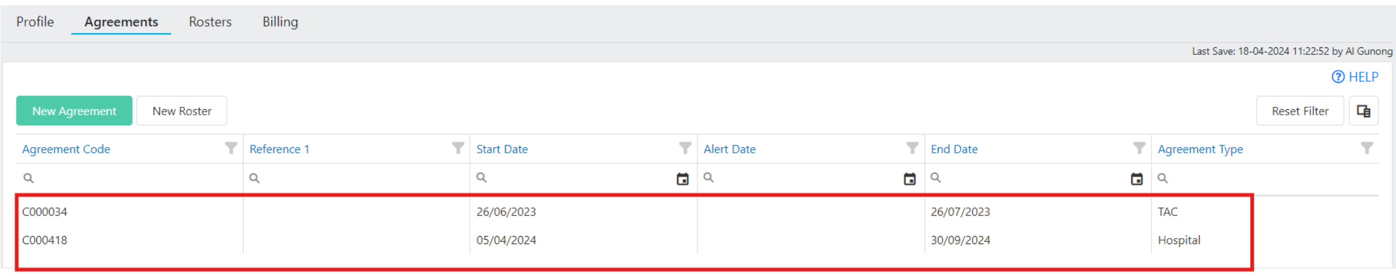


Figure 13 Highlighted Agreements.

As shown in Figure 14, select the New Agreement button.

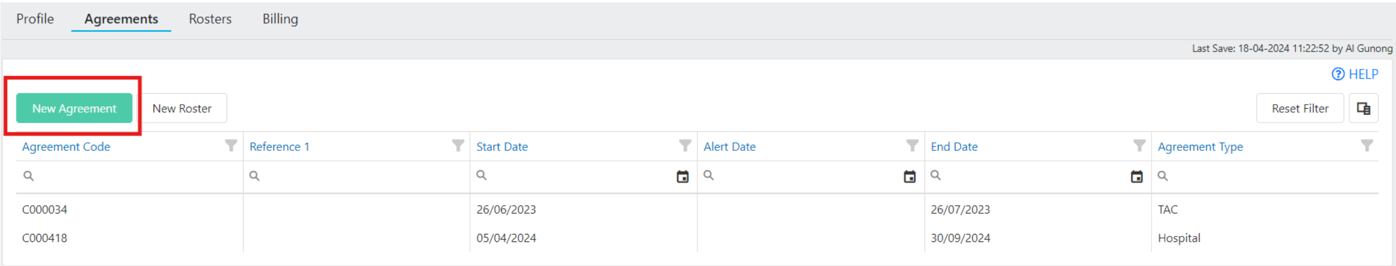


Figure 14 Select New Agreement button.

In the prompt that follows, simply click create. (Shown in Figure 15)

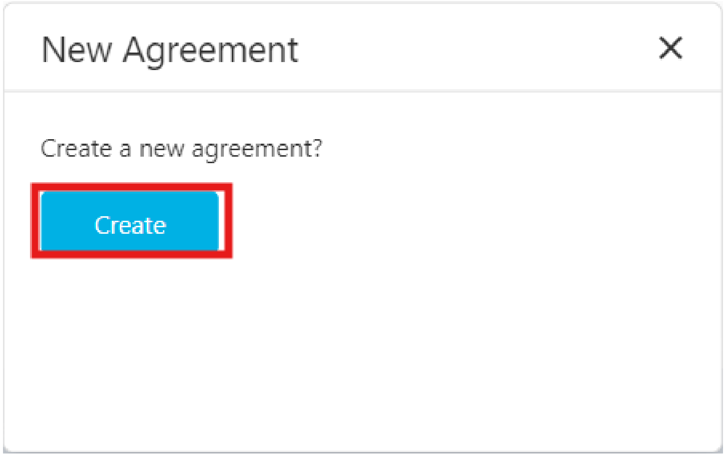


Figure 15 Prompt that will show after selected the new agreement button.

After clicking create, the agreement page will show.

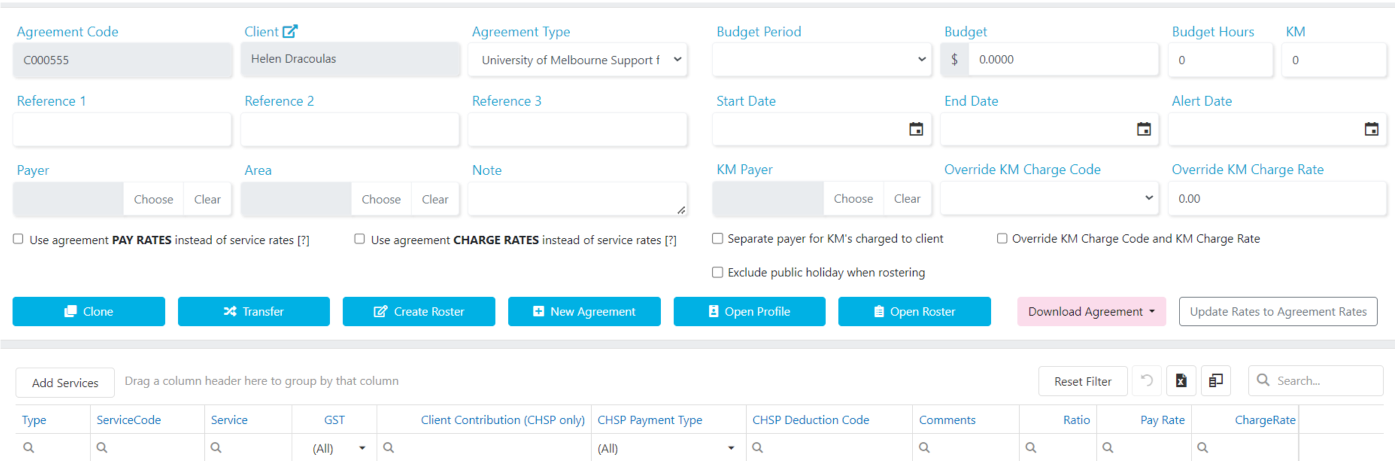


Figure 16 Agreement page.

In the agreement page you will need to change and add some information on it for easier documentation purposes. The parts that will need to be changed or added are:

- The Agreement type – NDIS or Home care package.

- Reference – Add the client code
- Payer – This will be the clients Care provider who is taking care of the funds.
- The start date – The start of the agreement
- End date – the End of the agreement.
- Alert date – When you should be notified that the agreement is coming to an end.
- The tick boxes for agreement payrates and charge rates.

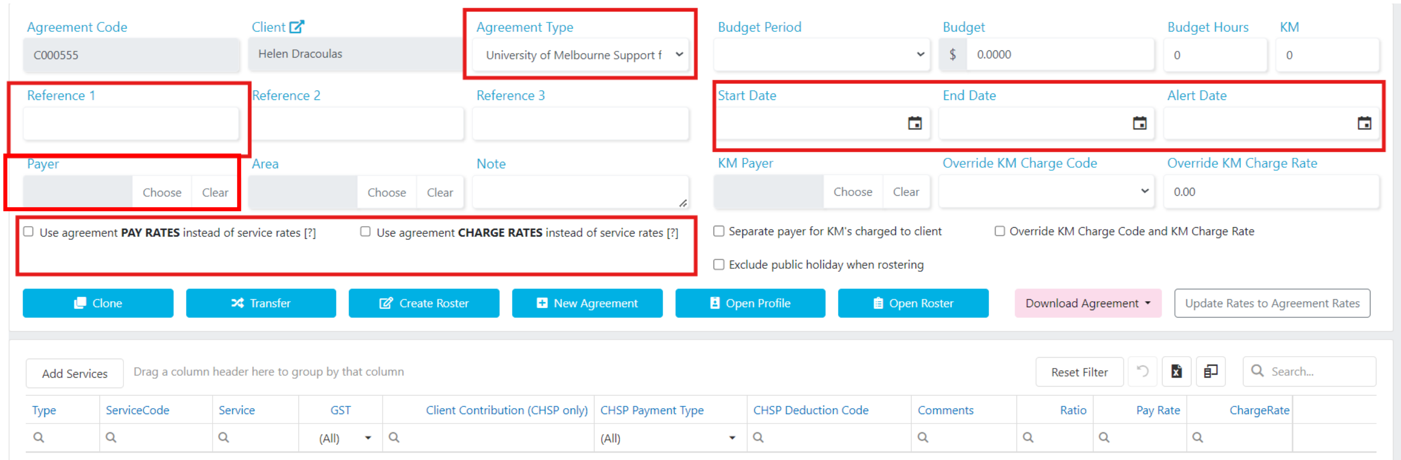


Figure 17 The parts of the agreement that needs to be changed or added.

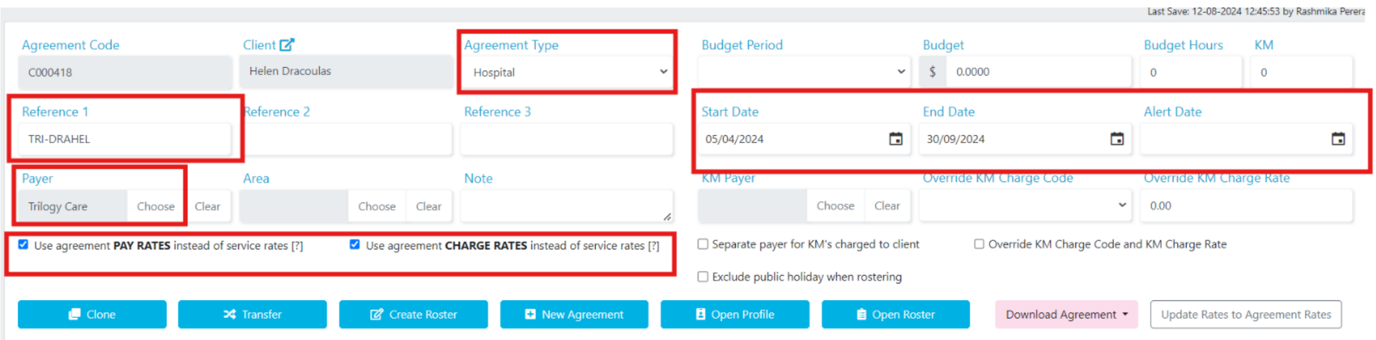


Figure 18 The parted with added or changed information.

Once the steps above are completed you can then add a service onto the agreement and make sure it is the correct pay rate and charge rate.

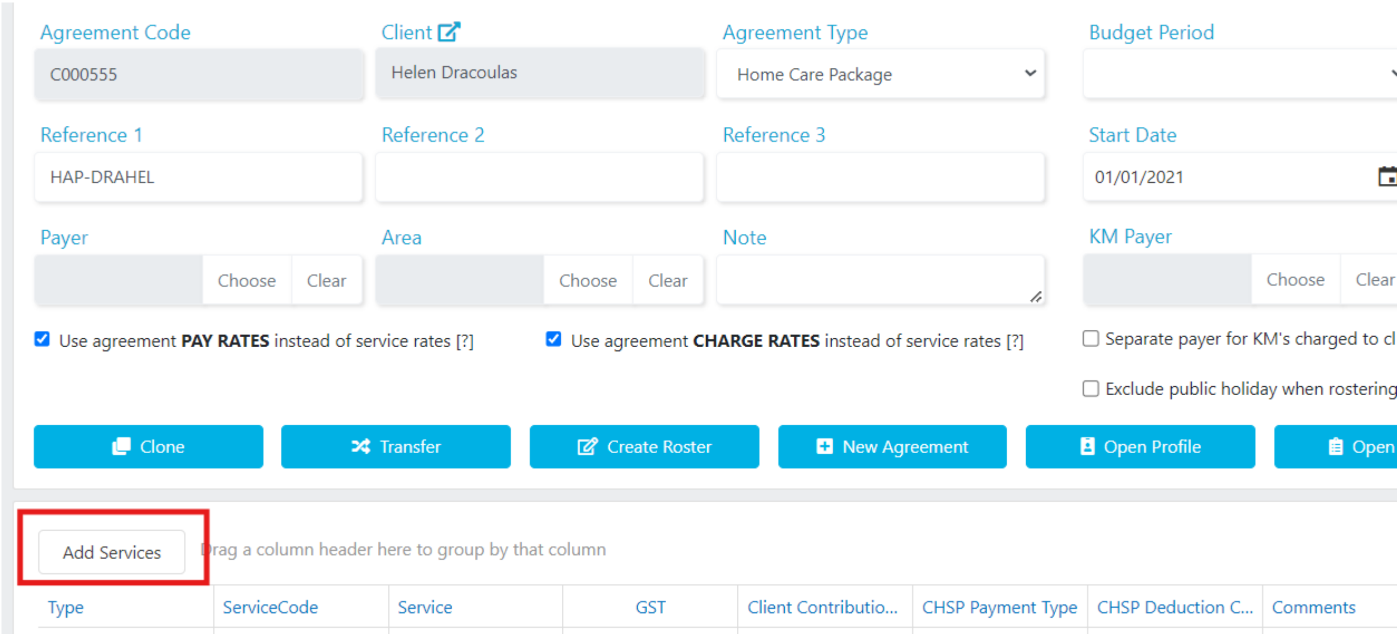


Figure 19 Add service button.

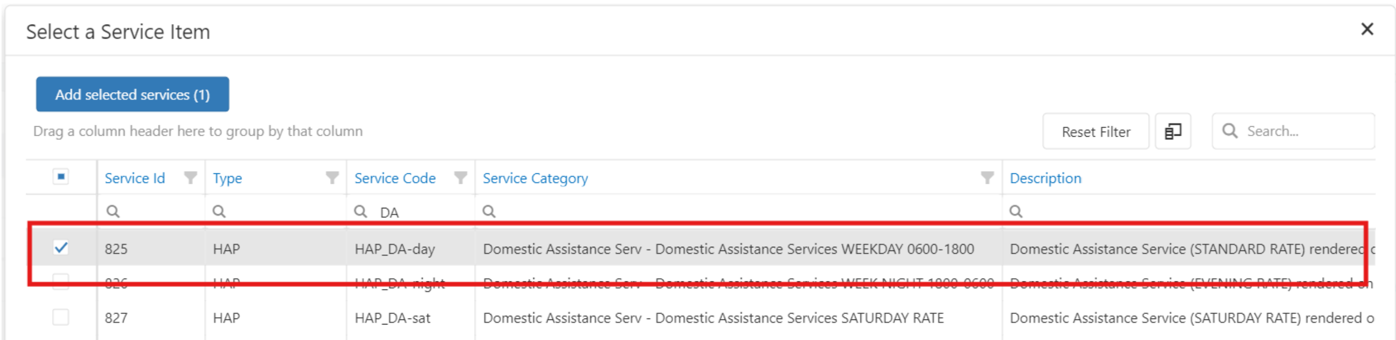


Figure 20 Add the service the client wants.

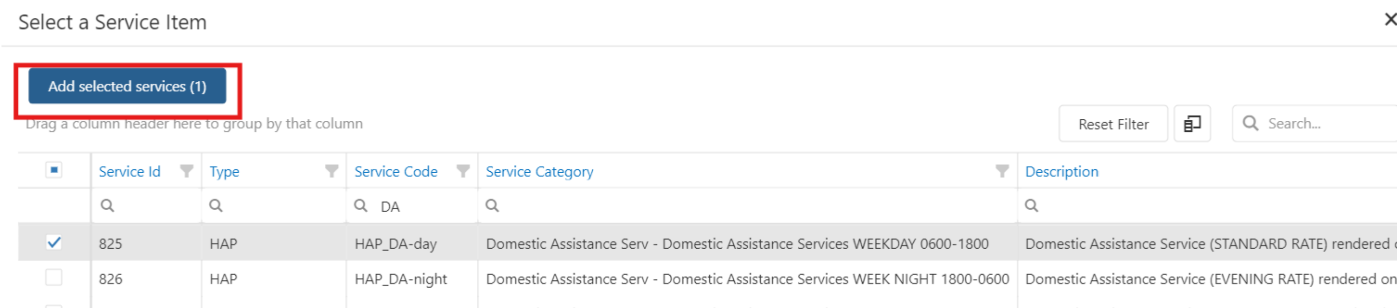


Figure 21 Add the selected service.

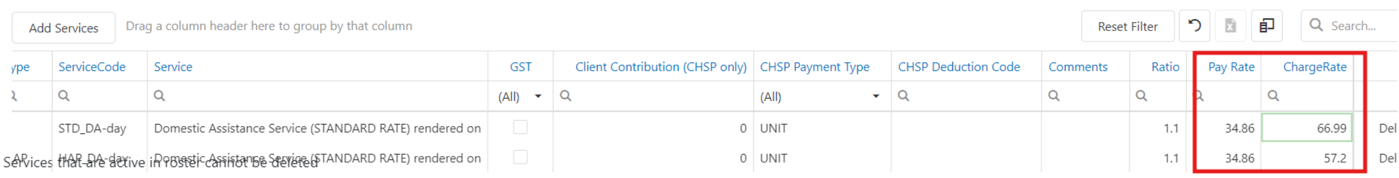


Figure 22 Change the pay rate or charge rate as required.

The Agreement is now completed! You can create the roster by selecting the create roster button.

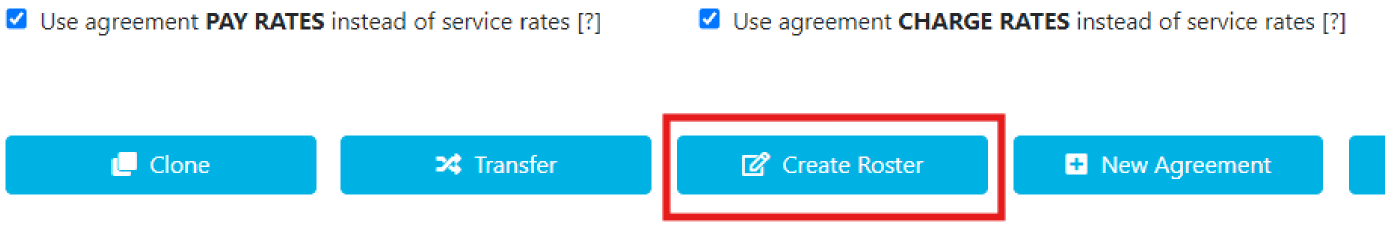


Figure 23 Create Roster Button

A prompt will show to confirm creation of a roster and simply click create to proceed.

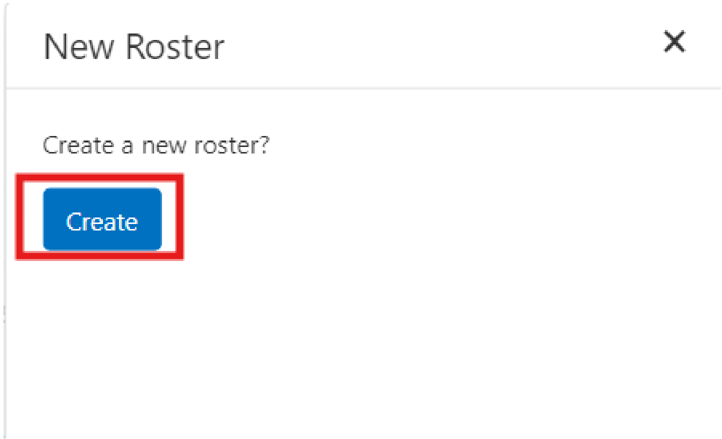


Figure 24 Roster creation prompt.

Once created you come to the roster page for the selected client.

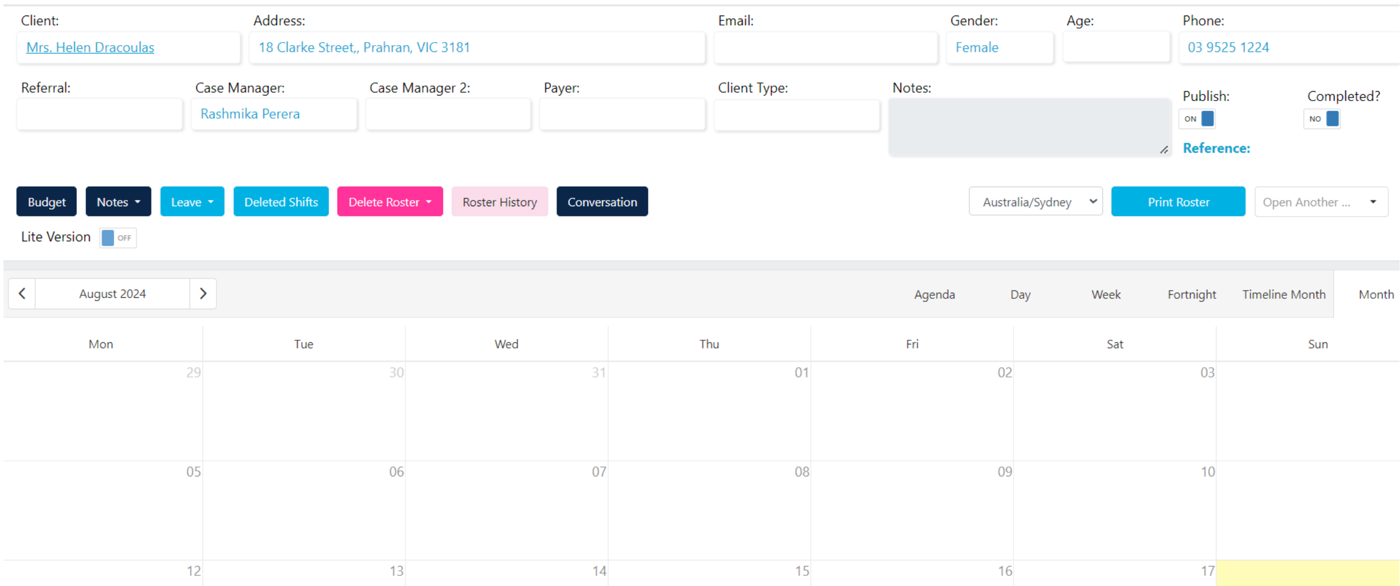


Figure 25 Roster page of Client

One the calender of the roster page, click on the day you need to book a service in and a service menu will show.

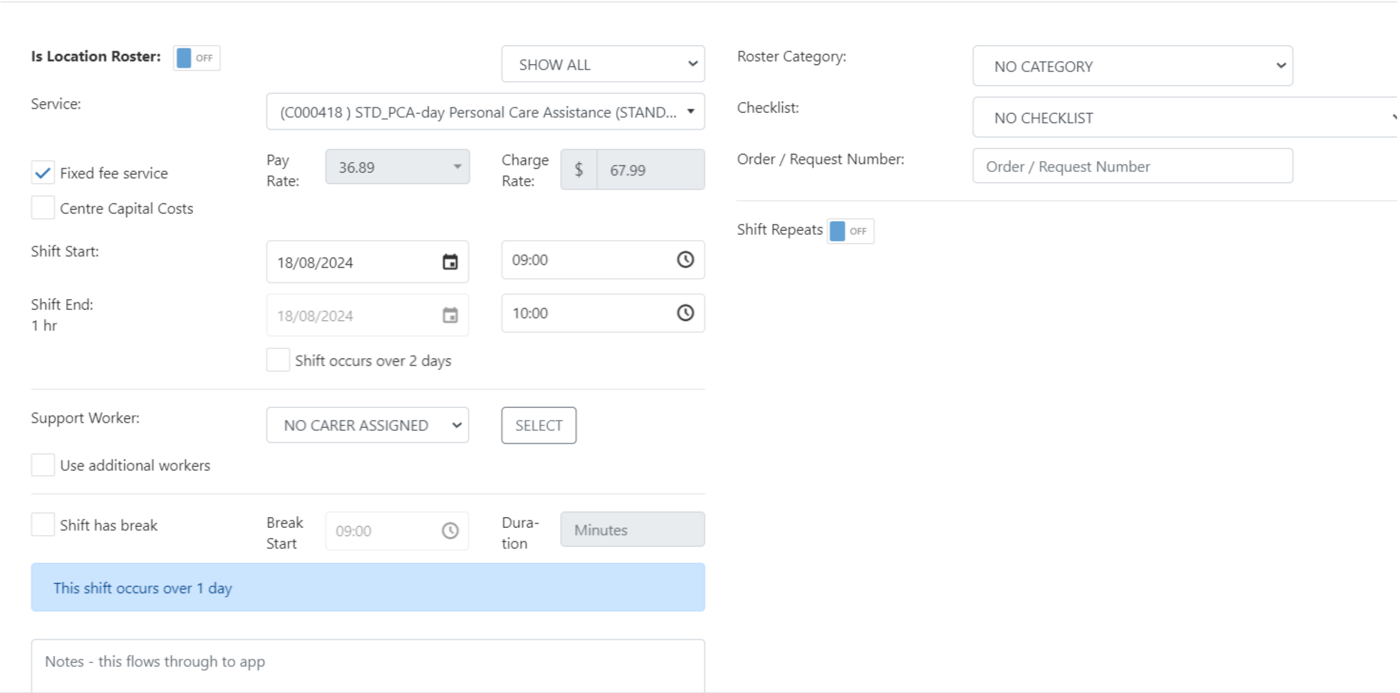
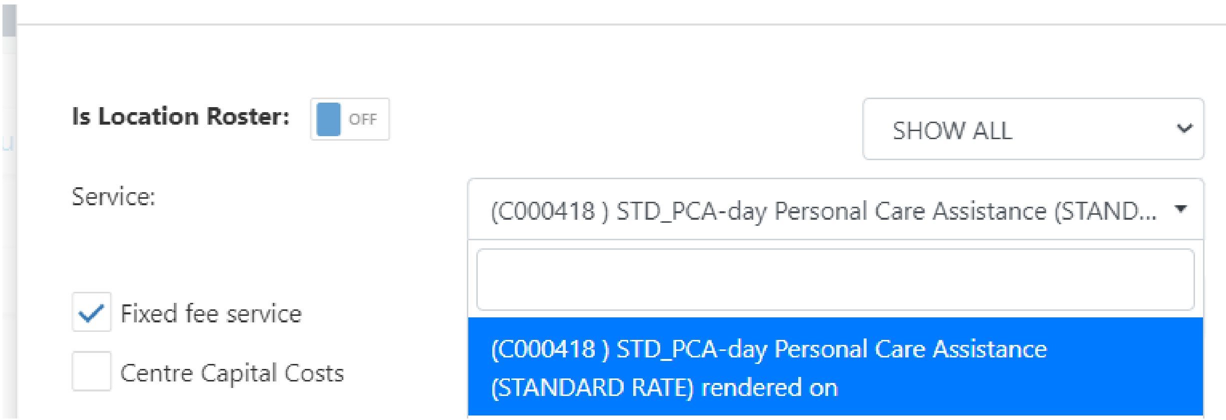


Figure 26 Roster Menu

Depending on the service and the duration required by the client the following details will need to change or added:

- Service
    - The service agreement can be chosen from the dropdown menu. Like shown in the image below.



- Service time and duration
- Pay rates (This will vary depending on the worker)
- Charge rates
- Notes
- Shift repeats (This depends on the duration the client prefers)

Figure 27 The details that need to be changed or added.

Once you have rostered the shifts for your client your roster calendar should look something like figure 28.

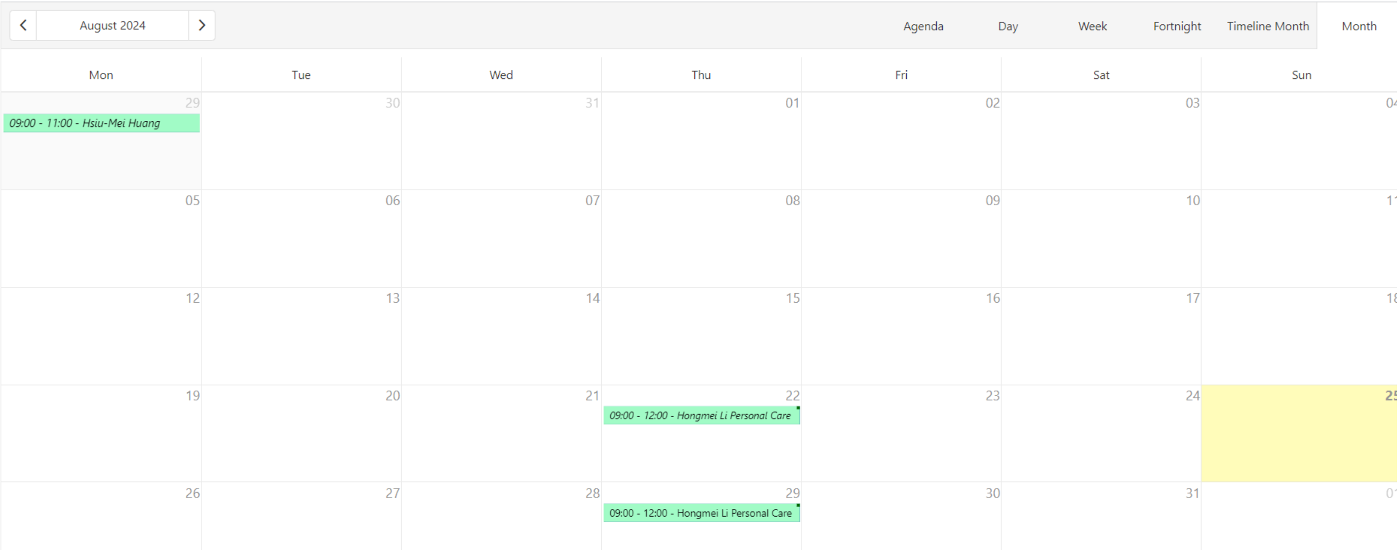


Figure 28 Roster Calendar with Multiple shits.

There you go! You have successfully learned how to roster a client through VisualCare! Congratulations!

Rostering shifts through ServiceMate (SM8)

To book a service through ServiceMate. You will first need to create the client profile (If it has not been created already).

From the ServiceMate homepage in Figure 29 click on the clients section.

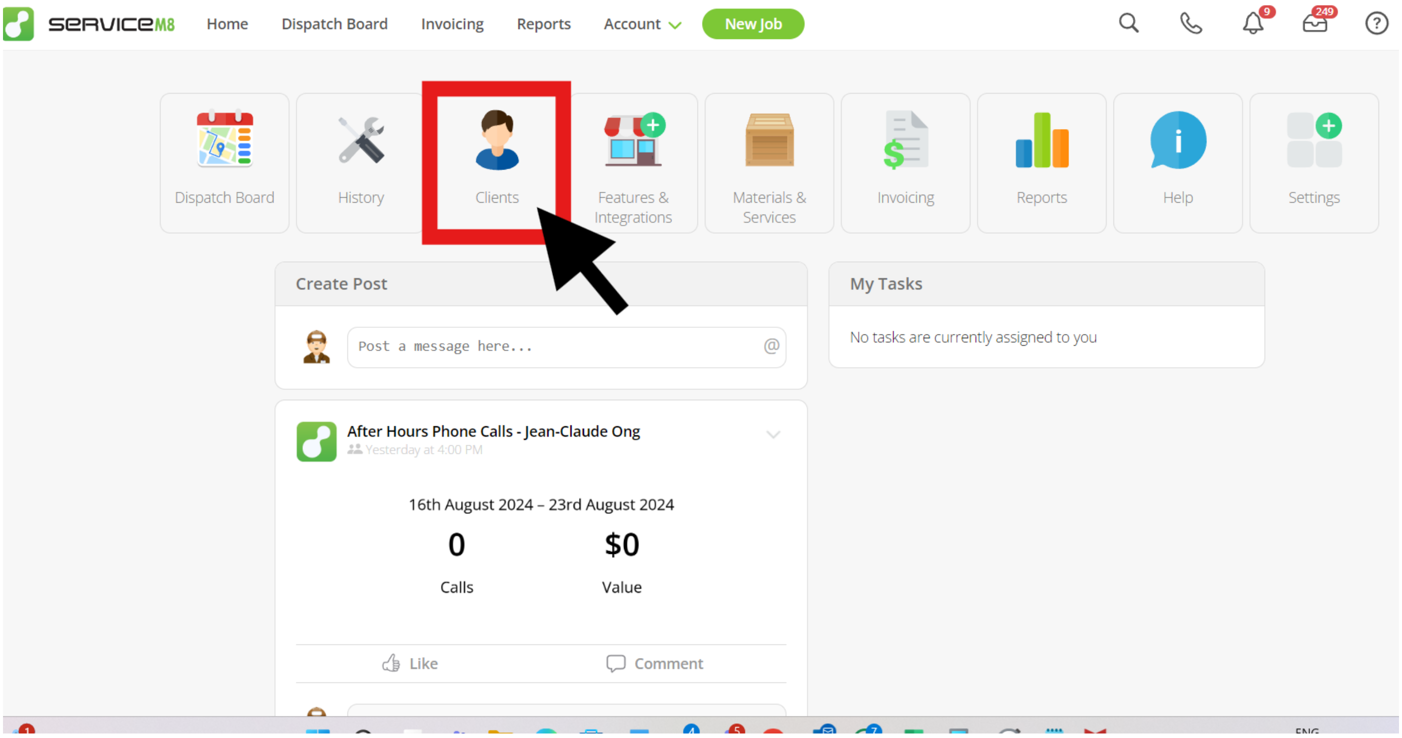


Figure 29 Click on the clients section shown by the large arrow

Once in the client section, click on the Add client button shown in Figure 30.

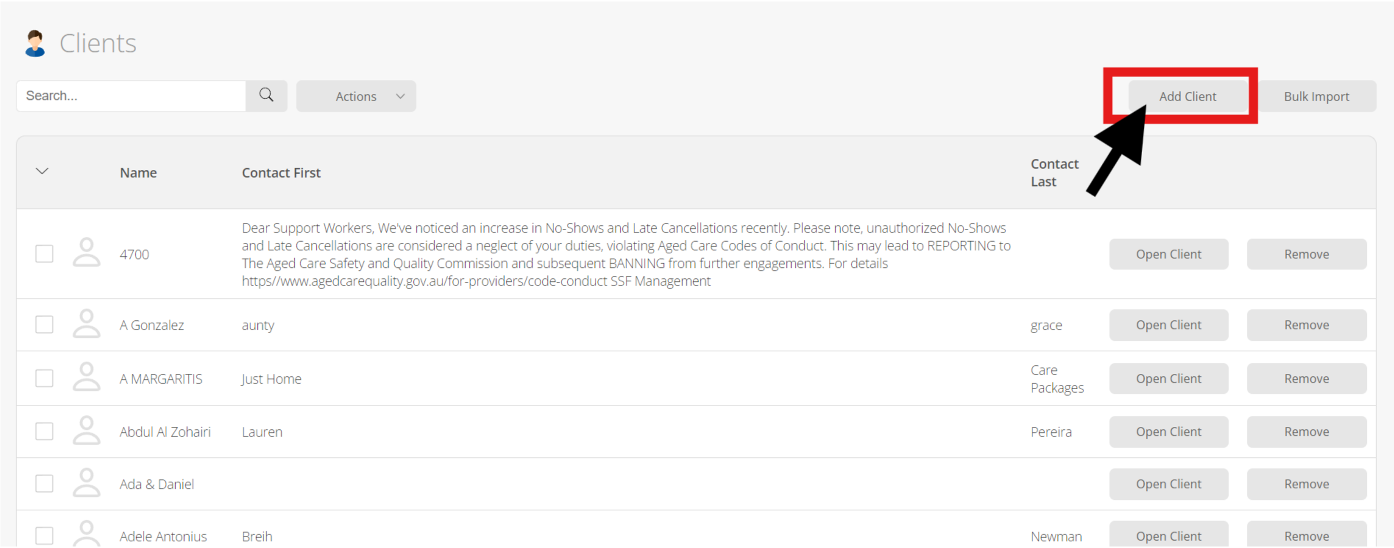


Figure 30 Click on Add client button

After you have clicked the Add client button, a prompt box will appear shown in Figure 31

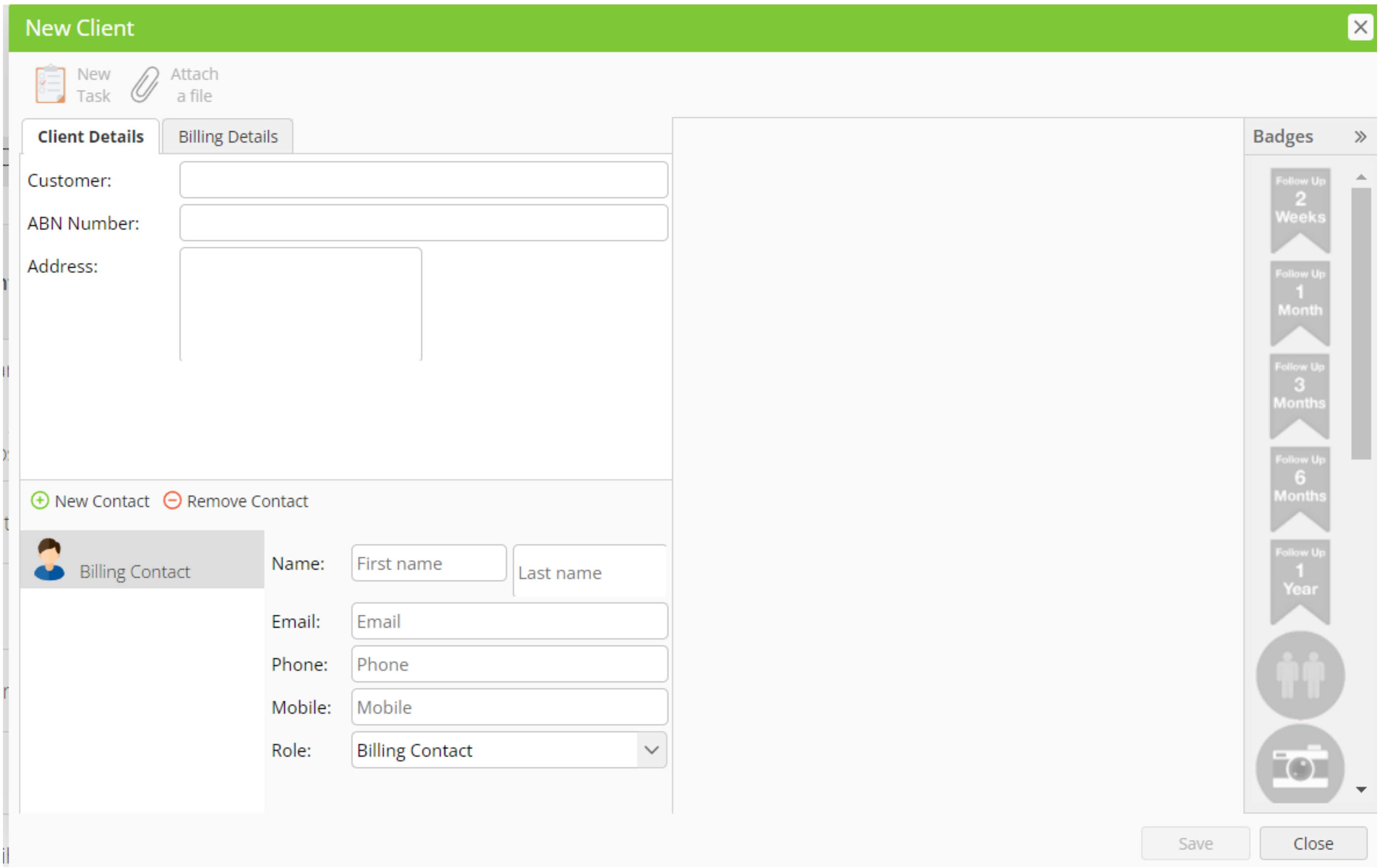


Figure 31 Prompt Box to add client.

In the prompt box, you will need to add the following details:

- Customer – The clients name will be added here.
- Address – The clients address will be added here.
- Billing Contact Name – The Care Provider will be added here.

An example of this is shown in Figure 32 with a mock client. Kindly note the following:

Customer name – Imadh Marjan

Address - 84 Hotham Street, Preston VIC 3072

Billing Contact – Southern Support Family

Important Note: The examples above and on Figure 32 have been made with a SSF employee. For further information on the Agencies we currently work with. Check the following list.

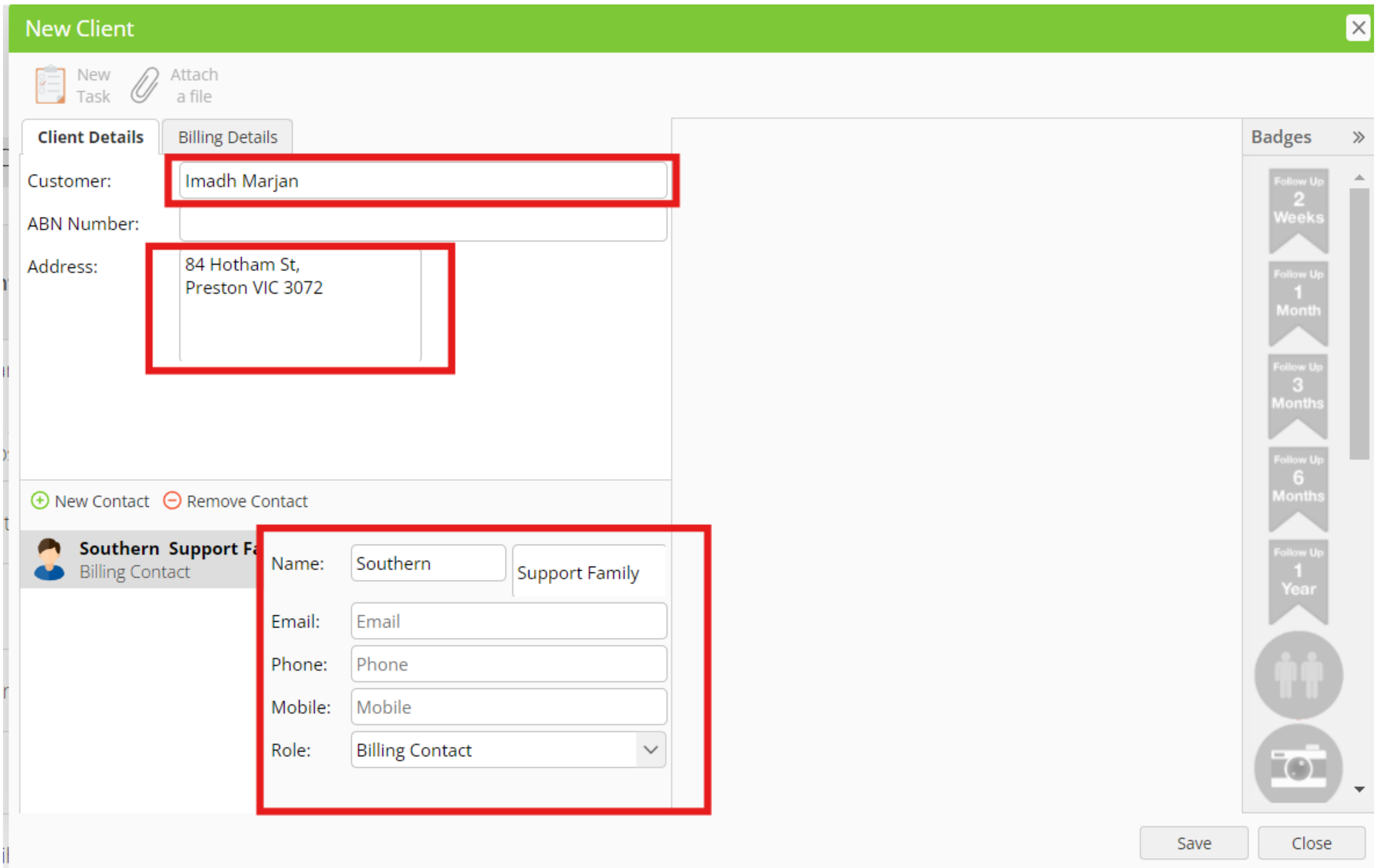


Figure 32 Prompt box filled with the details needed.

After this has been done you can proceed to click save on the bottom right of the prompt box (Figure 33).

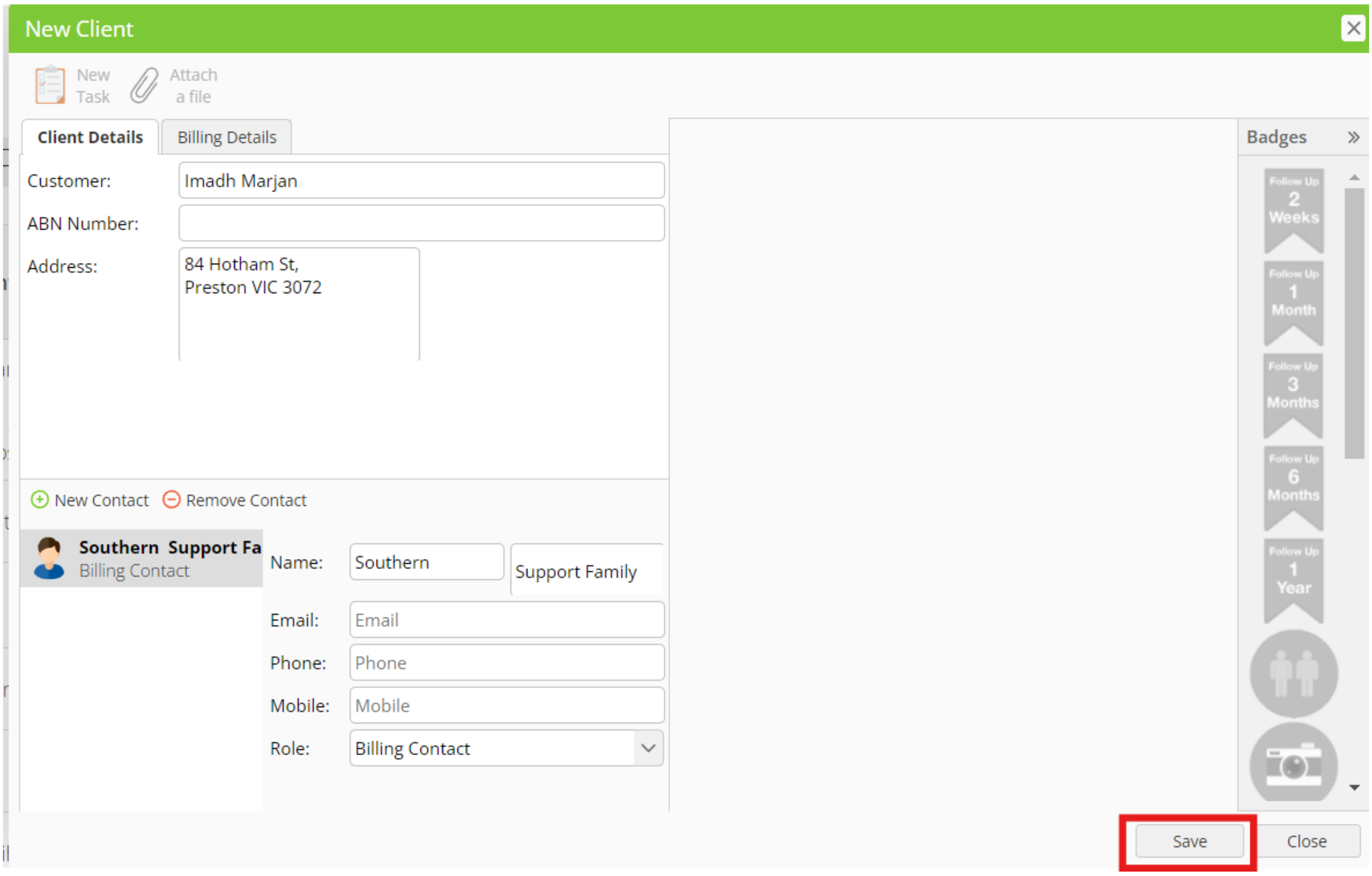


Figure 33 Click save in prompt box.

Now that we have created the client, go to the dispatch section of ServiceMate (shown in Figure 34).

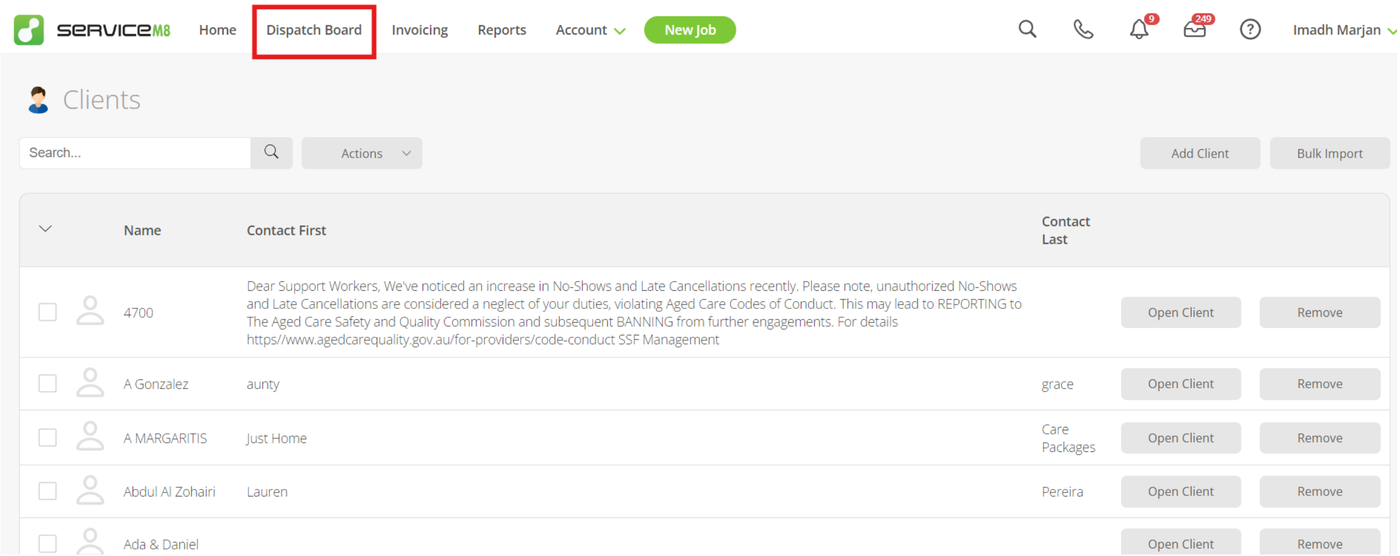


Figure 34 Click on the Dispatch Board shown in this screenshot.

After clicking on the Dispatch Board section, you will be shown this page shown in Figure 35.

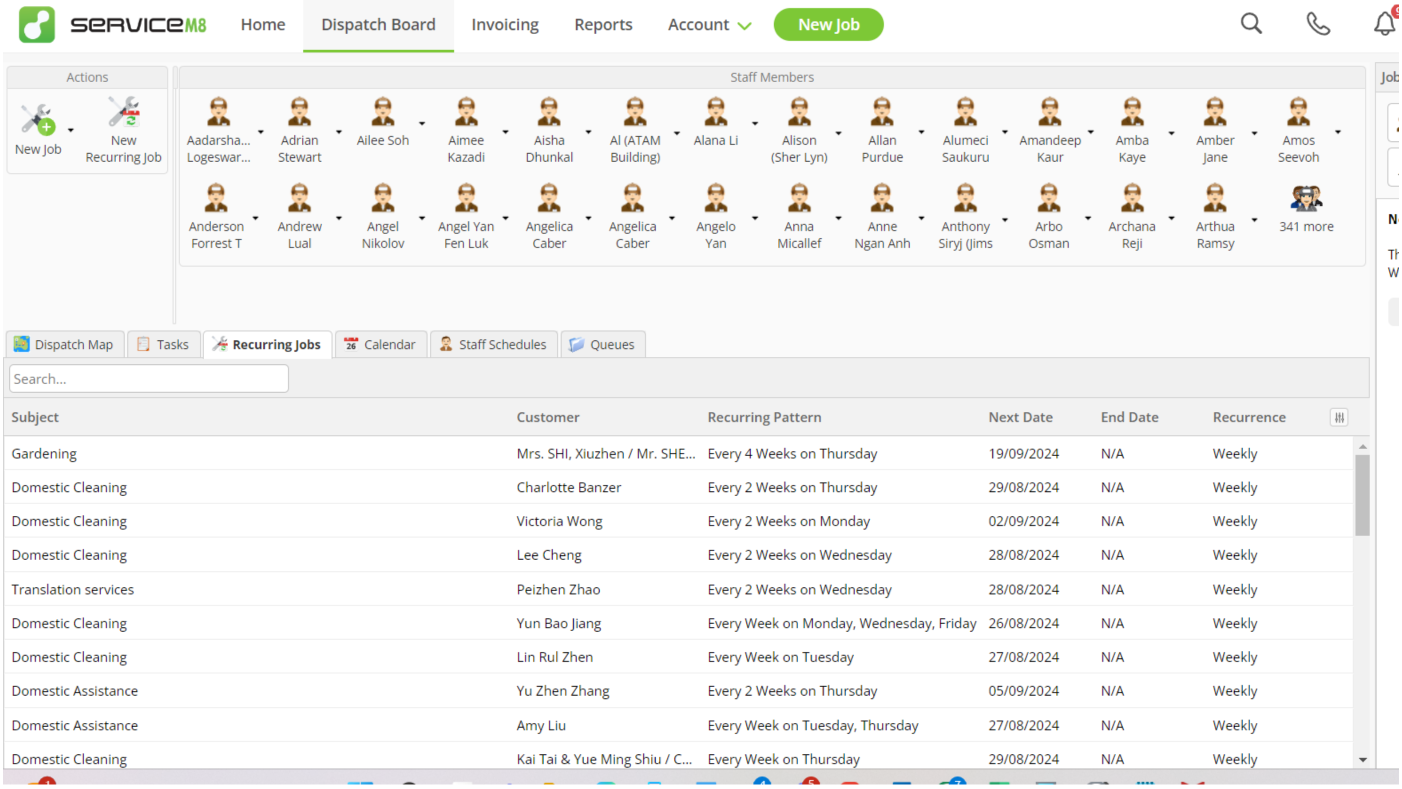


Figure 35 Dispatch Board Section

To book/roster a worker in you will need to create a job. Click on the New Job button as shown in Figure 36.

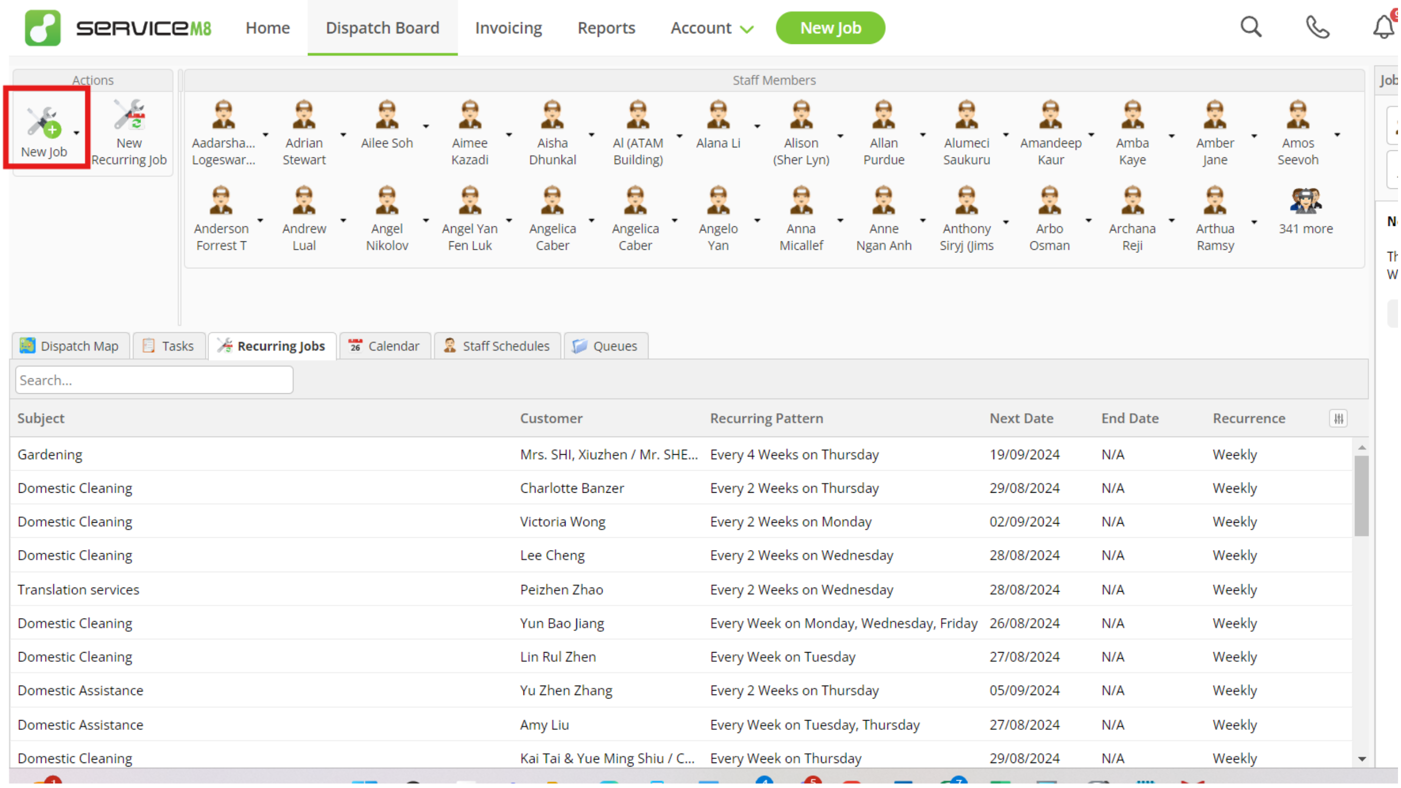


Figure 36 Click on the New Job button.

Once clicked it will show you the following prompt box shown in Figure 37.

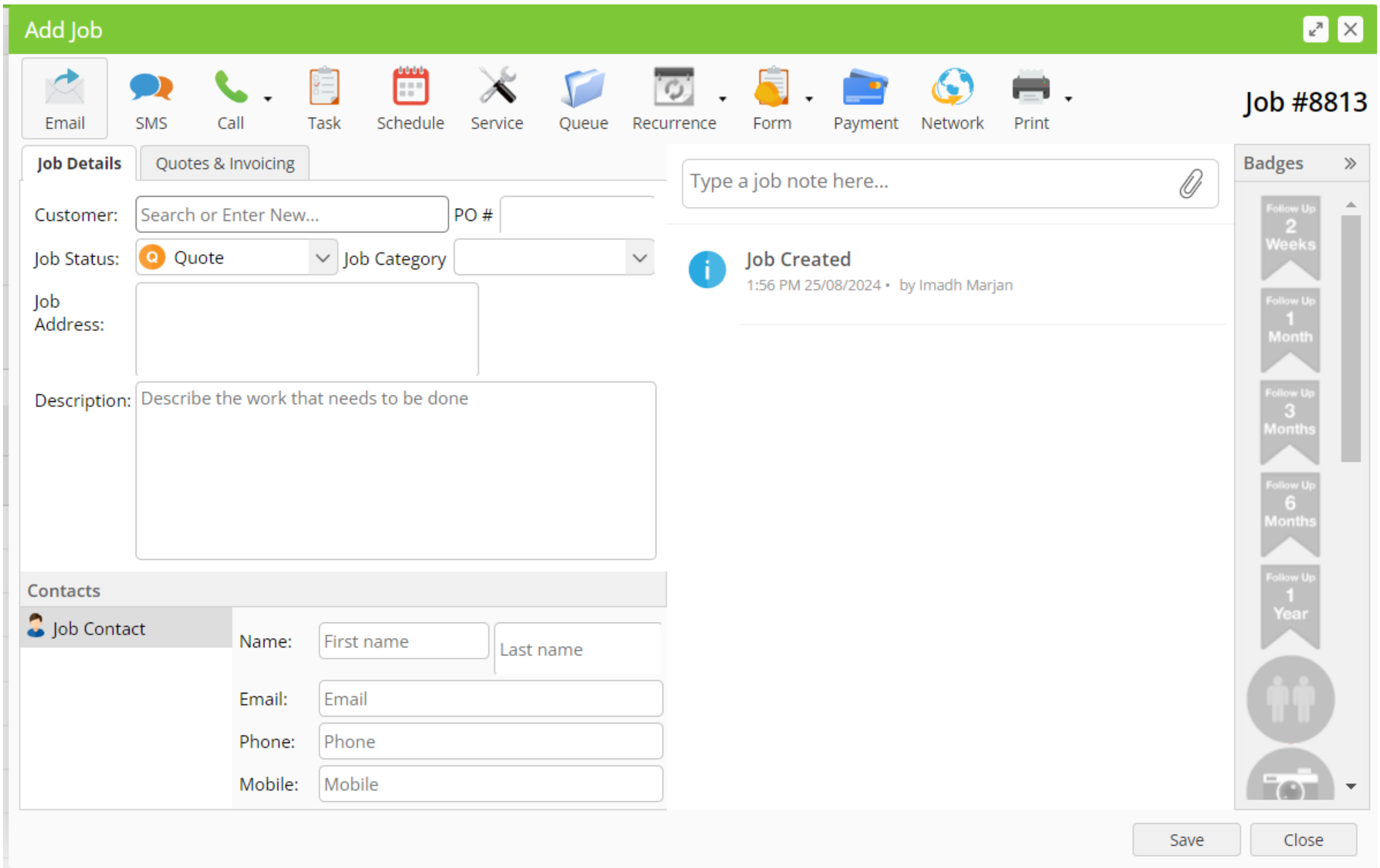


Figure 37 New Job Prompt box

The following information will need to be added or changed on the prompt box (highlighted in Figure 38):

- Customer – A dropdown box will appear when typing the clients name you added in the steps earlier. Simply select the clients name and the job address will also be added to the prompt box.
- PO# (Purchase Order Number or code) – You will enter the clients ID code here. Refer to Client code section for more details.
- Job Status – Change it to worker order if it an ongoing PCA service or DA service. It is to remain quoted if the service is for Tradies or Gardening
- Description – Add what the service will be for. Refer to services offered section.
- Job Notes – Add notes relating to the assigned workers and client preferences. After services have taken place you can add post-welfare reports on it as well.
- Job Contact – This will normally be the agency details.

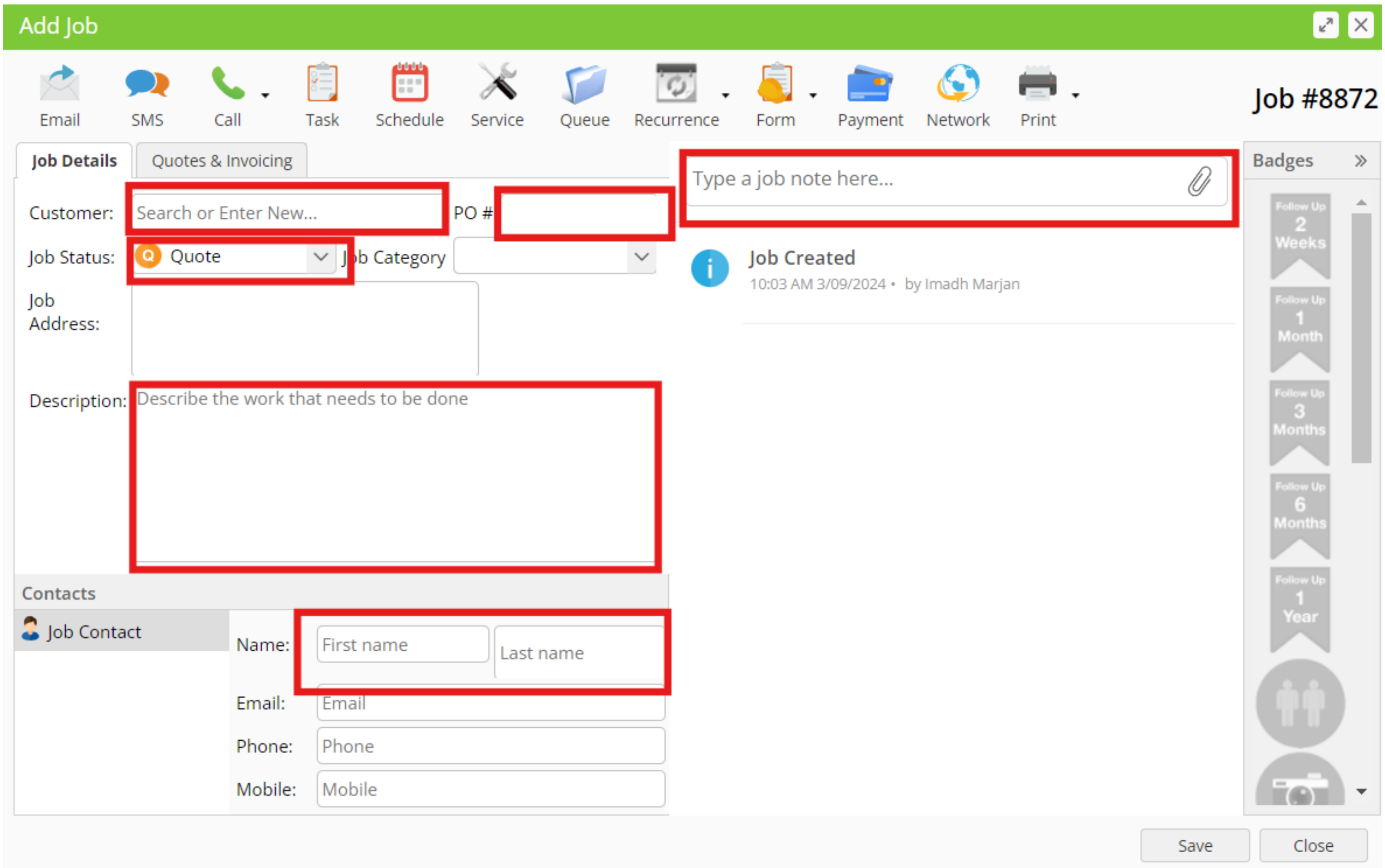


Figure 38 Highlighted Information that needs to be filled or changed.

Once the information on Figure 38 is added the Job order should look like the Figure 39.

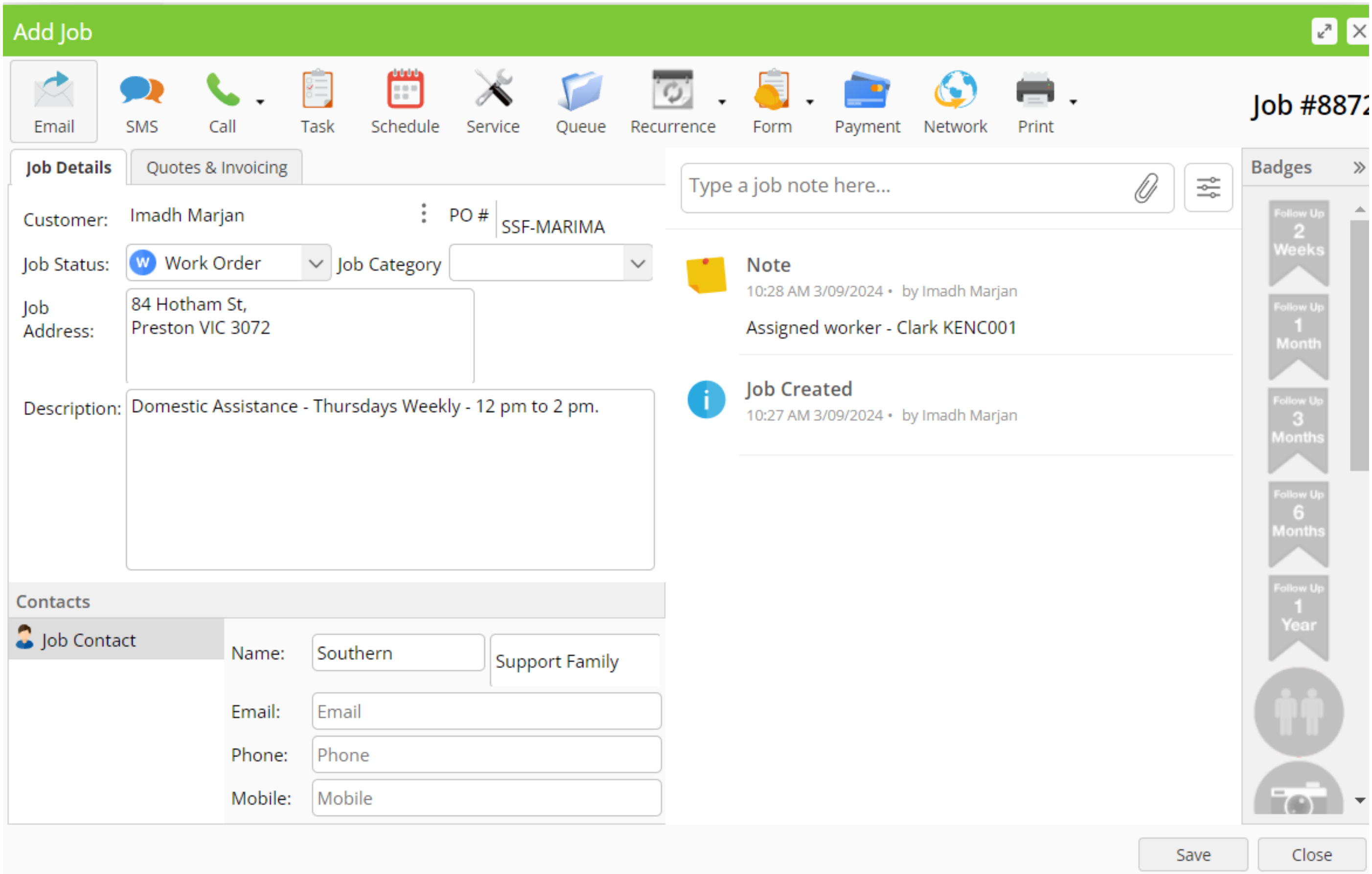


Figure 39 Job Order details filled.

To book a worker for a service you will need to send a SMS to the SW using the SM8 messaging tool within the job order as shown in figure 40.

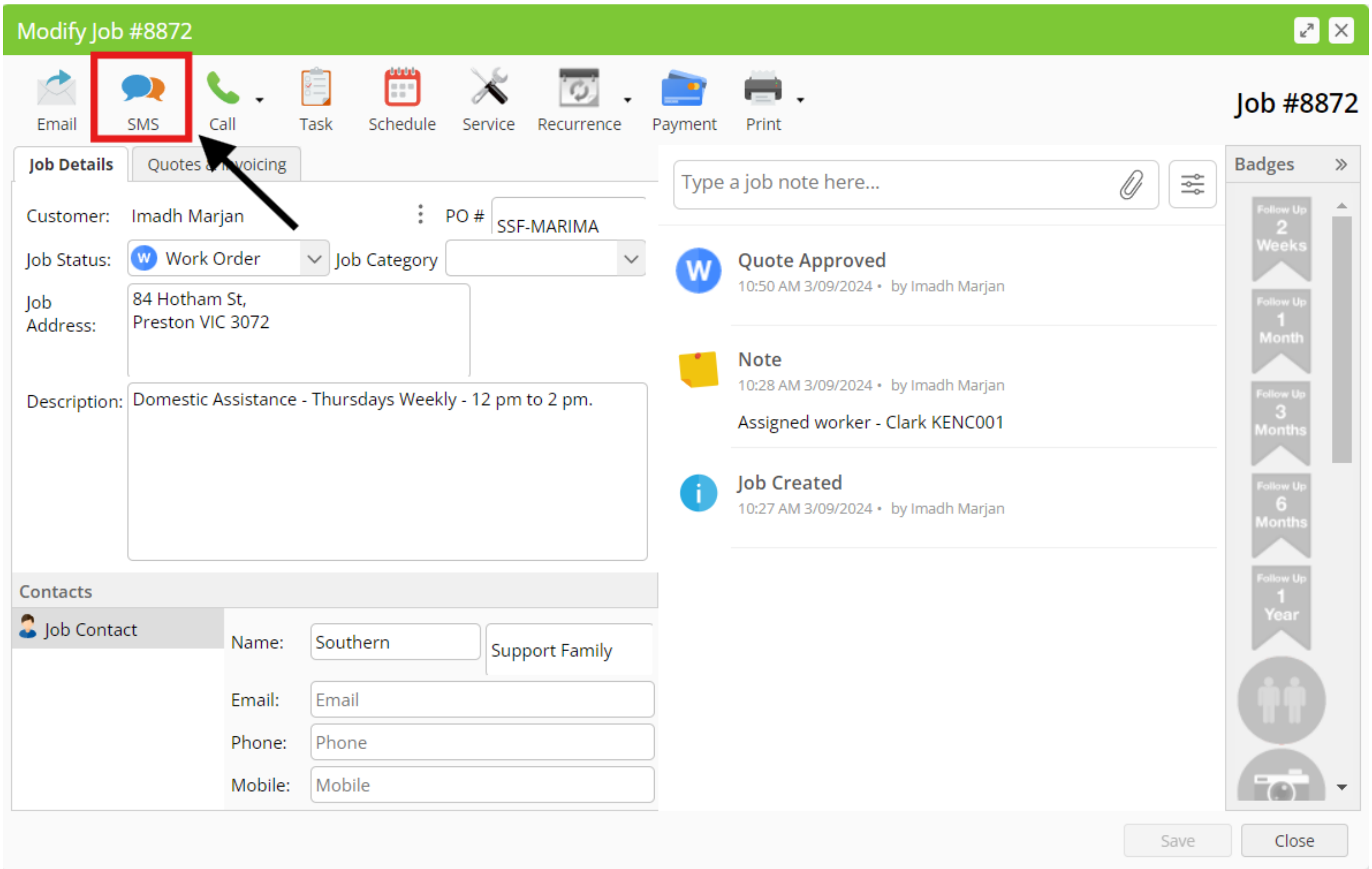


Figure 40 SMS tool on Servicemate

After clicking the button, a chatbox will appear where you can send a SMS (figure 41).

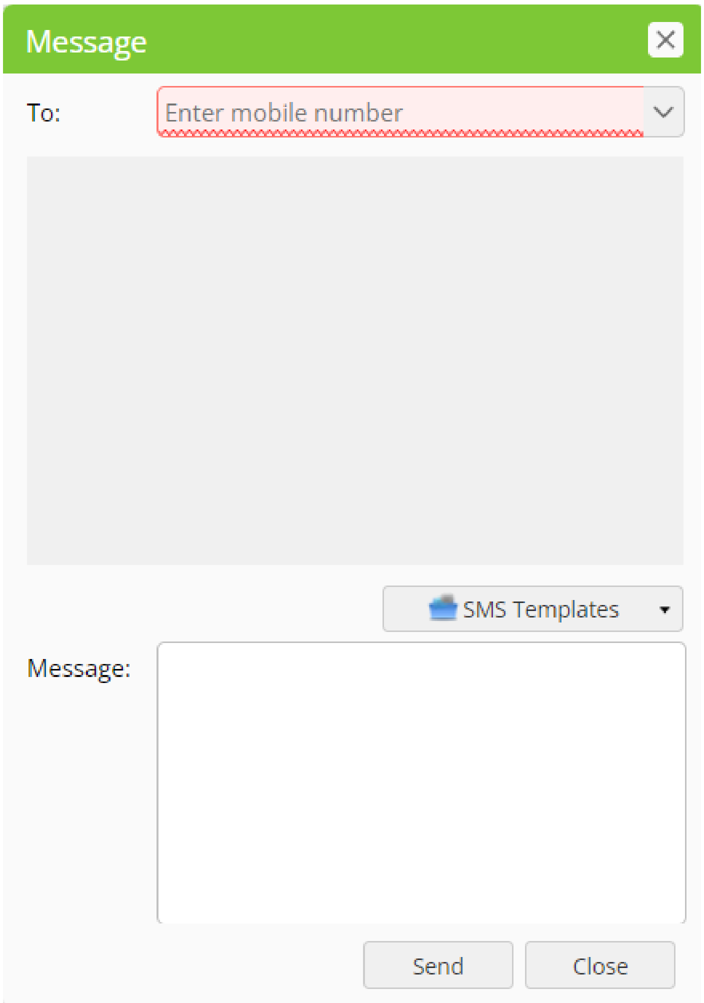


Figure 41 Servicemate chat-box

You will need to add the Support workers number shown in figure 42 and then select a template from the dropdown menu on the chatbox circled in red.

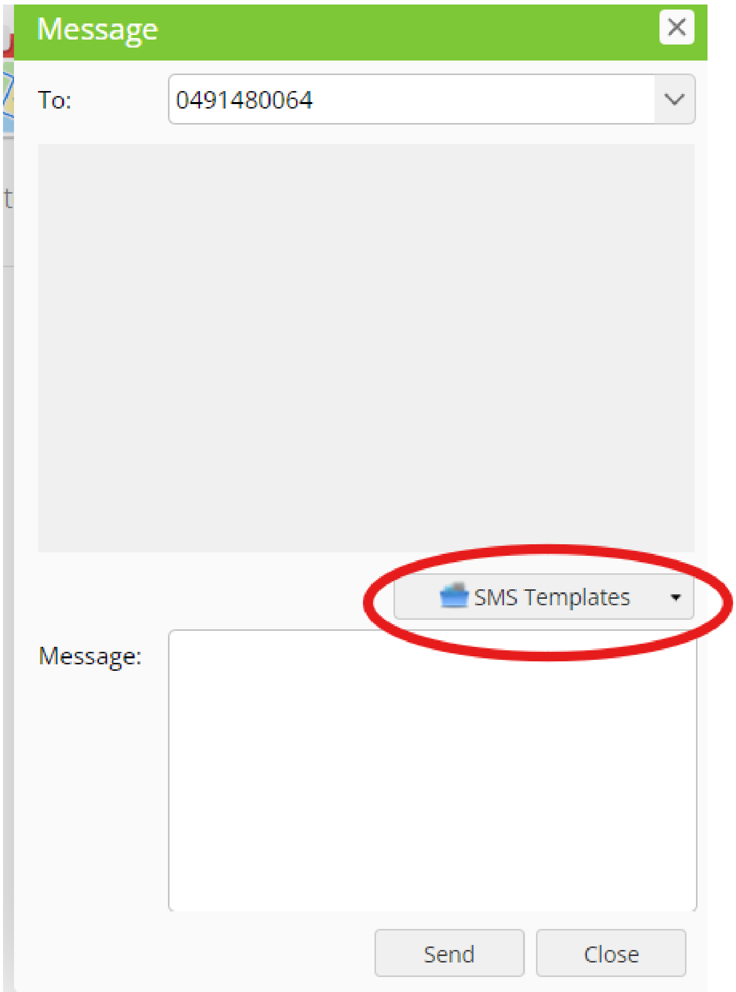


Figure 42 Enter number and then select dropdown menu

In the dropdown menu, you will be given some options. The SMS to select in the menu is the job order confirmation. (shown in figure 43)

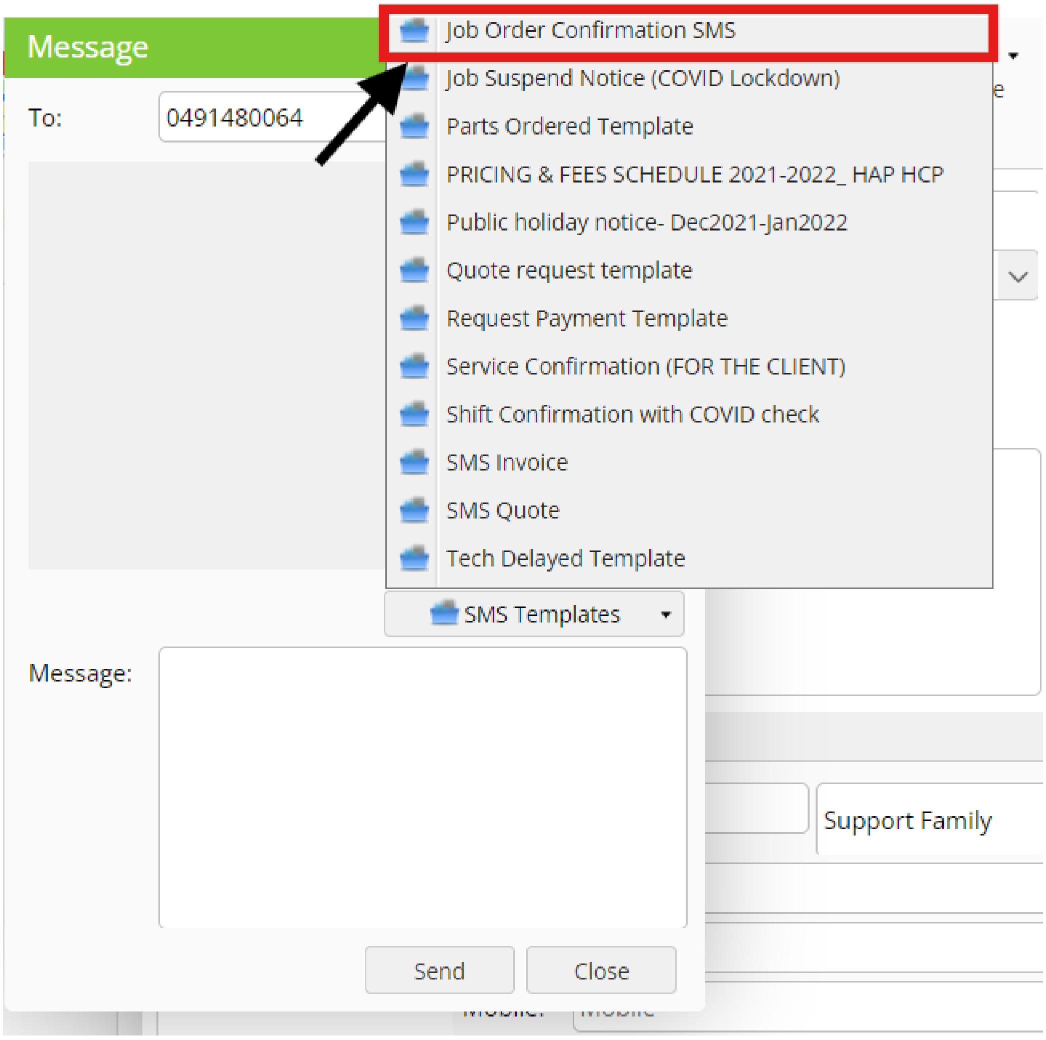


Figure 43 Select Job Order confirmation

Once you have select it the following SMS message template will be shown to you:

----Start of Template----

Job Confirmation
WO# 8872
Client Name: Imadh Marjan
CLIENT ID: SSF-MARIMA
Job Address: 84 Hotham St,
Preston VIC 3072
Contact: <insert valid number> or if during Afterhours & Weekends 03 9961 0058
Start Date:
Time:
Tasks: Ask the Coordinator
Assigned worker:
WORKER ID:
SIGN OUT: https://ssfservices.click/h22

CLIENT REPORT: https://ssfservices.click/eam
Any incidents? Report to the OAC ASAP! https://ssfservices.click/cy5

Reply YES to confirm
or here: https://ssfservices.click/4km

-----End of Template----

You will need to end the following details on the template:

- Contact - The main point of contact (best to put the company business line)
- Start Date - The start date of the service
- Time - the start time and the end time of the service e.g 9 am to 11 am or 9 am – 11 am
- Task – Enter the tasks required for the service
- Assigned worker – The worker assigned to shift. Usually enter just their first a name e.g Clark (Their full name is Clark Kent)
- WORKER ID – Enter the support workers staff ID as it enters on the staff list. In this example it would be KENC001

After you have entered the required details, you may select send button on the bottom of the chat-box (shown in figure 44).

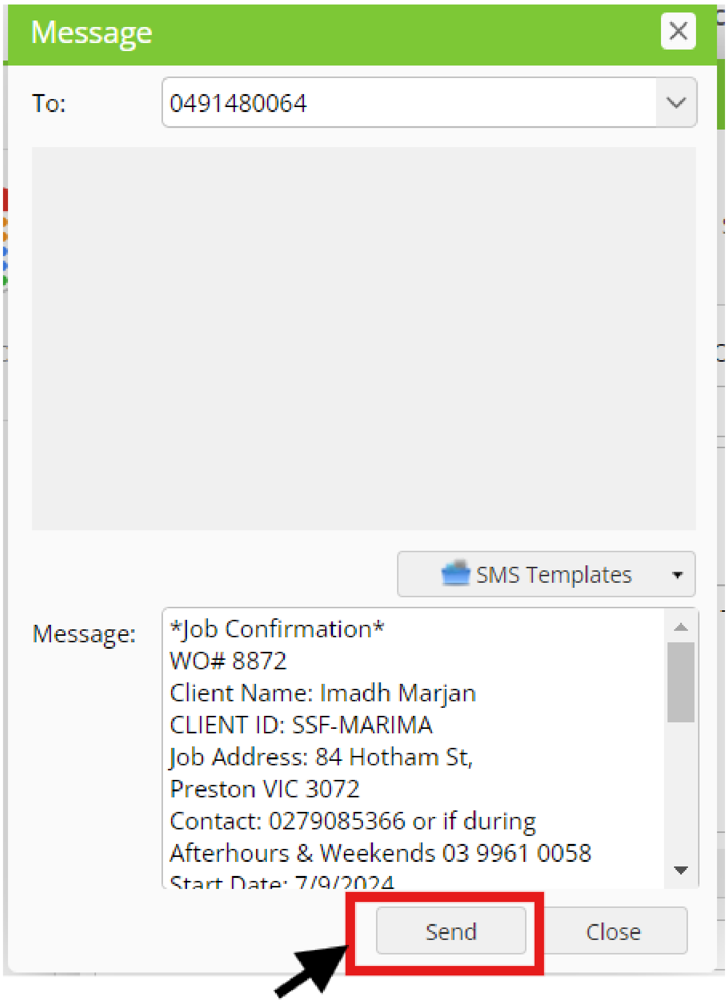


Figure 44 Select the send button to send the message

Once sent, the message will appear on the job like shown on the job order shown in figure 45.

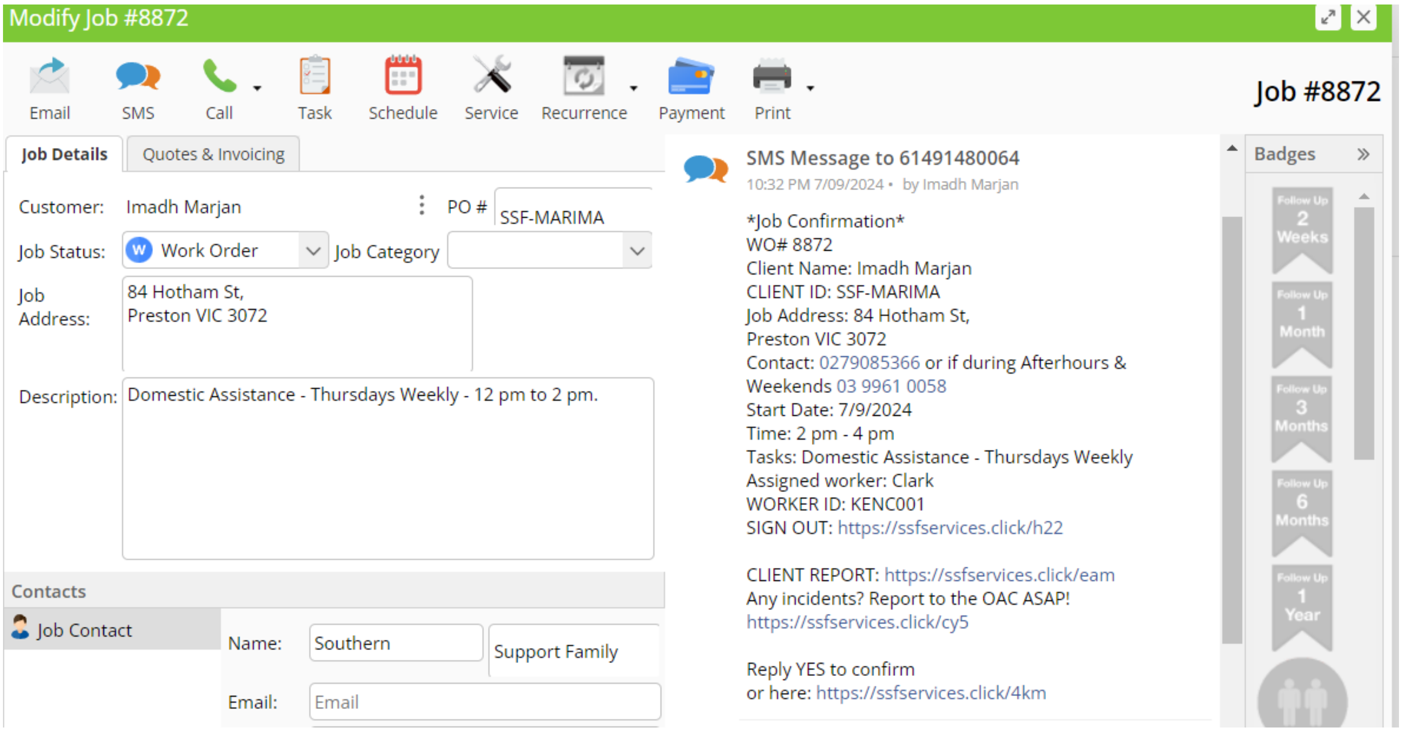


Figure 45 SMS Job order sent to the Support worker Clark.

When the support worker acknowledges the message via SMS. Their response will also be logged on the job order. An example is shown in figure 46.

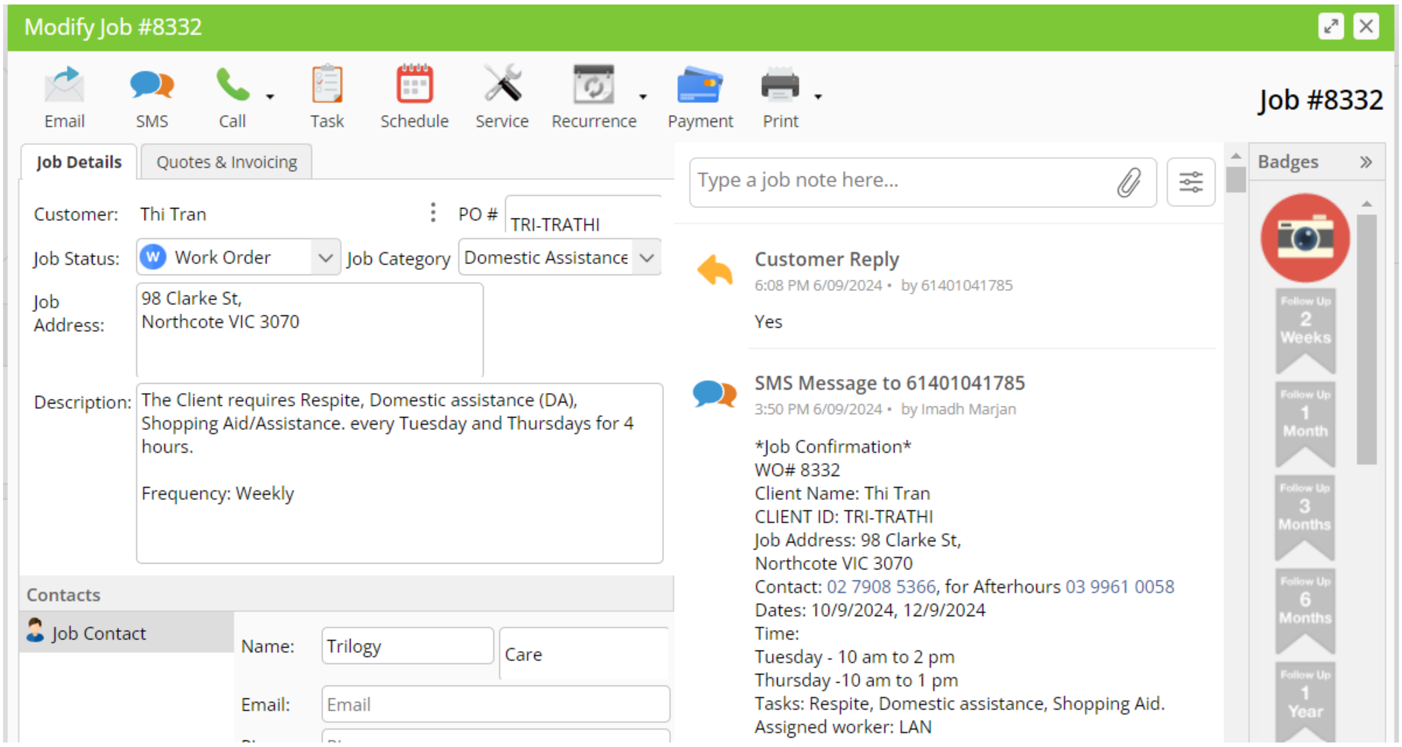


Figure 46 Example response from Support Worker.

If a Support worker is unable to respond yes to the message kindly get their confirmation via call or using the following form.

Rostering a quoted job.

Quoted Jobs are services that require SSF to add surcharge to a quote shared by Tradie, Gardener or an Occupational Therapist. Basically, Anyone who shares a quote for a service will need a surcharge added to it by SSF so the company can make a profiting for helping organize the service. In the following process guide, we will show how to roster a quoted job for a Gardener on Servicemate (SM8). The same process will be applicable to all quoted service requests received from our clients.

Once a client is created and you start creating a job as shown in the steps on [Rostering shifts through ServiceMate (SM8)](#). You will need to go to the Quotes and invoicing tab on the Job dispatch box as shown in Figure 47.

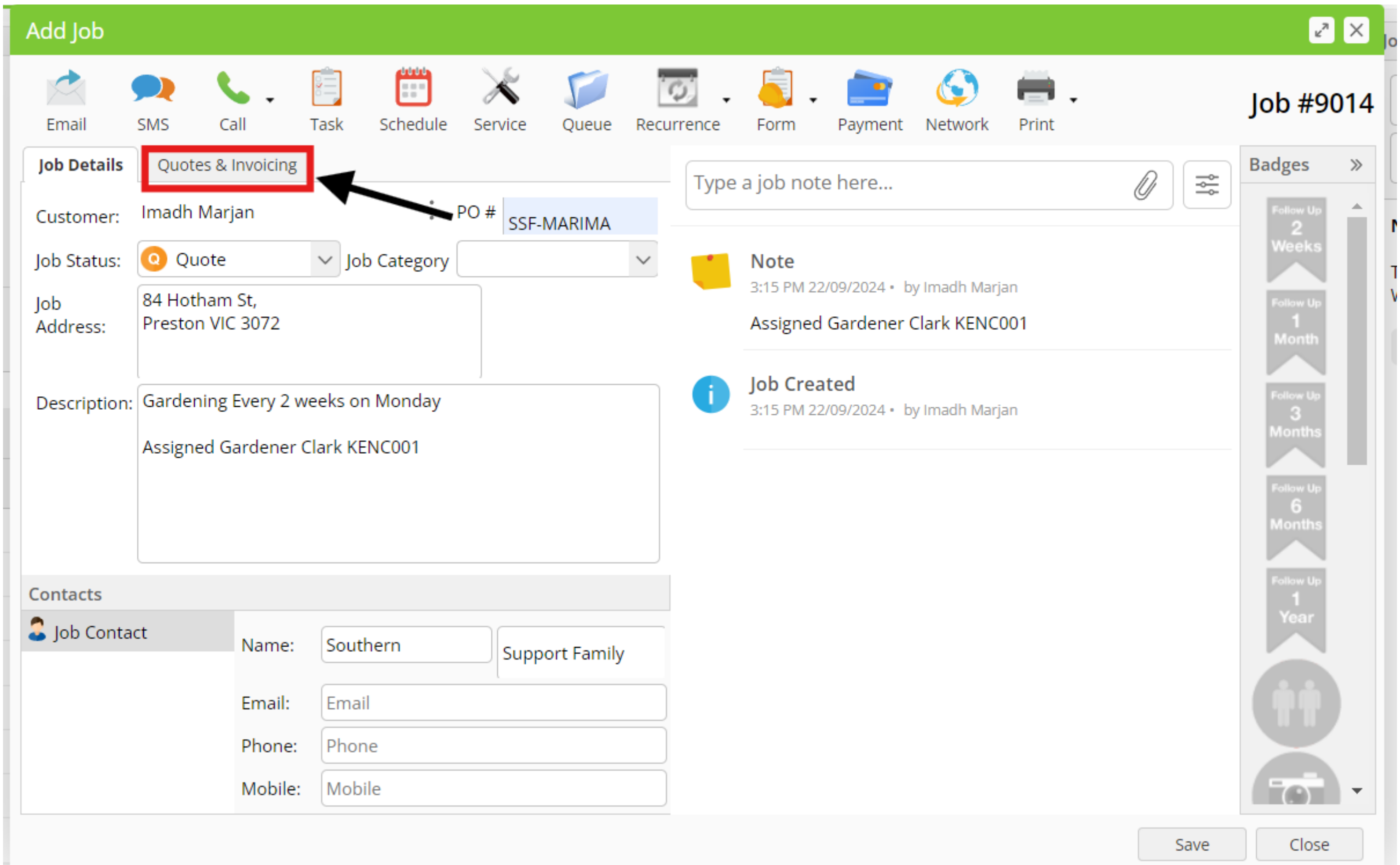


Figure 47 Click on Quote and Invoicing Tab.

Once clicked you will see a table (shown in Figure 48) with the following items for the quoted job:

- Item Code
- Item Name
- Qty
- Price ex GST
- Total ex GST

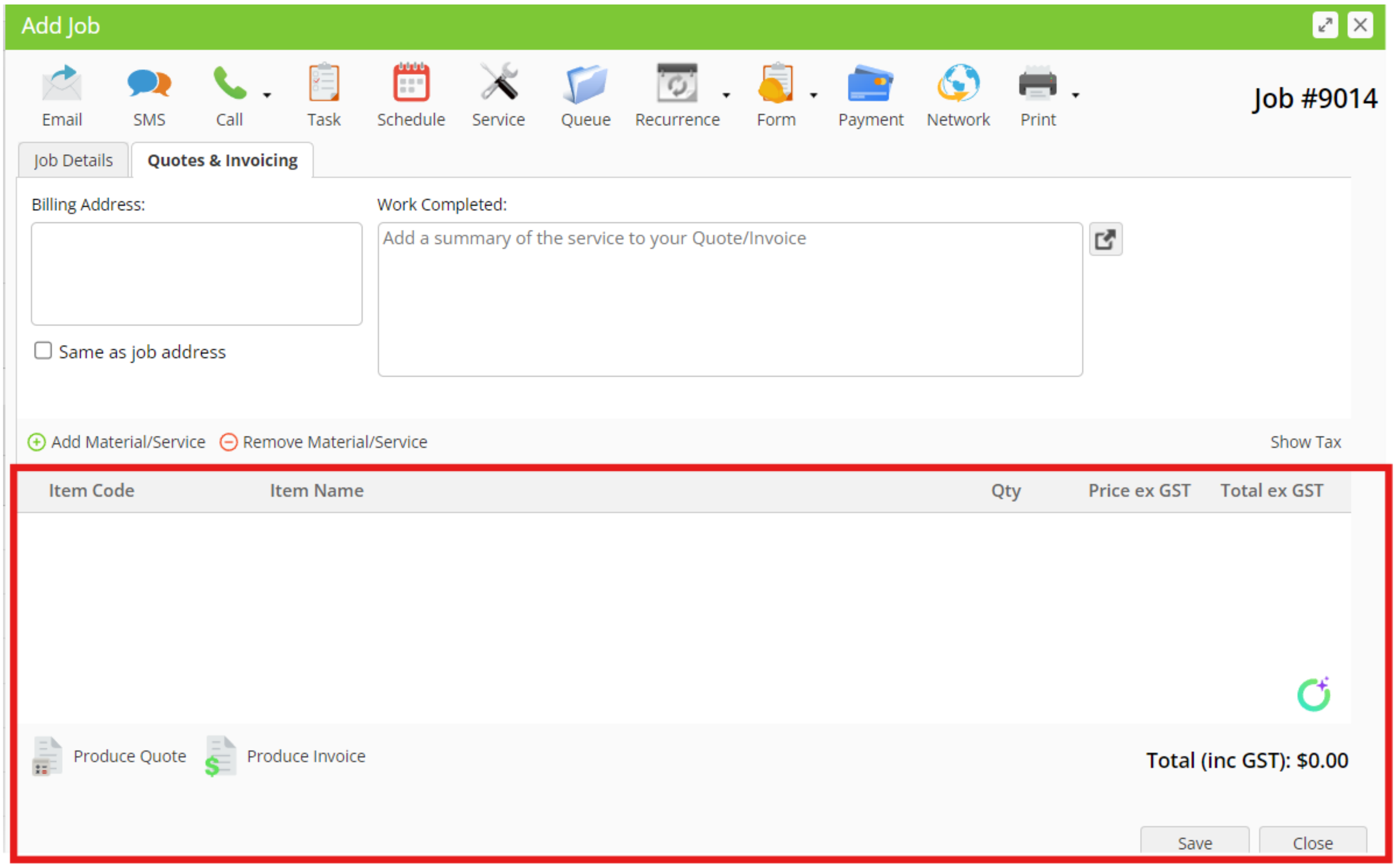


Figure 48 Table with items for Quoted job

To add a service item to the table, you will need to click on the green plus (+) button on the top left side of the table as shown in Figure 49.

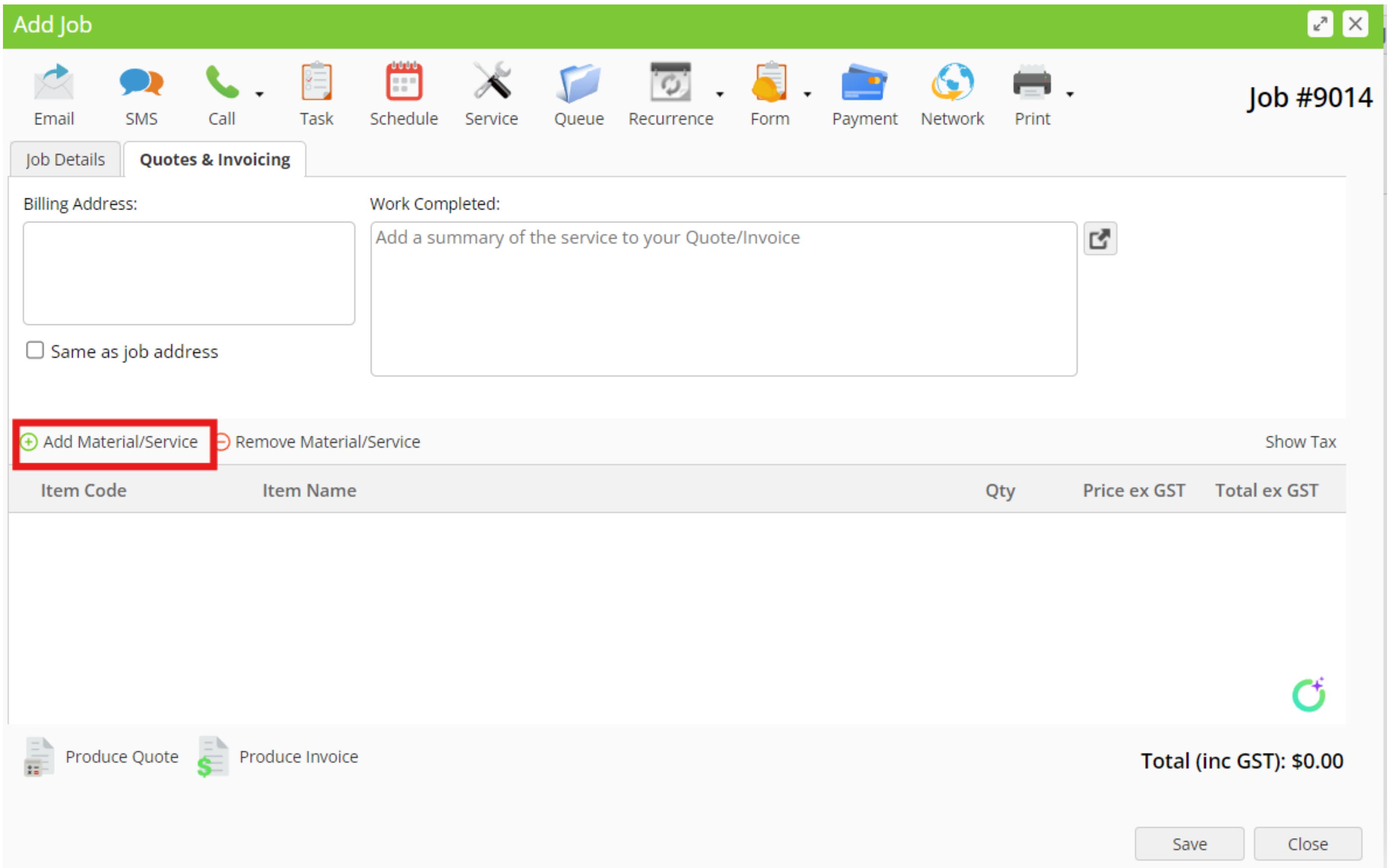


Figure 49 Click on Green plus (+) button.

Once clicked you will add a blank service item which will need to be updated using the dropdown list of the quoted services (shown in Figure 50).

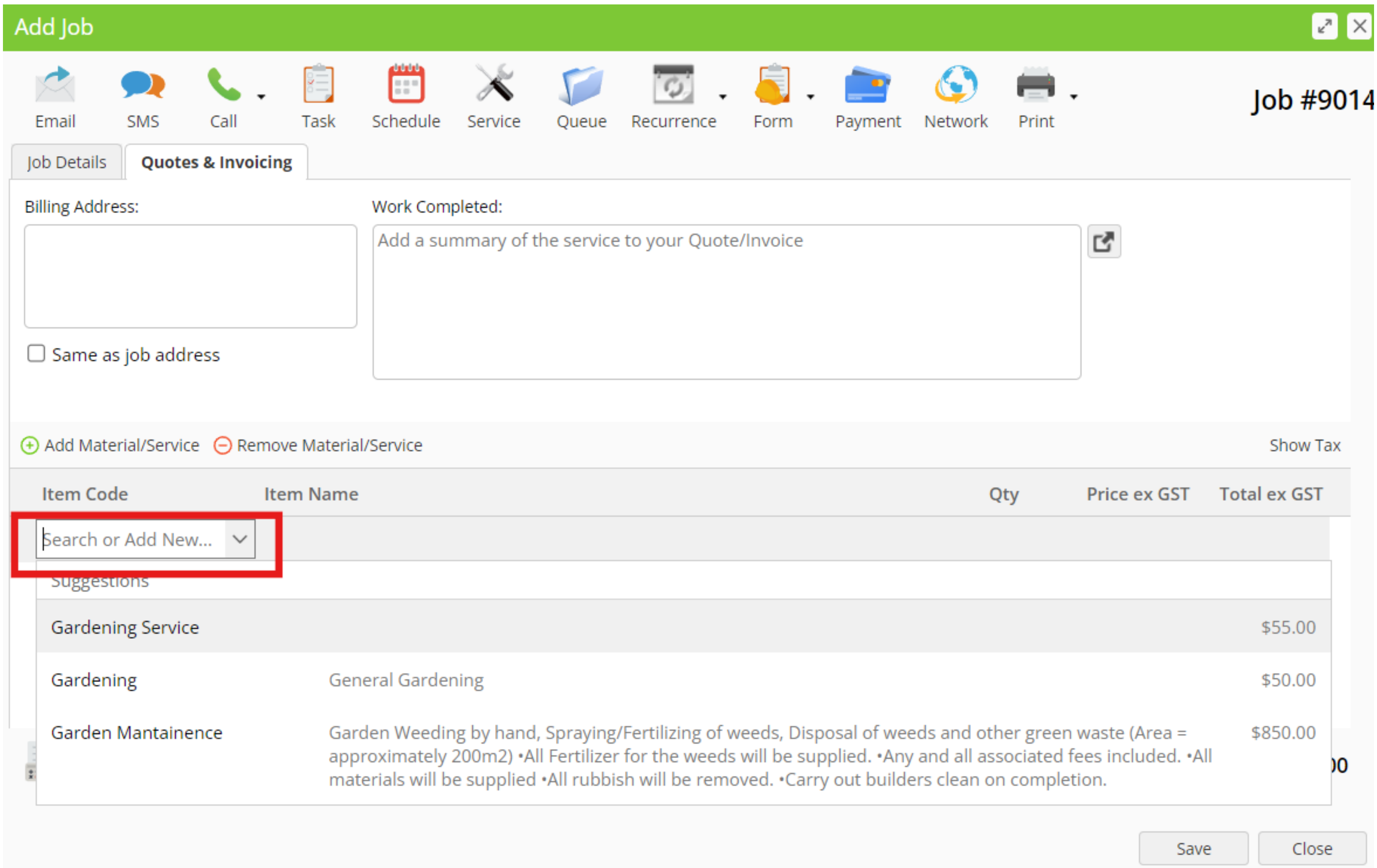


Figure 50 Blank service item

For this example, service you will need to add Gardening and then add the quote from the gardener. An Example of the quote sent by the gardener is below:

---***Example Quote***---

Hi SSF,

Client Name: Imadh Marjan

CLIENT ID: SSF-MARIMA

Client Address: 84 Hotham St, Preston VIC 3072

$75 per session. They want a service every 3 weeks. I'm available on the 22nd August and every 3 weeks thereafter.

--- ***End of Example Quote***---

Based on the information above, add it to the service item. Result is shown in figure 51.

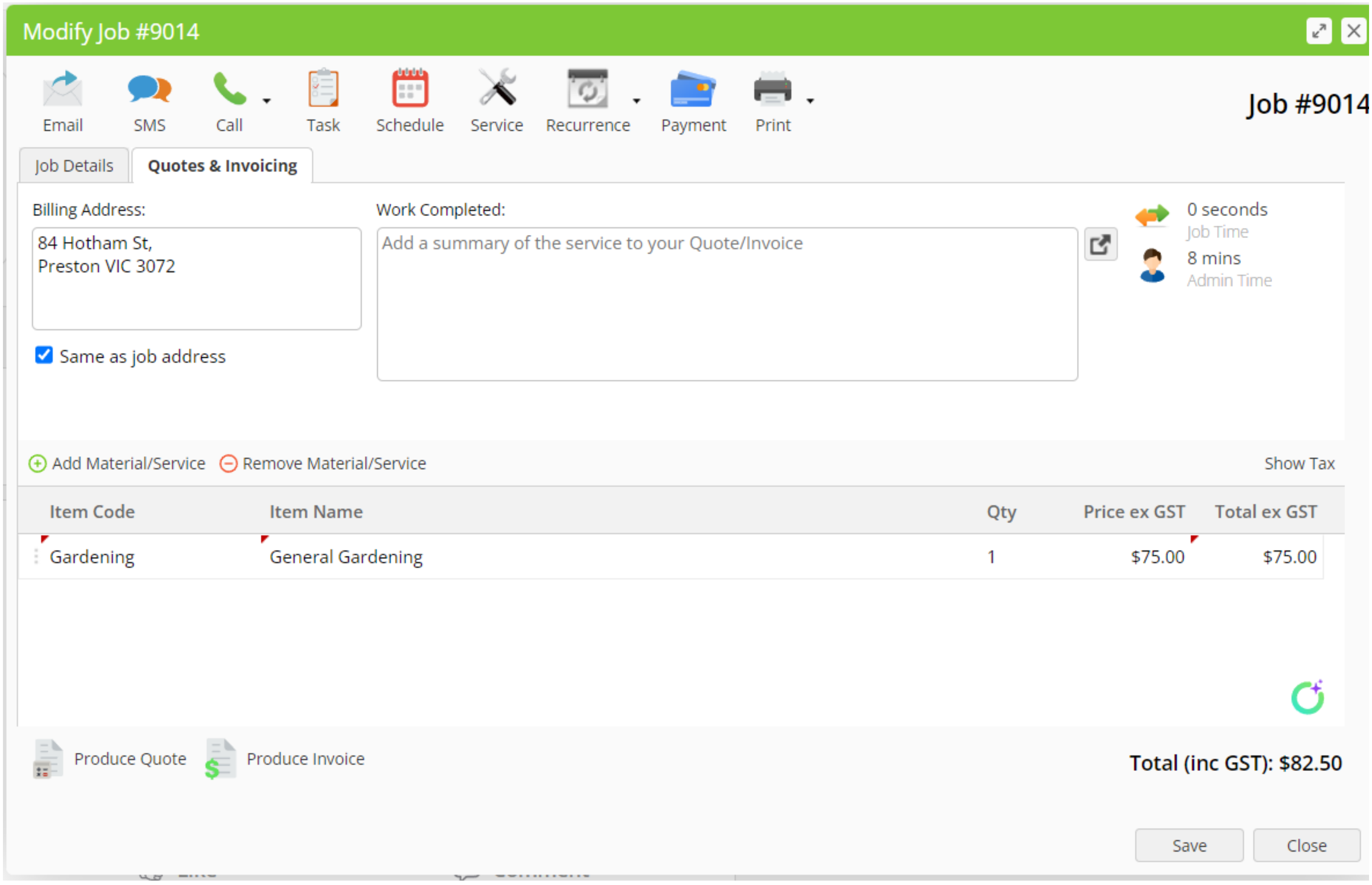


Figure 51 Gardening Service item added to the table.

Now, we will need to markup the price so that our company will be able to make a profit. You can mark it up using your amazing maths skills form school using the following formula:

Or alternatively you can make use of the online tool here to calculate the markup.

It is called the Markup Calculator by Omni-Calculator. It will be useful to help create a markup price for your quotes.

As of writing, the companys markup percentage is 20%. This is subject to change depending on the services and the clients budget restraints. Request assistance from the leadership team or the Management in regards to the markup prices or the accepted percentage margin.

Welfare Checks

It is essential to conduct welfare checks on our employees before their shifts to ensure they are prepared for service, as well as to follow up with our clients after their service to gather feedback on our services. At SSF, we implement two types of welfare checks: pre-welfare checks and post-welfare checks.

Pre-welfare check

Pre-welfare checks serve to remind support workers of their scheduled shifts for the day. This communication can occur via phone call, SMS, or WhatsApp. Conducting these checks is vital to ensure that clients receive uninterrupted service from SSF throughout the day.

Post-welfare check

This can be conducted with either the support worker or the clients, provided the agency permits us to reach out to them. The purpose of this communication is to gather feedback on the service provided. Based on this feedback, we can either offer guidance to the support worker on enhancing their service delivery or explore additional services for the client according to their requests.

Currently, the welfare checks are conducted by the OAC Connect department. To facilitate timely assistance in these checks, the coordination team is responsible for maintaining the service schedule log. At this time, there are two distinct service schedules: one tailored for the Southern team and another specifically for the Eastern team.

1 entry of the service schedule is shown in figure:

Frequency	Time	Client Name	ServiceM8 Job #	Visual Care Roster #	Day of the Week	Location	State	Service	Assigned To (include Full Name and Staff ID)	Possible Back Up Worker	Coordinator
Weekly	10 am to 12 pm	Beryl Jarvis		R0000591	MONDAY	Blackburn	VIC	Respite	Kiki KUWX001		Imadh

Figure 52 A service logged on the Service Schedule - Southern front

Note: If you are unable to access the Service Schedule. Kindly reach out to a senior team member or the Leadership Team help assist you in gaining access to the Resource.

Make sure you log your feedback from the client or the support workers on the Complaints/Feedback form here.

Guideline for PPE and Asset Distribution

There will come a time when SWs will not be able to acquire certain assets and equipment on their own. THUS, SSF WILL COME TO HELP THEM!

1. **Submission of Request** – SWs needing PPE or equipment should submit a request using the PPE and Equipment Requisition Form.
2. **Tracking Requests** - All submitted requests should be recorded and tracked on the PPE and Equipment Requisition Log.
3. **Inventory Check** - Verify with management if the requested items are:
   a. Available for immediate dispatch
   b. Available for online purchase
   c. Eligible for reimbursement
4. **Transfer of Equipment:**
   a. Once items are confirmed, proceed with the transfer of PPE or equipment to the SW.
   b. Update the PPE and Equipment Requisition Log to reflect the completed transfer and include any relevant comments.
5. **Asset Distribution Form:**
   a. After receiving the equipment, the SW must complete and sign the Asset Distribution Form.
   b. SC needs to enter the equipment details into the Asset management tracker – SW.
   c. This form is essential for tracking the equipment and ensuring it is properly accounted for during service.
6. **Monthly Asset Check** - Conduct a monthly check of all distributed assets to:
   a. Assess the condition of the equipment
   b. Determine if any items need replacement or maintenance and update the Asset management tracker – SW.

Expense Reimbursement Guideline

1. **Obtain Management Approval** - for items requested by the SW if they are:
    a. Eligible for company reimbursement, or
    b. Require the care manager's approval to be included in the client's invoice.
2. **Complete Expense Claim Form**:
    a. SW must fill out and sign the expense claim form.
    b. Attach all relevant receipts to the completed form.
3. **Submit for Review** - Submit the completed and signed expense claim form, along with receipts, to leadership and management for review and signature.
4. **Processing by Leadership and Management** - Leadership and management will review, sign, and submit the signed expense claim form and receipts to the accounts team for processing.
5. **Account Team Processing** – The accounts team will enter the details into WOT (Work Order Tracker) and process the claim for approvals.

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[i] Department of Health Victoria, Health.vic https://www.health.vic.gov.au/integrated-care/service-coordination-in-victoria