

Memorandum

To: OAC Unit

Re: Centralized Notes for Worker and Client Updates

Date: February 27, 2024

As part of our ongoing efforts to streamline communication processes and ensure efficiency within our company, we are implementing updated protocols for worker and client updates.

Effective immediately, the main source for worker updates will be the staff list in Smartsheet, while client updates will be managed through ServiceM8.

Note: This decision is the result of a poll conducted at the OAC TEAM- Service Delivery Team, where 10 voted for ServiceM8 and 12 voted for the Staff List.

1. Worker Updates on Staff List:

- Refer to the Staff List (PUBLISHED VERSION) on Smartsheet for updates such as but not limited to:
 - Worker Availability
 - Worker Status – Active, On leave, Do Not Use (DNU), Inactive/Resigned
 - Performance – No shows, tardiness, feedback/complaint
- Add notes on the comment section and attach relevant files

2. Client Updates on ServiceM8:

- Use ServiceM8 for all client-related updates such as but not limited to:
 - clients postponing services for a while
 - client upgraded in their funding package
 - client has COVID/hospitalized
 - new fee rate negotiated with the client
 - client made a complaint
 - client's services to be restricted due to overdue account
- Go to the relevant job order number, add notes on the job note section, and attach relevant files such as client's care plan, etc.

It's imperative that all employees adhere to these updated protocols to ensure smooth operations and effective communication within the company. Please acknowledge through the QR code attached below to indicate your understanding of the details confirmed in this memorandum.

If you have any questions or concerns in relation to this matter, please contact the OAC Governance Unit on OAC-GOVERNANCE@ssfservices.com.au.

SCAN TO REGISTER YOUR ACKNOWLEDGEMENT AND UNDERSTANDING

