Customer and Support Worker Preferences

Your 'how to' guide editing preferences in Carelink+

ENDEAVOUR
FOUNDATION
Opportunities for people with a disability

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Client / Support Worker   Skills   Age range   Shared preferences

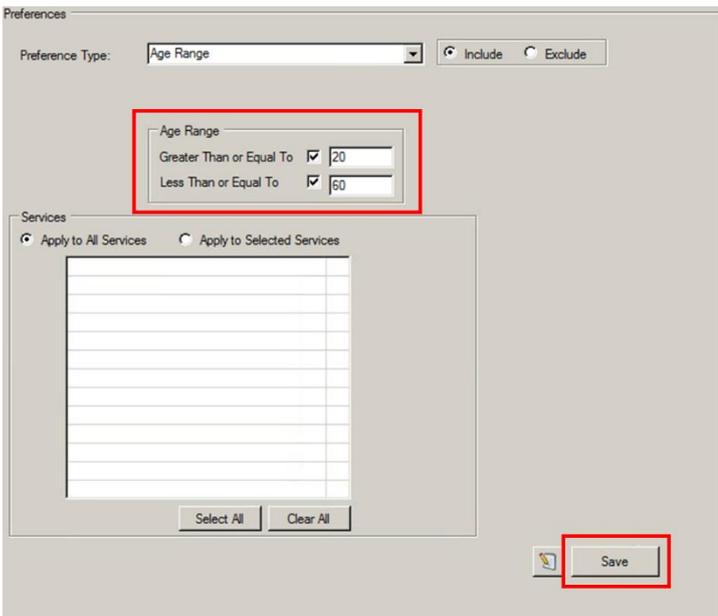# About preferences in Carelink+

1.1 What are Customer preferences?

Customer preferences are the specific requests or requirements that the customer or their family would like Endeavour Foundation Group to consider when deciding which Support Worker to deliver a specific service to the customer.

Of the many preference types available in Carelink+, there are nine specific types of preferences that Endeavour Foundation Group needs to capture for each customer:

- Age range
- Availability types
- Employees
- Cultures (Nationality)
- Genders
- Languages
- Religions
- Shared preferences
- Skills

Each of these customer preferences are described in detail in the following section, including how to enter this data into Carelink+.

1.1.1 Age range

Description	
The customer's preferred age range when selecting a Support Worker. To be entered as numerical values such as 30-45.	
How To	
Select Age Range from the list under Preference Type, and complete relevant fields like example image. You can customise to apply this preference to all the services the customer is receiving or to a selected service.Once complete remember to click on Save.	

1.1.2 Availability types

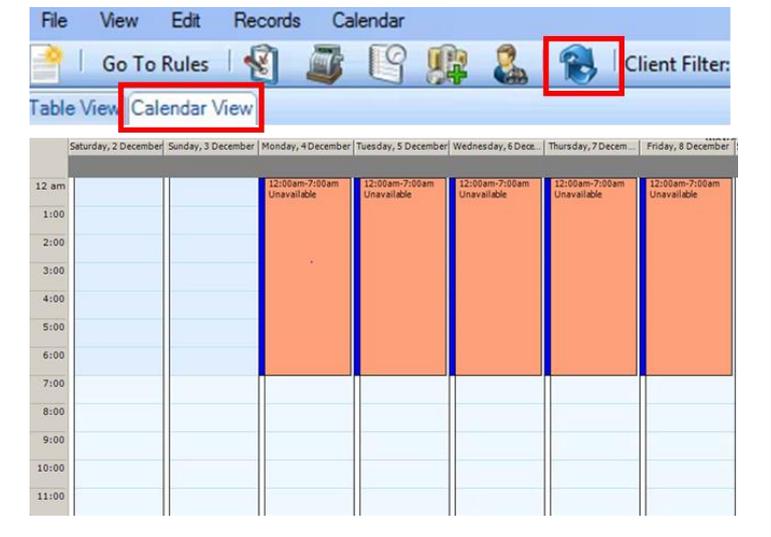| Description |
| --- |
| This relates to any preferences around specific days or times that the customer would like services to be scheduled. |

How To
Select Availability Types from the list under Preference Type then select Available against Preference Criteria and click Add. Once you see Available listed under Current Criteria then complete Time Span in 24 hour format, Recurrence Pattern and Range of Recurrence areas using the example image as a guide.

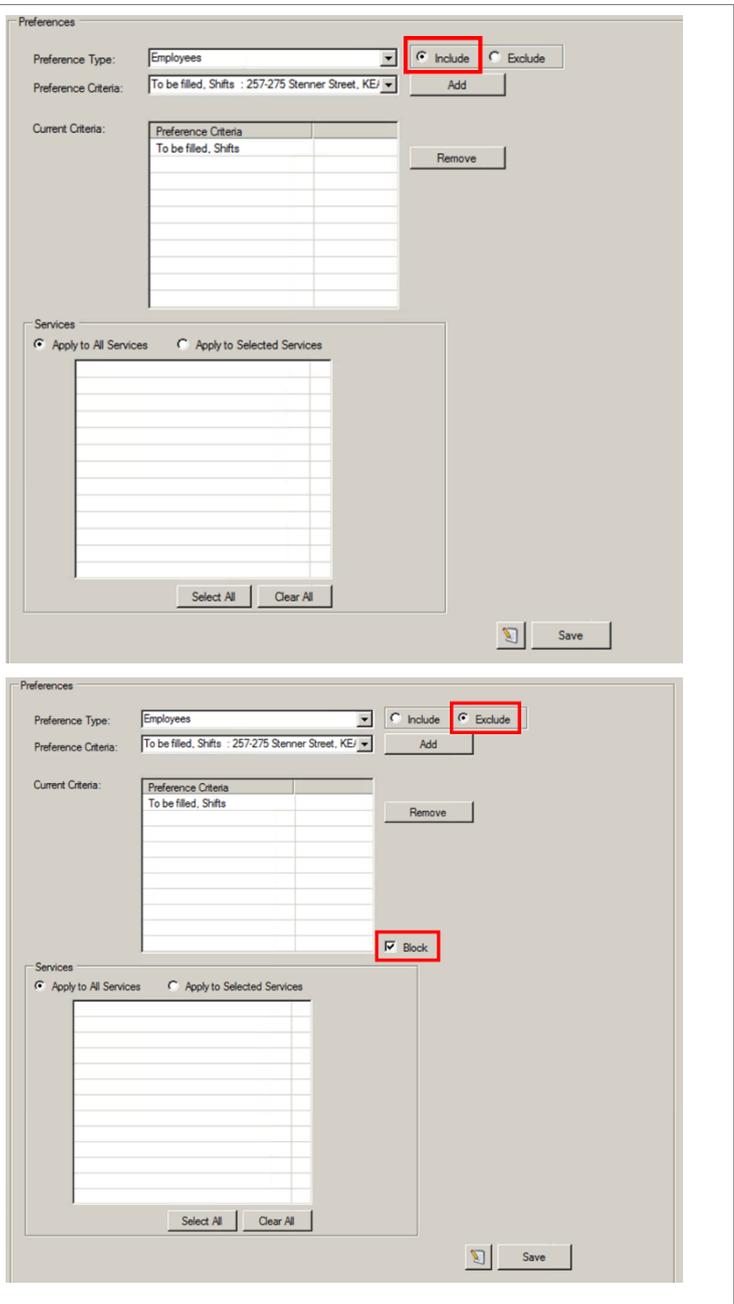Once complete remember to click on Save. |

| **QUICK TIP**: Go to roster, click the refresh icon and go to calendar view. From there you will see Orange sections blocked off in the calendar section to signify that services should not be rostered at those times as in corresponding image.

You may need to scroll up to see what you have entered depending on screen size. |
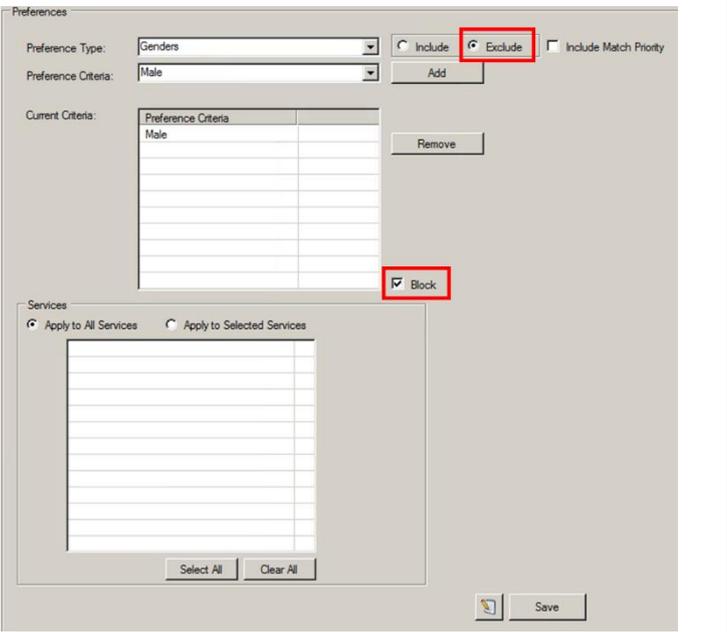
1.1.3 Employees

Description	
A customer's preference for working with specific Support Workers, or identifying any blocked Support Workers where a customer or family member has requested that services are not to be delivered by this Support Worker.	
How To	
Select Employees from the list under Preference Type, make sure include is picked next to Preference Type and then select specific employee under Preference Criteria and click Add. You can repeat this numerous times to add all preferred employees for the customer against Current Criteria. Once complete remember to click on Save.

If you wanted to exclude (block) an employee you would select exclude and then pick the relevant Employee and add them to Current Criteria, then tick Block and once complete save.

You can customise to apply this preference to all the services that the customer is receiving, or only to a selected service.

Please see example images for guide on how it should look once complete. | |

1.1.4 Cultures (Nationality)

Description	How To
Does the customer come from a specific cultural background, and they would prefer a Support Worker from a similar cultural background? Are there any other cultural considerations that need to be captured?	Select Cultures from the list under Preference Type, and then under Preference Criteria pick the relevant Culture (Nationality) and click add. Once complete remember to click on Save.

1.1.5 Genders

Description	
Does the customer prefer a Support Worker of a specific gender? For example do you have a female customer who refuses to have male Support Workers?	
How To	
Select Genders from the list under Preference Type and pick exclude next to it, and then under Preference Criteria pick the relevant Gender you want to exclude, click add and then tick the block option. You can customise to apply this preference to all the services that the customer is receiving, or only to a selected service. Once complete remember to click on Save.	

1.1.6 Languages

Description	How To
If a customer's main language is any language other than English, this language should be noted in this preference field, particularly if the customer has difficulty understanding English.	Select Languages from the list under Preference Type, and then under Preference Criteria pick the relevant Language and click add. Once complete remember to click on Save.

1.1.7 Religions

Description	How To
Where known, a customer's religion should be captured so that this is considered when matching a Support Worker to the customer, particularly if a Support Worker is aligned to a different or opposing religion.	Select Religions from the list under Preference Type, and then under Preference Criteria pick the relevant Religion and click add. Once complete remember to click on Save.

1.1.8 Shared preferences

Description	How To
This is the broadest preference category capturing the customer's personal interests, hobbies or preferred activities. This information will then help to match a Support Worker with similar interests or experience with these activities so the customer can receive a richer support experience.	Select Shared Preferences from the list under Preference Type, and then under Preference Criteria pick the relevant interests and click add, you can add more than one. For example, going fishing, playing football, doing arts and crafts, going to the cinema or the shops. Once complete remember to click on Save.

1.1.9 Skills

Description	How To
This relates to any requirements around specific skills that a Support Worker must possess when delivering supports to this customer.	Select Skills from the list under Preference Type, and then under Preference Criteria pick the relevant skills and click add, you can add more than one. For example manual handling, hoist, medication, peg feed, CPR or any other WHS requirements. Once complete remember to click on Save.

1.2 What are Support Worker preferences?

Support Worker preferences are the specific requests or skills that the Support Worker has that Endeavour Foundation may consider when deciding which customer they may be suitable to support.

Remember: All Support Workers are required to deliver all services to all customers as stipulated in their employment agreement or contract, or in line with their certifications and completed training. Where a Support Worker preference clashes with a Customer preference and no other Support Worker is available for the service, the Customer's preference will always take precedence over the Support Worker preference.

Of the many preference types available in Carelink+ there are seven specific types of preferences that Endeavour Foundation Group needs to capture for each Support Worker:

- Availability types
- Employees
- Cultures (Nationality)
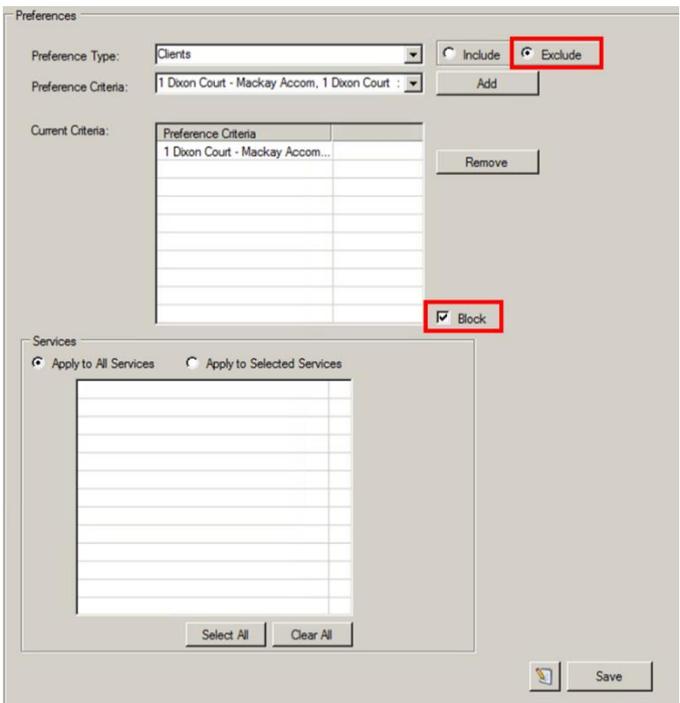- Languages
- Religions
- Shared preferences
- Skills

QUICK TIP: The process for entering Support Worker profile the majority of these preferences is exactly the same as for Customer preference information, but instead of searching for the client profile, search for the employee profile in Carelink+.

1.2.1 Availability types

Description	
This relates to any preferences around specific days or times that the Support Worker would prefer to work or not work. This should capture any mutually agreed availability as well as any negotiable requests.	
How To	
Select Availability Types from the list under Preference Type then select Available against Preference Criteria and click Add. Once you see Available listed under Current Criteria then complete Time Span in 24 hour format, Recurrence Pattern and Range of Recurrence areas. Once complete remember to click on Save.	

1.2.2 Clients (Customers)

Description	
This preference needs to capture any known customers that have blocked this Support Worker or vice versa if a Support Worker has said they can't attend the customer, and therefore services are not to be delivered to this customer by the Support Worker.	
How To	
Select Clients from the list under Preference Type and make sure exclude is picked next to Preference Type and then select specific Client under Preference Criteria and click Add.

You can customise to apply this preference to all the services that the customer is receiving, or only to a selected service.

Once complete remember to click on Save. | **QUICK TIP**: You can repeat this numerous times to add all excluded clients for the employee against Current Criteria. |

1.2.3 Cultures (Nationality)

Description	How To
Does the Support Worker come from a specific cultural background, and they would be able to support a customer from a similar cultural background? Or alternatively, are there any cultural considerations that need to be captured so as to avoid scheduling the Support Worker with a customer from a different culture?	Select Cultures from the list under Preference Type, and then under Preference Criteria pick the relevant Culture (Nationality) and click add. Once complete click on save.

1.2.4 Languages

Description	How To
If a Support Worker's main language is any language other than English, this language should be noted in this preference field. This field would then be matched against a Customer who can understand their native language if required or a customer who is able to interact with a Support Worker from a non-English speaking background.	Select Languages from the list under Preference Type, and then under Preference Criteria pick the relevant Language and click add. Once complete click on save.

1.2.5 Religions

Description	How To
Where known, a Support Worker's religion should be captured so that this is considered when matching a Support Worker to the customer, particularly if a Support Worker is aligned to a different or opposing religion. This is even more important if a customer is seeking support so they can participate in religious activities.	Select Religions from the list under Preference Type, and then under Preference Criteria pick the relevant Religion and click add. Once complete click on save.

1.2.6 Shared preferences

Description	How To
This is the broadest preference category capturing the Support Worker's personal interests, hobbies or preferred activities.	Select Shared Preferences from the list under Preference Type, and then under Preference Criteria pick the relevant interests and click add, you can add more than one. For example, going fishing, playing football, doing arts and crafts, going to the cinema or the shops. Once complete click on save.

1.2.7 Skills

Description	How To
This relates to any requirements around specific skills that the Support Worker has related to delivering supports to customers.	Select Skills from the list under Preference Type, and then under Preference Criteria pick the relevant skills and click add, you can add more than one. For example manual handling, hoist, medication, peg feed, CPR or any other WHS requirements.

1.3 Where to go for information and assistance

Email the Rostering team if you need help or more information:

rostering@endeavour.com.au

Or call the team directly on **1800 800 585**