

CarelinkGo

User Guide for Rostering Officers



Version No 1.0
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Version Control

This document is subject to change. The latest version of this document is available on the CarelinkGo page via the Intranet.

Version	Page(s)	Details of Amendment	Date Published	Date of Effect
1.0		First release of the <i>CarelinkGo User Guide for Rostering Officers</i>		04/09/2023



Purpose

The purpose of this user guide is to give you the skills and knowledge to use CarelinkPlus to send vacant shifts and messages to CarelinkGo.

After reading this user guide, you will be able to do the following in your CarelinkGo app:

- How to use the Employee Search to send vacant shifts to support workers
- How to find support worker applications for vacant shifts
- How to allocate support workers to vacant shifts
- How to send shift messages from CarelinkPlus to CarelinkGo
- How to view shift message replies from CarelinkGo in CarelinkPlus



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CarelinkGo

CarelinkPlus Vacancies

CarelinkPlus Vacancies Summary

This section of your CarelinkGo User Guide will show you step by step:

- How to send a vacancy request to CarelinkGo using the Employee Search
- How to add additional information about split shifts to a vacancy request
- How to allocate a support worker to a vacant shift for which they have applied



Step by Step Instructions

Step	Instructions
1	Log in to CarelinkPlus using your Endeavour Foundation Username and Password.
2	In the Start Menu, click on Employees under the Search section.
3	Search in the employee search field for the fictitious employee 'Backfill' for the region you are working in and open the profile.
4	Click on ' Roster ' in the employee menu.
5	Locate the shift you wish to be sent to a support worker as a vacant shift. Right click on the shift and click on ' Employee Search '.
6	The ' Employee Search ' window will open. Untick all options in the Client Preferences section, except for Service.
7	Click on ' Find Employees '. This will take a few seconds to run.
8	Support workers who are available to work this shift will be shown in the Results field.
9	If you scroll to the right of the support worker's names, in the column No. of Days Since Last Serviced, the results will show the number of days since that employee last worked with that client or facility.
10	You can select to send vacancies to one or multiple employees who appear in the results field. Hold the CTRL key and click on each support worker's name who you wish to send the vacant shift to.
11	Once the support workers are selected, click on the ' Send Vacancy Request ' button.
12	The ' Send Message ' screen will open. Your selected support workers have already been added to the receive the vacancy.
13	You can choose to add additional support workers through the ' Add Employee ' button, use the dropdown to choose additional support workers.
14	The vacancy message is preloaded with the shift related information.
15	Any additional information about the shift is to be added into the ' Extra Information ' field. This includes if the vacant shift is a part of a group of shifts to be applied for.
16	The ' Errors ' section will show if any of the support workers do not have a valid CarelinkGo account.
17	Click ' Send ' to send the Vacancy.

Step by Step Instructions

Step	Instructions
18	A pop up will advise you that the message has been successfully sent. Click on 'OK' to proceed.
19	Don't forget to flag the shift green to advise it is being worked on and has been sent via CarelinkGo.
20	If you need to look for the history of the shift vacancy message, right click on the shift and select 'History'. The date, time and vacancy request sent has been saved.
21	When a support worker accepts the vacant shift, you will find the response in the 'Vacancy Allocations' tab at the bottom right of the screen.
22	Open the 'Vacancy Allocations' tab. You may need to refresh this screen if you have not been in it for a while. The acceptance details are visible here.
23	You can choose to allocate or reject an employee into the shift. Left click on the option suitable.
24	A pop-up message will ask you to confirm your selection.
25	If this shift clashes with another shift in the support worker's roster, you will receive a pop-up asking you to confirm your selection.
26	Use the refresh button to refresh the roster screen. The shift will have been removed from the Backfill employee's roster. The accepted support worker will be assigned to the shift.
27	An alternative way to send vacancy messages is done whilst working in the roster table view screen.
28	Highlight the shift that you wish to send, you can only send one shift at a time. Click on the arrow next to the mailbox icon and select 'Vacancy Message'.
29	This will bring you to the 'Send Message' screen where you can send the vacant shift.

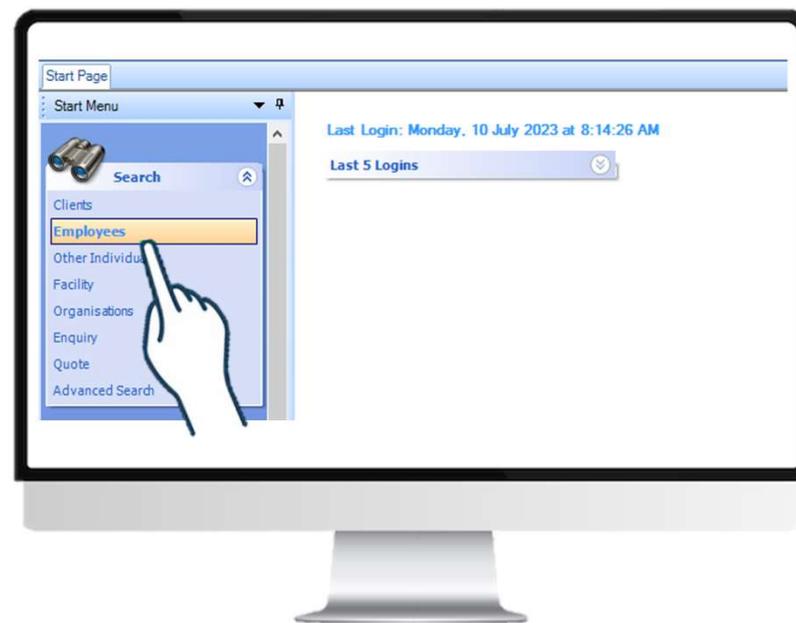
1

Log in to CarelinkPlus using your Endeavour Foundation Username and Password.



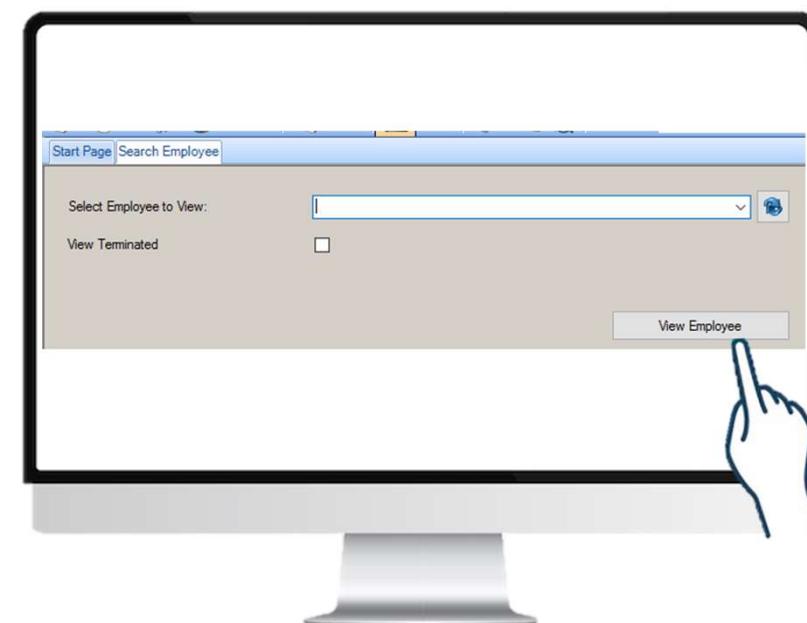
2

In the Start Menu, click on Employees under the Search section.



3

Search in the employee search field for the fictitious employee 'Backfill' for the region you are working in and open the profile.

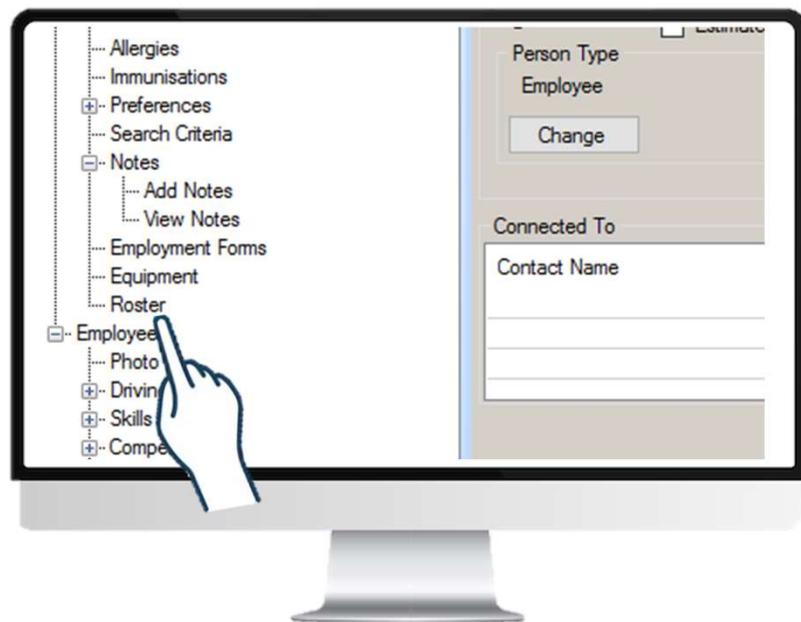


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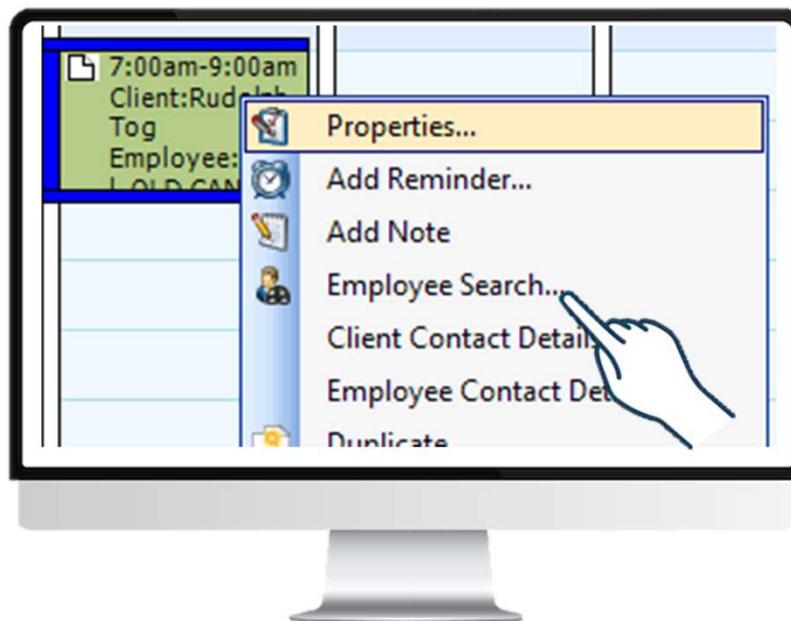
4

Click on 'Roster' in the employee menu.



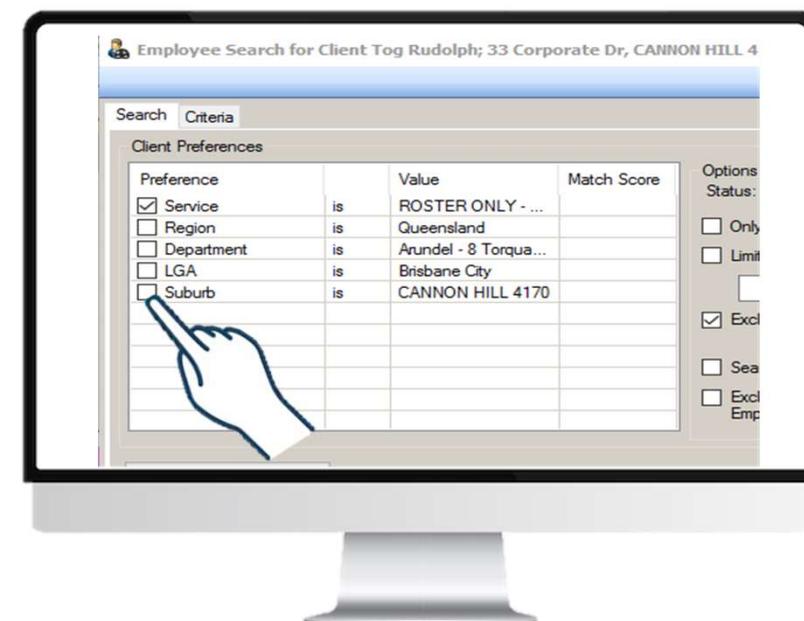
5

Locate the shift you wish to be sent to a support worker as a vacant shift. Right click on the shift and click on 'Employee Search'.



6

The Employee Search window will open. Unselect all options in the Client Preferences section, except for Service.

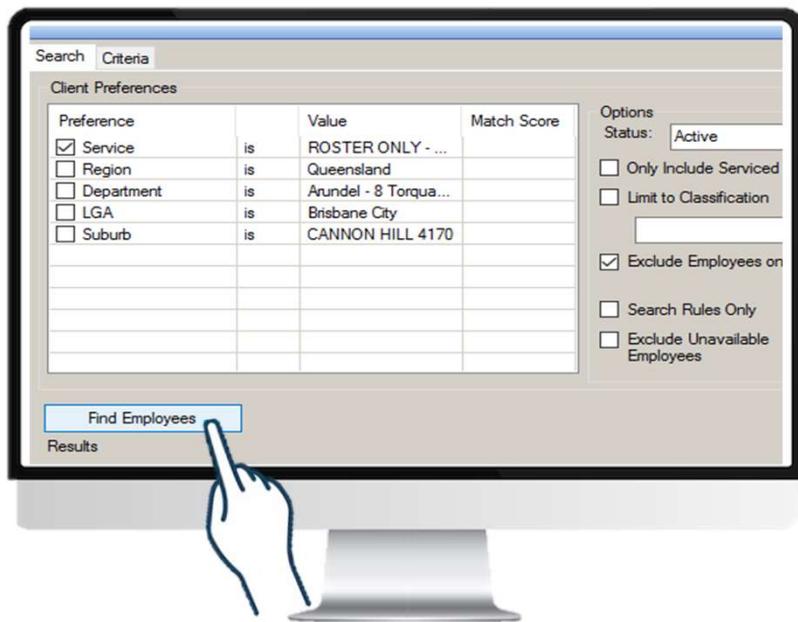


GO



7

Select 'Find Employees'. This will take a few seconds to run.



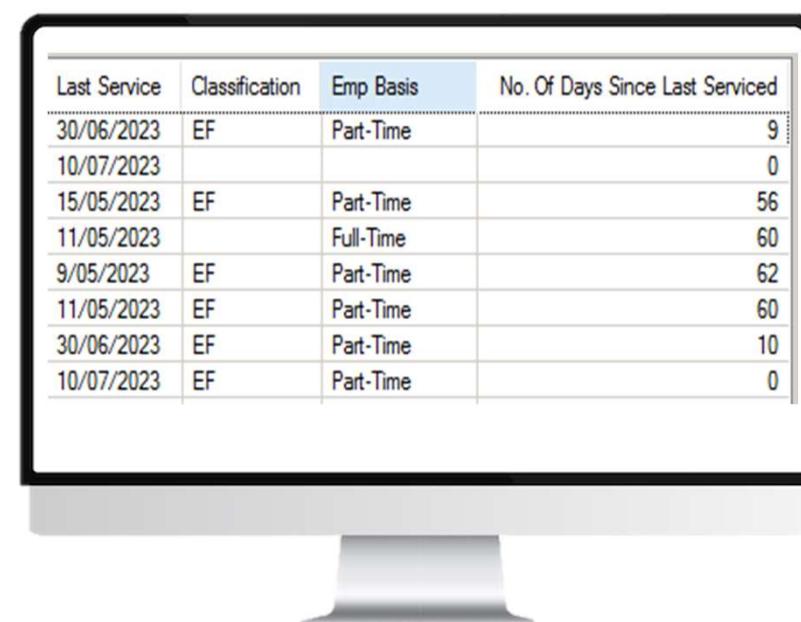
8

Support workers who are available to work this shift will be shown in the Results field.



9

If you scroll to the right of the support worker's names, in the column No. of Days Since Last Serviced, the results will show the number of days since that employee last worked with that client or facility.

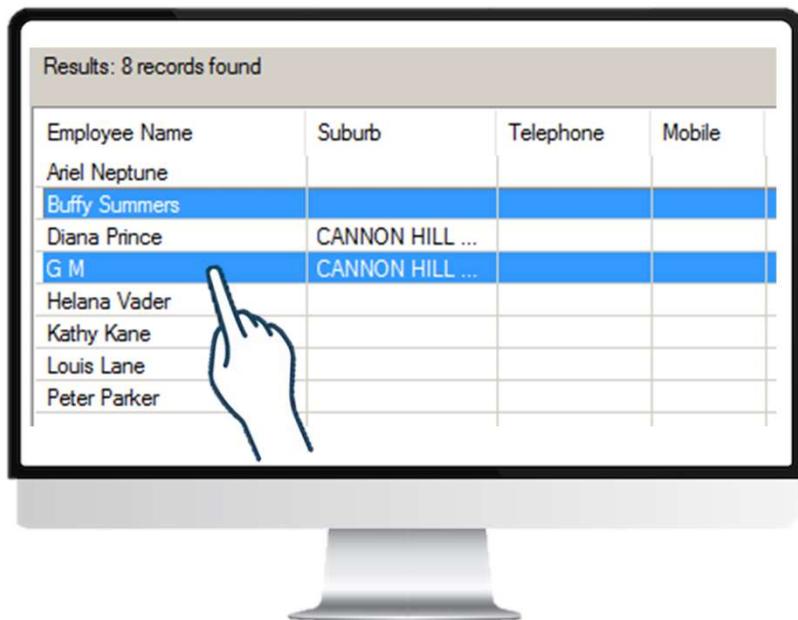


GO



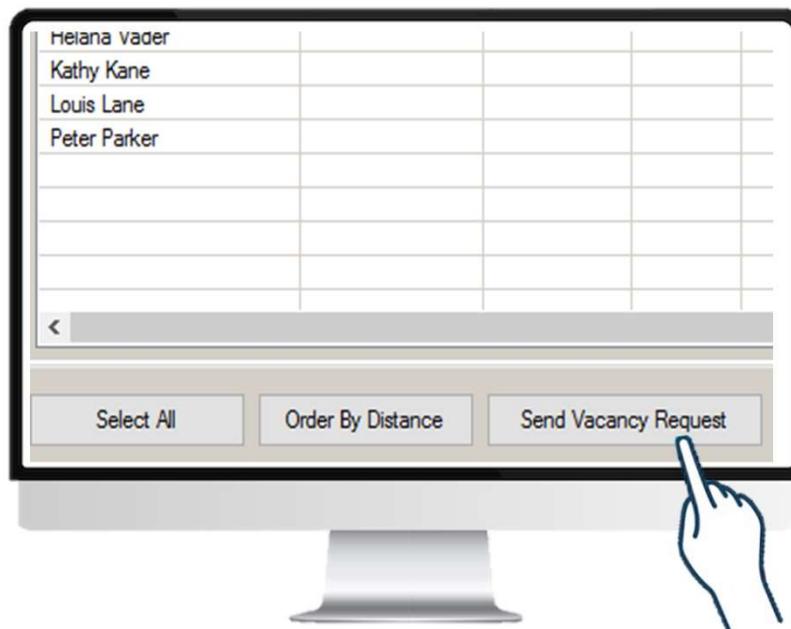
10

You can select to send vacancies to one or multiple support works who appear in the results field. Hold the CTRL key and click on each support worker's name who you wish to send the vacant shift to.



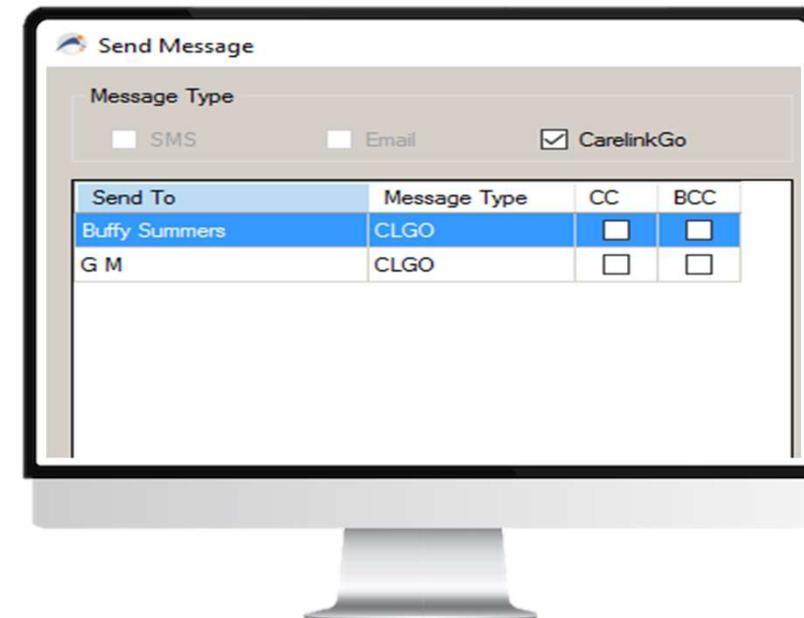
11

Once the support workers are selected, click on the 'Send Vacancy Request' button.



12

The 'Send Message' screen will open. The support workers listed are the people you highlighted in the Employee Search screen.

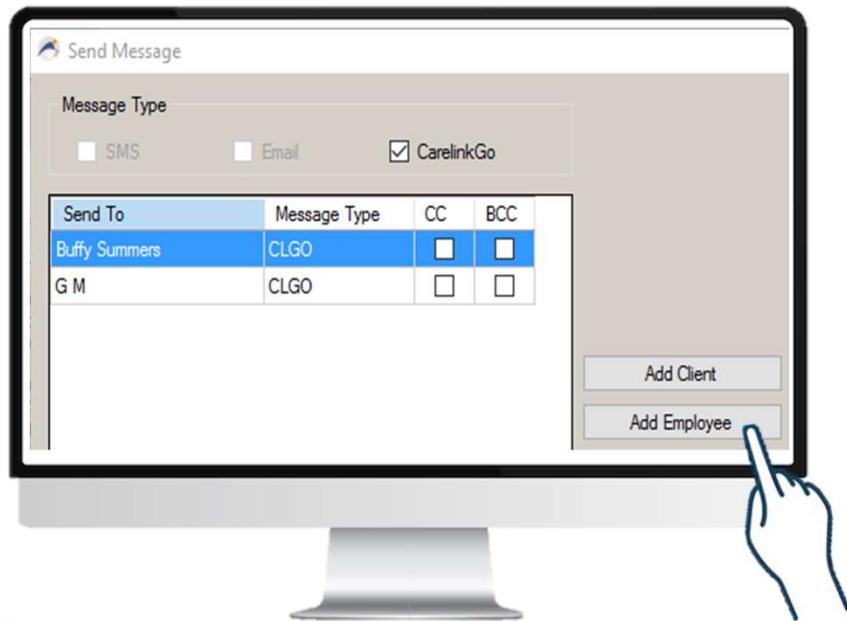


GO



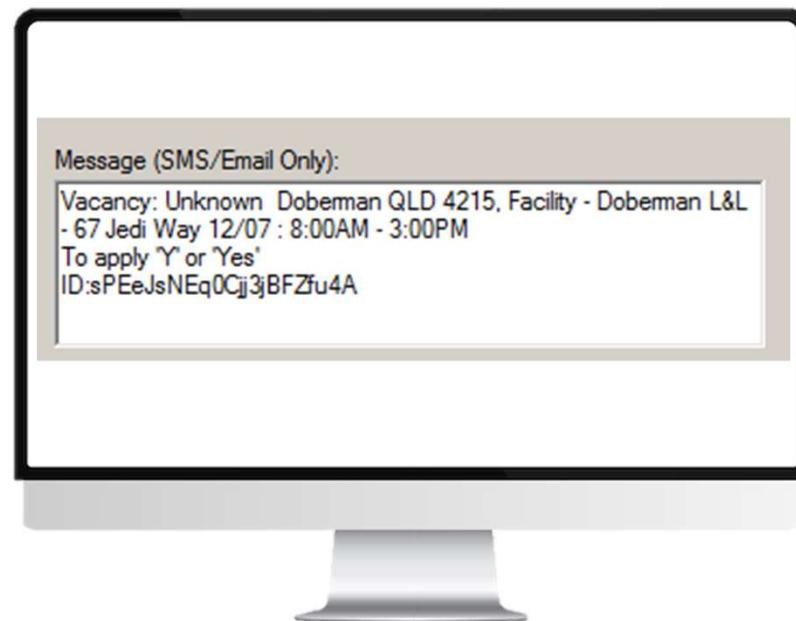
13

You can choose to add additional support workers by clicking on the 'Add Employee' button. This opens a dropdown list of employees to choose from.



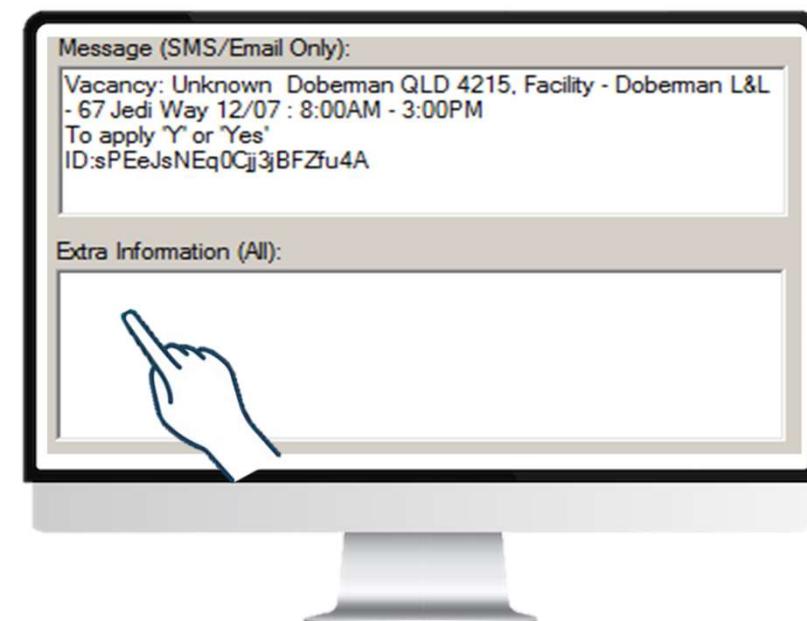
14

The vacancy message is preloaded with the shift related information.



15

Any additional information about the shift is to be added into the 'Extra Information' field. This includes if the vacant shift is a part of a group of shifts to be applied for.

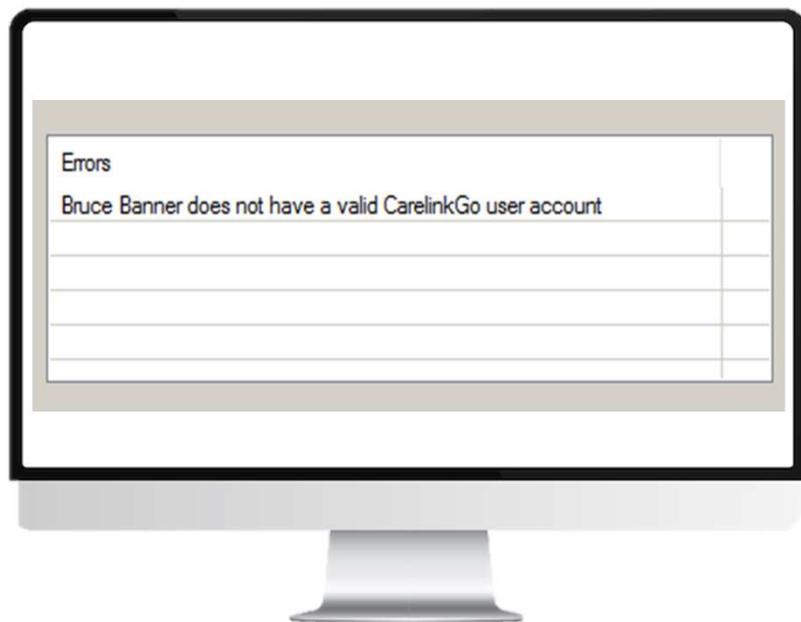


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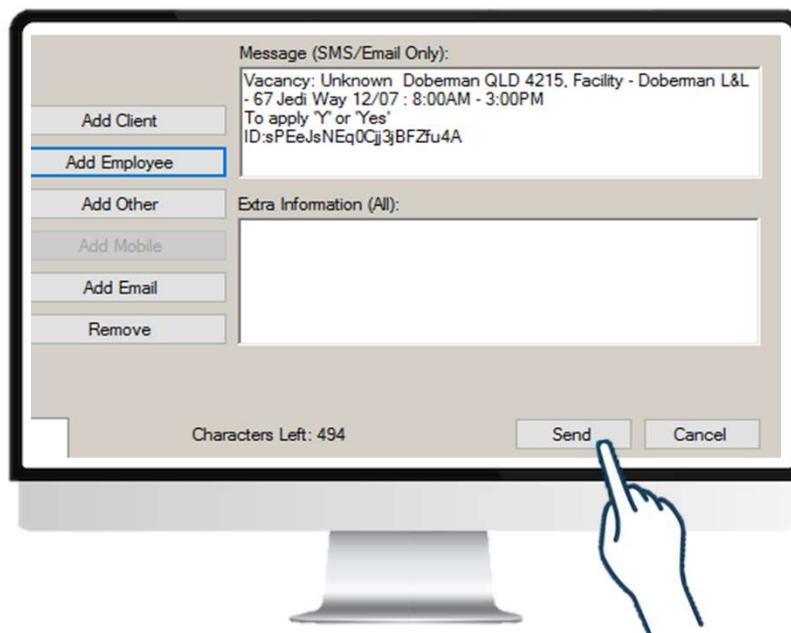
16

The **'Errors'** section will show if any of the employees do not have a valid CarelinkGo account.



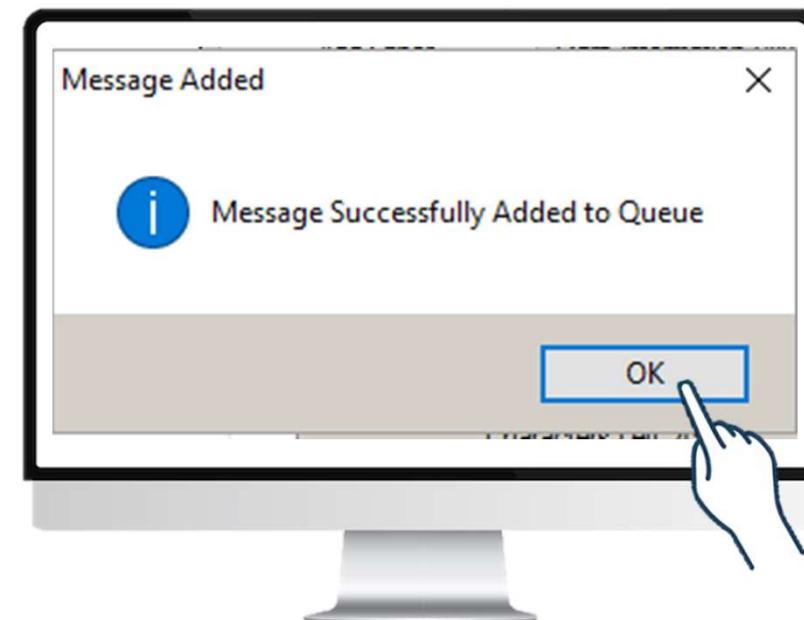
17

Click **'Send'** to send the Vacancy.



18

A pop up will advise you that the message has been successfully sent. Click on **'OK'** to proceed.

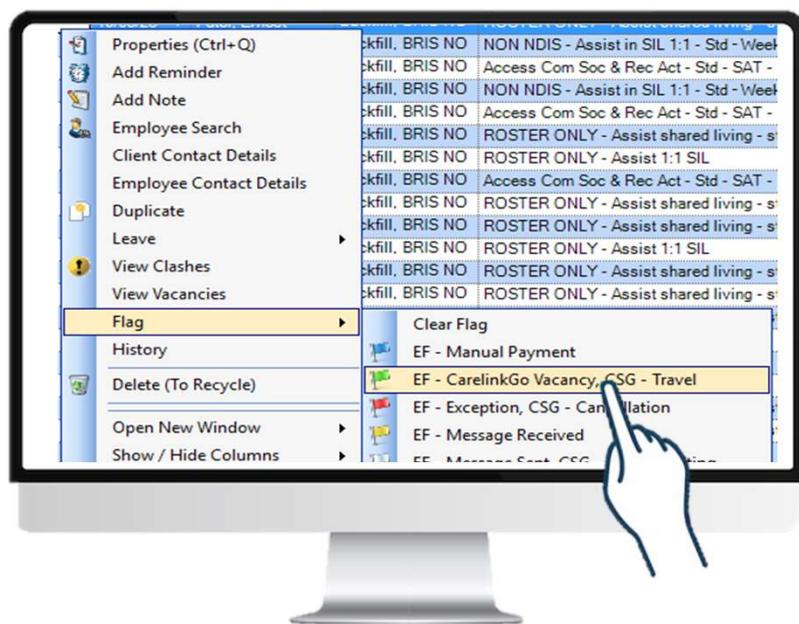


GO



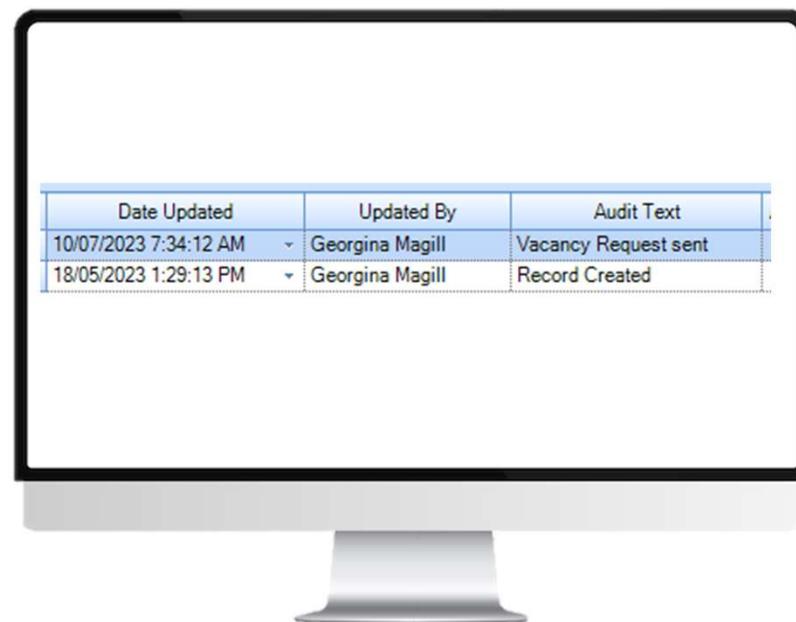
19

Don't forget to flag the shift green to advise it is being worked on and has been sent via CarelinkGo.



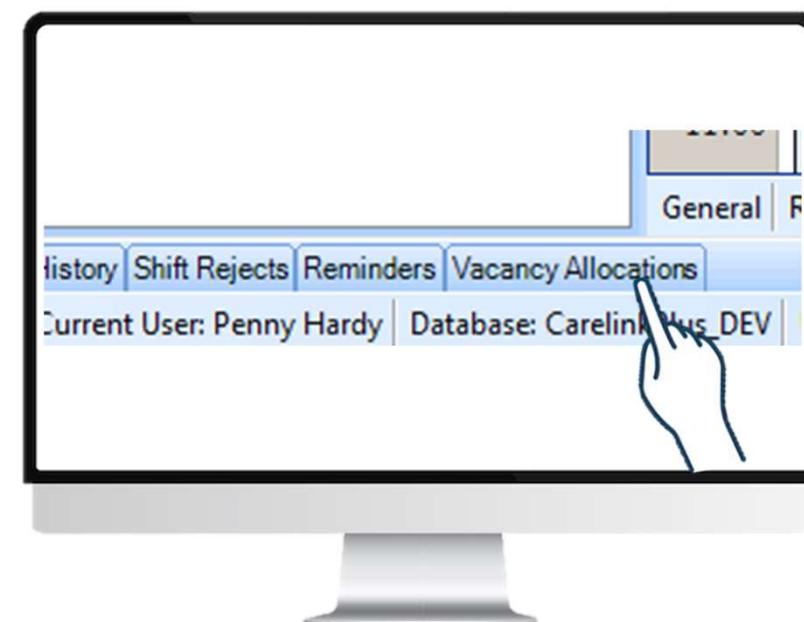
20

If you need to look for the history of the shift vacancy message, right click on the shift and select 'History'. The date, time and vacancy request sent has been saved.



21

When a support worker accepts the vacant shift, you will find the response in the 'Vacancy Allocations' tab at the bottom right of the screen.

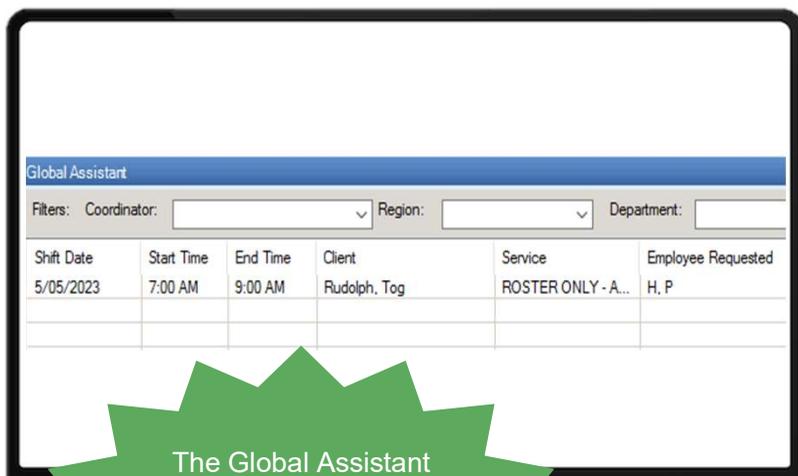


GO



22

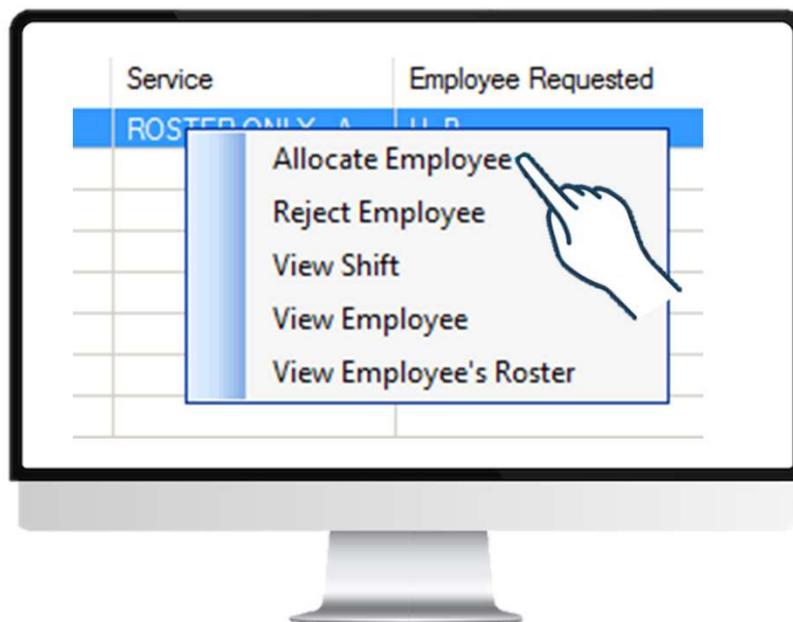
Open the **'Vacancy Allocations'** tab. You may need to refresh this screen if you have not been in it for a while. The acceptance details are visible here.



The Global Assistant can be pinned open on your screen using the pin icon  to the right of the Global Assistant.

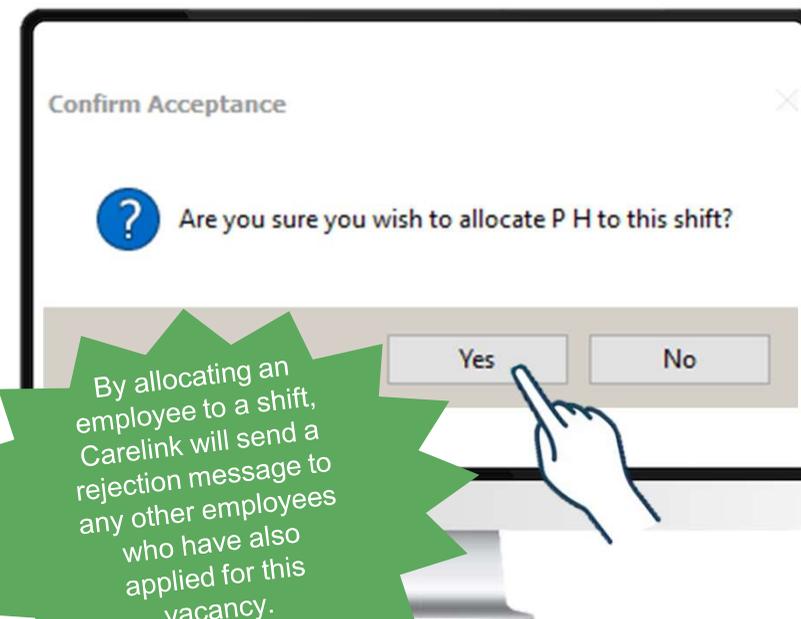
23

You can choose to allocate or reject an employee into the shift. Left click on the option suitable.



24

A pop-up message will ask you to confirm your selection.



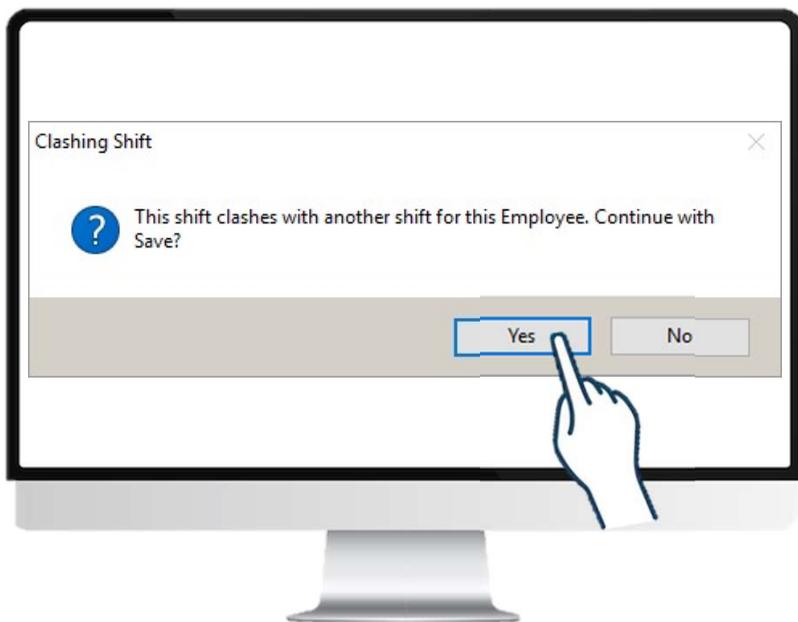
By allocating an employee to a shift, Carelink will send a rejection message to any other employees who have also applied for this vacancy.

GO



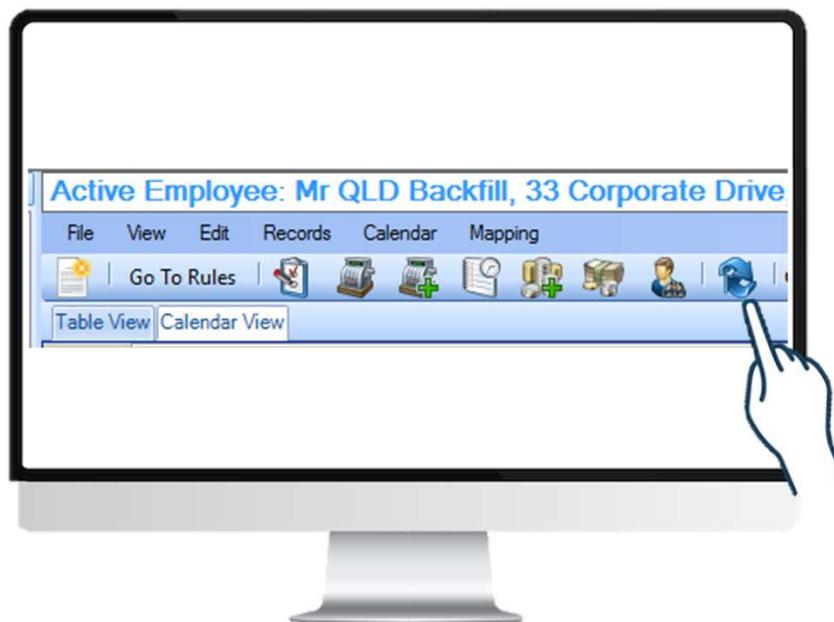
25

If this shift clashes with another shift in the support worker's roster, you will receive a pop-up asking you to confirm your selection.



26

Use the refresh button to refresh the roster screen. The shift will have been removed from the Backfill roster. The accepted support worker will be assigned to the shift.



27

An alternative way to send vacancy messages is done whilst working in the roster table view screen.

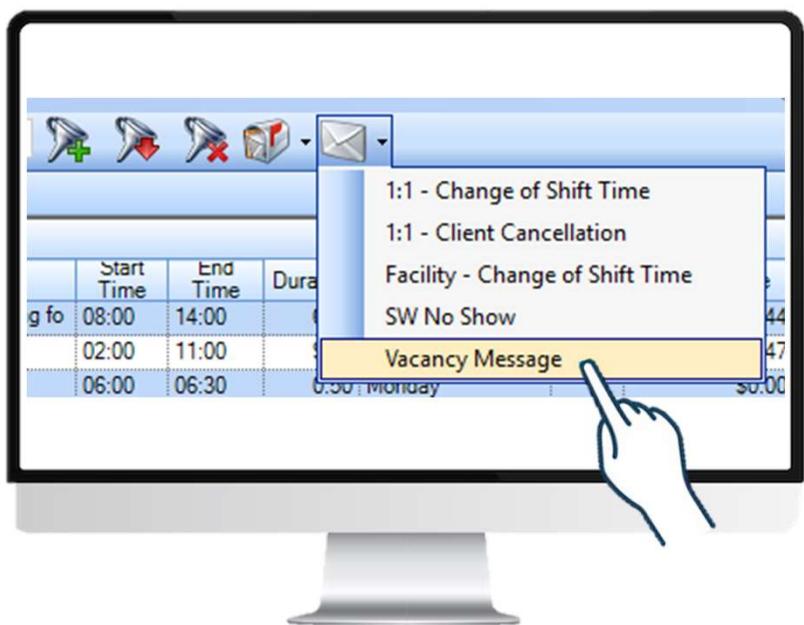


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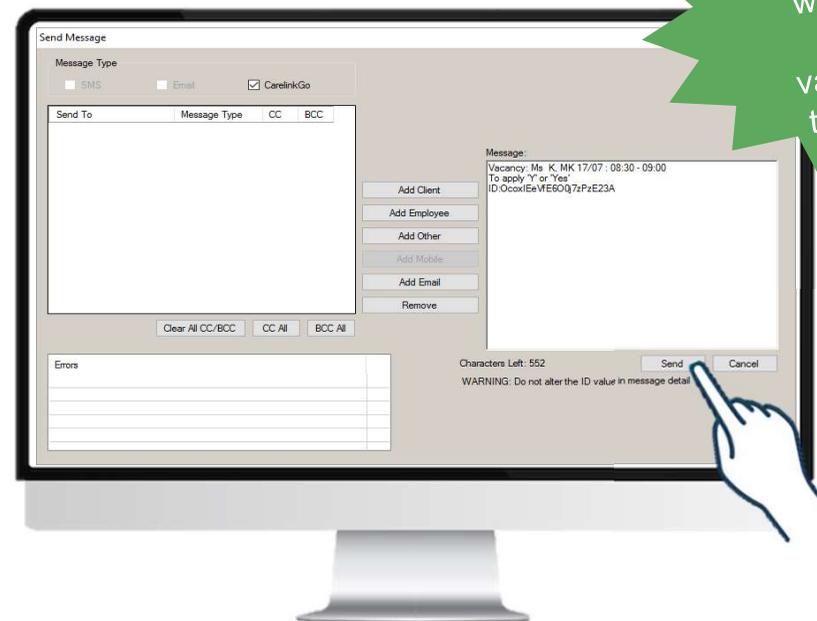
28

Highlight the shift that you wish to send, you can only send one shift at a time.
Click on the arrow next to the mailbox icon and select 'Vacancy Message'.



29

This will bring you to the 'Send Message' screen where you can send the vacant shift.



Don't forget to flag your shift with the green flag for any vacancies sent to CarelinkGo

GO



CarelinkGo

CarelinkPlus Shift Messages

CarelinkPlus Shift Messages Summary

This section of your CarelinkGo User Guide will show you step by step:

- How to send a shift message from table view
- How to view the message saved as a shift note
- How to view the message in the CarelinkGo Message Log
- How to view replies to messages



Step by Step Instructions

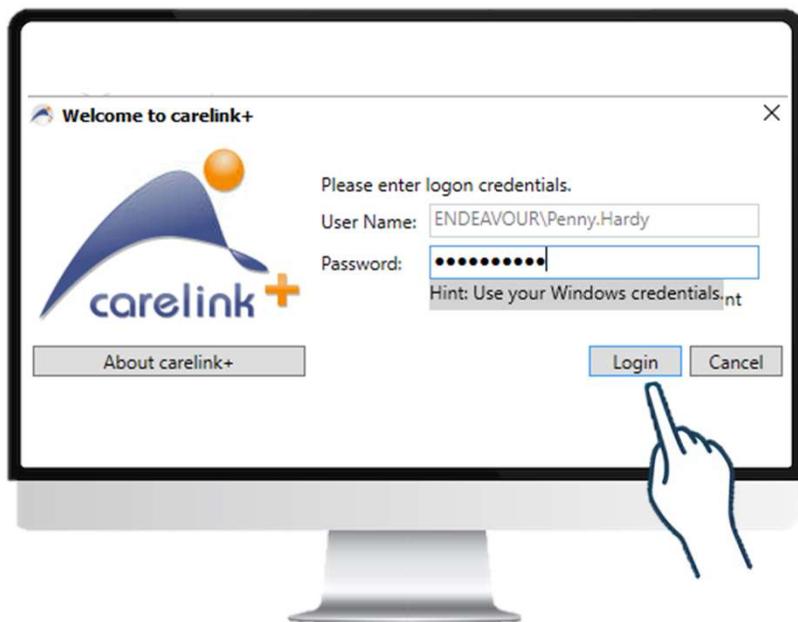
Step	Instructions
1	Log in to CarelinkPlus using your Endeavour Foundation Username and Password.
2	Find the shift you need to send a message. Use either a global roster, client, facility, or employee profile.
3	Click on 'Table View' .
4	Click on the specific shift you wish to send a message about.
5	Click on the down arrow next to the envelope.
6	Select the correct message template for the type of message you need to send.
7	The message will prefill with the template and specific shift information.
8	Add any additional information needed to the message.
9	If there is any error in sending the message via CarelinkGo, this will appear in the Errors box.
10	Click on 'Send' .
11	A pop-up box will state the message has been successfully added to the queue.
12	The shift will automatically be flagged light grey.
13	The message sent attached as a shift note.
14	To view the status of your message, go to the CarelinkGo Message Log.
15	In the Start Menu, under Utilities, click on CarelinkGo Message Log.
16	Apply any filters to find your message and click on 'Find Now' .
17	The columns to the right will state whether the message has been read and replied too.

Step by Step Instructions

Step	Instructions
18	The Reply Message column states whether the message was a reply from CarelinkGo.
19	Double click on the message to view it.
20	Any reply will also be saved as a roster shift note against the shift.
21	Replies can also be found by a Global Roster, filtering for the yellow flag.

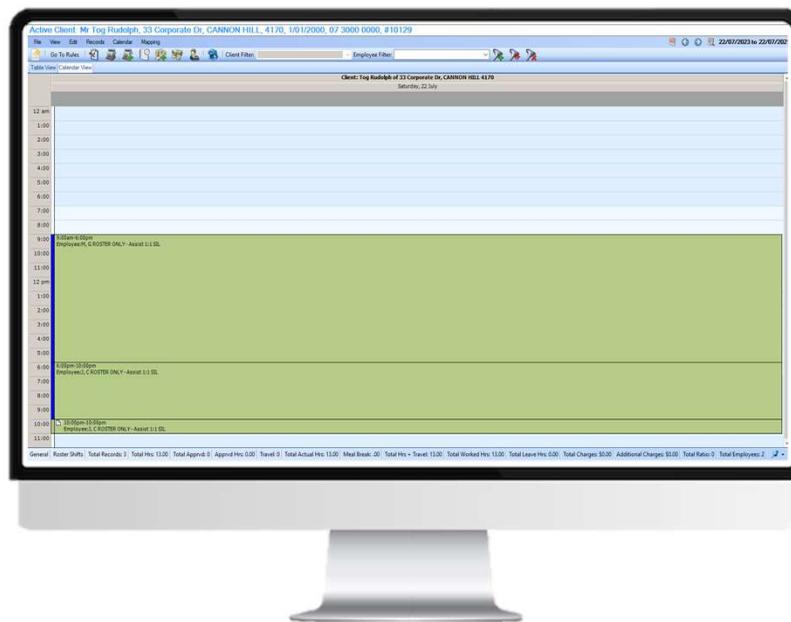
1

Log in to CarelinkPlus using your Endeavour Foundation Username and Password.



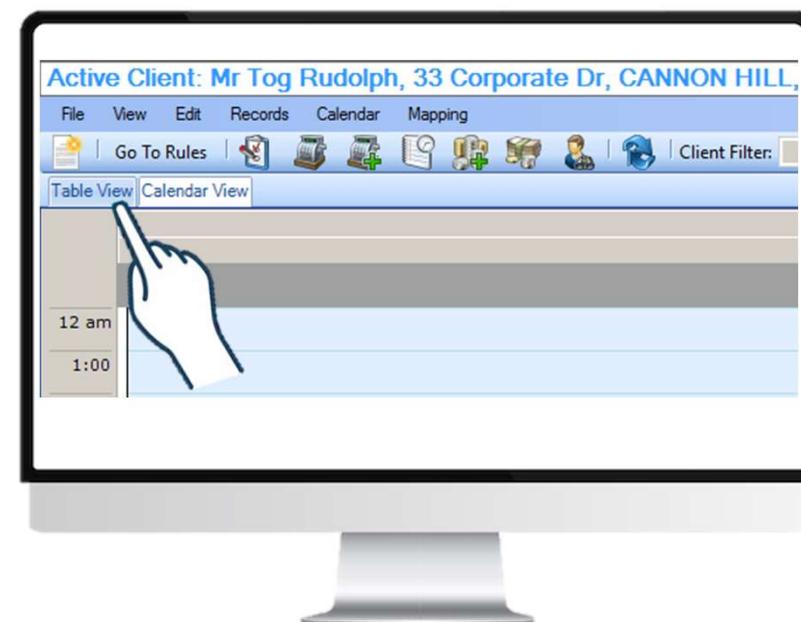
2

Find the shift you need to send a message. Use either a global roster, client, facility, or employee profile.



3

Click on 'Table View'.

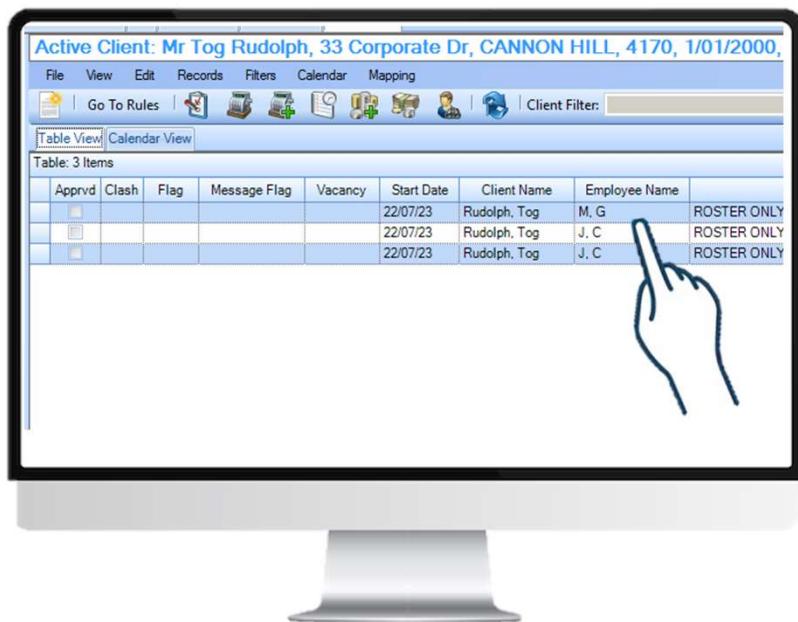


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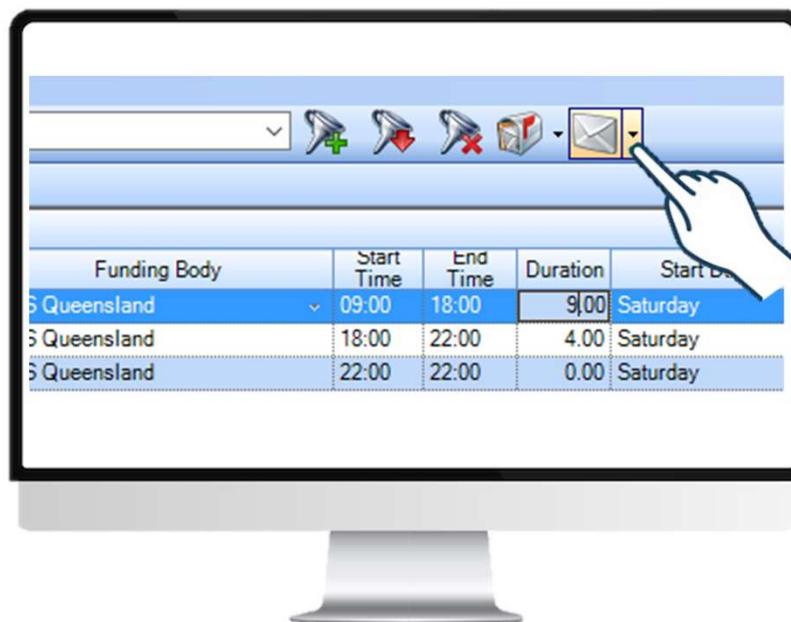
4

Click on the specific shift you wish to send a message about.



5

Click on the down arrow next to the envelope.



6

Select the correct message template for the type of message you need to send.

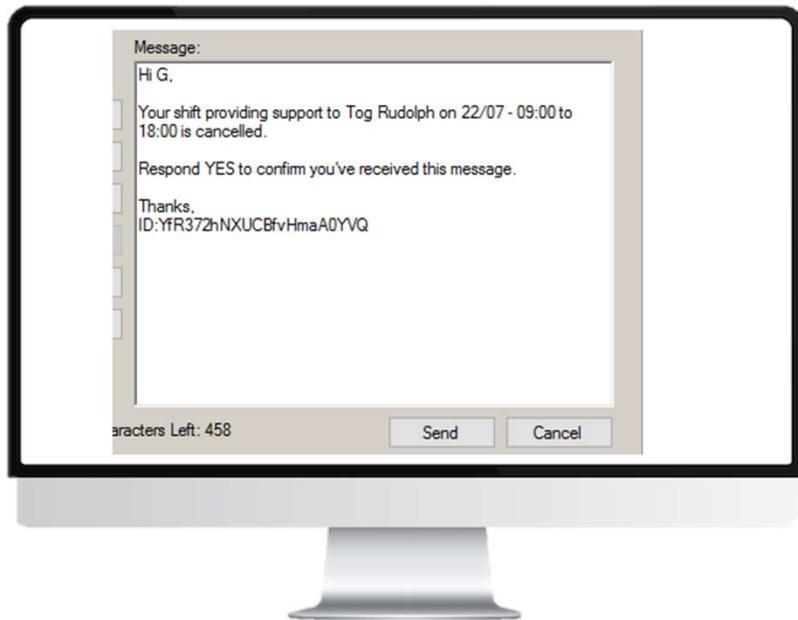


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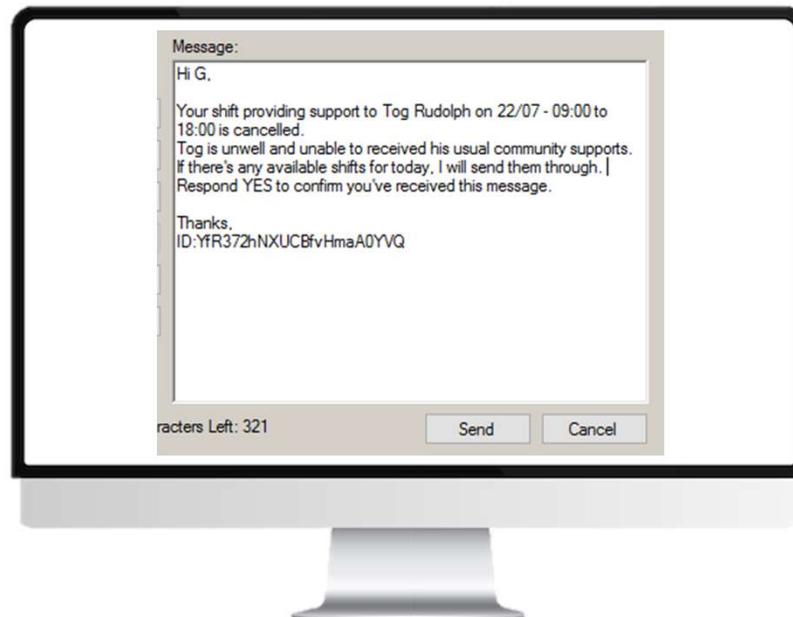
7

The message will prefill with the template and specific shift information.



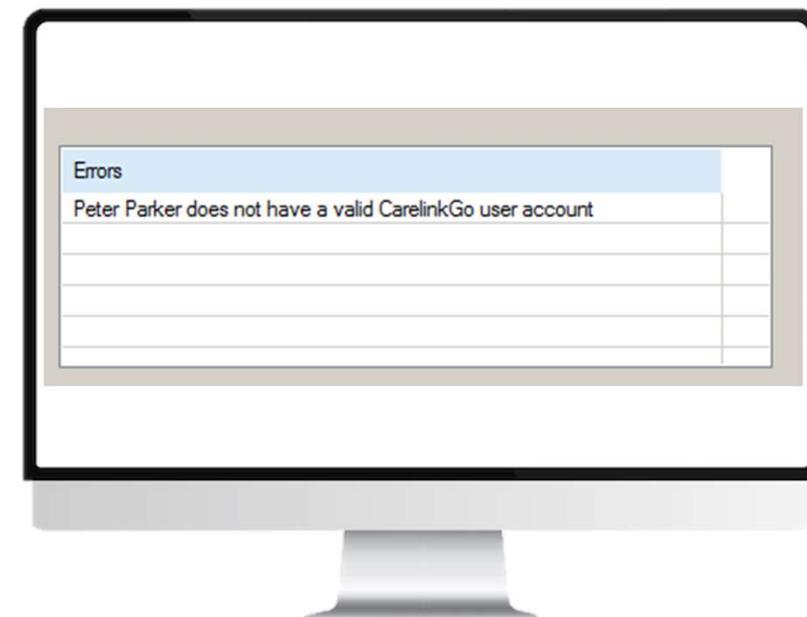
8

Add any additional information needed to the message.



9

If there are any errors in sending the message via CarelinkGo, this will appear in the Errors box.

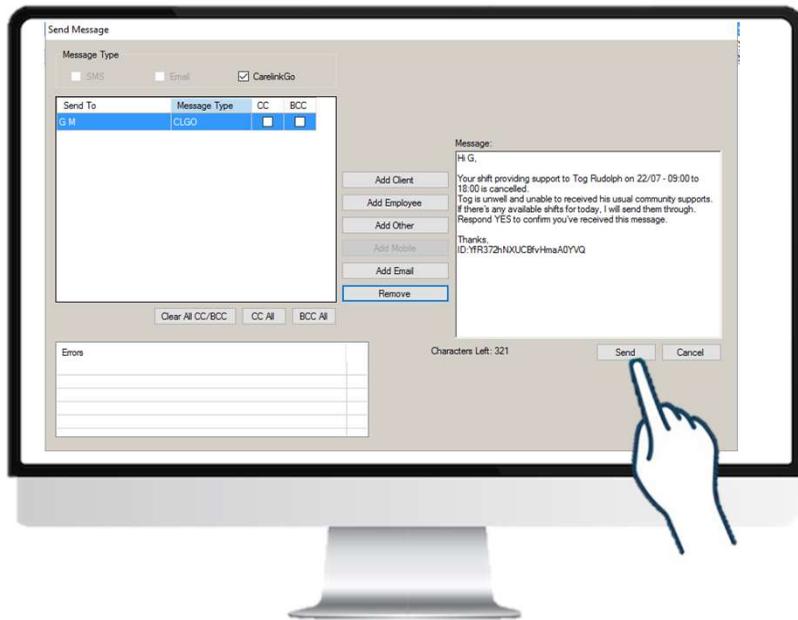


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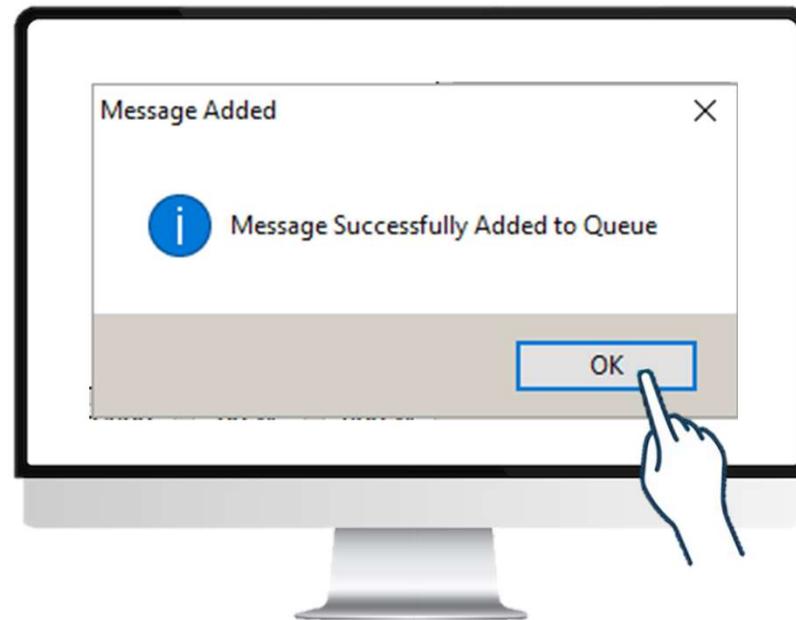
10

Click on Send.



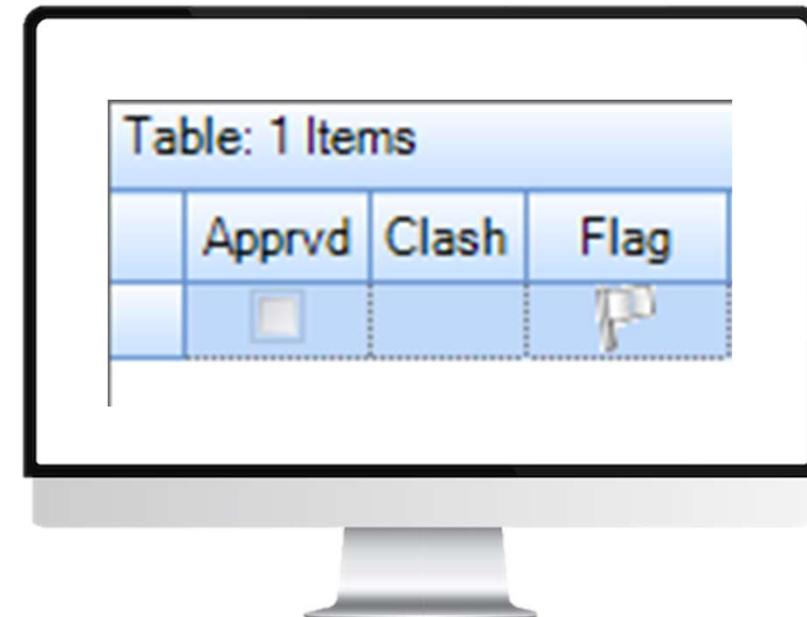
11

A pop-up box will state the message has been successfully added to the queue.



12

The shift will automatically be flagged light grey.

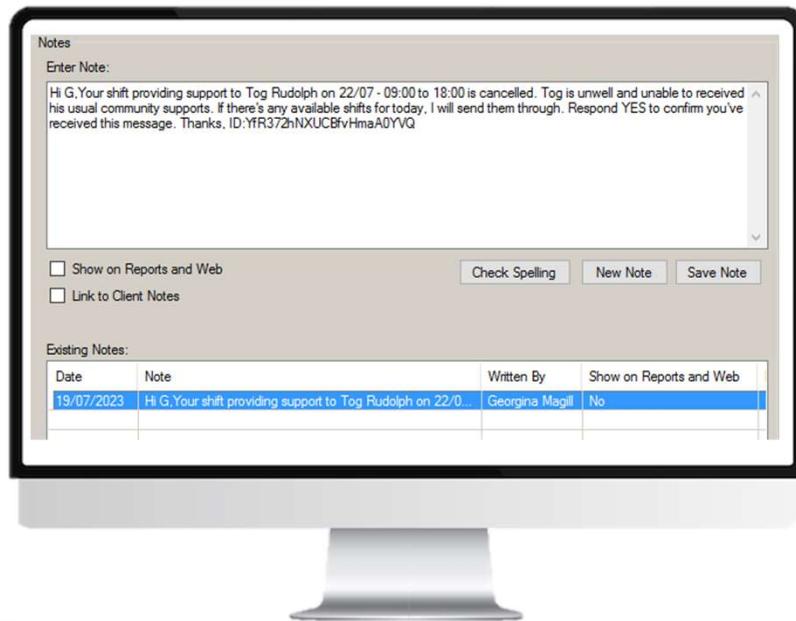


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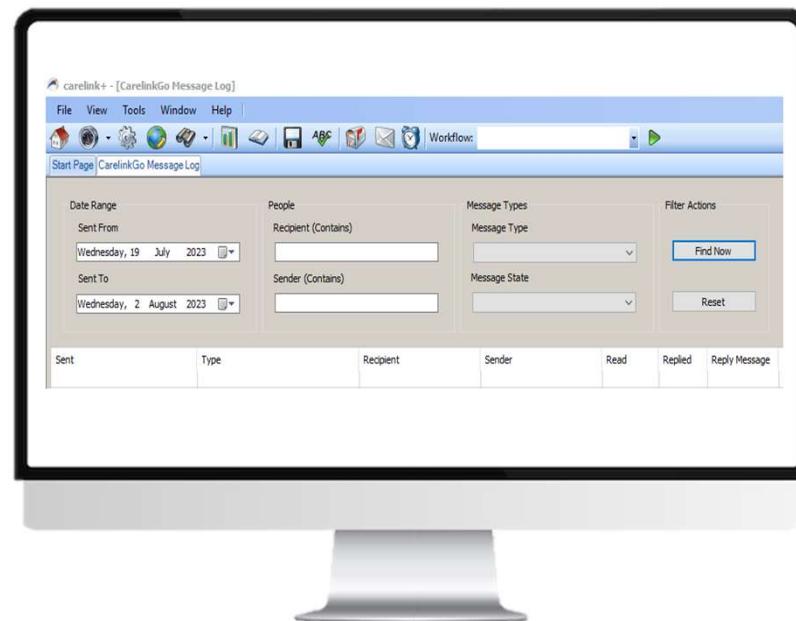
13

The message sent is attached as a shift note.



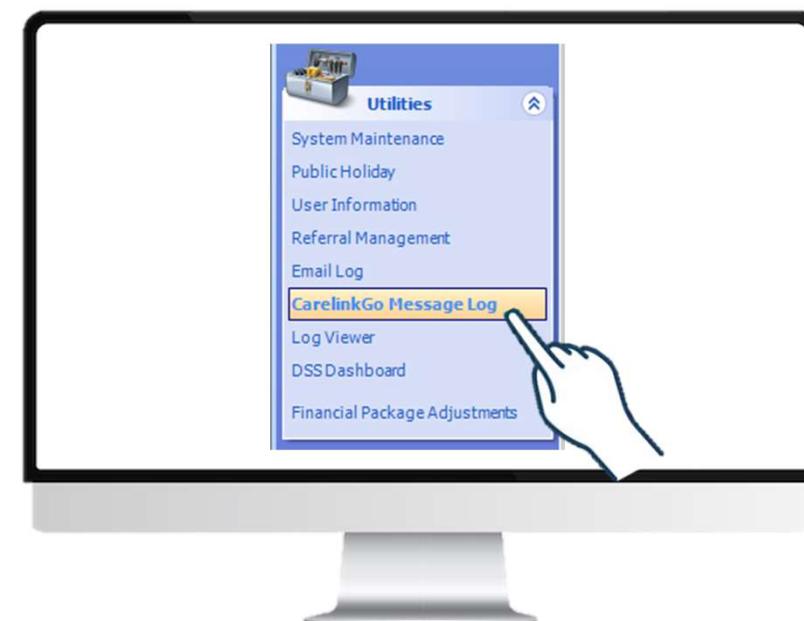
14

To view the status of your message, go to the CarelinkGo Message Log.



15

In the Start Menu, under Utilities, click on CarelinkGo Message Log.



GO



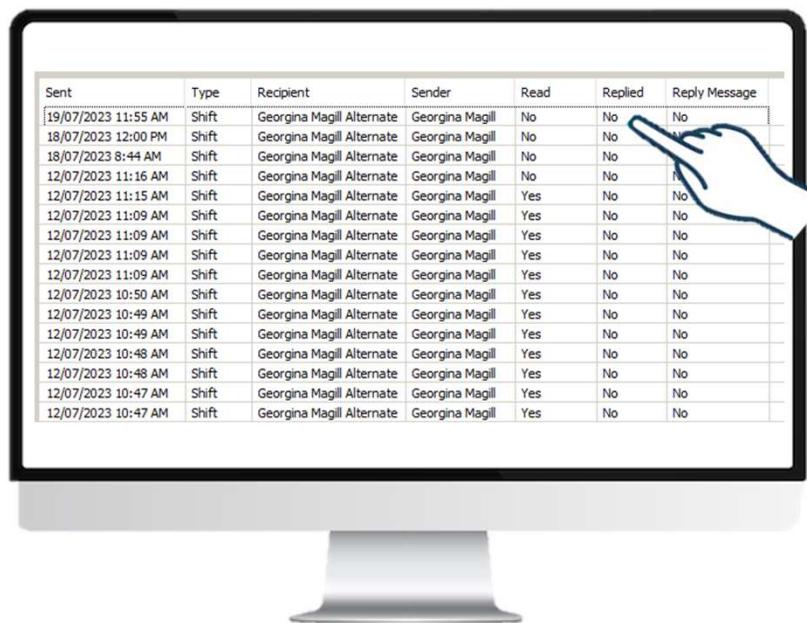
16

Apply any filters to find your message and click on 'Find Now'.



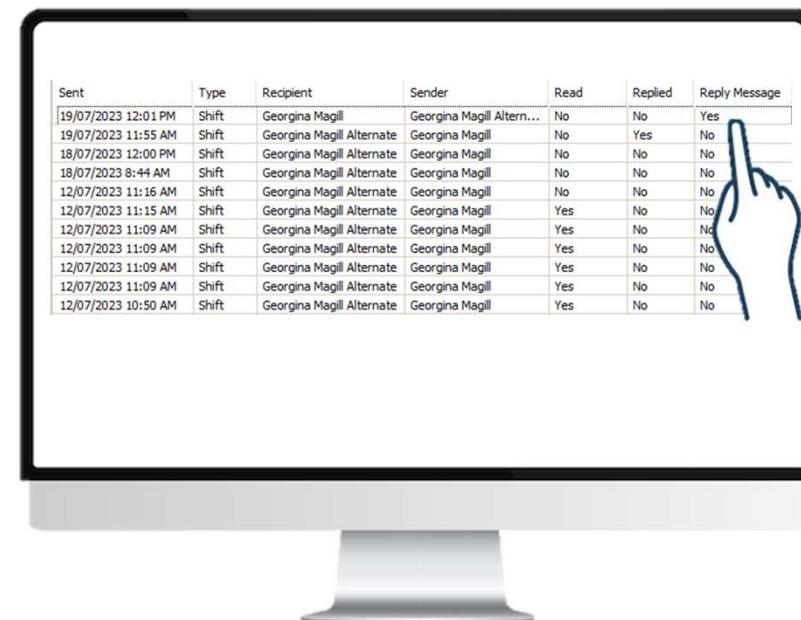
17

The columns to the right will state whether the message has been read and replied to.



18

The Reply Message column states whether the message was a reply from CarelinkGo.

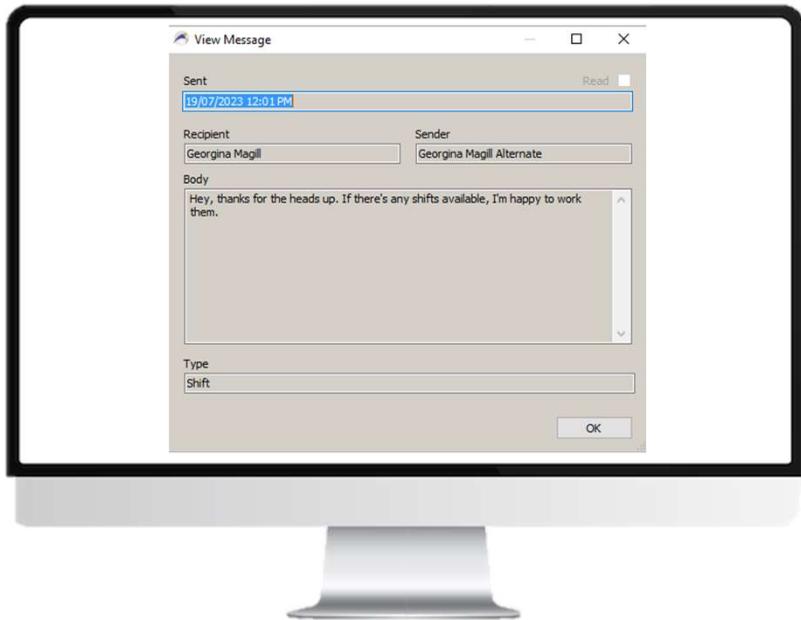


GO



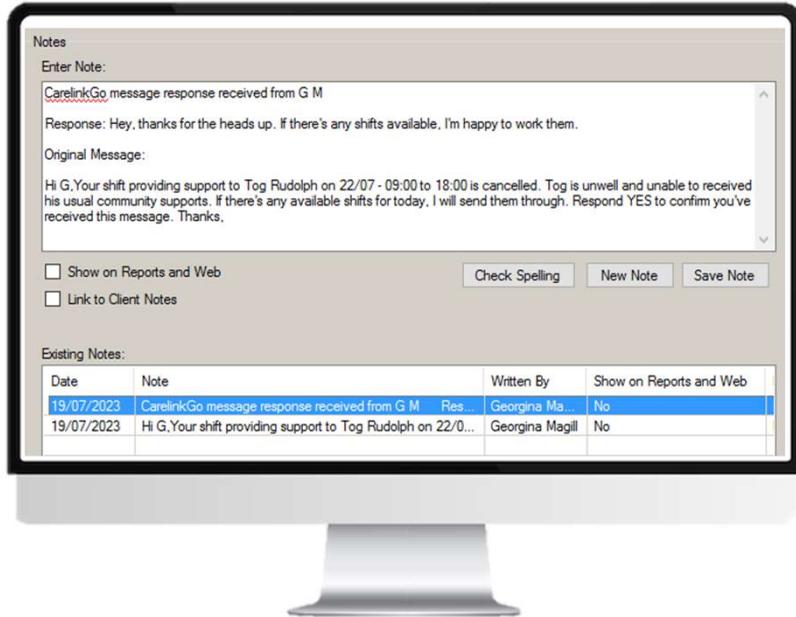
19

Double click on the message to view it.



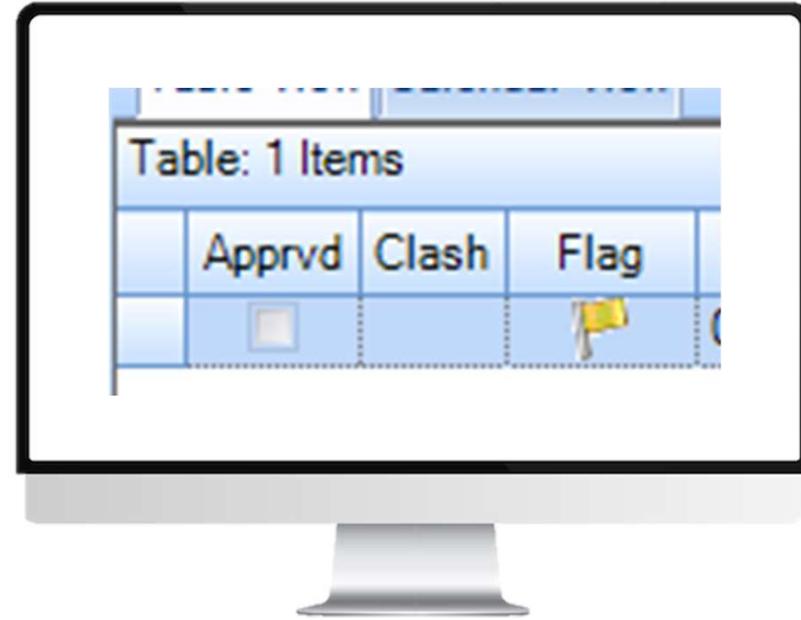
20

Any reply will also be saved as a roster shift note against the shift.



21

Replies can also be found by a Global Roster, filtering for the yellow flag.



CarelinkGo

CarelinkPlus General Messages

CarelinkPlus General Messages Summary

This section of your CarelinkGo User Guide will show you step by step:

- What is a general message
- When a general message is to be used and by who
- How to send a general message
- How to view general messages that have been sent



Step by Step Instructions

Step	Instructions
1	Log in to CarelinkPlus using your Endeavour Foundation Username and Password.
2	A general message is sent using the envelope icon at the top of CarelinkPlus.
3	A general message can also be sent using the envelope icon at the top of the roster screen and not selecting a template.
4	General messages are to only to be sent by the Rostering Team Leaders and Rostering Manager when advised by senior management.
5	General messages do not have templates in CarelinkPlus.
6	When a general message is sent to CarelinkGo, these messages cannot be replied to.
7	Copies of general messages can be found in the CarelinkGo Message Log.
8	The CarelinkGo Message log can be found under the Utilities menu on the Start Page.
9	You can filter on Message Type and select ' General ' to filter the results only for these messages.

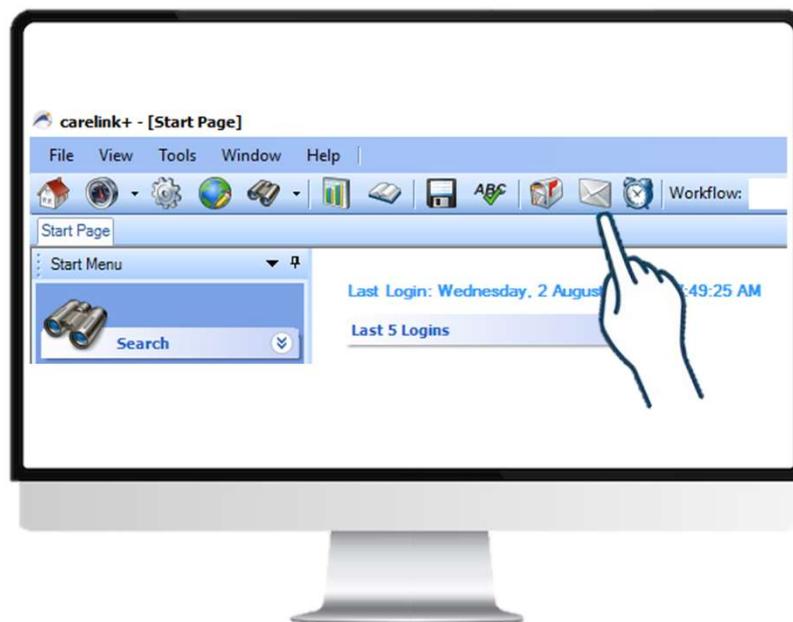
1

Log in to CarelinkPlus using your Endeavour Username and Password.



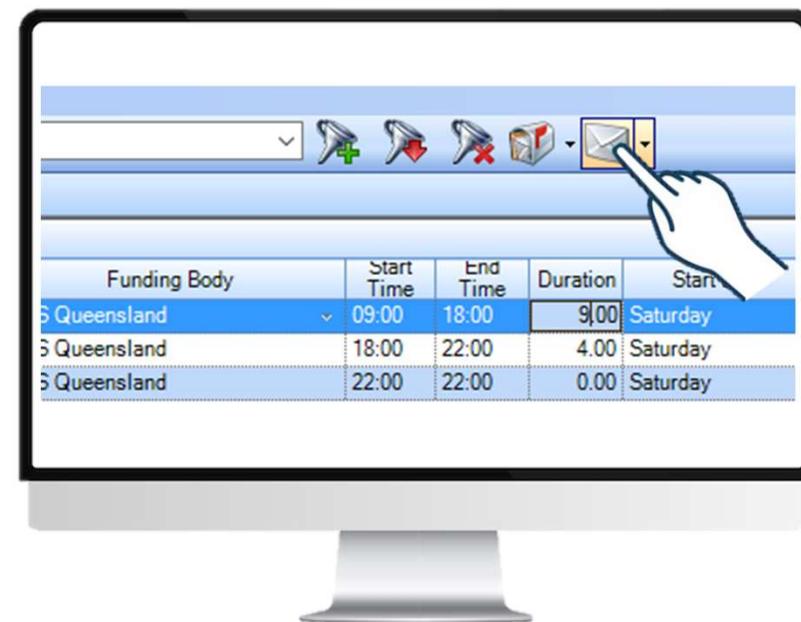
2

A general message is sent using the envelope icon at the top of CarelinkPlus.



3

A general message can also be sent using the envelope icon at the top of the roster screen and not selecting a template.

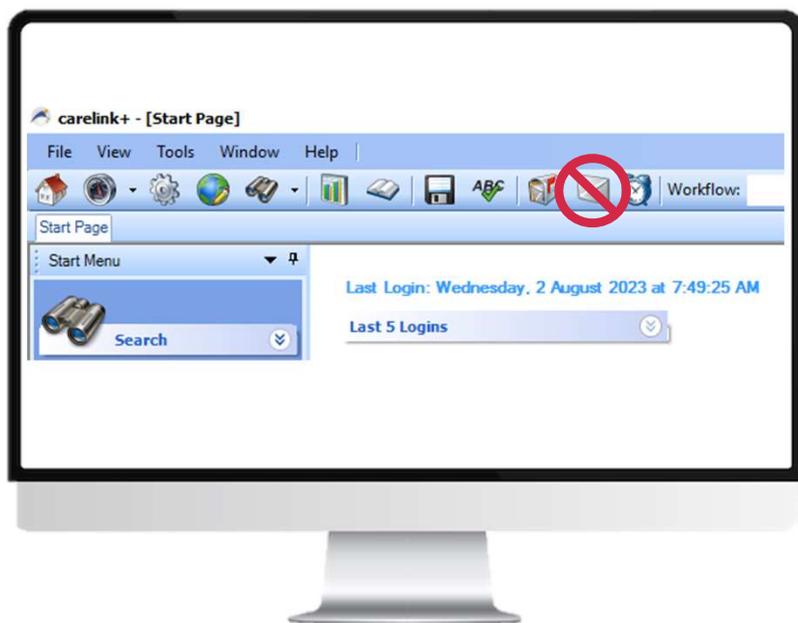


GO



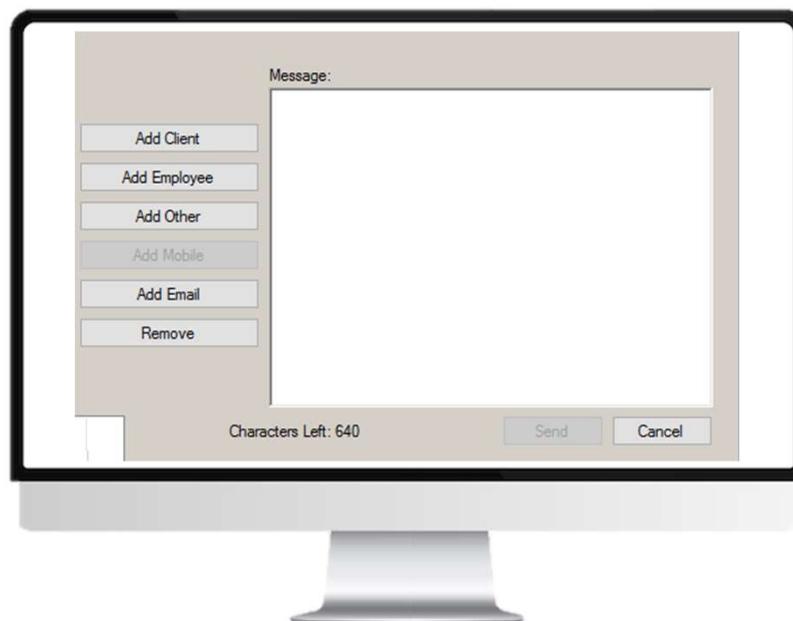
4

General messages are to only be sent by the **Rostering Team Leaders** and **Rostering Manager** when advised by senior management.



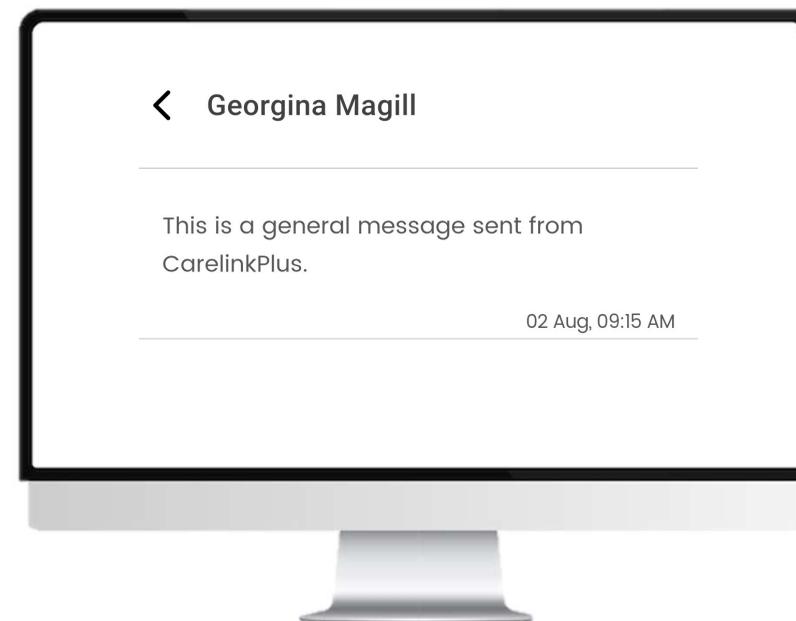
5

General messages do not have templates in CarelinkPlus.



6

When a general message is sent to CarelinkGo, these messages cannot be replied to.

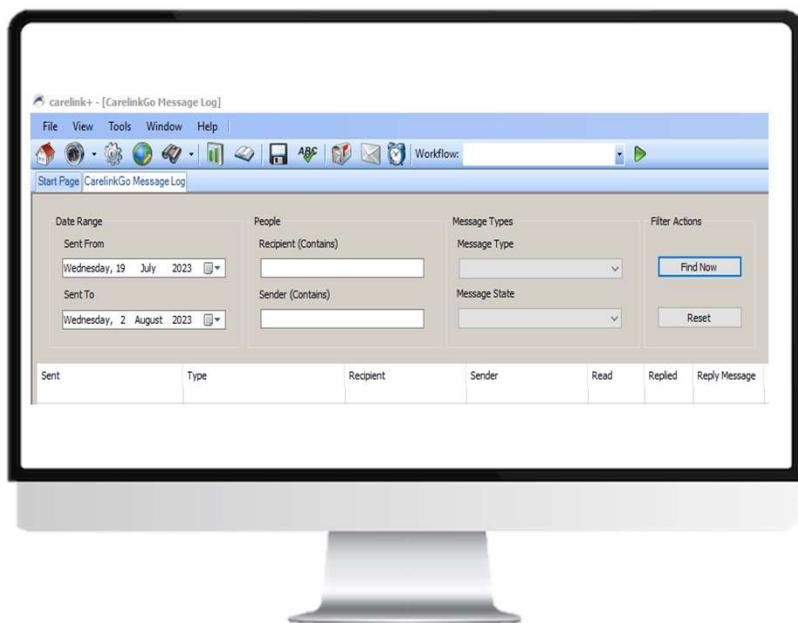


GO



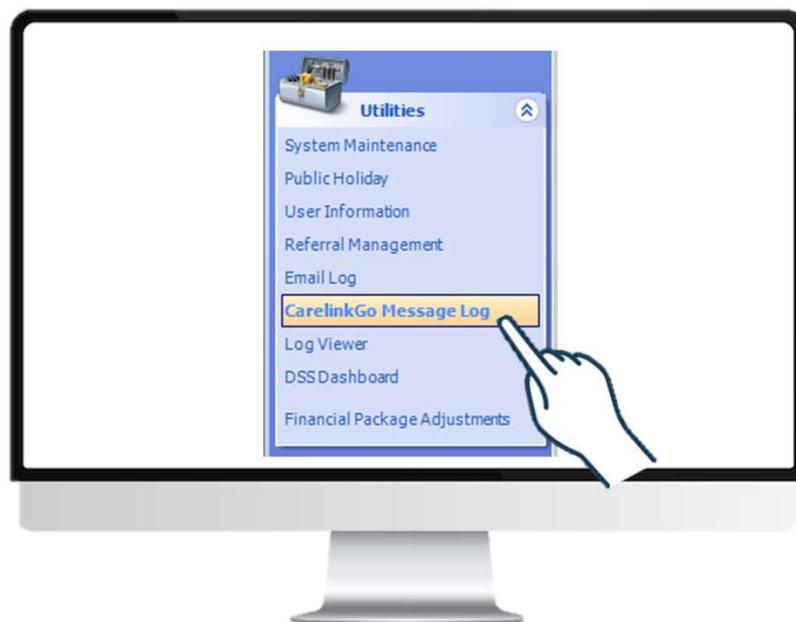
7

Copies of general messages can be found in the CarelinkGo Message Log.



8

The CarelinkGo Message Log can be found under the Utilities menu on the Start Page.



9

You can filter on Message Type and select 'General' to filter the results only for these messages. Click on 'Find Now' to view the results.



GO



Top Tips

- Flag all vacant shifts sent to CarelinkGo green.
- Always add a message to the '**Extra Information**' section of vacancy requests for split shifts.
- Always use a message template so support workers can reply.
- Don't tick '**Display on Carelink+ mobile**' for client or facility profile alerts about Backfill.

For IT Support



Contact the ICT Helpdesk on
1300 742 212