INTRODUCTION: Badges and Roles

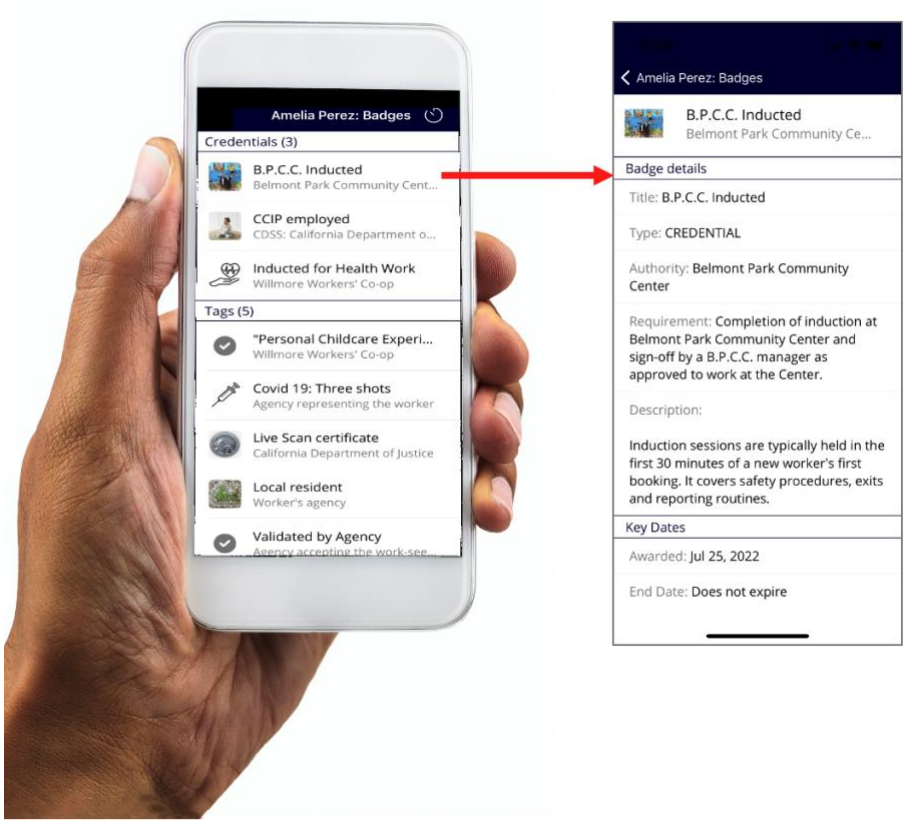
GoodFlexi BRIEFING

A badge records a datapoint about a worker, for example "*Holds a driving license*", "*Trained Caregiver*" or "*Happy to Work Outdoors*". Each worker can progressively increase their badges.

GoodFlexi allows creation of an unlimited number of badges. Each can be applied to any worker by their intermediary, or by the body that created the badge if they partner with the worker's intermediary.

Badging has two core purposes:

- **Role eligibility**: A role (type of work) can be made conditional on the worker having any badges required. For example: to work as a bar tender on Los Angeles tourist boats a worker must have badges "*ServSafe Certified*", "*Background Checked*" and "*I am Comfortable at Sea*".
- **Reporting**: Intermediary superusers can run reports specific to badges (e.g.: "*Show me all my workers badged as "CSULB student" then show utilization and aggregated availability for that subset of workers.*")



Types of badges

When a badge is created, it must be assigned to one of three categories:

- **Credential**: Any certification held by the individual as a result of training. (e.g.: *High School Diploma, Certified Home Care Aide, Walmart Checkout-Operator Trained*.)
- **Tag**: Any verified fact about the worker that could make them additionally attractive to buyers-of-labor, attract support, or be useful in reporting their outcomes but which they did not have to undergo training to achieve (eg: *Registered Disabled, Veteran, TSA Airport Work Clearance*).
- **Self-approved**: Captures what the person is or isn't willing to do. (e.g.: *Lift Loads up to 20lbs, Happy with Pets, Swimmer*) or anything else they can declare about themselves without verification. Self-approved badges can be used for voluntary reporting of languages for example.

Levels of badge

Each badge in *GoodFlexi* is created at one of three levels:

- **Standard**: Set up at system level and available to all labor market intermediaries.
- **Intermediary level**: Set up by an intermediary and only available to its workers.
- **Buyer-of-labor level**: Specific to one buyer-of-labor. (for example, a project, department, or client of an intermediary), the badge can only be used as a requirement for roles specific to that organization, initiative, or even a single household with very specific requirements.

Hidden badges

Any badge can be hidden from general view if deemed sensitive and marked "Not for *Public Display*" by whoever created it. (For example: "*SNAP recipient*" might attract support and public sector assignments for a worker but should only be visible to the worker's intermediary and the worker themselves.) Aggregated reporting on outcomes for this group is enabled, without revealing identities.

Approving badges for a worker

A worker can request the badges she claims are appropriate to her. Credentials and Tags must then be confirmed by her intermediary. Or the intermediary can approve them without a request. Self-approved badges are subjective and not verified, they become active as soon as the worker selects them.

When a badge is applied to a worker, a start date, expiry date, and notes can be added. A badge can be withdrawn from a worker by their intermediary at any time.

Expiry/Withdrawal of badges

When a badge is applied to a worker it can have an expiry date set. At 00.01 on that day the badge will be frozen in the worker's list. The worker will not be bookable against any role requiring that badge for any session with an end date from the day of expiry onwards. This supports legal compliance.

A worker's intermediary can manually withdraw any badge from the person. When this is done:

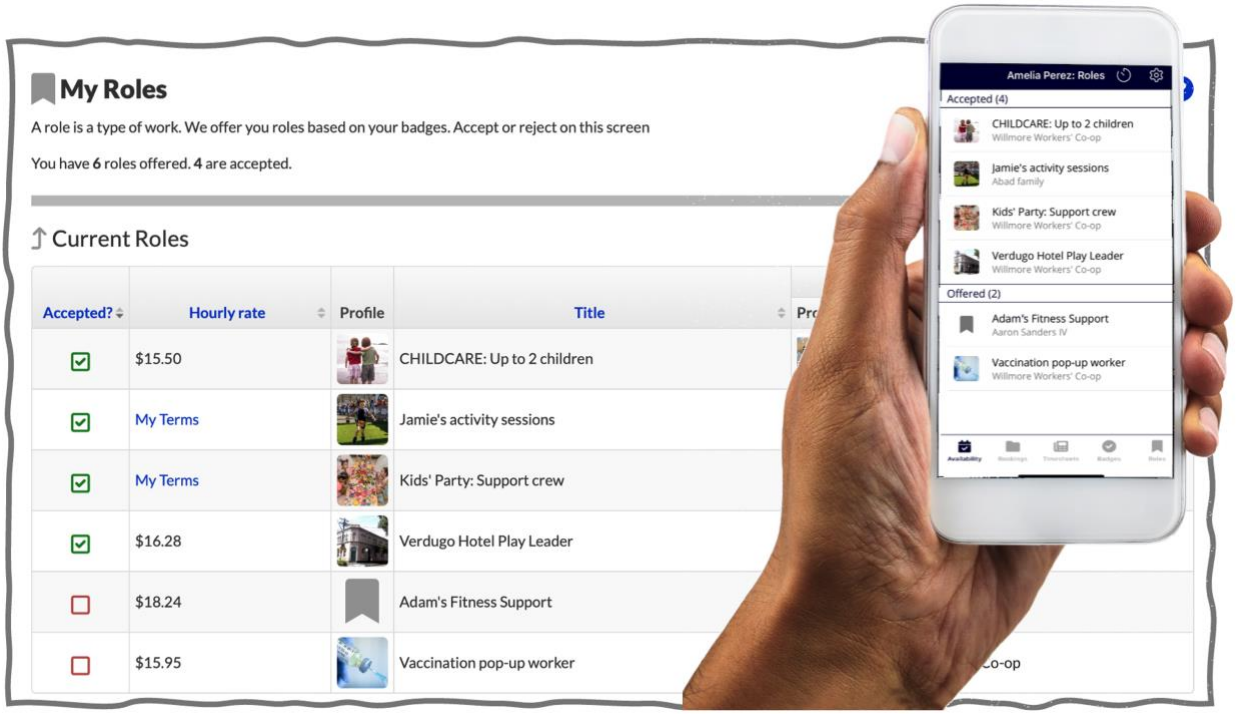
- The badge becomes inactive for the worker.
- The worker is no longer eligible for bookings against any role that requires the badge.

Self-approved badges can be switched off by the worker ("*I am not happy working outdoors in Januar*y"). This stops future bookings against any role requiring that badge.

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Roles

A role is a type of work (e.g. *Bricklayer, Barista, Security Guard*). Each worker can have an infinite number of roles, subject to meeting the criteria for each one. Every booking (period of work) requires one role specified as the type of work. Only workers who currently have that role set at Accepted are eligible for the booking.



Levels of roles

As with badges, each role has one level of three:

- **Standard**: Created by our backoffice team and available across the system.
- **Intermediary level**: Created by an intermediary and available to their buyers-of-labor/workers only. (They can tick to make it also available to their partner intermediaries.)
- **Buyer-of-labor level**: Created by an intermediary and behaves like an intermediary-level role. But only the named buyer-of-labor can book against the role or view its details. No other buyers-of-labor can do so. This fosters training of pools of flexible workers by businesses.

Worker eligibility for a role

A worker is eligible for any role if three conditions are met:

1. It is a systemwide role OR the worker has a relationship to the intermediary that created the role OR the role belongs to a client to which the worker's intermediary supplies workers.

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2. The worker has **all** the badges required for the role with none expiring during the work period or, in the case of self-approved badges, having been turned off.
3. The worker is based within any geographic area set for the role.

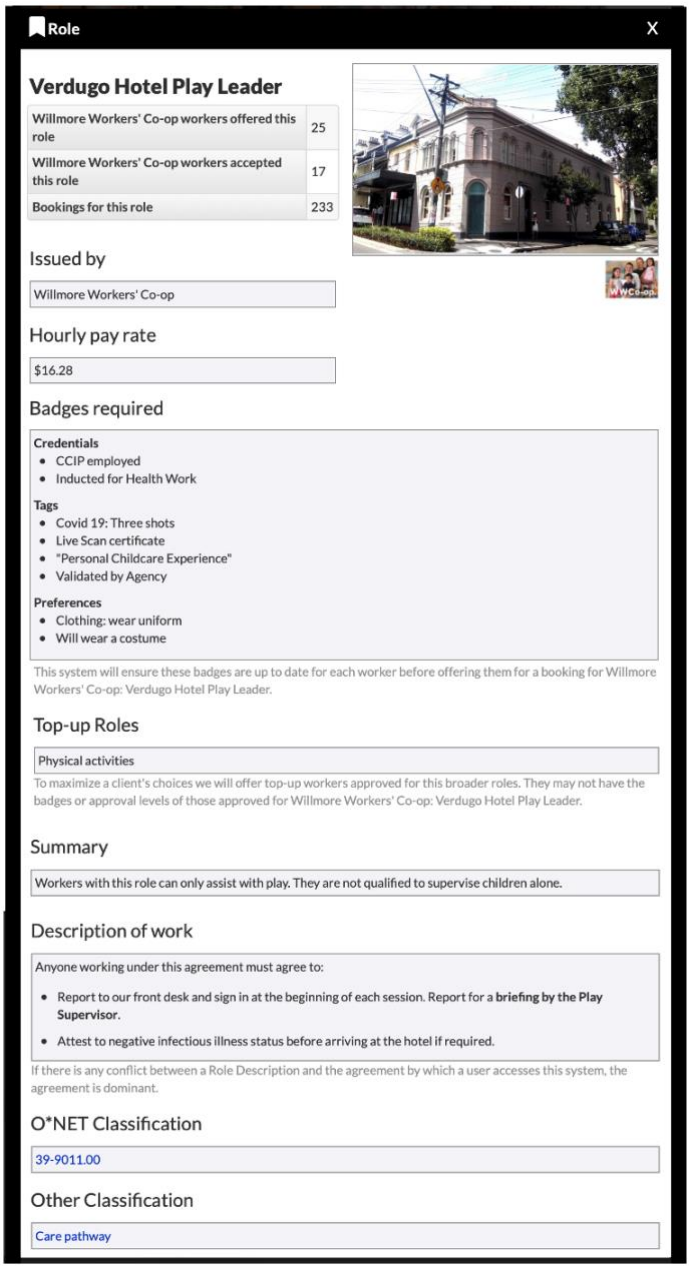
Offering roles to workers

Any worker eligible for a role can be offered that role at any time. A role can be offered to a worker only by:

1. The worker's intermediary.
2. A body that created the role and partnered with the worker's intermediary.

Roles can be offered in one of two ways:

1. One role to many workers
2. Many roles to one worker



Restricting or withdrawing a role

- Any user that can offer a role to a worker can remove the role from the person. Subject to continuing eligibility, the role can be reoffered by anyone authorized to make the offer.
- The intermediary can block any role from a Worker. Reinstating the offer requires UNBLOCK to be clicked by a staffer at the same intermediary. This is typically used while investigating a complaint about a worker.
- The entity that created a role can withdraw it entirely.

Worker control of roles

Each worker can set each role they have been offered at one of two statuses at any time:

- **Accepted**: The worker will show for bookings against the role.
- **Declined**: The worker has excluded herself from bookings for that role.

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