

Getting Started for Managers program checklist

Employee name

Department

Facility

Position title

Start date

Employee number

Instructions

Sydney Local Health District is committed to supporting staff orientation and development.

This checklist identifies orientation tasks and requirements, and available District resources, for new managers. It supports the [Corporate Getting Started Program and Department Orientations](#) for new District staff. It can be tailored to the needs of the individual. New managers and their line manager should include anything specific to their department/service as part of the orientation process.

New managers should use the checklist to become familiar with their department and role and should aim to **complete the tasks within three months** of starting their new role.

Important

Line managers will need to sign-off the checklist, to verify the new manager has completed their District orientation, within the new manager's first three months in the role.

Acknowledgement

I agree I have completed all tasks in this checklist and understand their relevance to my role within Sydney Local Health District.

Employee

Print name

Signature

Date

Line manager

Print name

Signature

Date

Once completed, please forward the original to your local Workforce Services Department.

A copy should be retained by the new manager and in Departmental records.



Commencing Day One – Line Manager Briefing

Item	Completed/ Not applicable
<p>Identify and review District</p> <ul style="list-style-type: none"> • Strategic Plan • Organisational structure • SLHD District Executive Team • SLHD Senior Management Chart • Management Accountability Framework 	
<p>Identify and review Department and/or Business Unit</p> <ul style="list-style-type: none"> • Organisational Chart • Clinical Streams and Heads of Department • Specific Departmental Policies • Strategic/Business Plan – priorities and deliverables • Key Performance Indicators (KPI's) • Service Level Agreement/s • Patient and Family Centred Care – what it means for your service and team • Consumer Engagement • Aboriginal Health Unit – management support related to ways of working and cultural safety 	
<p>Identify and review Workforce</p> <ul style="list-style-type: none"> • Awards/workplace agreements • FTE – staff levels and skill mix • Nursing hours per patient day • Rostering – staff per shift, agency staff, overtime • Recruitment – forecasting and vacancies • Leave – annual, long service, sick and other • Staffing/performance issues – probation, performance improvement plans • Return To Work (RTW) plans • Performance and Talent (PAT) – staff performance and development review • My Health Learning – mandatory training and course attendance approval • Mandatory Training Compliance 	
<p>Identify and review Finance</p> <ul style="list-style-type: none"> • Financial performance reporting, budget management, charter of accounts • Expenditure saving, own source revenue generation roadmaps • Debtor management via Oracle Stafflink ERP • IntraHealth AGIS (debtors + creditors within NSW Health) • Creditor management - S1 requisition processing and iExpenses staff reimbursement • Budget • Delegation • Revenue (patient billing) • Financial delegations 	

<p>Procurement, Contracts and Supply Service</p> <ul style="list-style-type: none"> • Assistance - nswhealth.sharepoint.com/sites/SLHD/procurement-contracts-supply/SitePages/About%20PCS%20Team%20Menu%20Tab.aspx • Procurement, Contracts and Supply Service – policy, website – refer links below under procurement • Goods and Services (G&S) dashboard for expenditure by cost centre • Consumables – stock levels and utilisation (DeliverEASE, dashboards) • Procurement training - types available via My Health Learning (MHL) 	
<p>Identify and review Department and/or Business Unit Work Health and Safety (WHS) status</p> <ul style="list-style-type: none"> • National Standards/Accreditation • Incident Management System (IMS+) • Enterprise Risk Management System (ERMS) • Investigations • Audits and Quality Auditing Reporting System (QARS) • Monthly inspections/Safety huddles • Chem Alert • Risk Assessment • Departmental Safe Work Practices 	
<p>Identify and review Quality/Clinical Governance</p> <ul style="list-style-type: none"> • Clinical Governance framework • QARS Access (for audits) – how audits are conducted and the role of the manager in audits • IMS+ – consumer feedback and incident reporting and management • QIDS – clinical coded data to guide QI initiatives • National Standards/Accreditation • Orientation of SLHD Clinical Governance website • Orientation of SLHD Policy Intranet 	
<p>Identify meetings and committees</p> <ul style="list-style-type: none"> • Attendance and frequency • Roles and responsibilities 	
<p>Add manager to relevant email distribution lists and MS Teams channels</p> <ul style="list-style-type: none"> • Groups • Meetings • Committees • Facility-specific distribution lists 	
<p>Discuss and identify Peer Mentor (where required)</p>	

Week One

Item	Completed/ Not applicable
<p>Systems access, applications, and training</p>	
<p>Line manager to complete any online forms needed to request appropriate system access for the new manager</p> <p>New manager to confirm access to systems and complete appropriate training</p> <ul style="list-style-type: none"> • Microsoft Office applications including MS Teams • Staff Services • StaffLink • Health Roster • Electronic Medical Record (eMR) • Patient Flow Portal • My Health Learning • Recruitment and Onboarding (ROB) • Procurement systems (iProcurement, DeliverEase, hTrack, PROcure) • Performance and Talent (PAT) • Incident management System (IMS+) • Enterprise Risk Management System (ERMS) • Corporate Analytics • Quality Auditing Reporting System (QARS) • Quality Improvement Data System (QIDS) • Sydney Local Health District Targeted Activity and Reporting System (STARS) • People Matters • Oracle Fusion (financial Stafflink ERP) • Remote access • TRIM 	
<p>Policies and procedures</p>	
<p>New manager to read and become familiar with key policies and procedures</p> <p>Workforce</p> <ul style="list-style-type: none"> • NSW Health Code of Conduct – PD2015_049 • Recruitment and Selection of Staff to the NSW Health Service – PD2023_024 • Managing Misconduct – PD2018_031 • Prevention and Management of Workplace Bullying in NSW – PD2021_030 • Resolving Workplace Grievances – PD 2016_046 • Leave Matters for the NSW Health Service – PD2024-046 • Managing Complaints and Concerns about Clinicians – PD2018_032 • Leading Performance, Development and Talent Management – PD2023_043 • Working with Children checks and Other Police Checks – PD2019_003 • Uniform Policy – PD2019_012 • Rostering: Best Practice – PCP2019_024 • Rostering Best Practice Intranet Site • Staff Services • Complaints Management • Incident Management 	

<p>Websites, intranet pages and Sharepoint sites</p>	
<ul style="list-style-type: none"> • Digital Health and Innovation (DH&I) • Performance Monitoring and Systems Improvement • Procurement • Recruitment • Rostering Best Practice • Staff Services • Sydney Education • Wellbeing Hub 	
<p>Finance</p> <ul style="list-style-type: none"> • Delegation Manual <p>Procurement</p> <ul style="list-style-type: none"> • NSW Health Procurement (Goods and Services) Policy PD2024_044 • SLHD Goods and Services Procurement policy PD023_055 <p>Work Health and Safety (WHS)</p> <ul style="list-style-type: none"> • Fatigue Management Guidelines • Hazardous Manual Tasks (HMT) and Ergonomic Policy - SLHD_PD2019_060 • Rehabilitation, Recovery and Return to Work – SLHD_PCP2023_043 • WHS Consultation - SLHD_PD2024_061 • WHS Policy - SLHD_PD2022_065 • Work Health and Safety: Better Practice Procedures - PD2018_013 <p>Clinical Governance and Risk</p> <ul style="list-style-type: none"> • SLHD Clinical Governance Framework • Clinical Governance in NSW <p>Digital Health</p> <ul style="list-style-type: none"> • eMR Downtime Procedure • Refer to local facility Downtime Procedures for additional operational information 	

Week Two onwards – Virtual Orientation Program

Item	Completed/ Not applicable
<p>Go to My Health Learning on the District intranet and enrol in the <i>Getting Started for Managers Learning Pathway</i> (375034611) then register for your preferred date for the sessions listed below.</p> <p>Virtual Key Stakeholder briefings</p> <ul style="list-style-type: none"> • Workforce • Finance • Procurement • Work Health and Safety (WHS) • Clinical Governance • Performance Monitoring, Systems Improvement, and Innovation • Sydney Education • My Health Learning – Manager and Manager Delegate roles • Management Accountability Framework • Staff Wellbeing 	
<p>Recommended Virtual Sydney Education Sessions (course codes are in brackets)</p> <ul style="list-style-type: none"> • Microsoft MS Teams: An introduction (334988333) • Coaching Conversations for Managers (335811559) • Preparing for and having a challenging conversation (334401752) • Emotional Intelligence: What is it and how to use it (333694664) • Managing Underperformance (336889477) • Navigating the Performance Development Process (494767059) • The 5 Cs Writing emails for effective results (334863669) <p>Online My Health Learning modules</p> <ul style="list-style-type: none"> • Business Writing in Healthcare (193770709) • Learning Pathway – Recruitment (227954011) • Fatigue: Minimising the impact at work (285850115) 	
<p>Schedule local stakeholder meetings</p>	
<p>Following the Virtual Stakeholder Briefings that provide an overview of each stakeholder group, schedule a one-on-one meeting with your local representative from each of the stakeholder groups to discuss relevant topics as listed below.</p> <p>Workforce</p> <p>Key points to discuss (as relevant to your team/service):</p> <ul style="list-style-type: none"> • Awards/Workplace agreements • Recruitment – ROB • Performance and Talent (PAT) • Managing Leave – planned and unplanned • Staffing and Rosters – staffing reports, staff skills, supplementation, roster adjustments and changes, casual pool and agency staff, special requests • Industrial/Employee Relations (ER/IR) • Employee Assistance Program • Payroll 	

Finance

Key points to discuss (as relevant to your team/service):

- Budget/s and budget management
- Delegation
- Road maps
- Revenue generation

Procurement training available

- HTrak
- iProcurement
- Local and Whole of Health Contracts
- Medical Consumables and DeliverEase
- Procurement and Expenditure Dashboards

Work Health and Safety

Key points to discuss (as relevant to your team/service):

- Hazardous substances and dangerous goods
- Incident Management
- Injury Management
- Monthly Inspections
- Reporting
- Return To Work
- Risk Management (hazardous manual tasks, psychosocial, fatigue etc)
- Training

Quality/Clinical Governance

Key points to discuss (as relevant to your team/service):

- Clinical governance
- National standards
- Risk management
- Incident management
- Accreditation
- HACs – Hospital Acquired Complications

Performance Monitoring, Systems Improvement and Innovation

Key points to discuss (as relevant to your team/service):

- Key Performance Indicators
- Performance data and analytics
- STARS
- Activity Based Funding
- Clinical Costing and iFRACs
- The Pitch

Sydney Education

Key points to discuss (as relevant to your team/service):

- My Health Learning including your role as a manager
- Education Support Portal (ESP – Moodle)
- Courses – VET and non-accredited
- Professional Development
- Navigating MHL as a Manager
- Overview of the Management Accountability Framework:
 - How it relates to you as a manager
 - Introduction to the Toolkit and other resources
 - Coaching opportunities available

Others (list below):

Item	Completed/ Not applicable
Line manager check-ins/reviews	
Week One – Orientation progress review with line manager	
Week Six – Orientation progress review with line manager	
Week 10 – Orientation progress review with line manager	
Week 12 – Getting Started for Managers program checklist sign-off with line manager	