

MANAGER'S ORIENTATION CHECKLIST

AQ CENTRES

Personal Details	
Employees Name:	
Position:	
Centre:	
Name of Manager:	
Date of appointment:	

This orientation checklist is to be done in conjunction with the localised orientation checklist.

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PART 1 – MANAGEMENT INFORMATION

Objective: To ensure the new Manager understands correct processes / protocols of the Association in regard to:

Organisational Structure	<input type="checkbox"/>	All centres operated at the AQ	<input type="checkbox"/>
Line of reporting	<input type="checkbox"/>	Philosophy of Care – SRV (indepth discussion)	<input type="checkbox"/>
Mission	<input type="checkbox"/>	Values	<input type="checkbox"/>
Board Reports	<input type="checkbox"/>	Uniforms in residential care	<input type="checkbox"/>
Social Media/PR policy	<input type="checkbox"/>	Police Certificate – exclusion from roster no exception	<input type="checkbox"/>
Communication	<input type="checkbox"/>	24 hour centre coverage	<input type="checkbox"/>
Motor Vehicle Policy	<input type="checkbox"/>	First Aid requirements	<input type="checkbox"/>
IT and Telecommunication	<input type="checkbox"/>	24 hour helpline	<input type="checkbox"/>
Leave application – approval process	<input type="checkbox"/>	Community Awareness	<input type="checkbox"/>
Overtime and TOIL only approved by CEO	<input type="checkbox"/>	Currency of knowledge – updates, email alerts, websites, journals, networks	<input type="checkbox"/>
CDC referral processes	<input type="checkbox"/>	Inhome worker after hours and weekend processes	<input type="checkbox"/>
		Strategic Plan	<input type="checkbox"/>
Employee Signature		Managers Signature	

PART 1 NOTES:

PART 2 – RECRUITMENT POLICIES

Objective: To ensure the Manager has completed and understood all required HR and Organisational forms and procedures:

Decision to recruit – how to decide when new staff are needed	<input type="checkbox"/>	Reference checks	<input type="checkbox"/>
Appropriate staff mix	<input type="checkbox"/>	Obtaining relevant documents: Police check, qualifications, work rights documents, visa's, copy of passport (if applicable)	<input type="checkbox"/>
Gaps in the roster	<input type="checkbox"/>	Qualifications	<input type="checkbox"/>
Informing the HR Manager to start advertising	<input type="checkbox"/>	Professional attire – hair colour, clothing, visible tattoos, piercings	<input type="checkbox"/>
Interviewing	<input type="checkbox"/>	AHPRA Registrations verified	<input type="checkbox"/>
Employee Signature		Managers Signature	

PART 2 NOTES:

PART 3 – HR AND STAFF EDUCATION			
Objective: To ensure the Manager has completed and understood all required HR and Organisational forms and procedures:			
Check In/Check Up	<input type="checkbox"/>	Mandatory Education	<input type="checkbox"/>
Training and Development Plan	<input type="checkbox"/>	Recommended Education	<input type="checkbox"/>
Supervision meetings (if applicable)	<input type="checkbox"/>	Staff requested education	<input type="checkbox"/>
Staff Meetings	<input type="checkbox"/>	Orientation process for new staff	<input type="checkbox"/>
Relevant awards that relate to the Centre	<input type="checkbox"/>	Family members employed in the centres	<input type="checkbox"/>
NES – National Employment Standards	<input type="checkbox"/>	Online Education - residential	<input type="checkbox"/>
Employee Signature		Managers Signature	

PART 3 NOTES:

PART 4 – FUNDING AND DOCUMENTATION – RESPITE			
Objective: To ensure Managers have an understanding of the funding and documentation requirements that relate to the Community Based Respite Centres:			
Familiarise yourself with:			
CHSP	<input type="checkbox"/>	Funding – Service Agreements	<input type="checkbox"/>
Aged Care Quality Standards	<input type="checkbox"/>	Funding – Service Outputs	<input type="checkbox"/>
Icare	<input type="checkbox"/>	Submissions – New funding opportunities	<input type="checkbox"/>
Monthly financial report	<input type="checkbox"/>	Weekly case manager reports	<input type="checkbox"/>
ConnX	<input type="checkbox"/>	Big Splash	<input type="checkbox"/>
Quality Audits	<input type="checkbox"/>	Moving on Audits	<input type="checkbox"/>
My Aged Care & Auskey	<input type="checkbox"/>	DEX reporting	<input type="checkbox"/>
Home Care Packages	<input type="checkbox"/>	NDIS/Proda	<input type="checkbox"/>
Riskman- entering incidents, feedback	<input type="checkbox"/>		
Employee Signature		Managers Signature	

PART 4 NOTES:

PART 5 – FUNDING AND DOCUMENTATION – (RESIDENTIAL CARE)

Objective: To ensure Managers have an understanding of the funding and documentation requirements that relate to the Residential Care facilities.

ACFI documentation	<input type="checkbox"/>	Residential Care Agreements	<input type="checkbox"/>
Aged Care Act	<input type="checkbox"/>	Key personnel form	<input type="checkbox"/>
Aged Care Principles	<input type="checkbox"/>	Medicare form	<input type="checkbox"/>
Aged Care Standards	<input type="checkbox"/>	iCare / Sarah	<input type="checkbox"/>
Employee Signature		Managers Signature	

PART 5 NOTES:

PART 6 – ROSTERING – RESIDENTIAL AND RESPITE

Objective: To ensure Managers have an understanding of how the Association prepares rosters.

Master Roster	<input type="checkbox"/>	Timelines – Publication of roster	<input type="checkbox"/>
Flexibility of roster	<input type="checkbox"/>	Reporting against variances from costed roster to actuals	<input type="checkbox"/>
Ability to change the master roster	<input type="checkbox"/>	Replacement of staff on the roster – AQ casual pool	<input type="checkbox"/>
Costed rosters (also relevant to budgeting & financials)	<input type="checkbox"/>	Scheduling in-home services	<input type="checkbox"/>
Agency usage – which agency and when is appropriate	<input type="checkbox"/>	Brokerage	<input type="checkbox"/>
Employee Signature		Managers Signature	

PART 6 NOTES:

PART 7 – BUDGETING AND FINANCIALS

Objective: To ensure Managers have an overview of their responsibilities in relation to budgeting and financial statements.

Delegation	<input type="checkbox"/>	Understanding the Profit & Loss	<input type="checkbox"/>
Reporting Requirements	<input type="checkbox"/>	Allocating Staffing hours	<input type="checkbox"/>
Capital expenditure	<input type="checkbox"/>	Annual Budget	<input type="checkbox"/>
Maintenance	<input type="checkbox"/>		
Employee Signature		Managers Signature	

PART 7 NOTES:

PART 8 – REPORTING – MONTHLY, QUARTERLY AND ANNUALLY

Objective: To ensure Managers have an awareness of the reporting requirements of the positions.

Board Reports – due 2nd Tuesday	<input type="checkbox"/>	Service Outputs	<input type="checkbox"/>
DEX	<input type="checkbox"/>	Outlook Calendar	<input type="checkbox"/>
Annual Report	<input type="checkbox"/>	Rosters to HR	<input type="checkbox"/>
EOM billing to accounts	<input type="checkbox"/>	Monthly staff education form to HR	<input type="checkbox"/>
EOM resident movements to accounts	<input type="checkbox"/>		
Employee Signature		Manager Signature	

PART 8 NOTES:

PART 9 – PERFORMANCE MANAGEMENT

Objective: To ensure Managers have an overview of the Performance Management processes of the Association.

Staff member to tick when each area or item is successfully located.

How to recognise performance issues	<input type="checkbox"/>	Confidentiality	<input type="checkbox"/>
When to communicate with HR and who to involve in this process	<input type="checkbox"/>	The importance of having a second person in the room	<input type="checkbox"/>
When to commence performance management (in conjunction with HR)	<input type="checkbox"/>	Informal conversations, ensure appropriate notes are kept	<input type="checkbox"/>
How and what to document on ConnX	<input type="checkbox"/>	The importance of written notes	<input type="checkbox"/>
Employees Signature		Manager Signature	

PART 9 NOTES:

PART 10 – STAFF INJURY – WORKCOVER PROCESSES

Objective: To ensure that Manager's have an overview of the Association's Workcover procedures. All work related injuries are to be reported to the HR Manager

Tick each item when located / completed and function understood

What to do when a staff member injures themselves	<input type="checkbox"/>
How and who to report the injury to	<input type="checkbox"/>
Workcover claim form	<input type="checkbox"/>
Required medical certificates	<input type="checkbox"/>
How to implement a light duties plan	<input type="checkbox"/>
Riskman – Respite Centres	<input type="checkbox"/>
Incident Forms – Residential Care Centres	<input type="checkbox"/>
Non-Work related injuries – clearance to return to work	<input type="checkbox"/>
Employees Signature	Managers Signature

PART 10 NOTES:

PART 11 – MANAGER EDUCATION

Objective: To ensure staff members are enrolled in relevant education modules and training.
 (if applicable)

Tick each item when staff member is enrolled or registered

SRV:	
• Education	<input type="checkbox"/>
• Culture	<input type="checkbox"/>
• Everything that goes on in the Centres	<input type="checkbox"/>
SRV Training – 2 day event	<input type="checkbox"/>
SRV Training - PASSING	<input type="checkbox"/>
Conferences	<input type="checkbox"/>
Employees Signature	Managers Signature

PART 11 NOTES:

THE FOLLOWING TO BE COMPLETED ONLY ONCE ALL RELEVANT SECTIONS COMPLETED:

I, confirm that the above orientation procedure has been completed and I am familiar with all aspects referred to herein. I am aware of my responsibilities as an employee of the Alzheimer's Association of Queensland and I hereby undertake to comply with expressed conditions to the best of my ability.

Employees Signature: _____

Manager's Signature: _____

Date ____/____/____

Completed form must be sent to HEAD OFFICE within 14 days of commencement of employment.