Clinical Support Officer Development Pathway

Resource Toolkit

Illawarra Shoalhaven Local Health District

About this toolkit

This toolkit has been developed to support ISLHD's Clinical Support Officer Development Pathway process. It contains links to various resources designed to assist the professional development of our new and current Clinical Support Officers.

For further assistance, or to provide feedback on this resource please contact ISLHD Workforce Development Unit: ISLHD-WorkforceDevelopment@health.nsw.gov.au

Contents

Recruitment and onboarding of staff

Your role:	Undertake tasks, as directed by the N/MUM, aimed at supporting and facilitating the efficient and timely recruitment of staff to the ward/unit.
Systems:	**ROB** http://rob.cit.health.nsw.gov.au/ To login to ROB, use your StaffLink username and password. **Ezisuite** https://www.ezisuite.net/login.cfm To gain access, complete Application for Ezisuite Access form and submit to Mark.Blythe@health.nsw.gov.au
Policy Directives and Guidelines:	• Recruitment and Selection of Staff to the NSW Health Service • Awards and Conditions
Accessing training:	• ROB eLearning options • ROB Training Schedule • How to enrol in eLearning modules • How to join a webinar via MS Teams
Getting support:	Your local Workforce Support Officer provides: • ROB system support • Policy and procedure guidance • Award interpretation and guidance

Getting prepared

1. Familiarise yourself with the Recruitment and Selection of Staff to the NSW Health Service Policy.

2. Before using ROB, complete the ROB eLearning modules in My Health Learning (see training details over the page).

3. Once you have a new Approval to Fill to create, contact your local Workforce Support Officer who will arrange a day/time to help guide you through the process.

ROB system training

The eHealth NSW Service Delivery Training team provide training and materials to staff across NSW Health on how users can utilise the Recruitment and Onboarding (ROB) system.

Training is offered and available through a variety of options, methods, and platforms:

- Virtual instructor led classrooms and webinars, bookable in My Health Learning.
- Self-directed eLearning through My Health Learning.
- Quick guide reference materials.

View the ROB Training Schedule or search 'ROB' in My Health Learning to find scheduled state-wide virtual classrooms and webinars.

Training materials

Training materials are located on the ROB Training Hub.

Title	Location	Details
Introduction to ROB	ROB Training Hub	**Quick Reference Guides** - Accessing and navigating system roles - Delegating in the Recruiting Centre - Accessing ROB externally - Maintaining state recruitment records **User Guides** - Introduction to ROB
Convenors/Job owners	ROB Training Hub	**Quick Reference Guides** - Searching the PD library - Creating an ATR - Saving an ATF as a draft - Adding approvers to an ATF - Candidate selection workflow (CSW) - Convenor - Requisition management - Changing owners on a requisition - Adding panel members to a requisition - Managing incomplete applications - Adding attachments to a candidate's general profile - Shortlisting candidates - Changing a candidate's step/status - Scheduling an interview - Sending correspondence to a candidate - Uploading documents to a candidate file - Recruitment process flow - More… **User Guides** - Attract and source - Selection - Verify and check - Offer and onboarding

Training offerings

Title	Delivery Method	Duration	Learning Outcomes	More details
HCM ROB – New to recruitment at NSW Health It is recommended to attend this webinar before any other webinar or virtual classroom.	Webinar	30 mins	• To introduce ROB to staff who are new to the recruitment process. • Develop an understanding of the NSW Health recruitment process.	My Health Learning
HCM ROB – Part 1: ATF creation and management	Webinar/ MS Teams	2 hours	• ATF creation • Adding approvers • ATF monitoring • ATF approval	My Health Learning
HCM ROB – Part 2: Candidate management and shortlisting	Webinar/ MS Teams	2.5 hours	• Viewing requisition and candidate information • Editing a requisition • Shortlisting candidates • Interview scheduling • Attaching documents to the candidate file and requisition	My Health Learning
HCM ROB – Part 3: Data validation and recommendation reports	Webinar/ MS Teams	1.5 hours	• Complete data validation at interview • Reference checks • Generate recommendation report • Approve recommendation report • Offer and assignment task • Next steps in the recruitment process	My Health Learning

Rostering and pay

Your role:	Assist the N/MUM/Nurse Manager with data entry for ward/unit into relevant IT systems. Assist as necessary with the replacement of staff from casual pools etc. as directed by the N/MUM. Liaise with ISLHD Roster Support and/or HealthShare to resolve pay and leave issues.
Systems:	**HealthRoster** Login to HealthRoster via the HealthRoster Intranet page or http://ishr.ros.health.nsw.gov.au/ To login to HealthRoster, use your StaffLink username and password. Note: All users need to complete training prior to access being granted.
Policy Directives and Guidelines:	• Recruitment and Selection of Staff to the NSW Health Service • Awards and Conditions
Accessing training:	• HealthRoster Training Schedule • How to enrol in eLearning modules • How to join a webinar via MS Teams
Getting support:	The ISLHD Roster Support Team provides: • HealthRoster system support • Rostering best practice guidance • Policy and procedure guidance

Getting prepared

1. Complete HealthRoster – Roster Creation BAU training in My Health Learning.

2. Complete HealthRoster Access Form and forward to islhd-roster-support@health.nsw.gov.au.

3. Familiarise yourself with the relevant Awards and Determinations.

HealthRoster system training

The eHealth NSW Service Delivery Training team provide training and materials to staff across NSW Health on how users can utilise the HealthRoster system.

Training is offered and available through a variety of options, methods, and platforms:

- Virtual instructor led classrooms and webinars, bookable in My Health Learning.
- Self-directed eLearning through My Health Learning.
- Quick guide reference materials.

View the HealthRoster Training Schedule or search 'HealthRoster' in My Health Learning to find scheduled state-wide virtual classrooms and webinars.

Training materials

All HealthRoster training materials are located on the HealthShare - HealthRoster training materials page. Further information and resources can be found on the HealthRoster page on the ISLHD Intranet.

Title	Location	Details
User guides	HealthRoster Training Hub	- Basic navigation user guide - Part 1 roster creation management user guide - Part 2 roster creation management user guide - Part 3 roster creation management user guide - Employee Online user guide - Reports user guide - Casual staff management user guide - NHPPD user guide - Medical rostering user guide - Pay Period Confirmation User Guide for Employee
Knowledge articles	HealthRoster Training Hub	**Basic navigation** - Accessing requested reports - Navigating HealthRoster basics - Exporting data using the toolbar - Changing to a compact view roster screen - Show and hide availability roster view **Requests and staffing availability** - Viewing personal details - Adding a demand roster from template - Requesting a HealthRoster demand template update **Roster creation** - Adding a non-productive to assigned shifts - Adding skills to a staff member - Using auto roster - Changing the cost centre of a vacant duty - Changing resourcing unit of a vacant duty **Rosters worked and maintained** - Assigning sleep breaks - Adding locations to a duty

Title	Location	Details
		- [Allocating pager number by position](#)
		- [Assigning cancelled duties to approved non-productives](#)
		- [Assigning overtime to a shift](#)
		- [Assigning allowances to a shift](#)
		- [Deploying a vacant shift using the padlock](#)
		- [Deploying via find person function](#)
		- [Overriding a staff member's grade](#)
		- [Assigning on calls and call backs](#)
		- [Assigning an on call shift on a public holiday](#)
		- [Searching for staff availability](#)
		- [Splitting demand](#)
		- [Assigning public holiday non-productives in bulk](#)
		Finalisation
		- [View post-finalised roster adjustments](#)
		Retrospective adjustments
		- [Make a retrospective adjustment](#)
		- [Viewing retrospective pay changes](#)
		- [Cancelling a non-productive retrospectively](#)
		NHPPD
		- [Viewing the nursing hours ward spot check report](#)
		Casual staff management
		- [Changing casuals availability in Employee Online](#)
		- [Rostering casuals using find person function](#)
		Pay period confirmations
		- [Viewing pay period confirmations](#)

Training offerings

To find available offerings, login to My Health Learning and search for 'HealthRoster'.

Title	Delivery Method	Duration	Learning Outcomes	More details
HealthRoster Roster Creation BAU *It is a mandatory requirement to complete this module before access to HealthRoster is granted.*	Virtual classroom	3.5 hours	- Understanding the HealthRoster process - Create a Roster from a template - Interpret HealthRoster Warnings and Violations - Approve and publish a Roster - Maintain a worked Roster - non-productives - Finalise Roster periods for payment - Access and execute available reports	[My Health Learning](#)

Title	Delivery Method	Duration	Learning Outcomes	More details
			• Request access to the HealthRoster application.	
HealthRoster for existing users	Virtual classroom	3 hours	• Create and maintain non-productives • Person search • Pay flags • Assign skills or locations • Staff outcomes • Vacancy management functions • Employee Online and Pay Period Confirmation • Roster finalisation and retrospective adjustments • Summaries and reports	My Health Learning
HealthRoster reports	Webinar	1 hour	• Essential reporting features and functions • Specific reports to assist with roster reporting and management • Roster Print Reports • Timesheet Reports • Staff outcomes to view staff statistics assisting with rostering decisions • Summaries listing HealthRoster information for viewing and analysis • Person search • Non-productive list • Staff hours • Assigned duties by person	My Health Learning
HealthRoster vacancy management	Webinar	1 hour	• Find person – match available staff for assignment to a shift based on specific criteria or person search to assign • Drag and drop staff deployment (padlock function) • Redeploy – sending staff with an assigned duty to another cost centre • Change resource Unit – sharing a vacant duty for fulfilment by another cost centre • Change cost centre – changing the cost centre on a vacant or assigned duty • Viewing unfilled duties	My Health Learning

Title	Delivery Method	Duration	Learning Outcomes	More details
HealthRoster retrospective adjustments	Webinar	1 hour	- Overview of payroll rostering process date matrix - Retrospective adjustments to duties - Cancel and updating non-productives retrospectively - Retrospective pay changes shortcut (Manager profile only) - Tips to minimise retrospective adjustments and priority pay	My Health Learning
HealthRoster non-productives	Webinar	1 hour	- Create full-day and part-day non-productives including: - Annual leave - Parenting leave - Sick leave - Overtime and sleep break - Workers' compensation leave - Public holiday - Cancel and delete non-productives - Assign multiple non-productives such as public holidays using person search - Solve specific public holiday non-productive scenarios - Non-productive reports - Non-productive list - Non-productive diary - Non-productives with warnings	My Health Learning
HealthRoster overtime essentials	Webinar	1 hour	- Assign overtime - Adjust and remove overtime - Assign call backs to rostered on call duties - Assign call backs where on call has not been rostered - Analyse overtime worked using staff hours summary - Analyse on call worked using assigned duties by person summary	My Health Learning

Reporting

Your role:	Assist the N/MUM/Nurse Manager in producing reports on staffing, performance, finance and quality parameters/indicators.
Systems:	**StaffLink** Login to StaffLink via https://stafflink.hss.health.nsw.gov.au/ Use your standard username and password. **SPaRC Analytics** Access via http://wolobj10:8080/ISLHDSPaRC/ISLHD/SPaRC_Web_Pages/SPaRC_HomePage.htm **Corporate Analytics** (formerly SMRS) Login to Oracle BI Enterprise Dashboards via https://spzbi.cit.health.nsw.gov.au/analytics/ Login using your standard username and password.
Policy Directives and Guidelines:	• Awards and Conditions
Accessing training:	• StaffLink HR/Payroll training
Getting support:	Support is provided by the State-wide Service Desk on 1300 285 533 or log a ticket in SARA.

Getting prepared

1. Arrange for manager to delegate their StaffLink MSS access to you to allow you to run reports in StaffLink.

StaffLink system training

Training is offered and available through a variety of options, methods, and platforms:

- Virtual instructor led classrooms and webinars, bookable in My Health Learning.
- Self-directed eLearning through My Health Learning.
- Quick guide reference materials.

Training materials

All StaffLink user guides are located on the HealthShare StaffLink page.

Title	Location	Details
User guides	StaffLink Training Hub	- Allocating Manager Self Service Delegation in MSS - Recording medicate certificates in MSS - Employee licence information in MSS - Add or update performance review date in MSS - View employee leave accrual as a manager in MSS - View employee professional registration in MSS - StaffLink MSS Reports including: - Performance review date report - Employee screening report - Working visa report - Position detail report - Approaching termination report - Employee approaching contract end date report - Excessive annual leave report - Medical certificate report - Excessive sick leave report

Training offerings

To find available offerings, login to My Health Learning and search for 'reporting.

Title	Delivery Method	Duration	Learning Outcomes	More details
SMR Service Workforce Reporting Learning Pathway – Getting started with SMR Service Workforce Reporting	eLearning	70 mins	In this module you will learn: - Core concepts behind SMR Service Workforce Dashboards. - Basics of navigating and using SMR Service Workforce Dashboards. - How to run and customise a Cost Centre Trend Analysis Report (and reports in general). - How to run and customise an Employee Drill report.	My Health Learning

Purchasing

Your role:	Within the scope of the CSO role and under the direction of the N/MUM, monitor audit and organise the purchase of medical and non-medical supplies and equipment to ensure ongoing supplies and well-maintained equipment that enable staff to perform their day-to-day duties in the delivery of patient care.
Systems:	**R12 Financial and Procurement (iProcurement)** Login to StaffLink via https://stafflink.hss.health.nsw.gov.au/ Use your standard username and password. **Winc** Login to Winc via https://www.winc.com.au/ To gain access, complete Winc Application Form and send form to ISLHD-ProcurementAndSupplyChain@health.nsw.gov.au
Policy Directives and Guidelines:	- NSW Health Procurement - Procurement Policy Framework - ISLHD PCard Policy - Disclosure of Contract Information - Conflicts of Interest and Gifts and Benefits - Official Travel - ISLHD Delegations Framework - Related policies and legislation
Accessing training:	Search for iProcurement in My Health Learning
Getting support:	Contact the Procurement and Supply Chain Team at ISLHD-ProcurementAndSupplyChain@health.nsw.gov.au

Getting prepared

1. Complete iProcurement training modules in My Health Learning.

2. Complete (R12) Financial & Procurement Access Request Form and forward to ISLHD-ProcurementAndSupplyChain@health.nsw.gov.au.

3. Familiarise yourself with the NSW Health Procurement Policy Directive and the ISLHD Delegations Framework.

iProcurement system training

The Procurement State-wide Training team provide training options and materials to staff across the state.

Training is offered and available through a variety of options, methods, and platforms:

- Virtual instructor led classrooms, bookable in My Health Learning.
- Self-directed eLearning through My Health Learning (search for iProcurement).
- Quick guide reference materials.

Training materials

All Procurement training materials are located on the [NSW Health Procurement Portal](). Further information and resources can be found on the [ISLHD Procurement and Supply Chain]() page on the ISLHD Intranet.

Title	Location	Details
User guides	Procurement and Supply Chain - Tools and Resources Intranet page	- Adding attachments to requisitions - Amending an existing PO - Amending OLR cost centre or delivery department - Amending the OLR approvers - Amending preferences - Approvers Review of OLR - Cancellation of Purchase Order - Completion of R12 Oracle Application form - Completion of WINC Application form - Cost Centre Inventory Listing from Oracle - Descriptions in iProcurement - Engaging a Consultant under the pre-qualifications scheme (SCM0005) - Engaging a Contingent Worker under the prequalification scheme (SCM0007) - Entering freight charges in R12 Oracle - Estimate Contract Value.pdf - Goods Return - Invoice against requisitions - iProcurement Audit reviews - MWE Requisition process - Ordering FREE OF CHARGE items - Ordering via Imprest and Scanner - OLR Approval Responses - OLR attachment checklist - Procuring from Contracts - Quote requirements in iProcurement - Raising a Free Text (Non-Catalogue) Requisition - Raising an Inventory Order - Receipting a Purchase Order - Request for Quote - Running a Health Expenditure Watch Report (HEWR) - Searching and Adding Vendors - Searching for requisitions - Setting up a vacation rule - Sourcing information from an invoice - Sourcing charging details on an existing purchase order

Title	Location	Details
		• Sourcing information on PO • Standing Orders • Un-receipting a Purchase Order (PO) • Workflow Mailers

Training offerings

To find available offerings, login to My Health Learning and search for 'iProcurement'.

Training by the ISLHD Procurement and Supply Chain Team can be requested by completing the Training Request Form and submitting to ISLHD-ProcurementandSupplyChain@health.nsw.gov.au.

Title	Delivery Method	Duration	Learning Outcomes	More details
iProcurement Learning Pathway *It is a mandatory requirement to complete these modules before access to iProcurement is granted.*	eLearning	Various	The iProcurement Learning Pathway contains five modules covering all aspects of requisitioning including: • iProcurement requisitioning • Editing and updating requisitions • iProcurement approving • iProcurement receiving • iProcurement miscellaneous At the completion of all training topics the user will have a full and comprehensive understanding of how the create, edit, manage, and receive requisitions and will have the opportunity to receive/print a certificate of completion.	My Health Learning
iProcurement training	MS Teams	4.5 hours	This training has been developed to assist new and existing iProcurement users of Oracle R12 to order, approve and receive goods and services. • Creating requisitions • Notifications • Receiving • Approval • PO inquiry	My Health Learning

Documentation and records management

Your role:	- Support and participate in the administrative aspects of activities such as numerical profiling, quality accreditation processes and incident management. - Follow local, State, and national protocols pertaining to the retention, disposal and storage of medical records. - Perform minute taking tasks, circulation of minutes and record keeping of files as required.
Systems:	**HPE Content Manager (TRIM)** HPE Content Manager is a subscription-based software program and is installed on individual computers. To obtain a licence, you will need to attend training.
Policy Directives and Guidelines:	State Records Act 1998
Accessing training:	Contact the RMU Helpdesk to arrange training and access to HPE Content Manager (TRIM).
Getting support:	Contact the Records Management Team at ISLHD-RMUHelpdesk@health.nsw.gov.au.

Getting prepared

1. Contact the RMU Helpdesk to arrange training and access to HPE Content Manager (TRIM).

HPE Content Manager system training

Training offerings - system

The ISLHD Record Management (RMU) team provide training and supporting materials to staff.

Contact the RMU Helpdesk to arrange access to HPE Content Manager (TRIM).

Training offerings - other

Title	Delivery Method	Duration	Learning Outcomes	More details
Corporate records management	eLearning	15 mins	By the end of this module the learner will be able to: • follow local guidelines and procedures to create accurate corporate records • manage corporate records within official recordkeeping or compliant business information systems • store, archive or dispose of corporate records to meet business needs and legislative requirements • protect and ensure the security of corporate records.	My Health Learning
Minute taking	eLearning	10-15 mins	On completion of this module you will be able to: • Identify the roles and responsibilities of the minute taker including legislative responsibilities • Take meeting notes and record meeting minutes, using Plain English and active voice, that accurately reflect the discussion and actions that occurred • Identify and use appropriate technology, templates and checklists for minute taking • Distribute minutes appropriately.	My Health Learning

Communication

Your role:	• Provide word processing and other documentation support including drafting and preparing complex correspondence accurately and clearly. • Produces a range of standard written documents, providing clear information and using language appropriate to the audience. • Speaks clearly and courteously and actively listens to others. • Undertakes straightforward negotiations with key stakeholders regarding timelines for service delivery.
Systems:	**Microsoft Office – Word, Excel, Powerpoint, Outlook** Access via Start menu on PC. **MS Teams** Access via Start menu on PC.
Policy Directives and Guidelines:	• NSW Health Code of Conduct • Communications - Use & Management of Misuse of NSW Health Communications Systems
Accessing training:	• Go to Microsoft Support website to access Microsoft Office training videos – login using your usual work login • Search for Communication in My Health Learning
Getting support:	ISLHD Workforce Development Unit – ISLHD-WorkforceDevelopment@health.nsw.gov.au ISLHD Interpreter Service – 1800 247 272

Getting prepared

1. Complete MS Teams modules in My Health Learning.

2. Familiarise yourself with the NSW Health Code of Conduct and Communications - Use & Management of Misuse of NSW Health Communications Systems.

Microsoft Office training

Training is offered and available through a variety of options, methods, and platforms:

- Virtual instructor led classrooms, bookable in My Health Learning.
- Self-directed eLearning through My Health Learning and Microsoft Office Support.

Training offerings

Title	Delivery Method	Duration	Learning Outcomes	More details
MS Teams Module 1 - essentials	MS Teams	1 hour	This course provides an overview of Teams meetings and covers the most essential features such as chat, audio/video calls, audio conferencing, content sharing as well as creating and managing standard Teams meetings.	My Health Learning
MS Teams Module 2 - advanced	MS Teams	1 hour	This course focuses on more advanced Teams conferencing functions such as breakout rooms, recording and transcripts and meeting etiquette, roles, and responsibilities.	My Health Learning
MS Teams essential and advanced features	eLearning	20 mins	These modules will provide you an overview of MS Teams Essential and Advanced meeting, calling and chat features that are most asked about such as: • Chat, audio/video calls and audio conferencing, • creating and managing standard Teams meetings and instant Teams meetings, • collaborating on files during meetings, • MS Teams Breakout Rooms and engaging with externals.	My Health Learning
Microsoft Outlook	Video	Various	Includes videos for: • Create and send email • Manage email • Organise your inbox • Contacts and tasks • Calendar	Microsoft Support Note: To access the training you may need to sign in using your work login details

Title	Delivery Method	Duration	Learning Outcomes	More details
Microsoft Office – Excel	Video	Various	Includes videos for: • Intro to Excel • Rows and columns • Cells • Formatting • Formulas and functions • Tables • Charts • PivotTables	[Microsoft Support](#) Note: To access the training you may need to sign in using your work login details
Microsoft Office – Word	Video	Various	Includes videos for: • Write and edit • Format text • Lay out pages • Insert tables, pictures and watermarks • Save and print	[Microsoft Support](#) Note: To access the training you may need to sign in using your work login details
Microsoft Office – Powerpoint	Video	Various	Includes videos for: • Slides and layouts • Text and tables • Pictures and graphics • Present slideshows • Animation, video and audio	[Microsoft Support](#) Note: To access the training you may need to sign in using your work login details

Interpersonal training

Training offerings

Title	Delivery Method	Duration	Learning Outcomes	More details
CORE Chat	Virtual	4 hours	Participants will be able to: • Demonstrate an understanding of the four CORE values in the context of working within the NSW Health system • Appreciate the importance of a set of values to the functioning of a high-performance team and positive workplace culture • Identify and model behaviours in the workplace that support the NSW Health CORE values • Demonstrate communication skills that enable solution-based conversations and positive interactions when giving and receiving feedback	My Health Learning
Easy guide to writing	eLearning	20 mins	On completion of this module you will be able to: • Recognise appropriate language to improve written communication. • Use a systematic approach to ensure information is easily understood. • Practice correct use of punctuation.	My Health Learning
First contact – customer service	eLearning	20 mins	On completion of this program you will be able to: • Recognise various types of customers • Identify customer's needs • Develop communication skills • Understand how to keep customers informed of progress • Reflect on quality of customer service.	My Health Learning

Title	Delivery Method	Duration	Learning Outcomes	More details
Business writing in Healthcare	eLearning	-	This web-based resource will assist you to: • Identify the purpose of ministerials, briefing notes, letters, emails and memos • Use the appropriate format for writing executive correspondence • Effectively communicate the main message and the essential details • Construct clear concise communique when corresponding with the Ministry of Health and other pillars, other staff and the public.	My Health Learning