



ClubsHR Manual

A central repository for all your employee management records, accessible
anywhere and anytime

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Welcome message

Welcome to ClubsHR!

ClubsHR is cloud-based human resources management (HRM) software designed specifically for the Club Industry, backed by Industry expertise.

This Operations manual will cover the following features and will be updated as ClubsNSW refinements happen to the system.

- Onboarding
- Rostering (lite version)
- Case Management
- Reports
- Document Library

From any page in the user-friendly HRM system you can add or manage staff, incidents, reviews, rosters, and documents. The Library contains wage rates and a copy of the Registered and Licensed Clubs Award, and you can update your own Staff Handbook, Enterprise Agreements or organisation chart for easy access.

ClubsHR has been built with the flexibility to customise it to your own Club, for example with Department names, adding sub-clubs or other business centres (such as a gym). This manual includes 'Customisation Options' throughout, highlighting areas they can be changed.

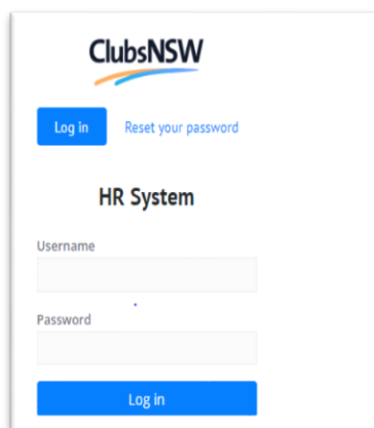
ClubsHR is a fully supported system, and will have feature upgrades and improvements made as the it develops. You will receive a notification when upgrades are happening as your site may need to be offline for a short period of time.

If you have any technical difficulties please email clubshr@clubsnswhelp.zendesk.com.

For specific workplace relations or human resources advice, please call the Member Enquiries Centre on 1300 730 001 or email enquiries@clubsnsw.com.au.

Login

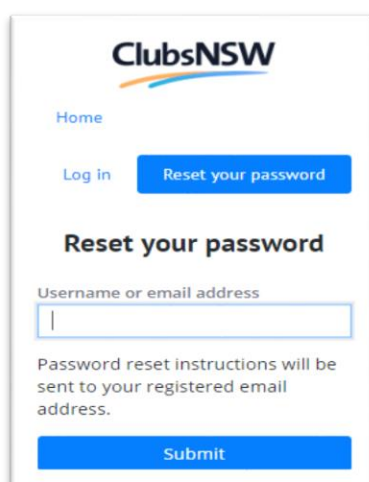
Log in using Username or email address and enter your password



The screenshot shows the ClubsNSW HR System login page. At the top left is the ClubsNSW logo. Below it are two buttons: "Log in" and "Reset your password". The main heading is "HR System". There are two input fields: "Username" and "Password". At the bottom is a blue "Log in" button.

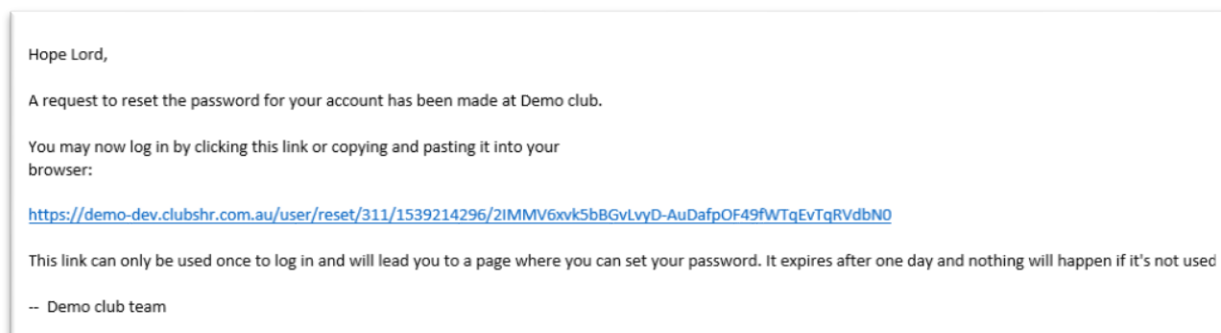
Forgot Password

In case you have forgotten your login details, click on [Reset your password](#) and enter your email address.



The screenshot shows the ClubsNSW "Reset your password" page. At the top left is the ClubsNSW logo. Below it are two buttons: "Home" and "Reset your password". The main heading is "Reset your password". There is one input field labeled "Username or email address". Below the input field is a paragraph: "Password reset instructions will be sent to your registered email address." At the bottom is a blue "Submit" button.

Once you have received the email, click on the [link](#) to reset your password.



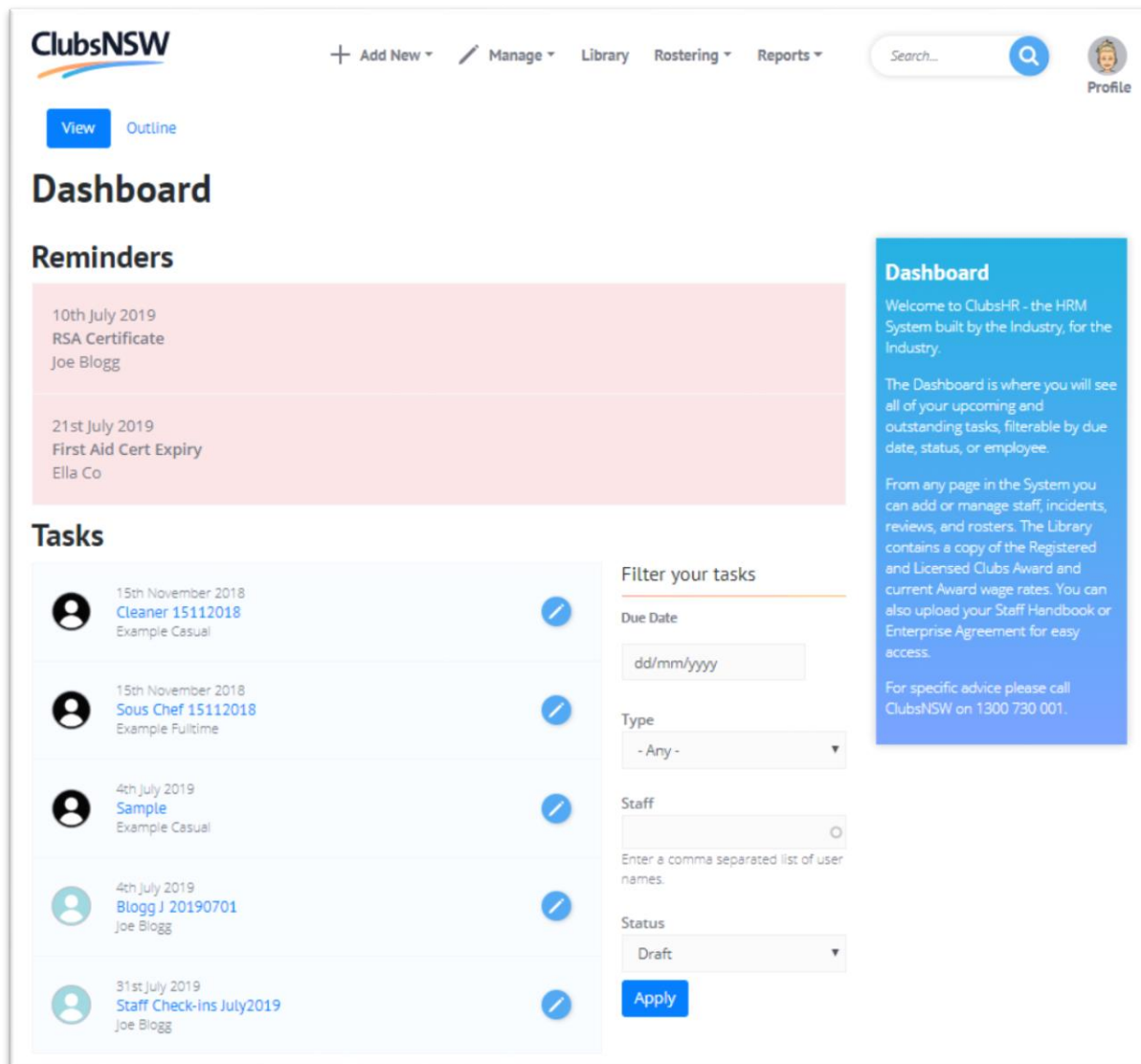
The screenshot shows an email template for password reset. It starts with "Hope Lord," followed by "A request to reset the password for your account has been made at Demo club." Then it says "You may now log in by clicking this link or copying and pasting it into your browser:" followed by a blue hyperlink: <https://demo-dev.clubshr.com.au/user/reset/311/1539214296/2IMMV6xvkSbBGvLvyD-AuDafpOF49fWTqEvTqRVdbN0>. Below the link is a paragraph: "This link can only be used once to log in and will lead you to a page where you can set your password. It expires after one day and nothing will happen if it's not used". At the bottom is "– Demo club team".

Help

Further assistance please contact the Member Enquiries Centre on 1300 730 001 during business hours or, email clubshr@clubsnswhelp.zendesk.com

Dashboard view

Let's get you familiar with your dashboard view.



The screenshot shows the ClubsNSW dashboard interface. At the top, there is a navigation bar with the ClubsNSW logo, a search bar, and a profile icon. Below the navigation bar, there are tabs for 'View' and 'Outline'. The main content area is divided into several sections:

- Reminders:** A list of reminders for employees, including '10th July 2019 RSA Certificate Joe Blogg' and '21st July 2019 First Aid Cert Expiry Ella Co'.
- Tasks:** A list of tasks for employees, including '15th November 2018 Cleaner 15112018 Example Casual', '15th November 2018 Sous Chef 15112018 Example Fulltime', '4th July 2019 Sample Example Casual', '4th July 2019 Blogg J 20190701 Joe Blogg', and '31st July 2019 Staff Check-ins July2019 Joe Blogg'.
- Filter your tasks:** A section with filters for 'Due Date' (dd/mm/yyyy), 'Type' (- Any -), 'Staff' (Enter a comma separated list of user names), and 'Status' (Draft). An 'Apply' button is located at the bottom of this section.
- Dashboard:** A blue box on the right side of the dashboard containing a welcome message and instructions on how to use the system.

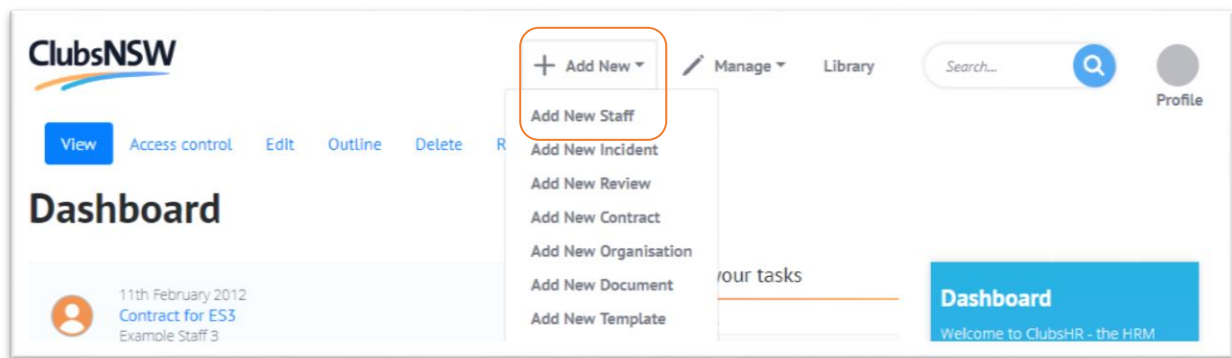
Your Dashboard includes all upcoming and outstanding tasks, which can be filtered by due date, type, employee, or status. Reminders are set in an employee's work details and can be used for important action items such as expiring qualifications or certificates. Reminders will appear four weeks in advance and will not go away until the Reminder is updated in the employee's profile [see *Work Details below*].

As a HR Manager, your view will differ to a user who is a staff member or other type of manager. HR Managers are super users and will have access to all fields within ClubsHR.

Onboarding

Adding New Staff Member

Top of the screen click on **+ Add New** and select **Add New Staff member**



Fields required:

- First Name
- Last Name
- Email address
- Username
- Password (*include at least 8 characters. 1 uppercase. 1 lowercase, 1 number & 1 special character*)
- Status: Active
- Notify user of new account (optional, but need email)

Note: Usernames and email addresses need to be unique

Role options will appear when you create any new user.



The 'HR Manager' role gives the user access to the entire system and all of the employee data. ClubsNSW recommends using discretion when giving multiple user's this level of access. The 'Rosterer' role allows access to the Roster section of ClubsHR only, for Clubs who allow Department Heads or Duty Managers perform this function.

Once you have created the user i.e. BBuilder you can edit details from their profile.

Edit user details – quick launch

Click on the **Pencil Icon** to edit the following details;

- Checklist

- Work Details
- Personal Details
- Financial details

Checklist

When editing a user's checklist – select which items have been completed or provided and **Save**

Home » BBuilder » BBuilder

Onboarding

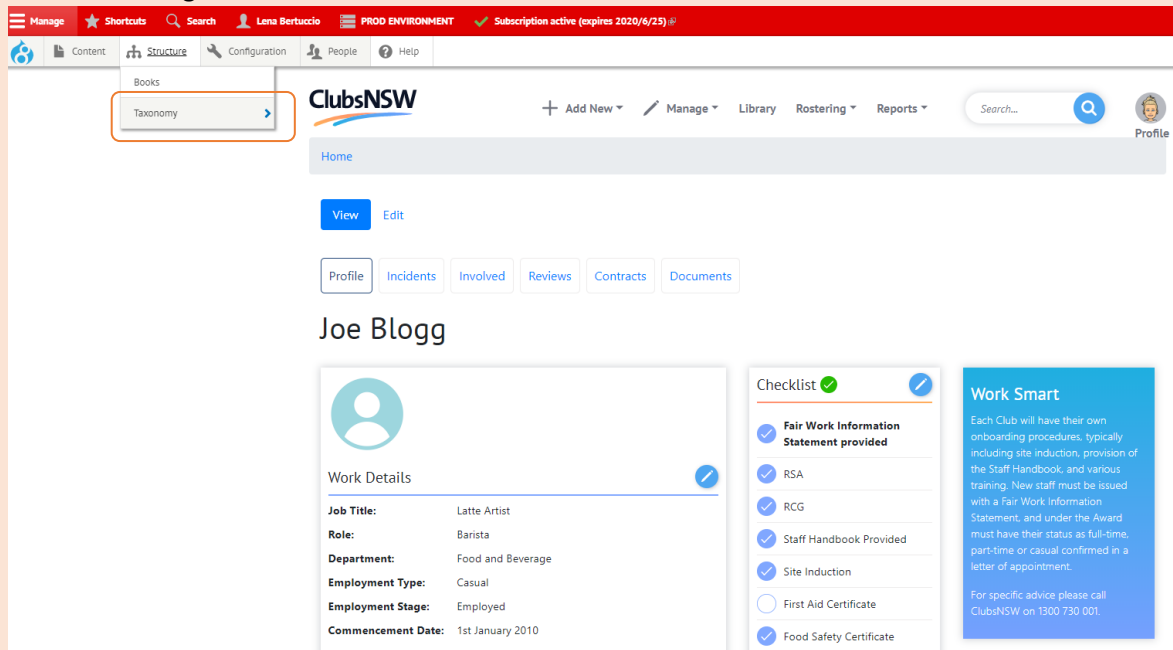
- Fair Work Information Statement provided
- RSA
- RCG
- Staff Handbook Provided
- Site Induction
- First Aid Certificate
- Food Safety Certificate
- AML/CTF Training
- Armed Robbery Training
- Bully/Harassment Training
- WHS Training

Check off the actions which have occurred.

[Save](#) [Cancel account](#)

CUSTOMISATION OPTION – Standard Checklists

To add your own terms to the Checklist, or remove unnecessary items, select **Taxonomy** then for the Onboarding Checklist click **List Terms**:



The screenshot shows the ClubsNSW web application interface. At the top, there is a navigation bar with 'Manage', 'Shortcuts', 'Search', and user information 'Lena Bertuccio'. Below this is a secondary navigation bar with 'Content', 'Structure', 'Configuration', 'People', and 'Help'. The main content area shows the 'ClubsNSW' logo and a search bar. A dropdown menu is open under 'Structure', highlighting 'Taxonomy'. Below this, there are buttons for 'View' and 'Edit'. A 'Profile' section is visible with tabs for 'Profile', 'Incidents', 'Involved', 'Reviews', 'Contracts', and 'Documents'. The 'Joe Blogg' profile is displayed, showing 'Work Details' such as Job Title (Latte Artist), Role (Barista), Department (Food and Beverage), Employment Type (Casual), Employment Stage (Employed), and Commencement Date (1st January 2010). To the right of the profile is a 'Checklist' section with a green checkmark and a pencil icon. The checklist items are: 'Fair Work Information Statement provided' (checked), 'RSA' (checked), 'RCG' (checked), 'Staff Handbook Provided' (checked), 'Site Induction' (checked), 'First Aid Certificate' (unchecked), and 'Food Safety Certificate' (checked). Further right is a 'Work Smart' section with a blue background and text explaining onboarding procedures and providing contact information for ClubsNSW.

Taxonomy

Home » Administration » Structure

Taxonomy is for categorizing content. Terms are grouped into vocabularies. For example, a vocabulary called "Fruit" would contain the terms "Apple" and "Banana".

[+ Add vocabulary](#)

| VOCABULARY NAME | DESCRIPTION | OPERATIONS |
|--------------------------|-------------------------|------------|
| + Department | | List terms |
| + Discipline Conduct | | List terms |
| + Discipline Performance | | List terms |
| + Employment Stage | | List terms |
| + Employment Type | | List terms |
| + Gender | | List terms |
| + Onboarding Checklist | | List terms |
| + Award | | List terms |
| + Classification | The job classification. | List terms |
| + Incident Checklist | | List terms |
| + Incident Type | | List terms |
| + Involvement type | | List terms |
| + Job Role | | List terms |

Select **+ Add Term** to create new checklist items, or **Edit** to remove.

Onboarding Checklist

List Edit

Home » Administration » Structure » Taxonomy » Edit Onboarding Checklist

You can reorganize the terms in *Onboarding Checklist* using their drag-and-drop handles, and group terms under a parent term by sliding them under and to the right of the parent.

[+ Add term](#)

| NAME | OPERATIONS |
|--|------------|
| + Fair Work Information Statement provided | Edit |
| + RSA | Edit |
| + RCG | Edit |
| + Staff Handbook Provided | Edit |
| + Site Induction | Edit |
| + First Aid Certificate | Edit |


Personal, Work and Financial Details

This will allow you to edit the users contact information, medical history, contract, emergency contact, superannuation details and inventory. All fields are required for document generation and employee management in other areas of ClubsHR. They can be edited by clicking on the **Pencil Icon** at any time.

Hint: If there is no medical history, put 'Nil'. If there is history, you can include supporting documentation in Notes section

Profile
Incidents
Involved
Reviews
Contracts
Documents

Joe Blogg



Work Details

Job Title: Latte Artist

Role: Barista

Department: Food and Beverage

Employment Type: Casual

Employment Stage: Employed

Commencement Date: 1st January 2010

Qualification Period: 6 months

Staff ID: 99

Staff ID issued: 1st January 2010

Contract: [Blogg J 20190701](#)

Personal Details


Gender: Male

Date of Birth: 2nd February 1990

Address: 12 Drury Lane
Muffintown NSW 2000
Australia

Checklist ✔

- Fair Work Information Statement provided
- RSA
- RCG
- Staff Handbook Provided
- Site Induction
- First Aid Certificate
- Food Safety Certificate
- AML/CTF Training
- Armed Robbery Training
- Bully/Harassment Training
- WHS Training



Work Smart

Each Club will have their own onboarding procedures, typically including site induction, provision of the Staff Handbook, and various training. New staff must be issued with a Fair Work Information Statement, and under the Award must have their status as full-time, part-time or casual confirmed in a letter of appointment.

For specific advice please call ClubsNSW on 1300 730 001.

First Name

Middle name

Last name *

ADDRESS

Contact address.

Country

- None -

Contract

The current contract.

Date of Birth

Gender *

- Select a value -

Inventory

B I [icons] Normal Source

body p

Text format Basic HTML

inform details, etc.

emergency Contact Name

emergency Contact Phone

emergency Contact Relationship

CUSTOMISATION OPTION - Departments

To rename the Departments to suit your Club, in the top bar go to **Manage** → **Structure** → **Taxonomy**, then select **Department**:

Manage | Shortcuts | Search | Lena Bertuccio | PRODUCTION ENVIRONMENT | Subscription active (expires 2020/6/25)

Content | Structure | Configuration | People | Help

Books
Taxonomy

ClubsNSW | + Add New | Manage | Library | Rostering | Reports | Search... | Profile

Home

View | Edit

Profile | Incidents | Involved | Reviews | Contracts | Documents

Joe Blogg

Work Details

Job Title: Latte Artist
Role: Barista
Department: Food and Beverage
Employment Type: Casual
Employment Stage: Employed
Commencement Date: 1st January 2010
Qualification Period: 6 months

Checklist

- Fair Work Information Statement provided
- RSA
- RCG
- Staff Handbook Provided
- Site Induction
- First Aid Certificate
- Food Safety Certificate

Work Smart

Each Club will have their own onboarding procedures, typically including site induction, provision of the Staff Handbook, and various training. New staff must be issued with a Fair Work Information Statement, and under the Award must have their status as full-time, part-time or casual confirmed in a letter of appointment.

For specific advice please call ClubsNSW on 1300 730 001.

Taxonomy

Home » Administration » Structure

Taxonomy is for categorizing content. Terms are grouped into vocabularies. For example, a vocabulary called "Fruit" would contain the terms "Apple" and "Banana".

[+ Add vocabulary](#)

| VOCABULARY NAME | DESCRIPTION | OPERATIONS |
|--------------------------|-------------------------|------------|
| + Department | | List terms |
| + Discipline Conduct | | List terms |
| + Discipline Performance | | List terms |
| + Employment Stage | | List terms |
| + Employment Type | | List terms |
| + Gender | | List terms |
| + Onboarding Checklist | | List terms |
| + Award | | List terms |
| + Classification | The job classification. | List terms |
| + Incident Checklist | | List terms |
| + Incident Type | | List terms |
| + Involvement type | | List terms |
| + Job Role | | List terms |

Select **+ Add Term** to create new Department name, or **Edit** to update or remove.

Department

List Edit

Home » Administration » Structure » Taxonomy » Edit Department

You can reorganize the terms in *Department* using their drag-and-drop handles, and group terms under a parent term by sliding them under and to the right of the parent.

[+ Add term](#)

| NAME | OPERATIONS |
|-------------------|------------|
| Administration | Edit |
| Cafe | Edit |
| Cellar | Edit |
| Child Care | Edit |
| Food and Beverage | Edit |
| Functions | Edit |
| Gaming | Edit |
| Greens | Edit |
| Gym | Edit |
| House-keeping | Edit |

Save Reset to alphabetical

Superannuation

In the employee's financial details, you can input their superannuation fund information. If an employee does not choose a superannuation fund they can be set up with Club Plus Superannuation by following the link.

Note: When an employee who is a member of Club Plus Superannuation leaves the Club and their account is deactivated, an automatic notification will be sent to Club Plus Superannuation.

Reminders

Reminders can be added for any staff member to suit the needs of the Club; the most common examples are expirations of Responsible Service of Alcohol or Responsible Conduct of Gambling certificates as an expired certificate will impact the employee's ability to work.

To add a reminder, go to **Work Details**, at the bottom of the page you can add or remove Reminders. To add a Reminder, insert the name of the qualification or certificate and the expiry date (Reminders will display on the dashboard for four weeks prior to the expiration date), then click **Save**.

REMINDERS

+ Reminder Remove

Reminder

Name of the item that a reminder needs to set for.

Expiry Date

This is for when the item expires.

+ Enter certification and training qualifications here with their expiry date to be notified.

Roles

Rosterer

[Cancel account](#)

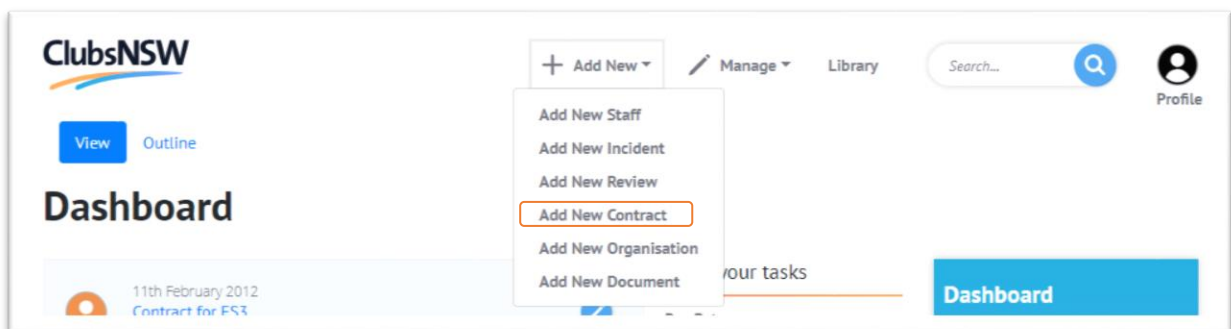
Employment Contracts

Create new contract

ClubsHR works with the concept of multiple contracts for one employee – for example, through status transfer, promotion, or temporary positions such as parental leave cover.

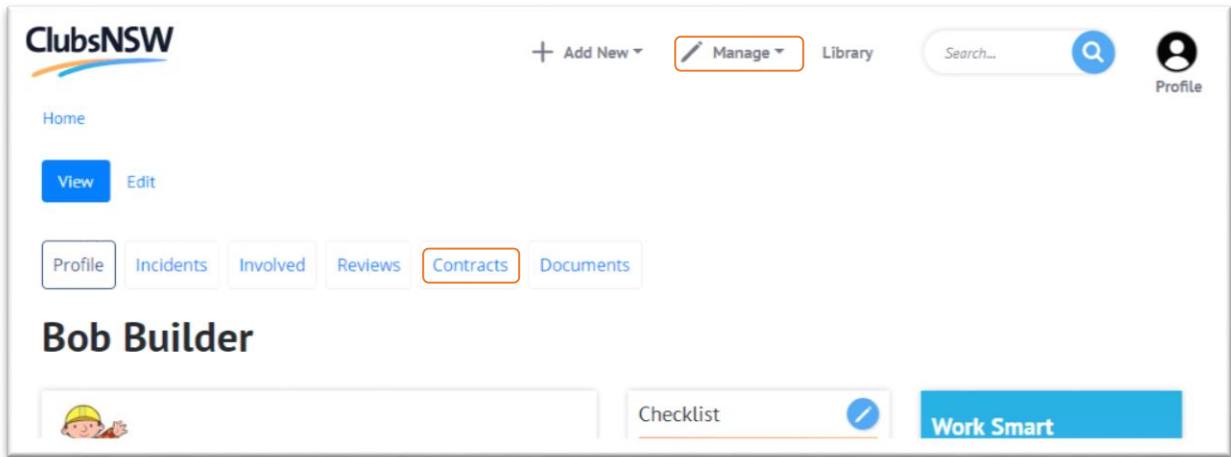
Note: double entering the contract data is something we will look to improve. However, at this stage it is necessary to accommodate employees who may have more than one contract.

Method 1: **Add new**



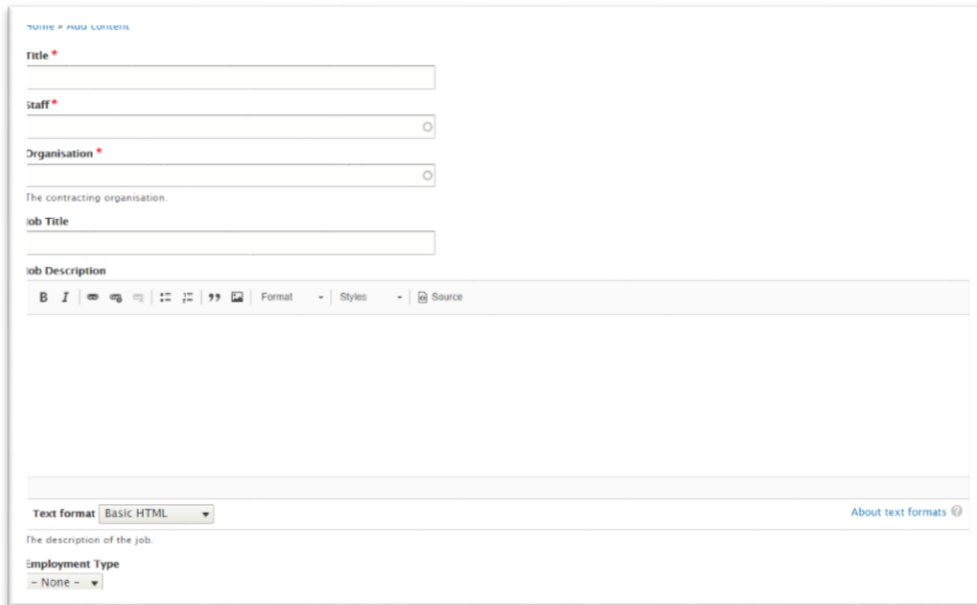
The screenshot shows the ClubsNSW dashboard interface. At the top left is the ClubsNSW logo. Below it are 'View' and 'Outline' buttons. The main heading is 'Dashboard'. On the right side, there is a navigation bar with '+ Add New', 'Manage', and 'Library' options. A search bar and a profile icon are also present. A dropdown menu is open under '+ Add New', listing several options: 'Add New Staff', 'Add New Incident', 'Add New Review', 'Add New Contract' (which is highlighted with an orange box), 'Add New Organisation', and 'Add New Document'. At the bottom left, there is a date and time indicator: '11th February 2012 Contract for FS3'. At the bottom right, there is a 'Dashboard' button.

Method 2: **Manage Staff**



The screenshot shows the ClubsNSW web interface. At the top left is the ClubsNSW logo. To the right are navigation options: '+ Add New', 'Manage' (highlighted with an orange border), and 'Library'. A search bar with 'Search...' and a magnifying glass icon is next to a 'Profile' button. Below this is a 'Home' section with 'View' and 'Edit' buttons. A horizontal menu contains 'Profile', 'Incidents', 'Involved', 'Reviews', 'Contracts' (highlighted with an orange border), and 'Documents'. The main heading is 'Bob Builder' with a small cartoon character icon. At the bottom right, there is a 'Checklist' button with a pencil icon and a blue 'Work Smart' button.

Enter all the details:



The screenshot shows a form titled 'TITLE = NEW CONTRACT'. It contains the following fields and options:

- Title ***: A text input field.
- Staff ***: A dropdown menu with a circular arrow icon.
- Organisation ***: A dropdown menu with a circular arrow icon.
- The contracting organisation.
- Job Title**: A text input field.
- Job Description**: A rich text editor with a toolbar containing icons for Bold (B), Italic (I), text color, background color, bulleted list, numbered list, link, unlink, and source. The text 'Format - Styles - Source' is visible.
- Text format**: A dropdown menu currently set to 'Basic HTML'. A link 'About text formats' is to the right.
- The description of the job.
- Employment Type**: A dropdown menu currently set to 'None'.

Start Date

The start date of the contract.

Accept Date

The date the contract was accepted.

Expire Date

The expire date for the contract.

Annual salary
 \$

Hourly rate
 \$

Payment period

Award

Attachments
 No file chosen
One file only.
256 MB limit.
Allowed types: txt pdf doc docx csv xls xlsx.

Signed contract
 No file chosen
The signed copy of the contract.
One file only.
256 MB limit.
Allowed types: niff

Hint: ClubsNSW templates to not include an expiry date, however including an annual or three-yearly expiry will prompt the Club to revisit documents

Hint: to get the hourly rate from an annual salary, divide the salary by 52.1428 and then 38

For casual's, put 00.00

Click **Save** and the following page will appear; click **Create document** to generate the PDF.

Home > BBuilder

BBuilder FT

| | |
|------------------|--|
| Organisation: | Example Organisation |
| Staff: | Bob Builder |
| Job Title: | Carpenter |
| Job Description: | Fixing |
| Employment Type: | Full Time |
| Classification: | Handyperson |
| Accept Date: | 1st November 2018 |
| Start Date: | 1st November 2018 |
| Expire Date: | 31st October 2021 |
| Hourly rate: | \$20.91 |
| Payment period: | fortnightly |
| Award: | Registered and Licensed Clubs Award 2010 |
| Annual salary: | \$41,431.63 |
| Status: | Draft |

Create Documents

Contract

Give the document a title and select the appropriate template. In **Source Objects** select the employee and the contract you wish to generate.

▼ SOURCE REFRESH

Pressing this button will overwrite Source field based on the template. ALL EXISTING CONTENT WILL BE LOST!

Refresh document source

▼ SOURCE OBJECTS

Staff

The staff member.

Contract

Incident

Performance Review

Save

Then click **Refresh document source** to load the template.

Create Document

Home » Add content

Title *

Template *

- Select a value -
- Full time contract
- Casual contract
- Letter of offer
- Letter of suspension
- Management contract
- Part time contract
- Part time hours
- Individual flexibility agreement
- Confirmation of endorsement

Text format: Restricted HTML [About text formats](#)

SOURCE REFRESH
 Pressing this button will overwrite Source field based on the template. ALL EXISTING CONTENT WILL BE LOST!

SOURCE OBJECTS

Carefully read through document to ensure correct contract details have loaded, and edit all sections that are contained in `[[double brackets]]`. The document will not generate if any double brackets remain.


Click **Save**

A preview of the document will appear, and the PDF will be downloadable by clicking the **arrow**.

Home » BBuilder

[View](#) [Edit](#) [Outline](#) [Delete](#)

BBuilder FT

Download PDF 

1. Parties

This Agreement is made between:

Example Organisation of 123 Eu Oratio Fabulas, Audire Vis Ut in the State of NSW(the Club);

and

Bob Builder of In the State of (the Employee).

2. Appointment and Term

2.1 The Club appoints you, and you agree to serve, in the full-time position of Carpenter with the classification level of Handyperson under the Registered and Licensed Clubs Award 2010, or such other position agreed between the parties in writing from time to time.

2.2 Your employment shall commence on 01/11/2018 and continue until terminated in accordance with this Agreement.

2.3 The location of your work shall be at the Club, or such other location as directed by the Club. You may be required to undertake travel as part of your duties.

2.4 The terms and conditions of your employment shall be governed by this employment agreement (the Agreement), the Registered and Licensed Clubs Award 2010 and applicable legislation. This includes, but is not limited to, the National Employment Standards in the Fair Work Act 2009 (Cth).

3. Hours

Once document has been generated, change status in Contract to **In progress**.

Print or email contract to employee, have them sign and return it. Signed contracts can be scanned and then uploaded in the **Contract**, and status changed to **Signed**.

The date the contract was accepted.

Expire Date

The expire date for the contract.

Annual salary

\$

Hourly rate

\$

Payment period

Award

Attachments

No file chosen

One file only.
256 MB limit.
Allowed types: txt pdf doc docx csv xls xlsx.

Signed contract

No file chosen

The signed copy of the contract.
One file only.
256 MB limit.
Allowed types: pdf.

Status *


Due date *

[Delete](#)

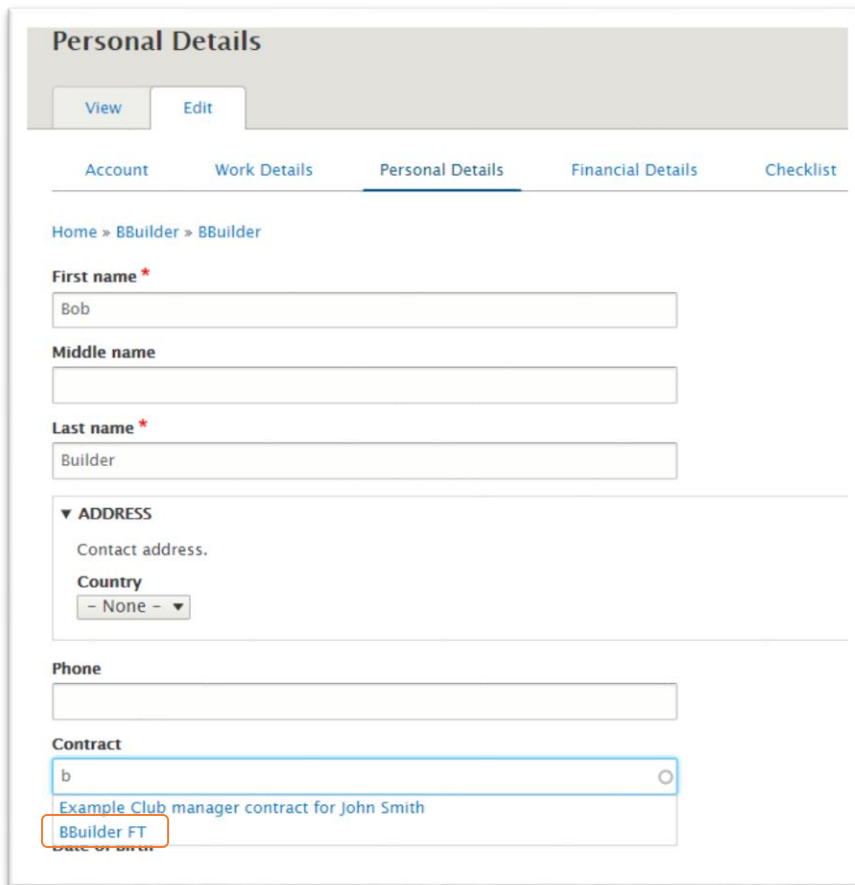
Home > BBuilder

[Edit](#) [Outline](#) [Delete](#)

BBuilder FT

| | |
|------------------|---|
| Organisation: | Example Organisation |
| Staff: | Bob Builder |
| Job Title: | Carpenter |
| Job Description: | Fixing |
| Employment Type: | Full Time |
| Classification: | Handyperson |
| Accept Date: | 1st November 2018 |
| Start Date: | 1st November 2018 |
| Expire Date: | 31st October 2021 |
| Hourly rate: | \$20.91 |
| Payment period: | fortnightly |
| Award: | Registered and Licensed Clubs Award 2010 |
| Annual salary: | \$41,431.63 |
| Status: | Signed |
| Signed contract: |  BBuilder SIGNED |

The **contract** can also now be entered into the user's profile.



Personal Details

View Edit

Account Work Details **Personal Details** Financial Details Checklist

Home » BBuilder » BBuilder

First name *
Bob

Middle name

Last name *
Builder

ADDRESS
Contact address.
Country
- None -

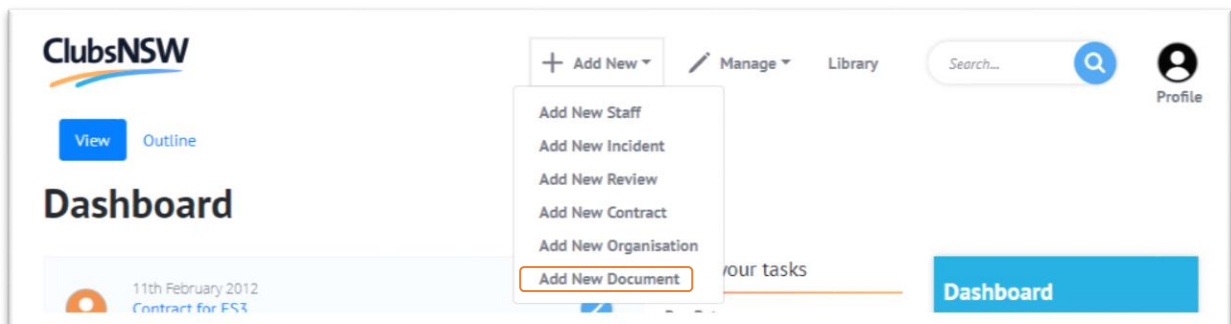
Phone

Contract
b
Example Club manager contract for John Smith
BBuilder FT

Other documents

The process above also applies to other template documents in the system, for example warning letters, termination letters, meeting requests.

Method 1: Add new



ClubsNSW

+ Add New Manage Library Search... Profile

View Outline

Dashboard

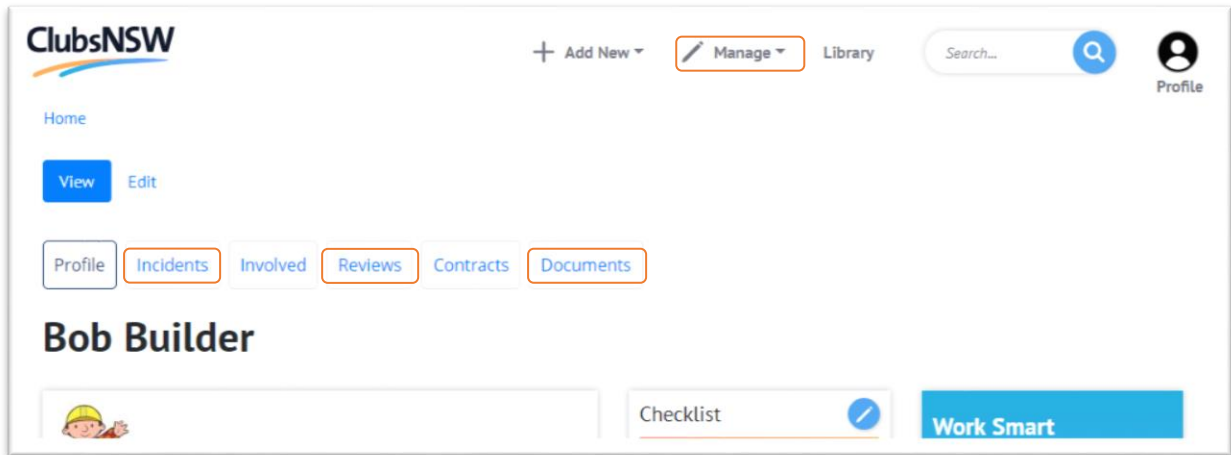
11th February 2012
Contract for FS3

our tasks

Dashboard

- Add New Staff
- Add New Incident
- Add New Review
- Add New Contract
- Add New Organisation
- Add New Document**

Method 2: Manage Staff



ClubsNSW

+ Add New Manage Library Search... Profile

Home

View Edit

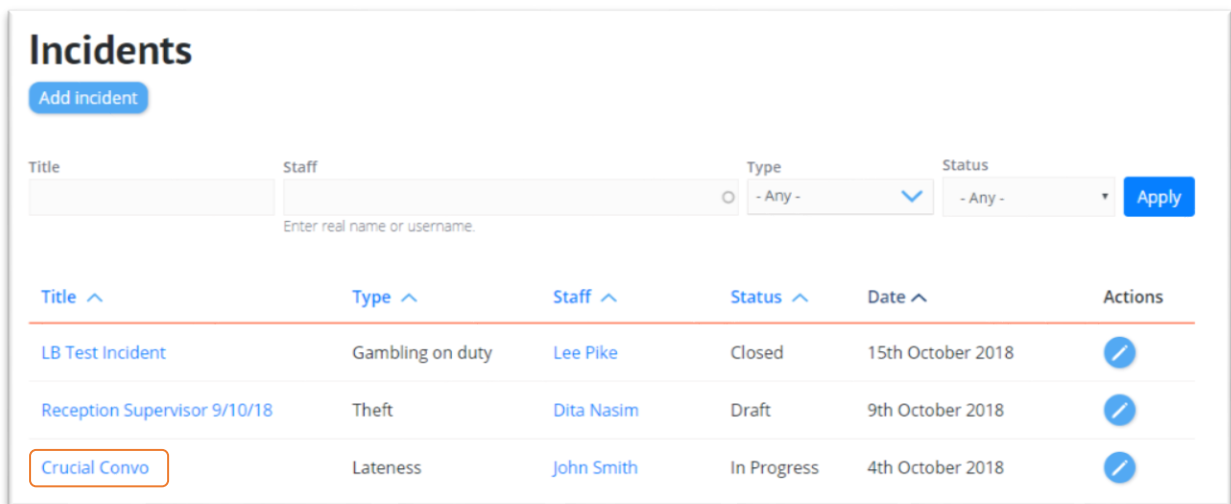
Profile Incidents Involved Reviews Contracts Documents

Bob Builder

Checklist Work Smart

Example, for an Incident:

Select an Incident



Incidents

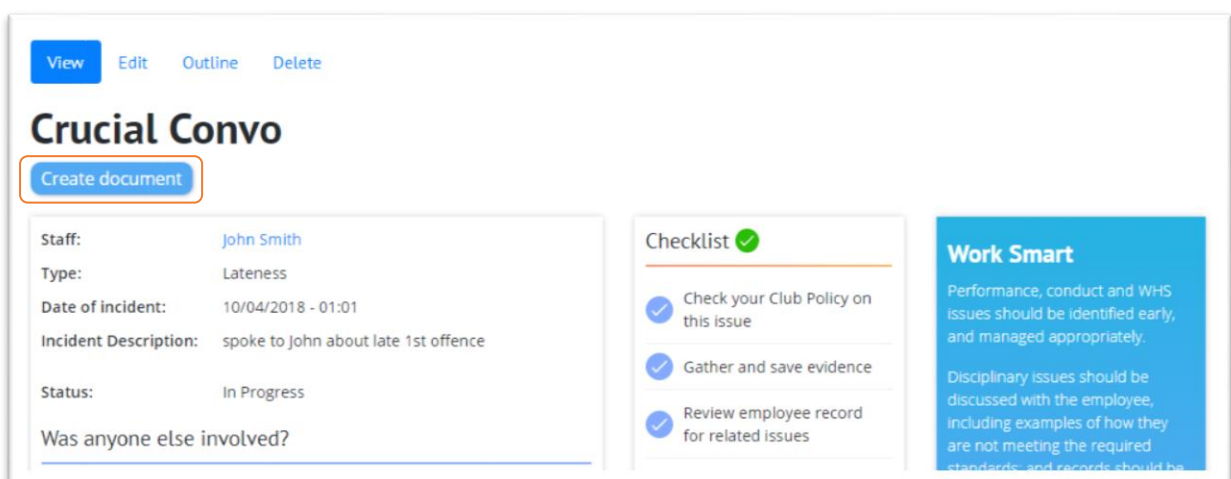
Add incident

Title Staff Type Status Apply

Enter real name or username.

| Title ^ | Type ^ | Staff ^ | Status ^ | Date ^ | Actions |
|------------------------------|------------------|------------|-------------|-------------------|---------|
| LB Test Incident | Gambling on duty | Lee Pike | Closed | 15th October 2018 | |
| Reception Supervisor 9/10/18 | Theft | Dita Nasim | Draft | 9th October 2018 | |
| Crucial Convo | Lateness | John Smith | In Progress | 4th October 2018 | |

Select **Create Document**



View Edit Outline Delete

Crucial Convo

Create document

Staff: John Smith

Type: Lateness

Date of incident: 10/04/2018 - 01:01

Incident Description: spoke to John about late 1st offence

Status: In Progress

Was anyone else involved?

Checklist

- Check your Club Policy on this issue
- Gather and save evidence
- Review employee record for related issues

Work Smart

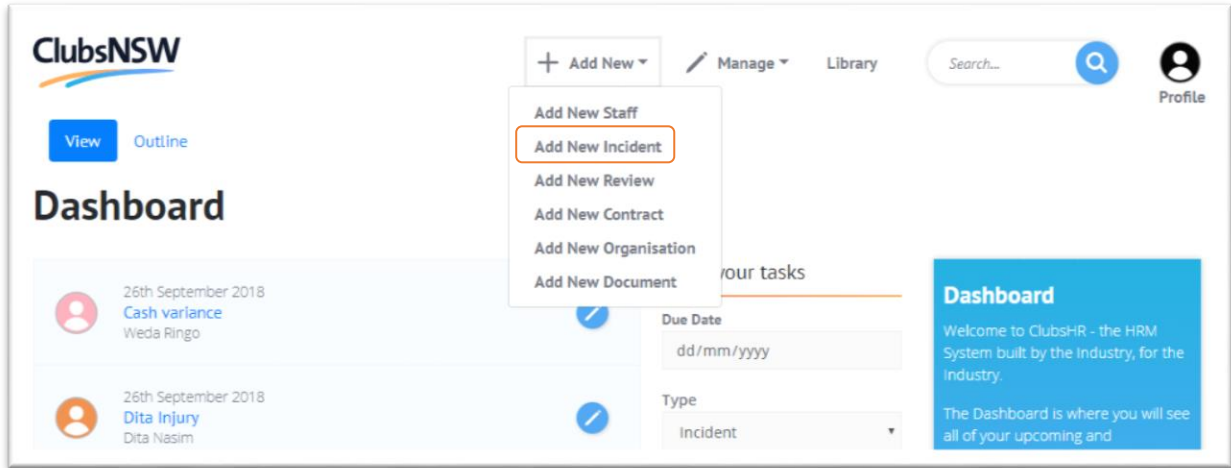
Performance, conduct and WHS issues should be identified early, and managed appropriately.

Disciplinary issues should be discussed with the employee, including examples of how they are not meeting the required standards, and records should be

Employee Management

Incident

+ **Add New** to create a new incident or **Manage** to edit or update an existing matter



The Checklist will update according to the type of incident that is selected. You will be able to update the checklist as the incident management progresses.

Create Incident

Home > Add content

Title *

What is the case about?

Staff *

The staff member involved in the incident.

Type *

- Select a value -

The type of incident.

Checklist

- Check your Club Policy on this issue
- Contact Workers Compensation Insurer
- External Investigator appointed
- Police Notified
- Remove hazard (if any)
- Send employee for medical testing (if Policy allows)
- Suspend the employee
- Gather and save evidence
- Review employee record for related issues
- Interview employee(s) involved
- Invite the employee to a meeting
- Offer the employee a support person
- Keep notes from meeting
- Notify employee of outcome
- Update the complainant (if any)
- Re-training offered
- Termination process initiated

Check the actions which have been completed.

Create Incident

Home > Add content

Title *

What is the case about?

Staff *

The staff member involved in the incident.

Type *

-Gambling on duty-

The type of incident.

Checklist

- Check your Club Policy on this issue
- Gather and save evidence
- Review employee record for related issues
- Interview employee(s) involved
- Invite the employee to a meeting
- Offer the employee a support person
- Keep notes from meeting
- Notify employee of outcome
- Update the complainant (if any)
- Re-training offered
- Termination process initiated

Check the actions which have been completed.

DATE OF INCIDENT *

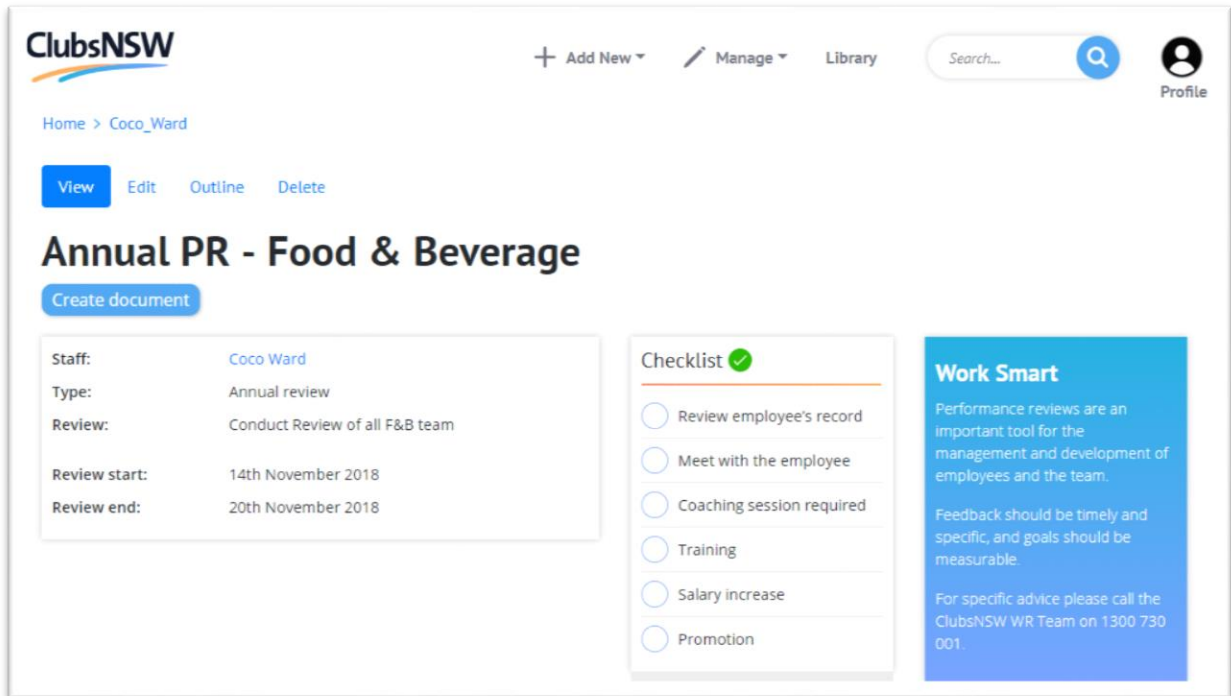
05/11/2018 10:36:00 PM

The date the incident occurred.

Review

Reviews can be captured as informal check-ins, requests from the employee for a review, or as part of formal process (for example annual reviews).

Process is as above for **adding new** or **managing** current review. Can also schedule reviews, and filter dashboard by due date (as above) for upcoming planned reviews.



ClubsNSW + Add New Manage Library Search... Profile

Home > Coco_Ward

View Edit Outline Delete

Annual PR - Food & Beverage

Create document

| | |
|---------------|--------------------------------|
| Staff: | Coco Ward |
| Type: | Annual review |
| Review: | Conduct Review of all F&B team |
| Review start: | 14th November 2018 |
| Review end: | 20th November 2018 |

Checklist ✓

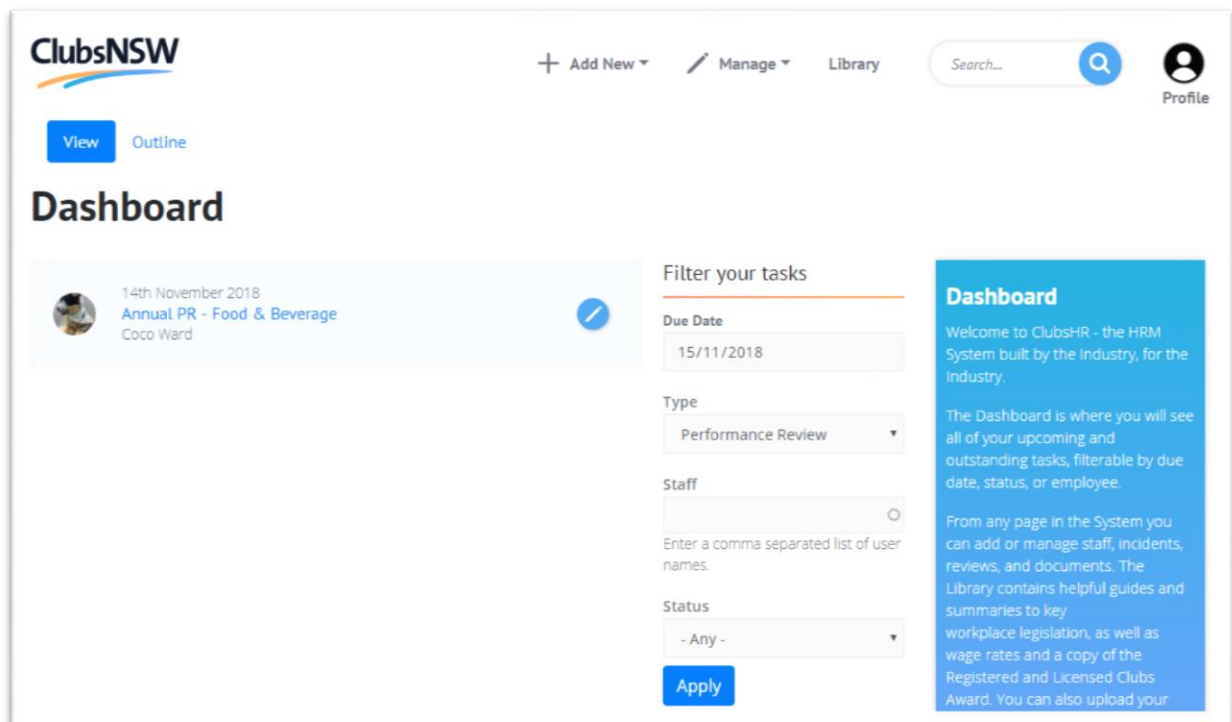
- Review employee's record
- Meet with the employee
- Coaching session required
- Training
- Salary increase
- Promotion

Work Smart

Performance reviews are an important tool for the management and development of employees and the team.

Feedback should be timely and specific, and goals should be measurable.

For specific advice please call the ClubsNSW WR Team on 1300 730 001.



ClubsNSW + Add New Manage Library Search... Profile

View Outline

Dashboard

14th November 2018
Annual PR - Food & Beverage
Coco Ward

Filter your tasks

Due Date: 15/11/2018

Type: Performance Review

Staff:

Enter a comma separated list of user names.

Status: - Any -

Apply

Dashboard

Welcome to ClubsHR - the HRM System built by the industry, for the industry.

The Dashboard is where you will see all of your upcoming and outstanding tasks, filterable by due date, status, or employee.

From any page in the System you can add or manage staff, incidents, reviews, and documents. The Library contains helpful guides and summaries to key workplace legislation, as well as wage rates and a copy of the Registered and Licensed Clubs Award. You can also upload your

Offboarding

When it comes time for an employee to leave the Club, like Onboarding, each Club will have its own process to follow. Under Reviews, there is an 'Exit' option where you can make notes and use the checklist to guide you through the process.

Create Performance Review

[Home](#) » [Add content](#)

Title *

Staff *

Type *

Checklist

- Uniform returned
- Keys returned
- Final pay
- Statement of Service provided
- Notify Centrelink

Review (Edit summary)

B I | | **Format** - | **Styles** - | **Source**

Text format

Review start *

Review end *

Home > Mary Lamb

[View](#) [Edit](#) [Outline](#) [Delete](#)

Mary Lamb Offboard

[Create document](#)

| | |
|---------------|---|
| Staff: | Mary Lamb |
| Type: | Exit |
| Review: | Exit Interview held with Mary. |
| | Club success: training offerings |
| | Club learning: Communication between departments. |
| Review start: | 25th July 2019 |
| Review end: | 25th July 2019 |

Checklist ✔

- Uniform returned
- Keys returned
- Final pay
- Statement of Service provided
- Notify Centrelink

Work Smart

Performance reviews are an important tool for the management and development of employees and the team.

Feedback should be timely and specific, and goals should be measurable.

For specific advice please call ClubsNSW on 1300 730 001.

club plus
SUPERANNUATION
YOUR CLUB FOR GOOD

CUSTOMISATION OPTION – Dynamic Checklists

Checklists associated with Incidents and Reviews are *dynamic*. This means the checklist items displayed will change depending on the type of Incident or Review selected.

To begin, the same process as Standard Checklists is followed: to add your own terms to the Checklist, or remove unnecessary items, select **Taxonomy** then for the Review Checklist click **List Terms**:

The screenshot shows the ClubsNSW web application interface. At the top, there is a navigation bar with a red header containing 'Manage', 'Shortcuts', 'Search', 'Lena Bertuccio', 'PROD ENVIRONMENT', and 'Subscription active (expires 2020/6/25)'. Below this is a secondary navigation bar with icons for 'Content', 'Structure', 'Configuration', 'People', and 'Help'. The 'Structure' menu is open, and 'Taxonomy' is highlighted with a red box. The main content area shows the 'ClubsNSW' logo, a search bar, and a 'Profile' button. Below the navigation, there are buttons for 'View' and 'Edit', and a row of buttons: 'Profile', 'Incidents', 'Involved', 'Reviews', 'Contracts', and 'Documents'. The 'Reviews' button is selected, leading to a page for 'Joe Blogg'. The page displays 'Work Details' for Joe Blogg, including Job Title (Latte Artist), Role (Barista), Department (Food and Beverage), Employment Type (Casual), Employment Stage (Employed), and Commencement Date (1st January 2010). To the right of the work details is a 'Checklist' section with a green checkmark and a blue pencil icon. The checklist items are: Fair Work Information Statement provided (checked), RSA (checked), RCG (checked), Staff Handbook Provided (checked), Site Induction (checked), First Aid Certificate (unchecked), and Food Safety Certificate (checked). To the right of the checklist is a blue 'Work Smart' box with text about onboarding procedures and contact information for ClubsNSW.

Taxonomy is for categorizing content. Terms are grouped into vocabularies. For example, a vocabulary called "Fruit" would contain the terms "Apple" and "Banana".

[+ Add vocabulary](#)

[Show row weights](#)

| VOCABULARY NAME | DESCRIPTION | OPERATIONS |
|--------------------------|-------------------------|--------------|
| + Department | | List terms ▼ |
| + Discipline Conduct | | List terms ▼ |
| + Discipline Performance | | List terms ▼ |
| + Employment Stage | | List terms ▼ |
| + Employment Type | | List terms ▼ |
| + Gender | | List terms ▼ |
| + Onboarding Checklist | | List terms ▼ |
| + Award | | List terms ▼ |
| + Classification | The job classification. | List terms ▼ |
| + Incident Checklist | | List terms ▼ |
| + Incident Type | | List terms ▼ |
| + Involvement type | | List terms ▼ |
| + Job Role | | List terms ▼ |
| + Outcome | | List terms ▼ |
| + Qualification Period | | List terms ▼ |
| + Review Checklist | | List terms ▼ |
| + Review Outcome | Outcome for Review | List terms ▼ |
| + Review type | | List terms ▼ |

Select **+ Add Term** to create new checklist items, or **Edit** to remove.

Note: Here you will be adding or editing possible checklist items for all types of Reviews, not just 'Exit'. In the next step, you will edit which checklist terms display in which type of Review.

Review Checklist

List

Edit

Home » Administration » Structure » Taxonomy » Edit *Review Checklist*

You can reorganize the terms in *Review Checklist* using their drag-and-drop handles, and group terms under a parent term by sliding them under and to the right of the parent.

[+ Add term](#)

Show row weights

| NAME | OPERATIONS |
|---------------------------------|------------|
| ⊕ Review employee's record | Edit ▾ |
| ⊕ Meet with the employee | Edit ▾ |
| ⊕ Schedule next review | Edit ▾ |
| ⊕ Uniform returned | Edit ▾ |
| ⊕ Keys returned | Edit ▾ |
| ⊕ Final pay | Edit ▾ |
| ⊕ Statement of Service provided | Edit ▾ |
| ⊕ Notify Centrelink | Edit ▾ |













Save

Reset to alphabetical

Once the term has been added, you need select which Type the checklist will display under. To do this, go to the Review Type and click **List terms**.

| | | |
|------------------|------------------------|--------------|
| ⊕ Review Outcome | Outcome for Review | List terms ▾ |
| ⊕ Review type | | List terms ▾ |
| ⊕ Status | Ticket style statuses. | List terms ▾ |
| ⊕ Super Provider | | List terms ▾ |







Click on **Edit** on the Review Type option you want checklist to appear under, in this example, Exit.

| NAME | OPERATIONS |
|--|---|
|  Annual review | <input type="button" value="Edit"/>  |
|  Employee's request | <input type="button" value="Edit"/>  |
|  End of probation | <input type="button" value="Edit"/>  |
|  Exit | <input type="button" value="Edit"/>  |
|  Informal check-in | <input type="button" value="Edit"/>  |
|  Mid-year review | <input type="button" value="Edit"/>  |

In the next screen, tick the checklist items you wish to display under 'Allowed Checklist Items' and hit **Save**.

Name *

Description

B I |       | Format | Styles | Source

Offboarding an employee when there is a resignation or termination.

Text format: Basic HTML [About text formats ?](#)

Allowed Checklist Items

- Review employee's record
- Meet with the employee
- Schedule next review
- Uniform returned
- Keys returned
- Final pay
- Statement of Service provided
- Notify Centrelink

▶ RELATIONS

Save [Delete](#)

After the Offboarding process has been completed, you can update the employee's employment stage in **Work Details** to 'terminated' or 'resigned'.

Work Details

[View](#) [Edit](#)

[Account](#) **[Work Details](#)** [Personal Details](#) [Financial Details](#) [Checklist](#)

Home » BBuilder » BBuilder

Job Title
Food and Beverage Attendant
Current job title.

Role
Bartender

Organisation
The Shellharbour Club

Department
Food and Beverage

Classification
Food and beverage attendant grade 2
The job classification.

Employment Type
Part Time

Employment Stage
Employed
- None -
Employed
Resigned
Terminated
Date of commencement.

Qualification Period
6 months

To cancel the employee's account, go to **Account** tab and click **Cancel account** at the bottom of the page.

Account Work Details Personal Details Financial Details Checklist

Home » BBuilder

Email address *

A valid email address. All emails from the system will be sent to this address. The email address is not mad

Username *

Several special characters are allowed, including space, period (.), hyphen (-), apostrophe ('), underscore (_).

Password

Confirm password

Passwords match:

To change the current user password, enter the new password in both fields.


| POLICY | STATUS |
|----------|--|
| Clubs HR | Fail - Password length must be at least 8 characters. |
| Clubs HR | Fail - Password must contain at least 1 uppercase character. |
| Clubs HR | Fail - Password must contain at least 1 lowercase character. |
| Clubs HR | Fail - Password must contain at least 1 numeric character. |
| Clubs HR | Fail - Password must contain at least 1 special character. |


Status

Blocked

Active

Picture



 bob-the-builder1.jpg (23.95 KB)

Your virtual face or picture.

Review date

Select from the following options:

Are you sure you want to cancel the account *Bob Builder*?

Home » BBuilder

When cancelling the account

Disable the account and keep its content.

Disable the account and unpublish its content.

Delete the account and make its content belong to the *Anonymous* user.

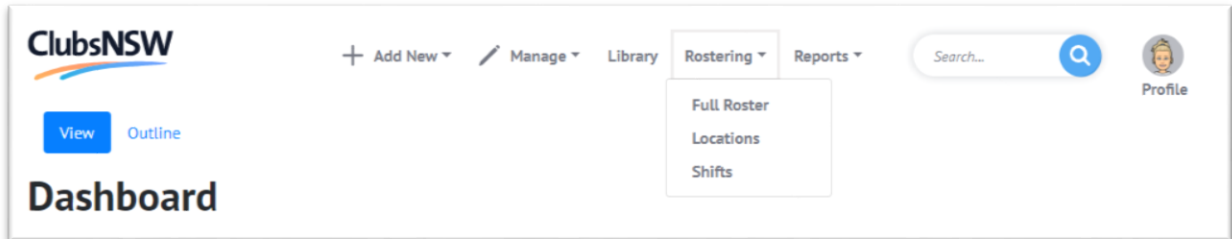
Delete the account and its content.

Require email confirmation to cancel account
When enabled, the user must confirm the account cancellation via email.

Select the method to cancel the account above. This action cannot be undone.

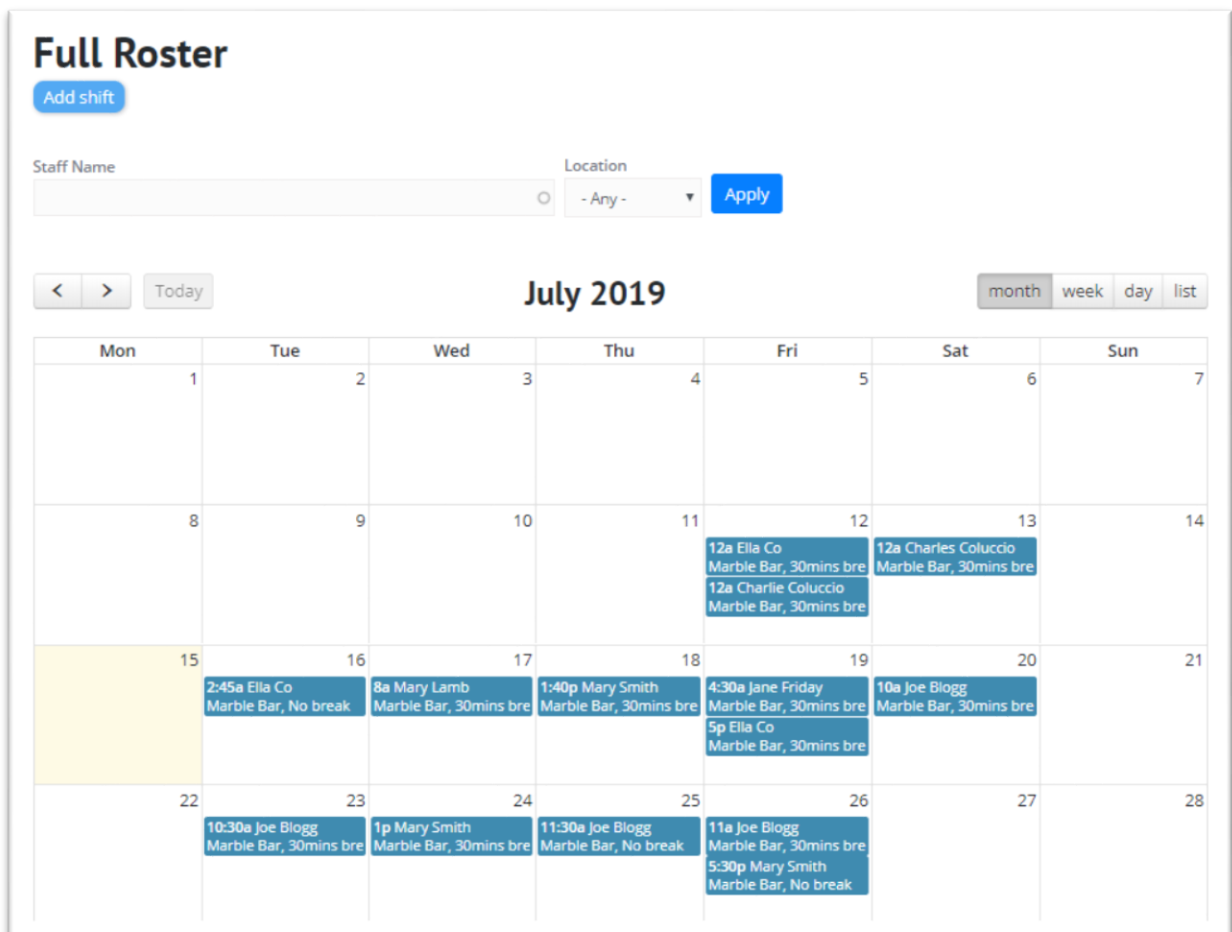
Rostering

The Rostering tab includes three options for creating and viewing your upcoming rosters.



Full Roster

From **Full Roster**, you can get a snapshot of the shifts rostered for the month, week or day. This view can also be filtered by location or staff member.



CUSTOMISATION OPTION - Locations

To add Roster Locations specific to your Club, click on **Locations**, then **Add location**:

Dashboard

Locations List

[Add Location](#)

| Location ID | Title | Description | Operations |
|-------------|--------------|-------------|------------------------|
| 26 | Bar 1 | | Edit ▼ |
| 31 | Cafe | | Edit ▼ |
| 36 | Cocktail Bar | | Edit ▼ |
| 46 | Marble Bar | | Edit ▼ |

Enter the name of the Location and click **Save**:

Add Location

Title

Description

[Save](#)[Cancel](#)

Now employees can be rostered in that Location, and you can filter the view by that location.

Full Roster

Add shift

Staff Name

Location

Cafe

Apply

Reset

< > Today

15 – 21 Jul 2019

month week day list

| | Mon 15/7 | Tue 16/7 | Wed 17/7 | Thu 18/7 | Fri 19/7 | Sat 20/7 | Sun 21/7 |
|---------|----------|----------|----------|--|--|---|----------|
| all-day | | | | | | | |
| 4am | | | | | | | |
| 5am | | | | | 4:30 - 9:30 Jane Friday Cafe, 30mins break | | |
| 6am | | | | | | | |
| 7am | | | | | | | |
| 8am | | | | | | | |
| 9am | | | | | | | |
| 10am | | | | | | 10:00 - 7:00 Joe Blogg Cafe, 30mins break | |
| 11am | | | | | | | |
| 12pm | | | | | | | |
| 1pm | | | | | | | |
| 2pm | | | | 1:40 - 10:45 Mary Smith Cafe, 30mins break | | | |
| 3pm | | | | | | | |

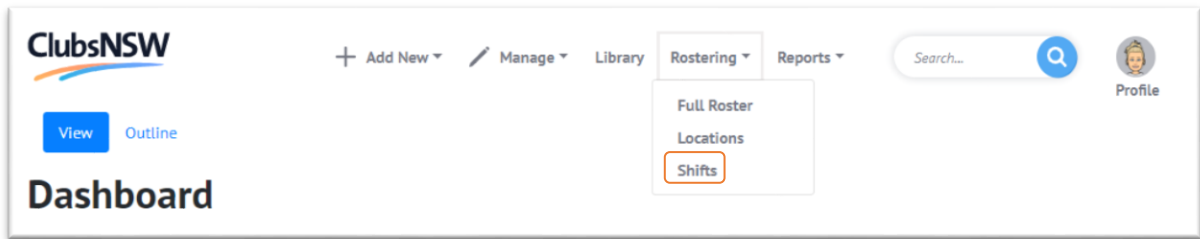
To add a shift, click on **Add shift** and enter the details. Shifts longer than five hours will require a break before they can be saved.

The screenshot shows the ClubsNSW Full Roster interface. The 'Add shift' button is highlighted with a red box. An 'Add Shift' modal form is open on the right, also highlighted with a red box. The modal form contains the following fields:

- Staff Member: Joe Blogg (846)
- Location: Sports Bar (51)
- Break: 30
- Shift break in minutes: 30
- Start Time: 30-07-2019 08:00am
- Finish Time: 30-07-2019 03:30pm

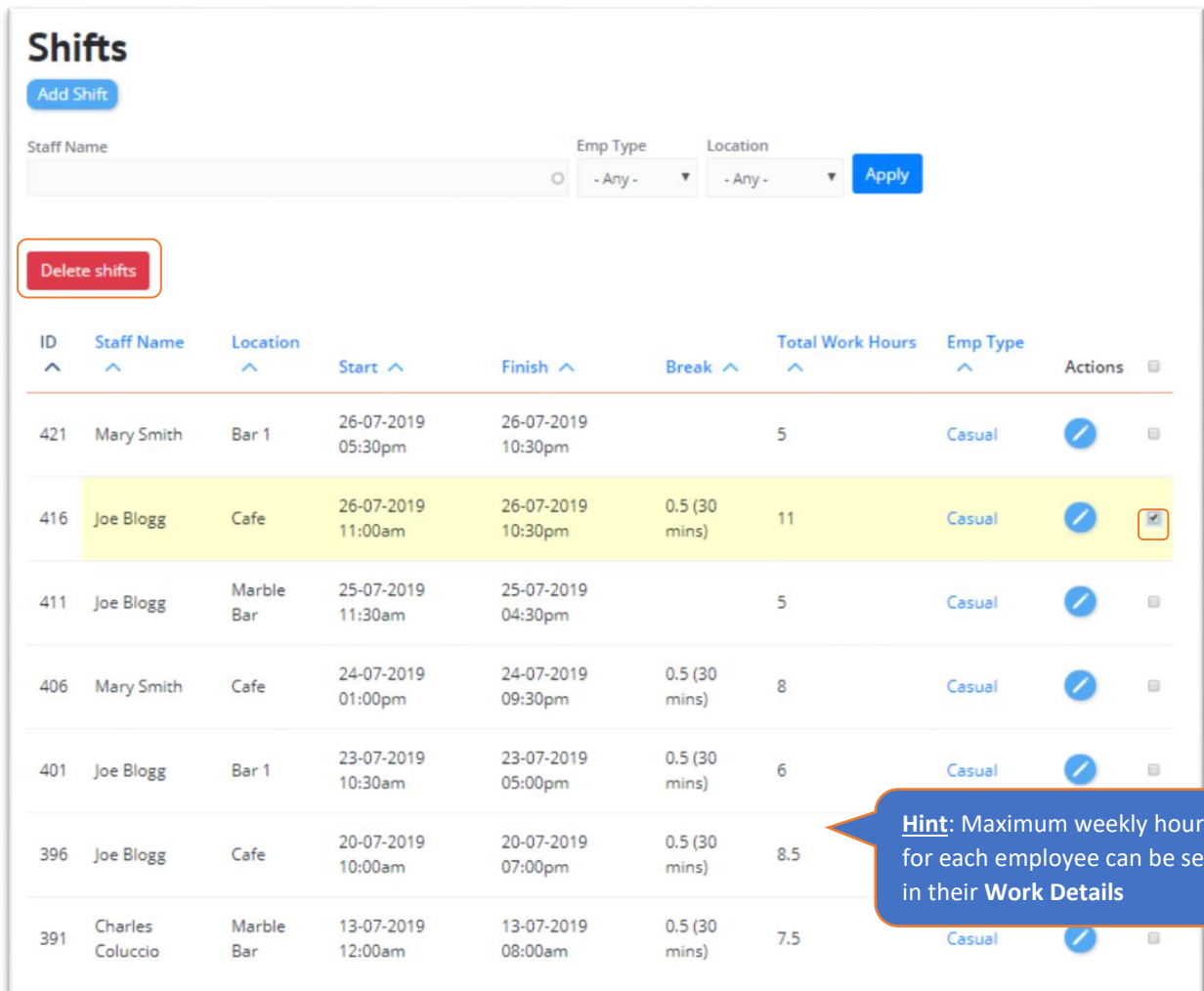
Buttons for 'Save' and 'Cancel' are visible at the bottom of the modal.

You can then track employee hours and delete rostered shifts under **Shifts**.



Shifts can be sorted by employee name, location, start/finish time, total shift hours, or employment type, by clicking on the appropriate heading.

To delete a shift(s), select the shift(s) by clicking the box on the right, then click **Delete shifts**.




The screenshot shows the 'Shifts' page with a table of shifts. A red box highlights the 'Delete shifts' button. A blue callout box contains a hint: 'Hint: Maximum weekly hours for each employee can be set in their Work Details'. The table has columns for ID, Staff Name, Location, Start, Finish, Break, Total Work Hours, Emp Type, and Actions.

| ID | Staff Name | Location | Start | Finish | Break | Total Work Hours | Emp Type | Actions |
|-----|------------------|------------|--------------------|--------------------|---------------|------------------|----------|---|
| 421 | Mary Smith | Bar 1 | 26-07-2019 05:30pm | 26-07-2019 10:30pm | | 5 | Casual | [Edit] [Delete] |
| 416 | Joe Blogg | Cafe | 26-07-2019 11:00am | 26-07-2019 10:30pm | 0.5 (30 mins) | 11 | Casual | [Edit] [Delete] <input checked="" type="checkbox"/> |
| 411 | Joe Blogg | Marble Bar | 25-07-2019 11:30am | 25-07-2019 04:30pm | | 5 | Casual | [Edit] [Delete] |
| 406 | Mary Smith | Cafe | 24-07-2019 01:00pm | 24-07-2019 09:30pm | 0.5 (30 mins) | 8 | Casual | [Edit] [Delete] |
| 401 | Joe Blogg | Bar 1 | 23-07-2019 10:30am | 23-07-2019 05:00pm | 0.5 (30 mins) | 6 | Casual | [Edit] [Delete] |
| 396 | Joe Blogg | Cafe | 20-07-2019 10:00am | 20-07-2019 07:00pm | 0.5 (30 mins) | 8.5 | Casual | [Edit] [Delete] |
| 391 | Charles Coluccio | Marble Bar | 13-07-2019 12:00am | 13-07-2019 08:00am | 0.5 (30 mins) | 7.5 | Casual | [Edit] [Delete] |

Reports

In **Reports** you can get quick and easy snapshots of your employees and trends in the workplace, and export the reports as excel workbooks. For example, to track types of incidents and their outcomes, select **Incidents**:

+ Add New ▾ ✍ Manage ▾ Library Rostering ▾ Reports ▾ Search... 

- Incidents**
- Reviews
- Staff
- Staff Status
- Contracts

Dashboard

ClubsHR Reports Incidents

| Staff | Title | Type | Status | Outcome |
|------------------|----------------------------|---------------------|-------------|-------------------|
| Ella Co | 11072019 Bullying COLUCCIO | Bullying/Harassment | In Progress | |
| Jane Friday | Bullying Allegation | Bullying/Harassment | Closed | Termination |
| Mary Lamb | Bullying Allegation | Bullying/Harassment | In Progress | |
| Example Fulltime | Fall in Kitchen | Injury | Closed | WC Claim Accepted |
| Example Casual | Example Theft | Theft | Closed | Written Warning |

CSV

incidents (1) - Excel Lena Bertuccio

File Home Insert Page Layout Formulas Data Review View Help M-Files Tell me

Clipboard Font Alignment Number Styles Cells Editing

| | A | B | C | D | E | F |
|---|------------------|----------------------------|---------------------|-------------|-------------------|---|
| 1 | Staff | Title | Type | Status | Outcome | |
| 2 | Ella Co | 11072019 Bullying COLUCCIO | Bullying/Harassment | In Progress | | |
| 3 | Jane Friday | Bullying Allegation | Bullying/Harassment | Closed | Termination | |
| 4 | Mary Lamb | Bullying Allegation | Bullying/Harassment | In Progress | | |
| 5 | Example Fulltime | Fall in Kitchen | Injury | Closed | WC Claim Accepted | |
| 6 | Example Casual | Example Theft | Theft | Closed | Written Warning | |
| 7 | | | | | | |

Library

In the ClubsHR Library you will find:

- Wage rates under the Registered and Licensed Clubs Award 2010
- The Registered and Licensed Clubs Award 2010
- Effective Dispute Resolution Pack
- A sample of ClubsNSW:
 - o Job Descriptions & KPI's Manual and templates
 - o Policies & Procedures Manual and templates

You can upload your club documents for easy reference in the Library, like a staff handbook, organisation chart, template job descriptions or Enterprise Agreement.

CUSTOMISATION OPTION - Library

To upload your Staff Handbook, select it from the menu on the right:

View Edit Outline

Library

Add book

Welcome to ClubsHR library. Here you will find:

- Wage rates under the *Registered and Licensed Clubs Award 2010*
- The *Registered and Licensed Clubs Award 2010*
- Job Descriptions & KPI's Manual and templates*
- Policies & Procedures Manual and templates*

For assistance uploading your Club's Enterprise Agreement or Staff Handbook, please contact ClubsNSW.

**Please note that templates are intended as guides only and should be tailored to suit the club's needs.*

- Library
 - 2018 - 2019 Wage Rates
 - 2019 - 2020 Wage Rates
 - Effective Dispute Resolution
 - Job Descriptions & KPI's Manual
 - Organisation Chart
 - Policies & Procedures Manual
 - Registered and Licensed Clubs Award 2010
 - Staff Handbook

Hint: This process can also be used for uploading other documents into the Library

Then click **Edit**:

View Edit Outline

Staff Handbook

Add book

Upload your Handbook here









Click **Choose file** and select it from your files, then **Save**.

Home » Library

Title *

Staff Handbook

Body (Edit summary)

B I |    |   |   | Format ▾ | Styles ▾ |  Source

Upload your Handbook here

Text format Basic HTML ▾

Attachments


No file chosen

One file only.
256 MB limit.
Allowed types: txt pdf doc docx csv xls xlsx.

The document will save to that 'Book' in the Library and be accessible to anyone with a HR Manager role.

Staff Handbook

Upload your Handbook here

 [Handbook sample.docx](#)