**ORIENTATION CHECKLIST**

**Agency Overview**

 Agency history, mission, and goals

 Tour of agency – Introduction to staff

 Services provided

 Organizational structure and role of social workers

 Role of the agency in relation to the community and its resources, referrals

 Population/Communities Served

 Security and/or safety procedures and protocol

 Policy & Procedure Manuals, Code of Conduct, Regulations

 Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### *Agency Policies and Protocols*

 Office procedures, work space, supplies, and provisions

 Telephone and communication/computer utilization, client information systems

 Intake/admissions/eligibility policy and procedures

 Dress code

 Parking details

 Mileage/Travel reimbursement policies and procedures

 Times and dates of required meetings

 Documentation and maintenance of records

 Agency Forms

 Confidentiality issues/HIPAA

 Client fees/payment schedule

 Emergency contacts and protocol

 Consumer rights and grievance policy

 Mandated Reporting

 Placement schedule, including lunch and breaks

 Professional language (jargon, acronyms, terms used by agency, etc)

 Agency policy regarding sexual harassment

 Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### *Field Instructor/Student Responsibilities*

 Expectations, availability, style, and schedule for supervision

 Giving and receiving feedback

 Student expectations, roles, responsibilities

 Student identification to clients

 Plan for monitoring of student hours

 Agency training or staff development opportunities

 Plan for mid-semester verbal evaluation and end of semester written evaluation

 Field liaison role

 Student’s personal safety issues and concerns and strategies to deal with them

 Guidelines for assignments and deadlines

 Overview of vision for the placement and working relationship

 Review Student syllabi for concurrent practice class

 Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Student Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Field Instructor Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Instructions:** This is a **suggested tool** for Field Instructors. It may supplement or be replaced with field agency orientation checklists.