**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.