Facility Clerk

Buddy Orientation Checklist

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| --- | --- | --- | --- |
| Job Duties | Date | Trainer Initials | Buddy Initials |
| **General:** |  |  |  |
| Review of Care of Model |  |  |  |
| Resident Care Manual |  |  |  |
| Recreation Manual |  |  |  |
| **Communication: [list all that apply for your organization below are some examples]** |  |  |  |
| Residents |  |  |  |
| Families |  |  |  |
| Co-Workers |  |  |  |
| **Department Specific Duties [list all that apply for your organization below are some examples]** |  |  |  |
| Show and explain the morning office **routine (insert all that apply for your organization some examples below)**   * **Insert site specific office routines** * **Unlock filing cabinets** * **Turn on office equipment** * **Surveillance TV** |  |  |  |
| Explain phone system (answering and transferring calls) |  |  |  |
| Explain paging system |  |  |  |
| Show and explain procedure for scheduling reservations including reservation binder **(Insert site specific information ie. hospitality suite)** |  |  |  |
| Explain how to book appointments **(DATS, appts for residents, interviews etc.)** |  |  |  |
| Explain procedure for how to respond to and document resident incidents. |  |  |  |
| Show and explain the procedures for move ins and outs   * Paperwork * Take home envelopes * Welcome bags |  |  |  |
| Show and explain payment and deposit procedures |  |  |  |
| Explain site tour procedure |  |  |  |
| Show where to get information for rent inquiries |  |  |  |
| Show and explain computer systems  **Update Resident information lists (Resident/Tenant list, birthday list, move in/out lists, etc.)** |  |  |  |
| Show location of staff schedules, phone lists and explain staff coverage process. |  |  |  |
| Supply ordering process |  |  |  |
| Invoicing procedure |  |  |  |
| Completed work order process (input/file) |  |  |  |
| Explain the incoming and outgoing mail procedure |  |  |  |
| Explain contractor procedure   * Scheduling * Contractor Hazard Management Record |  |  |  |
| Record retention process |  |  |  |
| Binder updating processes   * Which binders need to be updated * Where are files kept that need updating |  |  |  |
| Explain and show miscellaneous clerical activities |  |  |  |
| **Occupational Health and Safety Procedures [list all that apply for your organization below are some examples]** |  |  |  |
| First Aid Procedures |  |  |  |
| Go over Job Hazard Assessment |  |  |  |
| Go over SWPP for administration |  |  |  |
| Hazard Reporting process |  |  |  |
| Incident Reporting process |  |  |  |
| **Payroll: [list all that apply for your organization below are some examples]** |  |  |  |
| Time Sheets |  |  |  |
| Documentation |  |  |  |
| Staff Schedules |  |  |  |
| **Committee and Meetings: [list all that apply for your organization below are some examples]** |  |  |  |
| Department meetings |  |  |  |
| General Staff Meeting |  |  |  |
| OH & S meetings |  |  |  |
| Distribution of Minutes |  |  |  |
| Memo books |  |  |  |
|  |  |  |  |
|  |  |  |  |