

Customer Specific Orientation Checklist
(Please note N/A if a topic is not applicable in this setting)

- Safety review (all settings)
 - Emergency information
 - Emergency procedures
 - Evacuation routes
 - Location of safety equipment
- IPP/PCP review (all settings)
 - Resource binders
 - Formal goals
 - Schedules and routines
 - Customer's preferences and interests
 - Role of family and friends
- Documentation review (all settings)
 - Forms and daily documentation
 - Time-off procedures
- Communication review (all settings)
 - Communication log
 - Staff meetings
- Medication procedures
 - Medication location
 - Medication purposes
 - Medication side effects
 - Medication documentation
 - Reordering medication
 - Medical appointment procedures
 - CORE A/B (for staff in group homes) scheduled _____
- Behavioral support
 - Description of behaviors
 - Proactive interventions
 - Reactive interventions
 - Documentation
 - Behavioral medications
 - CPI training scheduled _____
- Transportation
 - General transportation procedures
 - Use of agency vehicles
 - Van training
- Allergies
 - Description of allergies
 - Epi-pen administration
- Seizure management
 - Description of seizures
 - Proactive interventions
 - Reactive interventions
 - Documentation
 - Seizure medications
- Special dietary needs
 - Swallowing difficulties
 - Choking risk
 - PICA
 - G-Tube feeding
 - Individual dietary concerns
- Mobility issues
 - Falling risk
 - Use of gait belt
 - Use of wheel chair
 - Lifting/transferring assistance
 - OT/PT routines
- Diabetes
 - Proactive interventions
 - Reactive interventions
 - Insulin administration training scheduled _____
- Respiratory issues
 - Inhaler administration
 - Nebulizer treatment
- Other high-risk health issues
- Adaptive equipment and systems
 - Sign language
 - Picture communication
 - Electronic communication device
 - Use of other adaptive equipment
- Financial assistance
 - Financial documentation
 - Financial procedures (for staff with access to customers' accounts)
- Pager procedures (for staff carrying emergency pager)

