

Risk Assessment Checklist

(Review annually)

✓ Informed Consent

- * Current within last year
- * Social worker and all clients signed within the last year

✓ Social Media Policy *(May be included in Informed Consent)*

- * Communication through electronic means in encrypted
- * How texts, e-mail, social media platforms will be allowed

✓ Payment Methods

- * Communicated payment policy to clients

✓ Documentation

- * Timely and Appropriate (Just the facts.)
- * All documentation is signed

✓ Client Record Access and Storage

- * How clients will access their records
- * Assure that if seeing multiple members of the same family, each member's record is separated from the rest of the family
- * Records are safely and securely stored

✓ Professional Will

- * Completed a Professional Will either with an attorney or had it reviewed by an attorney

✓ Insurance Protection

PROFESSIONAL LIABILITY INSURANCE

- * Have read and understand the policy
- * Understand what my PLI will not cover

GENERAL LIABILITY

- * Assessed the need for General Liability Policy
- * Read and understand what the policy does and does not cover

CYBER LIABILITY

- * Assess the need for Cyber Liability Policy
- * Read and understand what the policy does and does not cover

