Adjunct Faculty Liaison Orientation Packet Order

Left Pocket

-Orientation Packet Contents & Order
-Orientation Agenda
-Liaison Role & Recommendations
-Faculty Liaison Handbook
(Also Online: Password protected.)
-Table: Liaison Materials (Where to Find Info)
-Taskstream Handout
-Learning Contract and Competencies
-Faculty Liaison Profile

Right Pocket

-Activate Your UB IT Name
-Using Your UB Email
-Exchange Mail Using Outlook Web Access
-Mileage Reimbursement Note from the Director
-Mileage Reimbursement (UB Website for up to date info)
-Mileage Forms:

1. Travel Department Memo
2. Statement of Automobile Travel
3. Concur – Setting Up Your Profile
4. Concur- Power Point Slides (instructions and link to recorded session)

-Timesheet Instruction

Revised KG/LL 4/30/2018

Faculty Liaison Orientation Agenda

The following is the table of contents from the Faculty Liaison Handbook with a couple of additional helpful hints.

PART I: GETTING STARTED

Who does what – who should I contact with questions?

Default – if you are unsure who to ask and can email us, email sw-field@buffalo.edu and all of us will receive the email!

- **Laura Lewis –** Administrative questions regarding timesheets, paychecks, request more/less students on caseload etc.
- **Kathryn Griswold** – Kathryn can assist with questions regarding Taskstream, Tuition Waivers, and listserves
- **Michael Lynch -** please contact Michael regarding any student issues, or if you have a potential field placement that may want students
- **Katie McClain-Meeder** – please contact Katie regarding any student issues, or if you have a potential field placement that may want students
- **Margie Quartley** –Margie manages field education for online programs.

Faculty Liaison Handbook - TABLE OF CONTENTS

Introduction: Why the Field Manual is Your Friend

SSW Website – The UB SSW website has a totally new design starting July 2014. Please become familiar with the new website and make sure you review this with field educators.

Student List/Caseload of students

- You will have arranged with Laura Lewis what your specific caseload (number of students) will be. Laura will probably give you up to that range. If you have any question about the number of students you want/have gotten, please contact Laura directly.
- Kathryn actually generates this list. We understand that many liaisons are eager to get their list to begin scheduling orientations. If you want to know specifically when the list will come out, please contact Kathryn Griswold directly via email.

New Field Educator / Task Supervisor Orientation

PART II COMMUNICATION: HELPFUL TIPS, CHECKLISTS & TEMPLATES

Introduction: Helpful Tips and Points to Consider

- Helpful Hint – Ask the student what days they are in field placement and if they have a regular supervision time. This will make it easier for you to know when a good time to schedule a visit is.

First Site Visit

- You will be responsible for making a minimum of one field visit during each semester that the student is in field. The visits should include a three-way meeting with the student and field educator at the field site.
- During the first visit (or prior to the visit)
- Clarify Purpose of Visit
- If a Work/Study placement--check out issue of boundary between work & placement
- If have a task supervisor model --check out how this is going. If at all possible include task supervisor and field educator in the meeting with the student.

During the visit, be aware of the dual relationship of liaison with field educator & student

• With student: Advocating for student/ monitoring the integrity of the field placement site to assure good experience

• With agency/field educator: maintaining a positive relationship between school & agency

• Providing needed support to the field educator in their partnership with us to educate our students. Assist in gatekeeping role, if needed. (Remind field educator to document if this is an issue).

Sample Agenda for Liaison Visit Sample Communication Checklist Sample Correspondence

PART III COMMON REQUESTS

Changing Field Placements

- If a request is made notify field staff ASAP. Our philosophy is to change only as a last resort. Prefer to problem-solve first. Will rely on liaison to assess situation to assist in determining if a change should be made.

Requests to Accept Employment at Field Agency

Schedule Changes

PART IV WHEN ISSUES ARISE

Introduction

Expectations: Student Behavior

Roles & Responsibilities (FE, Liaison, and Student – See Field Manual) NASW Code of Ethics (See Field Manual; NASW Website)

SSW Expectations for Professional Decorum / UB Student Code of Conduct

Behaviors & Decision to Not Replace (Internal: Please do not share.)

Time & Attendance: A Common Concern

Steps to Take When a Problem Arises / Focused Learning Agreements (Addendums for Performance Improvement) and When They are Needed

See Also Forms: Faculty Summary Report (Required Form – Due Before Field Status Review

Meeting. See Field Status Review Policy in Field Manual)

APPENDIX

Sample Focused Learning Agreement (Addendum for Performance Improvement)

The following are forms/information in the FL orientation packet:

- **Taskstream**
- **New Hire Orientation**
- **Importance of Email Communication**
- **Mileage**
- **Timesheet instructions**

Field Education

The critical bridge between social work education & practice.

Key Responsibilities for Faculty Liaisons

1. Support students and Field Educators in placement
    a. Understand the Field Manual and field policies
    b. Importance of neutrality

2. Field Educator Training and Support
    a. New Field Educator Training
    b. Resources (Learning Contract development)
    c. Taskstream

3. Conduct a minimum of 2 site visits (one per semester) for each student
    a. Towards the beginning/mid semester
    b. Ask probing questions
    c. Meet with students by themselves first
    d. Early intervention if things are not going well

4. Intervene and problem-solve when issues arise
    a. Focused Learning Agreements
        i. Often reviewed every 2-3 weeks
    b. Field office support

The Important Role of Faculty Liaison

- Liaisons are PR people for the School. Your relationships with field educators can influence retention.
- Liaisons are adjunct faculty; important members of the School community
- Liaisons advise, support, and review the progress of students with a focus on the student's educational plan.
- Liaisons works with both field educator and student in this process.
- If a situation arises that goes beyond educational advisement and requires mediation or conflict resolution, the field department staff should be notified and will, after consultation with the faculty liaison, become involved in the problem-resolution process. In the event that a student is at-risk of failing their field placement the liaison should contact the field staff in order to assist them in intervening with the student/field educator.

Some Recommendations

- Make yourself known to the field instructor at the very beginning of the semester (or earlier) and ask for a phone call or email if there are any questions. This is vital for catching students who are struggling.
- If there is any hint of problem, call FE and student directly and inform the Field office immediately. Trouble shoot issues early, don't expect issues to simply resolve themselves over time
- Document everything- contacts with instructors and students
- Send a word of encouragement individually to every student at least once early on to build positive rapport and communication.
- Invite communication with follow-up emails and phone calls.
- Stay in communication with the field coordinator about any issues that raise a "red flag"
- Be knowledgeable about all gate-keeping policies
- Be familiar with the program curriculum
- Be familiar with Field Manual and Website
- Establish standards of professionalism early with the student and between the agency
- Ask students descriptive questions and move to more critical thinking questions about agency life
- Help students develop resources for solving issues - peers, school, & community resources
- CC: FE and Task on general emails to students
- Invite Task to all meetings
- Make no promises without consultation with Field Office.
- Reinforce that there is something to learn from every experience.

School of Social Work
University at Buffalo The State University of New York

FACULTY LIAISON HANDBOOK

Helpful information and resources; Managing difficult issues

Update August 2014

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APPENDIX

Sample Focused Learning Agreement (Addendum for Performance Improvement)

PART I: GETTING STARTED

INTRODUCTION (OR WHY THE FIELD MANUAL IS YOUR FRIEND)

The Field Manual contains virtually everything Field Educators, Students —and Faculty Liaisons—need to know about the Field Education Course. Looking for *contact information? Roles and responsibilities? Evaluation guidelines?* The School's *Mission & Vision?* The *calendar of start-end dates and due dates?* You'll find all of this and more in the Field Manual!

Whether you print out a copy for yourself, or bookmark it on your internet browser, you will want to keep the Field Manual handy.

SSW WEB SITE

Thousands of hours have been devoted to developing a user-friendly web site for field educators and students. Should you be familiar with the web site? Yes! Make your job easier by taking Field Educators and Students on a tour though the Field portion of the School's web. If you are comfortable finding what you need, the students and educators will be too!

What resources can be found on the website? Aside from the Field Manual, resources on completing the learning contract and conducting supervision can be found here. Applications for tuition waivers can be found on the web. Event information can be found on the web site. Learning Contract and Evaluation forms can be found on the web site. All of these resources are not just helpful for educators and students, but for liaisons, too.

STUDENT LIST

You will receive a listing of students assigned to you in the third or fourth week of August. As additional placements are finalized, updated lists will be sent. Placement information may change due to agency changes, and late admission of some students. Please contact the field office with any questions.

Students are informed about who their Faculty liaison is during the first week of their field placement. Students are emailed the contact information and are expected to share this with their field educator.

***NEW* FIELD EDUCATORS /** NEW **TASK SUPERVISORS: ORIENTATION & UPDATES**

The student list mentioned above will indicate whether there is Task Supervisor. (The Field Manual provides a description of the Task Model and the role of the Task Supervisor.) The list will also indicate where continuing Field Educators require *Orientation Updates*, and where new Field Educators and Task Supervisors require *Orientation*.

The Field Office has Orientation Packets ready for Liaisons by early August. Recall that orientations are being provided onsite, in an individualized way, as a service to our Educators. The key is to point the Educators to resources on the web, and to emphasize your availability should problems or questions arise. Liaisons are provided instruction around Orientation by the Field Office. If you have any questions please contact us!

PART II: COMMUNICATION: HELPFUL TIPS, CHECKLISTS & TEMPLATES

HELPFUL TIPS AND POINTS TO CONSIDER

Coordination and communication are often the key to a successful placement. Where there are additional people involved, as in the task model, including them in all communications is important. Copying the student, educator and task supervisor on all communication can help to ensure that everyone is “on the same page”.

Some helpful tips are as follows:

- CC: FE and Task Supervisor on general emails to students.
- Invite Task Supervisor to all meetings.
- Invite communication with follow-up emails and phone calls.
- If there is any hint of problem, call FE and student directly and inform the Field office immediately.
- Make no promises without consultation with Field Office.
- Reinforce that there is something to learn from every experience.

FIRST SITE VISIT

A good rule-of-thumb is to speak with the student alone, either by phone prior to the visit or by carving out time at the visit. Even if there is more than one student placed at a site please ensure that you speak with each student alone. Always meet separately with the F E and the Task Supervisor, without the student present, either by phone prior to the visit or at the visit.

If you have not spoken with the above individuals in detail prior to the visit, a typical visit may last about one hour. Let the FE and student know prior to the visit that you will want to meet with one, then the other and then the 3 of you will meet.

Regarding **timeframe,** please try to set up appointments for your site visits early in the semester. The longer you wait the more everyone's schedule fills up!! Try to set up all site visits to occur during mid-semester.

SAMPLE AGENDA FOR FIELD VISIT (WHERE ORIENTATION IS NOT TAKING PLACE)

1. Introductions

2. Housekeeping
   -Is there a task supervisor model? Yes No
   -If yes, are there meetings between field educator & task supervisor? Yes No
   -Using SSW Timesheets? Yes No
   -Has the student shared course syllabi with the educator as required? Yes No
   -Educator and student have discussed agency policies around safety? Yes No
   -Educator & student have discussed requirements related to docume ntation? Yes No

2. Field Contract (Mention resources on the SSW web):
   -Reviewed Placement Schedule; Discussed Attendance Policy
   -Site specific objectives?
   -Are the activities substantive enough to demonstrate competency by placement completion?
   -How will objectives and activities change as the student develops skills and experience?
   -Signatures
   -Progress (Semester Two)

3. Supervision (Mention resources on the SSW web; Supervision Record Form):
   -When are the student and supervisor (s) meeting?
   -Is the student coming in prepared with questions and discussion points? With the Supervision Record Form filled out?
   -Has the student shared current and relevant course syllabi and class information?
   -Is there an opportunity to discuss concerns (of the student or supervisor) during supervision?
   -How will concerns (of the student or supervisor) be addressed over the school year?

4. Time and Attendance:
   -Is the student maintaining responsible time and attendance?
   -Are the time sheets being completed?

5. Additions, questions and concerns.

SAMPLE COMMUNICATION CHECKLIST

Dates Student Name:______________________________

__________ Sent initial email to student and FE.

__________ Received response from student. Follow-up phone call if more than one week.

__________ Received response from FE. Follow-up phone call if more than one week.

__________ Reviewed contract, provided feedback if needed and approved.

__________ Appointment for site visit set.

__________ Sent reminder email with agenda to student and FE.

__________ Sent follow-up email and/or site visit to student and FE.

__________ Completed site visit report for Field office.

__________ Received evaluation. Reviewed and sent email to student and FE.

Follow-up and notes:

____

____

____

____

____

Initial email to students

I hope your first few weeks of field have gone well. I am e-mailing to introduce myself. My name is Jane Doe, and I am your field faculty liaison from the UB School of Social Work. This is to confirm that you have been assigned to me as one of my field students.

I hope to talk with you soon to answer any questions or concerns you may have. I also will be contacting your field educator to introduce myself and to set a convenient time for us all to meet together this semester. This will be an opportunity for us to discuss your placement and learning progress. My role is to assist you in your progression through your field placement this year.

To assist me with this process, please verify that this is indeed the email address that I can use to get information to you. Please respond as soon as you read this e-mail with your field schedule and your supervision schedule. If you would, please add my email address to your own address book so as to get messages to me ASAP.

I am available to you for any questions or concerns as they arise, so please do not hesitate to contact me. I can be reached through this email, me@buffalo.edu any time or by phone, 716-867-5309. Please leave a message, and if I am not available and I will get back to you as soon as possible. I will do my best to assist you in making your placement a good learning experience. Also, I have a mailbox in the copy room next to the main social work office (685 Baldy). Just ask the staff in the main office or in the field office (636 Baldy) to place anything there as needed.

I look forward to hearing from you soon. Please keep this e-mail for reference.

INITIAL EMAIL TO FIELD EDUCATOR / TASK SUPERVISOR

Good Afternoon FE Name /Task Supervisor Name if applicable,

I wanted to touch base with you and thank you for taking a student from the UB School of Social Work this year. My name is Jane Doe and I will be acting as the faculty liaison this year. As the faculty liaison I am responsible for assisting you and your student in making this a positive learning experience. In doing so, it is my responsibility to maintain all records, including the learning contracts and evaluations.Additionally, I will need to come out and make a site visit where I will sit with you and____________ to discuss the learning in the placement setting and field any questions orconcerns you may have.

Please let me know when you have supervision and I will try to arrange my schedule to visit your site at that time. I have other students at your site and I am trying to coordinate those as well. Thank you very much for your assistance with this process. I look forward to meeting with both of you and learning more about the placement. Hope to hear from you soon. As always, please do not hesitate to contact me if the need arises, all my contact information is found below.

INITIAL EMAIL TO FIELD EDUCATOR / TASK SUPERVISOR WHERE ORIENTATION IS NEEDED

Good Afternoon Fe Name / Task Supervisor Name If applicable,

I wanted to touch base with you and thank you for taking a student from the UB School of Social Work this year. My name is Jane Doe and I will be acting as the faculty liaison this year. As the faculty liaison I am responsible for assisting you and your student in making this a positive learning experience.

To be respectful of your time, the UB SSW Field Department moved to providing on-site orientations for Field Educators (and Task Supervisors) several years ago. Please let me know a convenient time for me to visit. I'll point you to helpful information and resources, and answer any questions you may have about this important role. The meeting requires no more than an hour, but I am happy to spend as much time as you like, or would be helpful.

Please let me know when you have supervision and I will try to arrange my schedule to visit your site at that time. I have other students at your site and I am trying to coordinate those as well. Thank you very much for your assistance with this process. I look forward to meeting with both of you and learning more about the placement. Hope to hear from you soon. As always, please do not hesitate to contact me if the need arises, all my contact information is found below.

It is also my responsibility to maintain all records, including the learning contracts and evaluations. Additionally, I will need to come out and make a site visit where I will sit with you and _____________ to discuss the learning in the placement setting and field any questions or concerns you may have.

MEETING REMINDER

TO: Field Educator, Task Supervisor (If applicable), and Student

This is just a reminder that we will be meeting on ________________at your office on_______________. Thank you again for coordinating this with me. I have attached an agenda for the meeting. Please let me know if you have any additions or concerns you would like to address at the meeting. Please have your copies of the contract with you for discussion and signature.

Thank you.

____

THANK YOU FOR MEETING WITH ME

Dear __Student / FE /Task Supervisor_,

It was great to meet you at our site visit. Thank you for taking the time to talk with me about the contract and placement. It looks like you have things well coordinated and are setting the course for a great learning experience.

Please don't hesitate to contact me if the need arises.

PART III COMMON REQUESTS

Common Requests: Schedule Changes; "Making up" Time

There are some requests that come up fairly frequently. While we stress, for example, that student schedules are fixed at the start of the year, there are times when a student's schedule needs to be altered. Sometimes a student needs to make up hours due to illness. Any time that a student's schedule changes significantly, the change should be delineated in writing, and be signed off on by the student, educator and liaison. This ensures that substantive learning is available, and that the agency and the field educator are in agreement. If hours are being "made-up" due to significant time away from field, i.e. due to illness, or if the hours are extending beyond the end of the term, please submit the final agreement to the Field Director for approval. Students' registration and financial aid can be impacted by these changes, and consideration must be given to the appropriate grade.

Common Requests: Requests to Accept Employment

As soon as the issue of possible employment with the agency arises, the Field Office should be made aware. Students are provided with a form which delineates the difference between placement and job responsibilities, identifies supervisors, etc. This formality relates to CSWE requirements around employment and field.

Students should submit the form to the Field Office prior to accepting employment.

PART IV WHEN ISSUES ARISE

HAS THIS ISSUE EVER COME UP BEFORE?

Chances are if an issue arises, it is one that the Field Office has encountered many times before. The student wishes to accept employment at the field agency? There's a form for that! The Field Office aims to apply policies and procedures across all circumstances, and when possible, apply any exceptions to policy in a way that is fair. Thus, never hesitate to check with the Field Office no matter how big or small an issue may be. That old saying of, "Why reinvent the wheel?", definitely applies to the field course.

We know that **problems** can arise in field. When they do, a student's first instinct may be to ask for a new placement. Please respond to any such requests in a way that is neutral, i.e. don't respond 'That sounds like it will be fine but I need to check first'. When any of us are hoping to hear that our request will be approved we may 'hear what we want to hear'. So a response that begins with a statement that sounds like the request will be approved may be interpreted that the request has been approved.

There are **criteria for changing a student's placement**, but our first step is always to engage in a problem-solving framework. Effectively solving a problem, with the support of the Liaison and Field Office, can contribute tremendously to a student's growth. Often learning style differences or miscommunications are underneath the presenting concerns. There are certainly times when a change in placement is called for, either after attempting to problem solve, or when there are concerns for a student's health and safety. Please consult with the Field Office for support.

Criteria for student to change placements: 1) Inadequate supervision (not receiving minimum one hour per week supervision; 2) Inadequate educational opportunities; 3) Population/agency is triggering student and causing emotional harm; 4) Relationship appears to be unworkable; and, 5) if a student is in jeopardy of failing, unless the above criteria is met, the student is not replaced.

EXPECTATIONS: STUDENT BEHAVIOR

Please note that *student responsibilities* are discussed in Foundation Year Field Lab/ Orientation. Please familiarize yourself with these; a comprehensive list of student, educator and liaison responsibilities can be found in their most up-to-date version of the *Field Manual*. Students also sign and submit an *acknowledgment form* which states that they have reviewed these.

Examples of common issues or problems that students have:

- Inability to establish relationships at the basic level due to lack of sensitivity and feeling (empathy?) for people as well as difficulty disciplining his/her own feeling responses.
- Concrete issues such as; Time and attendance, not following agency policy about computer, dress code, cell phone use etc.
- Preoccupation with own needs and feelings.
- Inability to do case planning.
- Persistent problem viewing client systems objectively with overemphasis on either positive or negative aspects of a situation.
- Inability to be self-reflective.
- Limited ability to conceptualize.
- Behavior in supervisory relationship indicating limited ability to involve self in the learning process and a high degree of defensiveness. Frequent need for external controls and propulsion for learning.
- Evidence of a lack of personal integrity throughout performance.

University at Buffalo School of Social Work MSW Program
Expectations for Professional Decorum

An important part of students' socialization into the social work profession is the practice of professional decorum in the classroom, field placement and the larger campus. By learning and demonstrating professional and ethical behaviors, students will be better prepared to achieve success as professional social workers as they practice.

The University at Buffalo School of Social Work expects students to build upon their strengths and accomplishments that they bring into the program, and to be their best professional selves while interacting with peers, staff, administrators, supervisors, agency personnel, consumers/clients and all other persons. Throughout the UBSSW and in all our professional interactions, we strive to foster safety, collaboration, choice, trustworthiness, and empowerment, which are the principles of trauma-informed service delivery.

1. **Integrity**
   - Practice honesty with self, peers, instructors, supervisors.
   - Practice academic integrity (e.g., properly cite the work of others to avoid plagiarism).
   - Accept constructive feedback from colleagues (i.e., peers, faculty, staff, administrators, field supervisors).
   - Provide constructive feedback to colleagues, such as on course evaluations and in class discussions.
   - Use feedback to enhance your performance.

2. **Communication**
   - Practice professional communication skills. Be assertive, positive, constructive, respectful and non-judgmental.
   - Be respectful of colleagues in all electronic and web-based communications.

3. **Accountability**
   - Arrive on time for classes and field and return promptly from breaks.
   - Observe deadlines and complete assignments on time.
   - Actively participate in class.
   - Dress according to the professional expectations of the field placement.
   - Report any violations of academic integrity that come to your attention.

4. **Respect**
   - Show positive regard towards peers, faculty, staff, administrators, and all persons.
   - Practice active listening skills.
   - Advocate for self and use appropriate channels of communication for resolving conflicts (e.g., professors, field liaisons).
   - Practice empathy and compassion.
   - Observe instructors' guidelines around appropriate use of laptops, ipads and cell phones in class.

5. **Competence**
   - Exhibit a conscientious attitude towards school work and field.
   - Apply knowledge and research findings to professional performance.
   - Respect deadlines.
   - Prepare for class in advance (e.g., reading assigned materials).
   - Seek academic support when needed (e.g., research & writing tutors).
   - Prioritize responsibilities.
   - Assume responsibility for the quality of your work.
   - Be self-aware and self-monitor personal issues that could impede effectiveness with clients.

6. **Diversity**
   - Be open to and appreciative of new ideas, beliefs and people that are unfamiliar to you.

- Demonstrate a willingness to learn about different cultures and populations.
- Be open to discussion and constructive feedback about the impact of stereotyping, biases, language, values and beliefs on individuals and groups.

7. **Confidentiality, Self- Care and Boundaries**
    - Respect professional expectations around confidentiality.
    - Exercise discretion in disclosing personal information during class and field.
    - Seek help when personal issues may interfere with school performance.
    - Integrate self-care into your weekly routine.
    - Uphold professional boundaries between you, peers, faculty, staff, supervisors and other professionals.

These expectations are congruent with the ethical values and standards laid down by the NASW Code of Ethics (http://www.socialworkers.org/pubs/code/code.asp), the academic integrity policies and procedures that are found in the UB Graduate School Policies and Procedures Manual (http://www.grad.buffalo.edu/policies/academicintegrity.php#preamble), and the University at Buffalo Student Code of Conduct (http://www.ub-judiciary.buffalo.edu/11rulesp.pdf). Students should also consult the Student Handbook and be familiar with the UBSSW's Impairment Policy and procedures related to referring students to the Committee on Students for violations of professional ethics and behaviors. The School of Social Work will not consider ignorance of these expectations and the above policies as a defense for unprofessional and unethical behavior.

(UB SSW 2012)

The following are some behaviors that indicate problems in field placement performance that likely will lead to termination or failure. A Field Status Review meeting is held, and the hope is that the student will demonstrate a degree of insight about their behavior.

a. Not keeping to the field hours agreed upon (e.g., arriving late, leaving early, disappearing during the day, unexcused absences).

b. Violating agency policies.

c. Failing to notify the field educator of any schedule changes.

d. Disruptive behavior, such as swearing at staff and/or clients, and not using agency mechanisms for problem-solving or to resolve complaints when it would be reasonable to do so.

e. Using cell phone or social media for personal matters while at field placement after being informed that such use is not appropriate at the placement.

f. Rejecting feedback from the field educator or task supervisor.

g. Passivity in the role of learner.

h. Misuse or unauthorized use of agency property.

i. Inability to develop collaborative relationships. Inability to manage conflict.

j. Creating a condition which endangers or threatens the health, safety, or welfare of another person.

k. Inability to complete tasks for any reason, including those due to personal problems, psychosocial distress, legal problems, substance abuse, or mental health difficulties that are interfering with their professional judgment and performance.

l. Adherence to stereotypes <u>that interfere with practice.</u>

m. Judgmental and critical attitudes.

n. Inability to communicate effectively such that practice behaviors and competencies cannot be attained.

o. Violation of NASW Code of Ethics (related to student ignorance versus disregard).

Behaviors which are extreme, such as the following, will likely result in dismissal from the program (following a Field Status Review meeting:

a. Causing physical harm to clients or colleagues.
b. Behavior emotionally damaging to clients (e.g., insulting or berating clients, swearing at clients, calling clients names).
c. Violation of NASW Code of Ethics related to disregard of clients, agency and/or field instructor.
   Illegal behavior (stealing; drug use).

TIME AND ATTENDANCE: A COMMON CONCERN (ALSO SEE THE FIELD MANUAL)

The schedule for the duration of the placement should be decided at the very start of placement. Once a schedule is agreed upon, it is documented on the cover page of the student's learning contract.

Of course, things come up. If a short leave is expected, i.e. a student is pregnant and will be taking a short leave later in the semester, ***a written plan*** that includes the student's, field educator's, and liaison's signature must be put in place. If a student misses time due to an illness or accidence, ***a written plan*** that includes the student's, field educators, and liaison's signature must be put in place.

The plan should include a schedule of how and when missed hours will be made-up, and the timeframe for completion.

Please note that the goal is NOT to put in time, but for the student to engage in substantive learning. Making up time on evenings and weekends, for example, may fit the student's schedule, but may not fulfill the real goal of field placement.

STEPS TO TAKE WHEN A STUDENT IS HAVING PROBLEM / ADDENDUMS TO THE LEARNING CONTRACT

An addendum is needed whenever there are concerns about a student's performance, and/ or where there are ratings of IP or UP.

Addendums are given to help students be successful. When, the field educator and/or the student are stressed, communication can become unclear.

The addendum is added to the learning contract's objectives and must be written in behaviorally specific language to clearly state what the area of concern is and what is considered acceptable performance.

Sometimes performance concerns relate to unevenness in progress or slow progress related to the application of theory and the development of skills. The student may have periods of improved functioning and responsiveness to specific direction from the field educator; however it is not up to the level expected.

The addendum specifies:

1. What the field educator will do to assist the student in learning the new skill, i.e. new instructional methods may be applied. For example, journaling, role playing, video/audio taping or some other tool to help the student learn the needed skill (s). "If we change nothing, nothing will change." An exception to this may be if the area of concern is regarding professional work skills e.g. the student is late to placement or has called in too many times. The necessary change may be that the student has to check in with someone to verify they have come in on time etc.
2. What the student's responsibility will be.
3. The addendum should be written in behavioral terms, and indicate how it will be determined when competence is obtained.
4. The addendum should reference specific learning contract objectives.

APPENDIX

Field Summary Report Example 1 (Following Termination of Failure) Student:

Field Placement:

Date:

Submitted by: (Faculty Liaison)

Briefly describe concerns, indicating the SSW competency or competencies each concern is associated with, and efforts around remediation:

(Field Educator) contacted this writer with concerns about the student's performance in October. (She) explained that concerns had arisen early in the Fall term, and that the student had been given constructive feedback and support, but little progress had been made.

Issues included: 1) unprofessional behavior (raising voice in response to Field Educator request and becoming argumentative); 2) not accepting and integrating constructive feedback; and, 3) disregarding program/field site procedures on several occasions. ***[Competency #1: Identify as a professional social worker, apply social work ethical principles to guide professional practice and conduct oneself accordingly.]***

Thus, a meeting was held on (date) to discuss these concerns. When asked directly about her behavior, (student) stated that she was not doing anything inappropriate, and seemed unable to take responsibility for problematic behaviors. With support, she was able to state that it was a mistake to continue use of her cell phone. A formal plan for improvement/ an addendum was developed in mid-December. (See attached.)

Specific behaviors:

Not following procedures, i.e. in the use of personal cell phone.

resistance to feedback i.e. argumentative when Field Educator is not in agreement with him

Not following Field Educator's directives, and at times disregarding agency policy.

In Summary:

During this semester, (student) was provided feedback regarding a number of areas that needed to be improved (please refer to attached addendum and evaluation for specifics). During the meetings that this writer was in attendance, (Student) appeared to be open to feedback received. (Student) made some progress, however it was not enough to place her at a level of competence or emerging competence at the end of the semester period.

Signature *(Required)*

Field Summary Report Example 2 (Following Termination or Failure)
Student: Field Placement: Date:
Submitted by: (Faculty Liaison)

On October 11, 2011, I met with Elizabeth Dole, Field Educator at Super Duper School. Elizabeth was the Field Educator for Elton John, FT Foundation Year student with the UB SSW. During our initial meeting Elizabeth immediately expressed her concerns regarding Elton who had begun his field placement with her about 3 weeks before.

The atmosphere at the field placement is congruent with many other school Social work sites; a fast paced environment with significant crisis work. The Social Workers and interns interact with a multitude of systems within the district: administrators, teachers, staff, parents and child associates in a host setting.

Elizabeth had received feedback about Elton from several of her co-workers and the Principal describing Elton's interactional style as one that was perceived as being challenging, overconfident and not necessarily appropriate for a beginning foundation year student. One of the staff that Elton interacted with had 25 years of experience and she reported that Elton asked her "Isn't there a more efficient way of doing this?" When Elton was told to do screenings with children, he apparently asked about what his other options might be. On the surface, these questions could appear to be within reason because students are responsible for asking questions. However, Elizabeth explained that it was the manner the questions were asked and the number of questions asked that fed into the perception that Elton was being contrary and challenging authority. Elizabeth reported a similar perception of Elton when she spent time with him discussing cases.

Elizabeth stated that she felt strongly that this placement would not be a good fit for Elton in part because she was called out of her office frequently and she was not confident that Elton would seek out assistance before responding to issues that may arise. Elizabeth explained that Elton would need to report to several people with a variety of work styles in a fast paced environment. Elton appeared to be overwhelmed in this setting as demonstrated by his response to those in authority and their directives.

Specific behaviors identified by the Educator include:
- Frequent questioning of School procedures
- Questioning Field Educator directives
- Questioning various aspects of assigned activities.

The Field Educator refers to the above as a "pattern of behavior" that may make the student unsuited to the setting.

Later in the afternoon (10/11/11), Zoe Koston, Elton and I met to discuss the issues raised by Elizabeth Dole, Elton's Field Educator. Elton was quite surprised by the feedback he received regarding how his actions had been perceived. Elton explained that in his attempts to perform his responsibilities at placement, he often questioned each staff member to fully understand what they wanted from him. However, upon further discussion Elton disclosed that interacting with a variety of people who provided him instruction raised his anxiety resulting in an 'intensity' of his questions and manner. This appears to have been perceived by others as being challenging, although that was not Elton's intent.

In addition, there appears to have been miscommunication between at least one supervisor and Elizabeth. Elton apparently had asked for clarification regarding how to complete a form and the supervisor told Elton that he could write notes/observations in the margins, however when this was reviewed by others it was interpreted that as being inappropriate. (Continued next page)

Elton was informed that a meeting was scheduled for the next morning with him, his Field Educator, Justin Timberlake the contact person for the Super Duper School District and me (Faculty Liaison). We discussed possible outcomes to the scheduled meeting which included the possibility of his termination from this placement. His responses indicated he realized how serious the situation was and he would accept responsibility and move forward.

We met the following morning (10/12/11) with Elizabeth, Justin, Elton and I to discuss areas of concerns and possible outcomes. Elizabeth provided feedback to Elton that his approach to directives and his recent responses to Elizabeth and various staff members created a sense of uncertainty as to how he might react in crisis situations that may require an immediate response. Elizabeth explained that she did not feel she could trust that an appropriate response by Elton would occur. She clearly indicated that this placement would not meet Elton's learning needs at this time. Elton heard these difficult words with professionalism and maturity. He clarified his responses to his actions, took responsibility for their impact, apologized for any misconceptions that were perceived and clearly indicated that it was not his intent to cause any harm or stress. He agreed that continuation of this placement would cause increased stress to the Field Educator and himself. Again, the school environment requires working with so many systems and quick responses that as this time it appears Elton is not ready for this type of placement. Justin complimented Elton on his reaction to a difficult meeting and indicated another smaller setting would give him the opportunity to hone his skills.

In summary, during my observations of Elton he presented as being analytical in nature and he stressed several times that when he is working with someone in a position of authority that he focuses on understanding what that person expects of him and then he attempt to change his behavior to meet that persons expectations. Elton recognizes that this process can be stressful for him until he has an understanding of those expectations. This process can often result in Elton asking numerous questions in an intense manner that could possibly be experienced as being challenging.
Although much of the feedback Elton received in the meetings on 10/11/11 and 10/12/11 were challenging to hear, he was not defensive, he processed the information in a professional manner and was took responsibility when the situation called for. As noted above, both his field educator and the contact person for Super Duper Schools commended Elton for his professional demeanor during this process.

(Faculty Liaison Signature Required)

Focused Learning Agreement (Addendum for Performance Improvement)

The following addendum is given when a student's level of performance is marginal or poor. There may be more than one area that needs improvement, please use a separate form for each area e.g. use one form for time/ attendance issues and a separate form for issues related to marginal engagement skills. The purpose of this process is to assist the student to be successful.

Directions

1. Please discuss areas of concern with the Faculty Liaison prior to completing this form.
2. Complete the form (complete all sections and use additional paper if needed). review with student, sign and date the form

Send a copy of the completed, signed form to the Faculty Liaison

A. Please describe the issue/behavior which needs to improve. Please be as specific (behavioral) as possible.

B. Please circle the objective(s) from the learning contract that the issue/behavior falls under e.g. time and attendance could be Objective 1, Objective 3 (if not prepared for meetings due to attendance), and objective 4.

C. Please list what the responsibility of the student will be (please be as specific as possible.

For example – The student will complete the Log/Journal Format form, Appendix K in Field Manual weekly. The student is to focus on the issues related to improving their engagement skills with clients. The student will send this electronically to the Field Educator by Monday morning (weekly). The student will come prepared to discuss the contents of the Log/Journal in weekly supervision with his/her Field Educator.

D. Please list what educational tools will be used to assist the student with learning e.g. journaling, video/audio taping etc.

E. Please list what the responsibility of the Field Educator will be e.g. direct observation of the student, gathering communication from co-workers to assist with determining progress.

For example -The Field Educator will review the weekly journal and be prepared to discuss observations and thoughts with student in weekly supervision. The field educator will gather information regarding the student's progress by direct observation, input from co-workers, reviews of student's documentation and (when appropriate) feedback from clients. The Field Educator will verbally provide feedback to the student in weekly supervision regarding progress and areas to continue to improve on.

Objective 1: Identify as a professional social worker, apply social work ethical principles to guide professional practice and conduct oneself accordingly.

Objective 2: Engage diversity and difference in practice to advance human rights and social and economic justice.

Objective 3: Apply appropriate engagement skills (with individuals, groups, families, organization, and communities).

Objective 4: Engage in policy practice to advance social and economic well-being and to deliver electives social work services.

Objective 5: Engage in research-informed practice and practice-informed research.

Objective 6: Apply critical thinking to inform and communicate professional judgments to assess, intervene and evaluate individuals, families, organizations and communities.

Signature of field educator________________________ Date________________

By signing below the student acknowledges and understands that this Addendum to the Learning Contract is a write notification to the student that the student may be in jeopardy of failing. If the student's level of performance does not improve the result may be an unsuccessful grade in the field placement.

Signature of student_________________________ Date___________________

Signature of faculty liaison Date

The student may list any comments or concerns:

____

____

____

____

New Liaison Orientation (Getting Started)	New FE Orientation Packet	Field Manual (Liaison must be familiar with)	Web Site (Liaison must be familiar with)	Faculty Liaison Handbook
New Liaison Orientation: Liaison Packet • Liaison Role & Recommendations • Liaison Handbook • New Hire Orientation Sheet • Note: Please use your UB Email • Mileage Forms • Timesheet instructions • This Grid: Where to Find Info • Taskstream	• List of Packet Contents • Welcome Message • Web Site HO; • Field Manual HO • Taskstream	**Roles and Responsibilities**	**Resources for Students**	**Getting Started:** Introduction; SSW Website; Student List/Report; New FE Orientation
New FE Orientation (Packet) (Have Sample) Who get oriented; How do you know	FE Orientation Session Outline	**Evaluation Guidelines**	**Resources for Educators**	**Communication:** Introduction; Helpful Tips; Sample Agendas; Sample Communication Checklist; Sample Correspondence
Field Manual (Online): Roles and Responsibilities; Grading; Attendance, etc. Student Status- Definitions; Foundation Placements versus Advanced; Learning Contract; Evaluation	Learning Contract/Evaluations worksheets	**Code of Ethics**		Common Requests Request for schedule change; Request to accept employment at field agency
Website: Forms; Resources; Learning Contract **Liaison Resources Page on SSW Web** http://www.socialwork.buffalo.edu/msw/field/ User name is faculty; Password is liaison • Liaison Handbook • Taskstream Quick-start Guide for Reviewer Role • Quick-start Guide for Evaluation Manager Role • Account Setup		**Termination of Placement**		**When Issues Arise**; Introduction; Expectations for student behavior; Time &Attendance; Steps to Take When A Problem Arises or concerns;
FL Handbook: What to Address in Site Visit /Agenda (Refer to HB); When Issues Arise		**Appendix: Field Status Review**		**Appendix:** Sample Field Summary Reports; Sample Addendum

University at Buffalo
Office of Field Education
School of Social Work

taskstream by Watermark™

We have a system for students, field educators, liaisons & field staff to develop the learning contract & evaluate student performance! One central place for students to create, submit, share and store all field related work online.

What are the Benefits of Taskstream for Educators and Students?

- **No more paper—Complete field paperwork and easily acquire all necessary signatures online.**
- **Students have lifetime access to materials in Taskstream.**
- **Students can create high-impact online portfolios, and create multiple, targeted showcases of their work to show employers, schools, etc.**
- **Students can look back on work they've done throughout their program and reflect upon their personal growth.**
- **Students can maintain portable record of work samples and accomplishments even after they graduate.**

Is There a Cost?

There is no cost for educators. There is a cost, however, for students. Student Cost >> $50 for one year(as of 7/1/2018)

How do Field Educators Register? (It's easy)

- Go to Taskstream.com to create or renew your account. (Save your user name and password.)
- You will need this key code: **23X6UC-36P32V**
- The Field Office will group you with your student's account

Form: "Activities & Target Dates - Foundation"

Created with: Taskstream
Author: University at Buffalo Social Work Manager

Instructions: For each activity below, include the following *** (Hint: You could cut and paste the following into each of your activities if that is helpful.):

• Description of learning activity (What you are going to do)
• How will learning be demonstrated (What would others observe you doing)
• How will learning be evaluated (What will others observe once you are competent in this area)
• Target Date

Helpful Verbs
Interview, write, observe, role play, participate, accompany, attend, summarize, co-lead
Develop, understand, utilize, be able, distinguish between, interpret, formulate, demonstrate, examine, and take initiative

Example
(What) Student will co-lead a social skills group, (How Demonstrated) demonstrating the ability to engage effectively with individual group members, exhibiting positive regard and openness, (Evaluation) and will reflect on progress in supervision.

Student Name	
Field Educator Name	

Page intentionally left blank.
Use for notes, etc.

Competency 1

Demonstrate ethical and professional behavior.

Expected Outcomes / CSWE Component Behaviors

- Make ethical decisions by applying the standards of the NASW C Code of Ethics, relevant laws and regulations, models for ethical decision-making, ethical conduct of research, and additional codes of ethics as appropriate to context.
- Articulate the value base of the social work profession, its ethical standards, and relevant laws including the NASW Code of Ethics.
- Describe possible resolutions in resolving ethical conflicts using a trauma-informed and human rights perspective.
- Articulate the links among social work ethics, the core values of trauma-informed care, and universal human rights.
- Use reflection and self-regulation to manage personal values and maintain professionalism in practice situations.
- Demonstrate professional demeanor in behavior; appearance; and oral, written, and electronic communication.
- Critically evaluate the rationale for adhering to professional social work roles and boundaries in diverse practice situations.
- Describe how technology can be used to ethically facilitate practice outcomes at micro, mezzo, and macro levels, and locally, nationally and globally.
- Critically analyze both facilitators and barriers to accessing and utilizing technology to enhance practice outcomes.
- Use supervision and consultation to guide professional judgment and behavior, and exhibit openness in receiving feedback.
- Identify the importance of self-care in professional social work practice.
- Understand elements of ethical leadership.
- Understand social work's responsibility to provide leadership that honors trauma-informed and human rights perspectives.

Competency 1

Activity 1 and Target Date	Activity 2 and Target Date

Q:\Taskstream\Worksheet - Learning Contract\Foundation Learning Contract - Worksheet.doc

Competency 2

Engage diversity and difference in practice.

Expected Outcomes / CSWE Component Behaviors

- Apply and communicate understanding of the importance of diversity and difference in shaping life experiences in practice at the micro, mezzo, and macro levels.
- Describe how the dominant cultures' structures and values may oppress, marginalize, alienate, or create or enhance privilege and power in the region, nationally, and internationally.
- Describe the potential for policy, research, theory, and practice to perpetuate or redress social injustice and human rights violations.
- Present themselves as learners and engage clients and constituencies as experts of their own experiences.
- Apply self-awareness and self-regulation to manage the influence of personal biases and values in working with diverse clients and constituencies.

Competency 2

Activity 1 and Target Date	**Activity 2 and Target Date**

Competency 3

Advance human rights and social, economic and environmental justice.

Expected Outcomes / CSWE Component Behaviors

- Apply their understanding of social, economic, and environmental justice to advocate for human rights at the individual and system levels.
- Articulate the principles and tenets of trauma-informed care and human rights frameworks.
- Articulate how trauma-informed care and human rights frameworks can be integrated in practice at micro, mezzo, and macro levels.
- Engage in practices that advance social, economic, and environmental justice.
- Describe the universal relevance of trauma and human rights to professional social work practice.

Competency 3

Activity 1 and Target Date	**Activity 2 and Target Date**

Competency 4

Engage in practice-informed research and research-informed practice.

Expected Outcomes / CSWE Component Behaviors

- Use practice experience and theory to inform scientific inquiry and research.
- Describe ethical scientific approaches to building knowledge.
- Apply critical thinking to engage in analysis of quantitative and qualitative research methods and research findings.
- Utilize research generated by diverse (e.g., culturally-grounded, interdisciplinary, international) sources.
- Use and translate research evidence to inform and improve practice, policy, and service delivery in an ethical manner, integrating a trauma-informed and human rights perspective.

Competency 4

Activity 1 and Target Date	Activity 2 and Target Date

Competency 5

Engage in policy practice.

Expected Outcomes / CSWE Component Behaviors

- Identify social policy at the local, state, and federal level that impacts well-being, service delivery, access to social services, and the protection of human rights.
- Assess how social welfare and economic policies impact the delivery of and access to social services.
- Identify the role of a trauma-informed care and human rights perspective in policy practice to advance human rights and social, economic and environmental justice.
- Apply critical thinking to analyze, formulate, and advocate for policies that advance human rights and social, economic, and environmental justice.
- Collaborate with colleagues and client systems for effective policy action.

Competency 5

Activity 1 and Target Date	Activity 2 and Target Date

Competency 6

Engage with individuals, families, groups, organizations, and communities.

Expected Outcomes / CSWE Component Behaviors

- Apply knowledge of human behavior and the social environment, a trauma-informed and human rights perspective, and other multidisciplinary frameworks to engage with clients and constituencies.
- Use empathy, reflection, interpersonal skills, and a trauma-informed and human rights perspective to effectively engage diverse clients and constituencies.

Competency 6

Activity 1 and Target Date	**Activity 2 and Target Date**

Competency 7

Assess individuals, families, groups, organizations, and communities.

Expected Outcomes / CSWE Component Behaviors

- Collect and organize data, and apply critical thinking to interpret information from clients and constituencies.
- Apply knowledge of human behavior and the social environment, person-in-environment, and other multidisciplinary theoretical frameworks in the analysis of assessment data from clients and constituencies.
- Develop mutually agreed-on intervention goals and objectives based on the critical assessment of strengths, needs, and challenges with clients and constituencies.
- Select appropriate intervention strategies based on the assessment, research knowledge, and values and preferences of clients and constituencies.

Competency 7

Activity 1 and Target Date	**Activity 2 and Target Date**

Competency 8

Intervene with individuals, families, groups, organizations, and communities.

Expected Outcomes / CSWE Component Behaviors

- Critically evaluate the evidence base and choose and implement interventions to achieve practice goals and enhance capacities of clients and constituencies.
- Apply knowledge of human behavior and the social environment, taking into account the trauma-informed care and human rights perspective.
- Employ empowerment strategies to bring about problem resolution.
- Identify the strengths of interprofessional collaboration.
- Negotiate, mediate, and advocate with and on behalf of diverse client systems and constituencies.
- Describe normative and non-normative processes associated with endings and transitions.
- Facilitate effective transitions and endings that advance mutually agreed-on goals, using a trauma-informed and human rights perspective.

Competency 8

Activity 1 and Target Date	**Activity 2 and Target Date**

Competency 9

Evaluate practice with individuals, families, groups, organizations, and communities.

Expected Outcomes / CSWE Component Behaviors

- Match goals and objectives to methods for evaluation of outcomes.
- Apply knowledge of human behavior and the social environment, person-in-environment, a strengths perspective, and other multidisciplinary theoretical frameworks in the evaluation of outcomes.
- Articulate a rationale for selecting particular methods of evaluation based on theoretical frameworks.
- Critically analyze, monitor, and evaluate intervention and program processes and outcomes.
- Apply evaluation findings to improve practice effectiveness at the micro, mezzo, and macro levels.

Competency 9

Activity 1 and Target Date	Activity 2 and Target Date

Form: "Activities & Target Dates - Advanced"

Created with: Taskstream
Author: University at Buffalo Social Work Manager

Instructions: For each activity below, include the following *** (Hint: You could copy and paste the following into each of your activities if that is helpful.):

• Description of learning activity (What you are going to do)
• How will learning be demonstrated (What would others observe you doing)
• How will learning be evaluated (What will others observe once you are competent in this area)
• Does this activity relate to a “trauma-informed human rights perspective” - you should have at least one or two
• Target Date

Helpful Verbs
Interview, write, observe, role play, participate, accompany, attend, summarize, co-lead Develop, understand, utilize, be able, distinguish between, interpret, formulate, demonstrate, examine, and take initiative

Example
(What) Student will co-lead a social skills group, (How Demonstrated) demonstrating the ability to engage effectively with individual group members, exhibiting positive regard and openness, (Evaluation) and will reflect on progress in supervision.

Students should identify at least one or two activities that relate to a “trauma-informed human rights perspective”, a key component of the UB SSW curriculum. You’ll see mention of a trauma-informed human rights perspective is mentioned in Competencies 1-9.

Copy and paste the web link below into your browser to find sample activities:
http://socialwork.buffalo.edu/field-educators-liaisons/field-educator-resources/orientation-and-training/learning-contracts-and-performance-evaluations/learning-contract-evaluation-activity-search/advanced-year.html

Student Name	
Field Educator Name	

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Use for notes, etc.

Competency 1

Demonstrate ethical and professional behavior.

Expected Outcomes / CSWE Component Behaviors

- Practice professionally in accordance with social work ethics, the core values of trauma-informed care, and universal human rights
- Apply guidelines for ethical decision making in practice situations.
- Apply a TI-HR perspective to guidelines for ethical decision making in practice situations.
- Engage in continuous self-reflection, self-regulation, and self-correction in practice situations to ensure linkages among social work ethics, the core values of trauma-informed care and universal human rights.
- Exemplify professional demeanor in behavior, appearance, and oral, written and electronic community.
- Act within the scope of professional roles and boundaries within the context of a trauma-informed and human rights perspective.
- Demonstrate how technology can be used to facilitate ethical and appropriate practice outcomes at micro, mezzo, and macro levels, and locally, nationally, and globally.
- Apply in practice knowledge derived from supervision and consultation.
- Develop a plan for continuing education and self-care.
- Provide leadership in organizations and communities that enhances a trauma-informed and human rights perspective at all levels of practice.

Competency 1

Activity 1 and Target Date	**Activity 2 and Target Date**

Competency 2

Engage diversity and difference in practice.

Expected Outcomes / CSWE Component Behaviors

- Apply an understanding of trauma-informed and human rights perspectives to diversity, difference, and cultural issues in practice.
- Exhibit an understanding of privilege and power in anti-oppressive practice at the micro, mezzo, and macro levels.
- Demonstrate the ability to leverage policy, research, theory, and practice to redress social injustice and human rights violations.
- Foster client empowerment through engaging them as experts of their lived experience.
- Demonstrate an ability to self-regulate personal biases and values and act in accordance with professional values.

Competency 2

Activity 1 and Target Date	**Activity 2 and Target Date**

Competency 3

Advance human rights and social, economic and environmental justice.

Expected Outcomes / CSWE Component Behaviors

- Take action to challenge social, economic, and environmental injustice and promote trauma-informed practice and policy and human rights.
- Choose strategies to advocate for human rights and social, economic and environmental justice.
- Incorporate trauma informed and human rights approaches into practice at the micro, mezzo, and macro levels.
- Integrate a trauma-informed and human rights perspective in social work practice.
- Engage in practices that advance social, economic and environmental justice and integrate a trauma-informed and human rights perspective.
- Demonstrate a critical awareness of the relevance of trauma and human rights to professional social work practice.

Competency 3

Activity 1 and Target Date	**Activity 2 and Target Date**

Competency 4

Engage in practice-informed research and research-informed practice.

Expected Outcomes / CSWE Component Behaviors

- Evaluate practice, programs, and policy, and use findings to strengthen these.
- Apply a trauma-informed and human rights perspective to research.
- Demonstrate proficiency in quantitative and qualitative research.
- Apply research generated by diverse (e.g., culturally-grounded, interdisciplinary, international) sources.
- Apply research findings and a trauma-informed and human rights perspective to improve practice, policy, and social service delivery.

Competency 4

Activity 1 and Target Date	Activity 2 and Target Date

Competency 5

Engage in policy practice.

Expected Outcomes / CSWE Component Behaviors

- Analyze social policy at the local, state, and federal levels from a trauma-informed and human rights perspective.
- Analyze, formulate, and advocate for policies that respond to emerging local, regional, and societal trends to advance well-being and attenuate the impact of trauma on client systems.
- Engage in policy practice that is informed by a trauma-informed and human rights perspective.

Competency 5

Activity 1 and Target Date	Activity 2 and Target Date

Competency 6

Engage with individuals, families, groups, organizations, and communities.

Expected Outcomes / CSWE Component Behaviors

- Reflect on and analyze theories of human behavior and the social environment and other multidisciplinary frameworks to engage with clients and constituencies.
- Exhibit the ability to tailor interpersonal skills and empathetic responses to the unique, situation-specific presentation of client systems.
- Incorporate a trauma-informed and human rights perspective to engage with client and systems collaboratively.
- Apply culturally relevant practices and service delivery that do not re-traumatize client systems.
- Articulate the rationale for employing a particular strategy behind engagement of client systems.

Competency 6

Activity 1 and Target Date	**Activity 2 and Target Date**

Competency 7

Assess individuals, families, groups, organizations, and communities.

Expected Outcomes / CSWE Component Behaviors

- Utilize and interpret client data while drawing on evidence-based practice knowledge as well as theories of human behavior, trauma-informed care, and human rights.
- Articulate a theory- and evidence-based rationale for selecting an assessment strategy.
- Demonstrate the ability to collaborate with client systems in order to develop innovative and creative intervention goals and objectives.

Competency 7

Activity 1 and Target Date	**Activity 2 and Target Date**

Competency 8

Intervene with individuals, families, groups, organizations, and communities.

Expected Outcomes / CSWE Component Behaviors

- Demonstrate the ability to select, adapt, and adjust interventions in accordance with the changing needs of the client system.
- Link intervention to assessment, assess the effectiveness of an intervention, and adjust the strategy based on client progress.
- Differentially apply social work skills to improve interprofessional collaboration.
- Articulate a rationale for selecting particular methods of negotiation, mediation, and advocacy on behalf of diverse clients and constituencies.
- Select and evaluate practice skills leading to effective transitions.

Competency 8

Activity 1 and Target Date	**Activity 2 and Target Date**

Competency 9

Evaluate practice with individuals, families, groups, organizations, and communities.

Expected Outcomes / CSWE Component Behaviors

- Assess organizations' outcome evaluation processes for best practices, particularly with vulnerable populations.
- Measure progress based on mutually agreed upon goals and evaluation methods.
- Demonstrate the ability to select particular methods of evaluation based on theoretical frameworks that are culturally and developmentally appropriate.
- Apply interdisciplinary knowledge and methods consistent with evidence-based, trauma-informed, and human rights perspectives to evaluate practice.
- Use a trauma-informed and human rights perspective to evaluate practice.
- Engage in a continuous process of evaluation.

Competency 9

Activity 1 and Target Date	**Activity 2 and Target Date**

University at Buffalo
Office of Field Education
School of Social Work

Faculty Liaison Profile

Date _______________

Name ____

UB Email ____

Alt Email ____

Phone (____) ____ - ______ work ☐ Ok to provide to students

Phone (____) ____ - ______ cell ☐ Ok to provide to students

Phone (____) ____ - ______ home ☐ Ok to provide to students

Field Office Use Only
☐ Entered into database
☐ Added to FL ListServ
☐ Emailed about Taskstream

Activate Your UBITName: Faculty or Staff by visiting:
http://www.buffalo.edu/ubit/service-guides/accounts/your-ubitname-account/getting-started-with-your-account/activate/faculty-or-staff.html

This will allow you to access a vast array of campus services, including:

- UBmail
- Wi-Fi on campus
- UB File System (UBfs) where you may store your data
- UBbox
- MyUB
- and many other IT services.

You will first need to gather your UB information

You will need the following **three pieces of information** to activate your UBITName:

Information	How You Get It	Where to Get Help If Lost or Unknown
1. UBITName	Postal Mail, in NEW Employee Welcome packet from Human Resources	Look up your UBITName online
2. Last four digits of your Person Number	On your UB Card	UBIT Help Center
3. One-Time Password	Postal mail, in NEW Employee Welcome packet from HR	**In Person:** Bring your UB Card or current government-issued photo I.D with date of birth, in English (e.g., driver's license or passport), to the UBIT Help Center. **Remote**: Fax to 716-645-3617 an enlarged and lightened copy of government-issued I.D described above. Call the UBIT Help Center at 716-645-3542 during business hours and verify your identity with UBIT Help Center staff.

Secondly, visit the UBITName Manager to activate

Using Your UB Email
Important Notice

Regarding email communications from
the School of Social Work:

UB Email is secure. All employees are advised to use this address.

UB email address example: yourubitname@buffalo.edu

Using UB Email also allows adjuncts to be consistent with communications to students.

This web link will allow you to forward UB email to another account: http://ubit.buffalo.edu/mail/forwarding/create.php

For technical assistance:

CIT Help Desk
214 Lockwood
Lockwood 2nd Floor Cybrary
(716) 645-3542
cit-helpdesk@buffalo.edu
http://helpdesk.buffalo.edu/

Exchange Mail Using Outlook Web Access

University at Buffalo
The State University of New York

UBIT Help Center

The UBIT Help Center in the 2nd Floor Lockwood Cybrary (North Campus)

Get help with your **UBITName**, password, printing and more, or **request an IT service**. Call us at **716-645-3542**, or visit one of our two locations:

- North Campus: Lockwood 2nd Floor Cybrary
- South Campus: Abbott 1st Floor Health Sciences Library

Online visit:

https://www.buffalo.edu/content/www/ubit/help

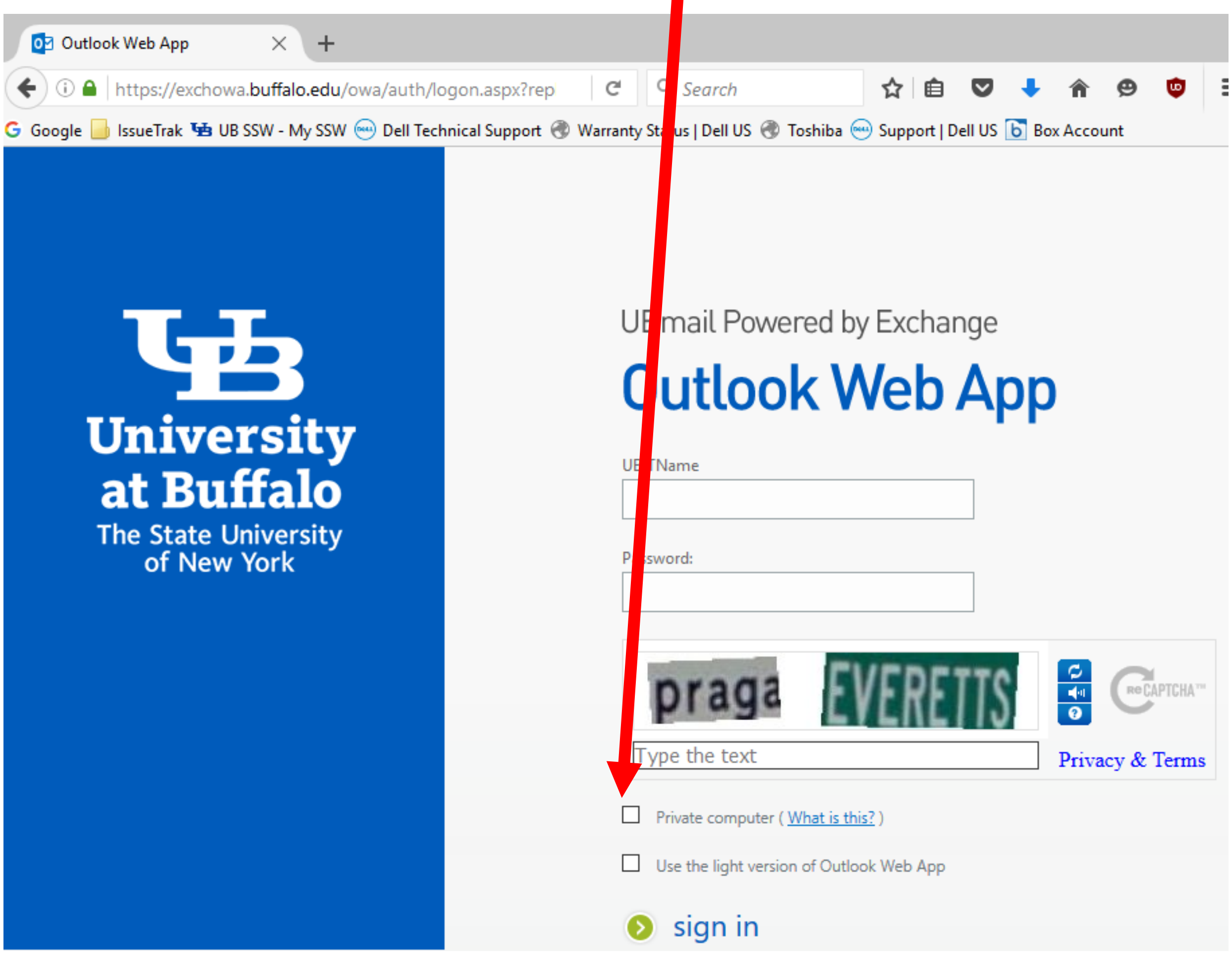
UBmail Powered by Exchange Mail using Outlook Web Access (OWA)

When you're not at your work computer, you can read your UBmail Powered by Exchange mail using a Web browser. Different browsers allow you access to different features.

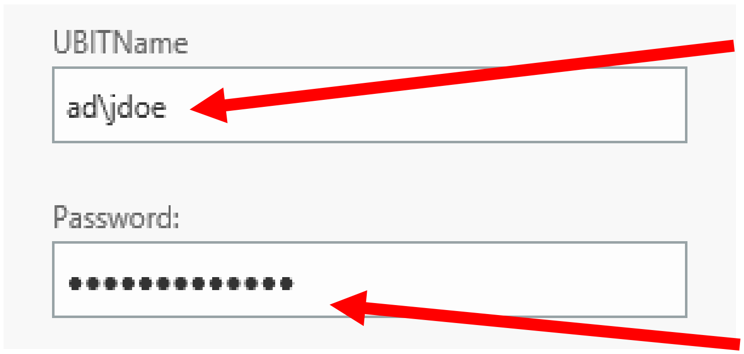
[Log into UBmail Powered by Exchange](#)

Logging In

1. Open a Web browser.
2. In the URL field, enter https://exchowa.buffalo.edu and press **Enter**.
3. On the Office Outlook Web Access screen: If you are the only person who uses this computer, you can check the "Private Computer" box.



4. In the Domain\User name field, enter **ad** followed by your UBITName.



*PLEASE NOTE: The slash is a **backslash ** Located under the Backspace key

For instance, if your UBITName is jdoe, you would enter **ad\jdoe**.

In the Password field, enter your UBIT Password.

5. Enter the ReCaptcha codes shown

6. Click **Sign In**.

Features by Browser Version

Outlook offers Premium and Lite access. Premium access is available for:

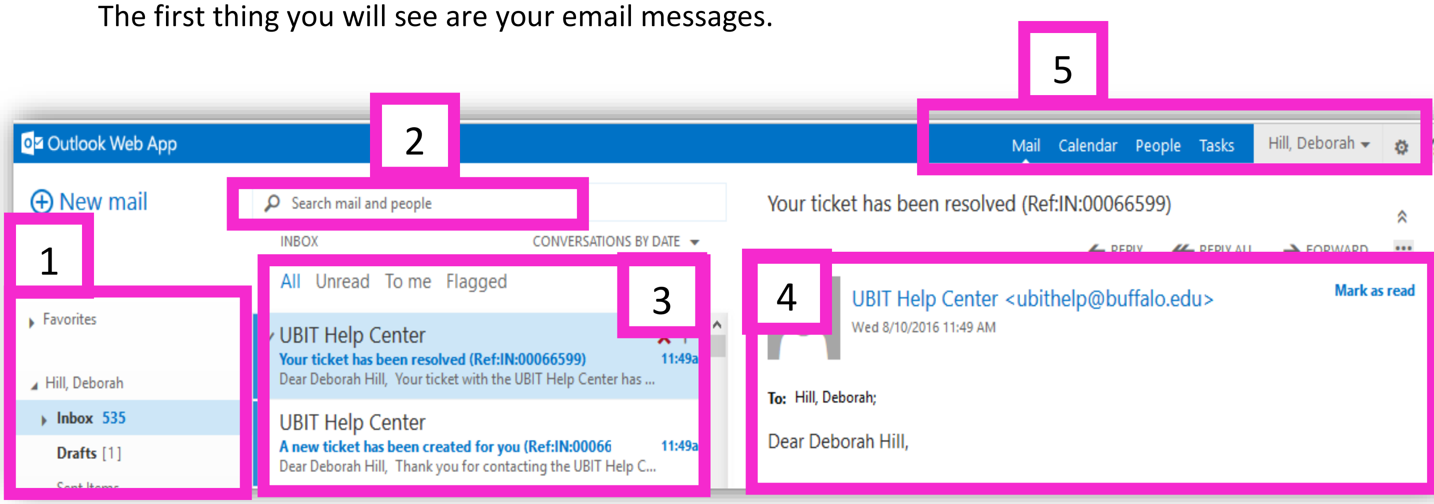
- Internet Explorer 7 or higher
- Mozilla Firefox 3.01 or higher
- Google Chrome 3.1 or higher
- Apple Safari 3.1 or higher

See which options are available for Premium and Lite:

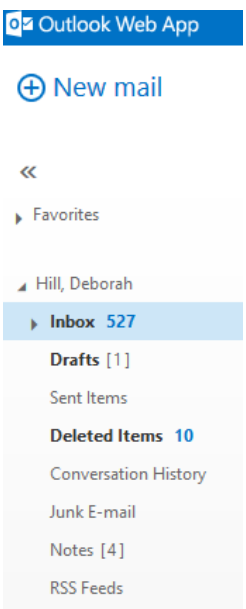
Feature	Premium	Lite
Spell Check	yes	no
Reading Pane	yes	no
Accessibility for blind/visually impaired	no	yes
Notifications and Reminders	yes	no
Weekly Calendar view	yes	no
Windows SharePoint Services and Windows file share integration	yes	no
Compose messages using HTML	yes	no - plain text only
Calendar options	yes	Limited to: • Show week numbers • Set first day of week • Select days of week • Set day start/end times
Arrange by	yes	Limited to a subset of choices
Right-click menu	yes	no
Drag-and-drop	yes	no
Explicit login	yes	no
Type-down search	yes	no
Resource mailbox management	yes	no
Appearance (color scheme)	yes	no
Voice mail options	yes	no

Email Overview

The first thing you will see are your email messages.

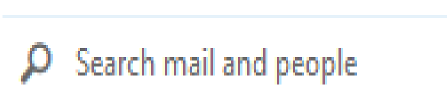


1. FOLDER LIST



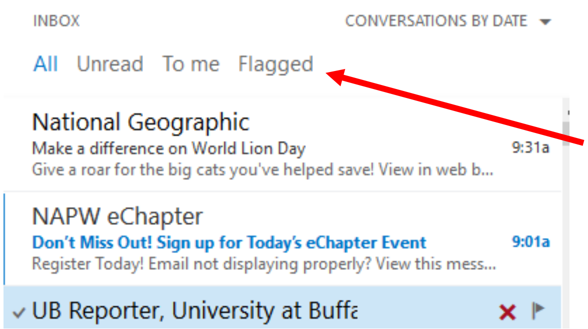
On the left is your Folder List: The folder list includes the folders in your mailbox and Favorites. You can expand and collapse folders in this view by clicking on the triangle icons next to the folder names.

2. SEARCH WINDOW



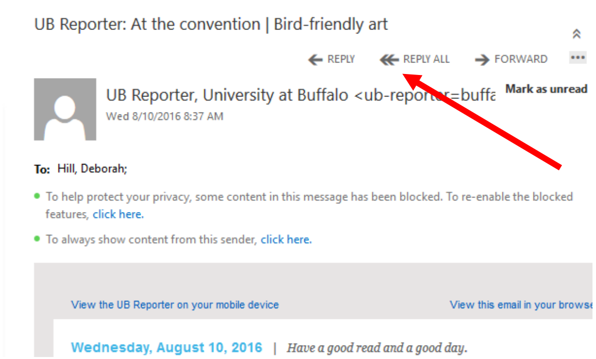
Search window. Type what it is you want to search for here, such as the name of a person you want to find messages from, or text that you want to search for to find a particular message.

3. RECEIVED MESSAGES



List of messages in the current folder. Your messages can be filtered by clicking the options at the top

4. READING PANE



The reading pane lets you read the message you have selected without opening it up. You can respond to any message in the conversation by clicking the links on the right.

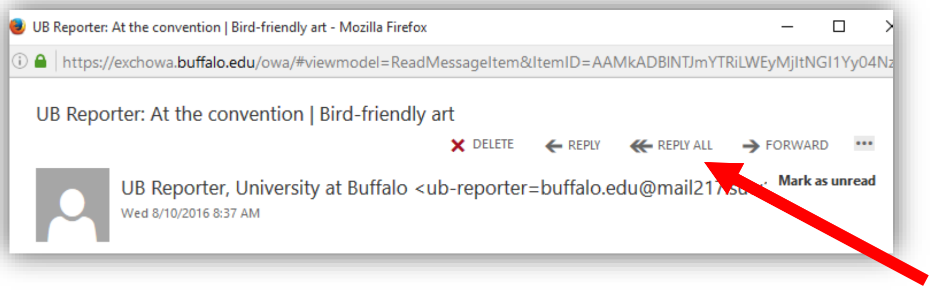
You can turn the reading pane off under settings:

5. CALENDAR, PEOPLE, TASKS

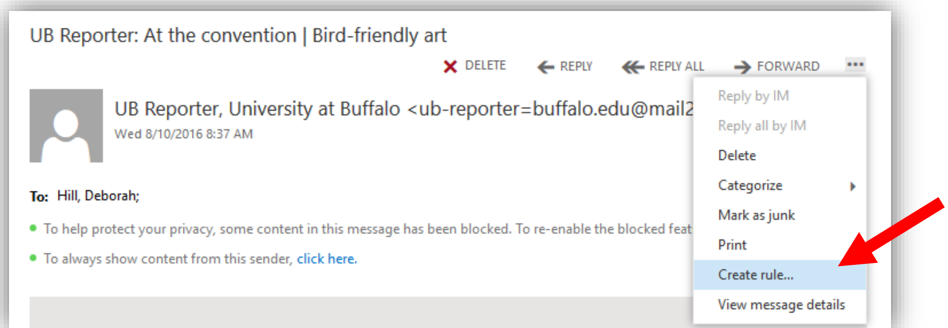
You will have access to your Outlook calendar, Contacts and Tasks located in the ***top right*** hand corner.

Messages

READING EMAIL



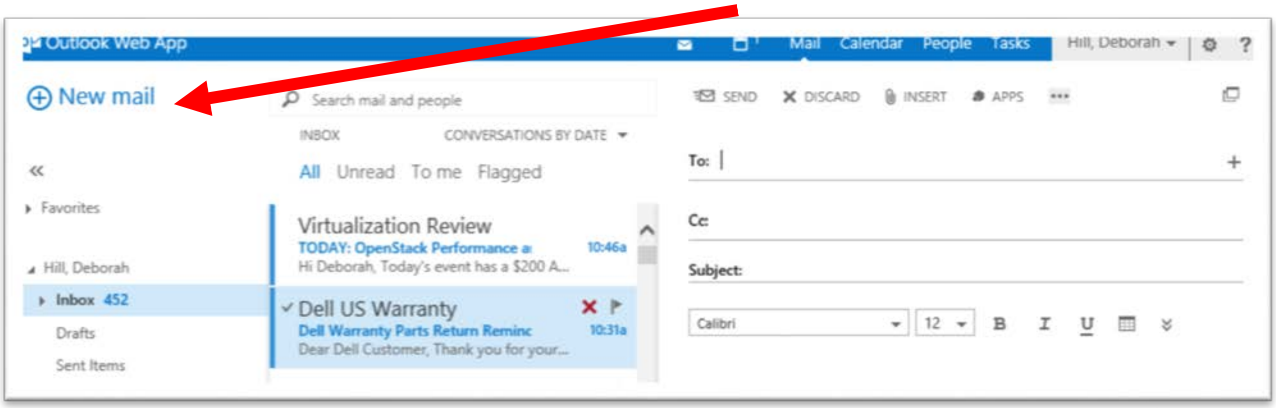
As you read your email you will notice the options for each email are location to the top right: From here you can **delete, reply** and **forward** an email.



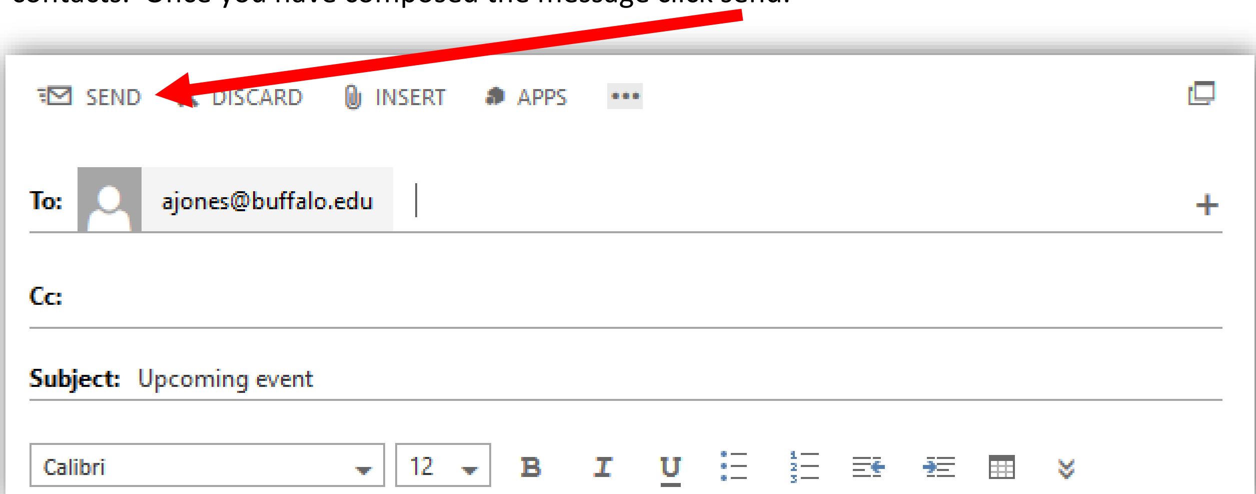
The drop down menu has a few more options such as create a rule.

NEW EMAIL

You can create a **new email** by clicking “New mail” in the ***top left*** hand corner:



You can type the email address of the person you are sending to or choose from your list of contacts. Once you have composed the message click send.



Folders

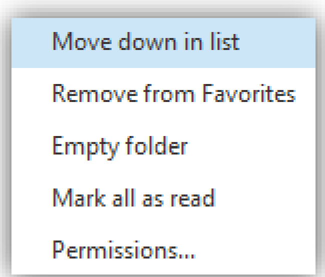
DEFAULT FOLDERS

Your account starts with these default folders:

- **Inbox** Incoming messages arrive in your Inbox unless you've created an Inbox rule to redirect them to another folder, or they're identified as junk email.
- **Drafts** If you create or respond to a message, but can't finish it right away, it will automatically be saved to your Drafts folder. You can come back to the message later to continue editing it, and then send it.
- **Sent Items** By default, a copy of every message you send is put in your Sent Items folder.
- **Deleted Items** When you delete a message, it's moved to the Deleted Items folder.
- **Junk Email** Messages that have junk email characteristics but that aren't blocked by a spam filter before they reach your mailbox will automatically be moved to this folder.

SHORTCUTS OR FAVORITE FOLDERS

The Favorites folder shows folders you access the most. Right Click any folder to see the options that are used or needed most often when working with these folders.



- **Move up in list** or **Move down in list** Use one of these options to reposition the folder higher or lower in the folder hierarchy. Which action appears first in the list depends on the location of the chosen folder in the hierarchy.
- **Remove from Favorites** Removes the link to the folder you created from Favorites; default folders can't be removed. The folder is retained in your personal folder.
- **Empty folder** Deletes everything in the folder, including any subfolders.
- **Mark all as read** Marks every item in the folder as read.

CREATING FOLDERS

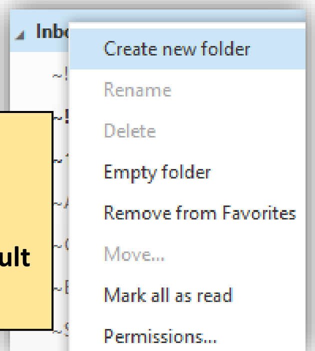
You can create additional folders to organize your messages as you like.

There is a difference between a folder and a subfolder. In a hierarchal structure, a folder—like your Inbox—is at the parent (first) level, and a subfolder is at the child (second) level.

To create a new folder

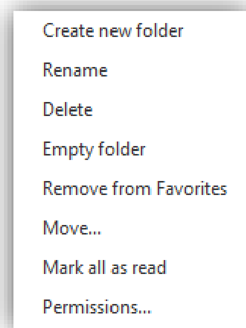
1. To create a new folder, do one of the following:
    - Choose your personal folder, right-click, and then choose **Create new folder**.

DEFAULT



Note that you cannot delete, rename or move any of the "Default Folders"

OTHER

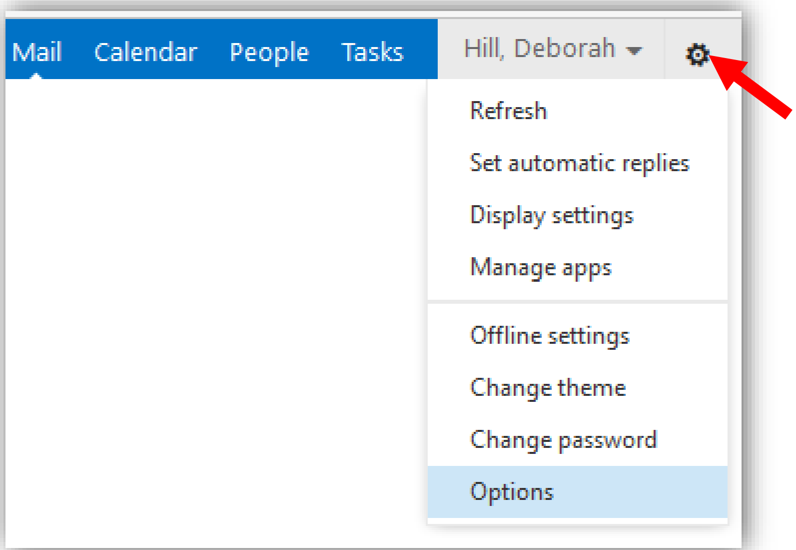


2. In the new folder box, enter a *name* for the folder, and then press Enter.

Important: Should you decide to delete a folder after you've created it, it's moved to the **Deleted Items** folder and remains in the **Deleted Items** folder it's emptied manually or automatically.

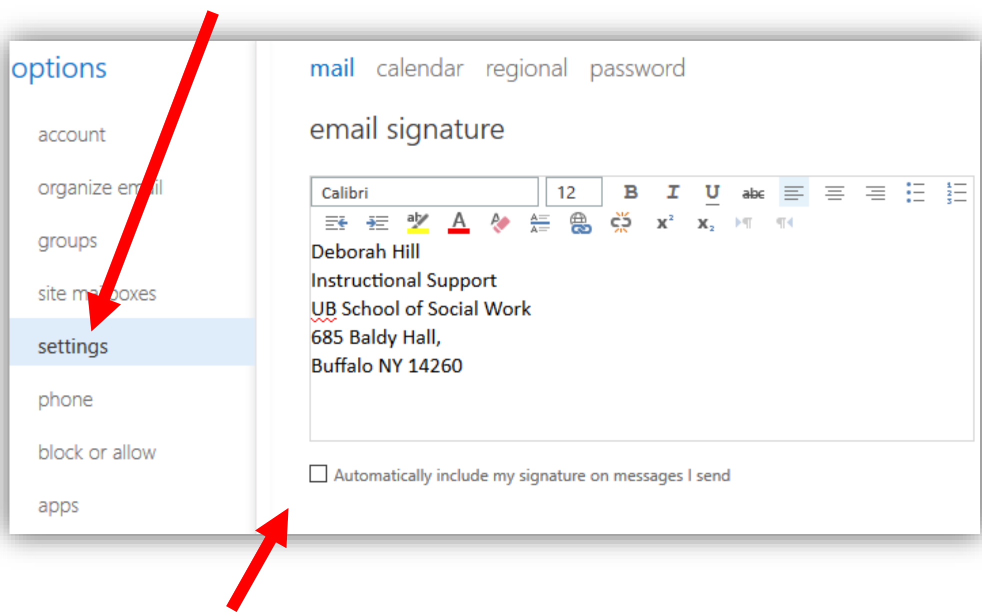
Create a Signature

CREATE AND SAVE A SIGNATURE



- Click on the gear symbol next to your name at the top right and choose Options

- Choose **settings** on the left to view your email signature



- Type the signature you want to use in the text box. Use the formatting bar to format the font as you want it to appear.

- If you want to have this signature appear in all messages you send check the box at the bottom

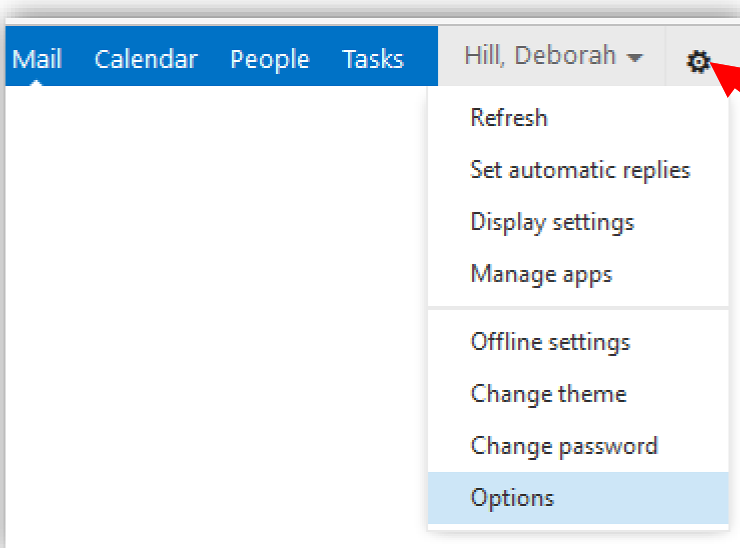
- When finished click Save

Rules

Manage your messages using rules that automatically act on arriving or sent messages that meets conditions you specify.

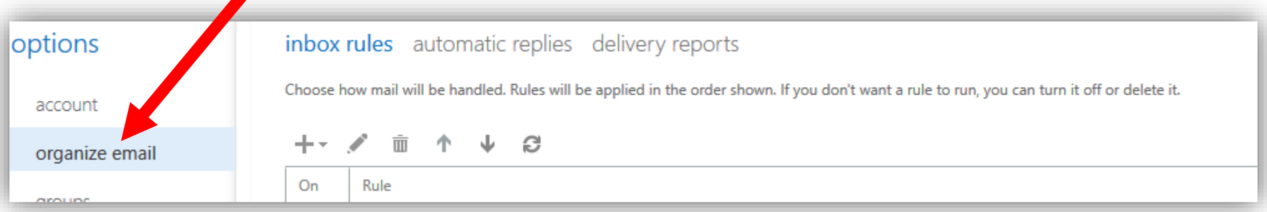
Rules don't operate on messages that have been read, only on those that are **unread**

OPEN RULES SECTION

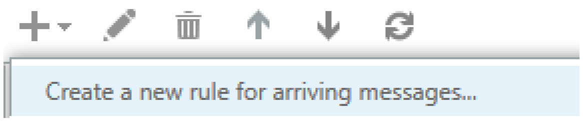


- Click on **settings** button on the top-right corner and select **Options**.

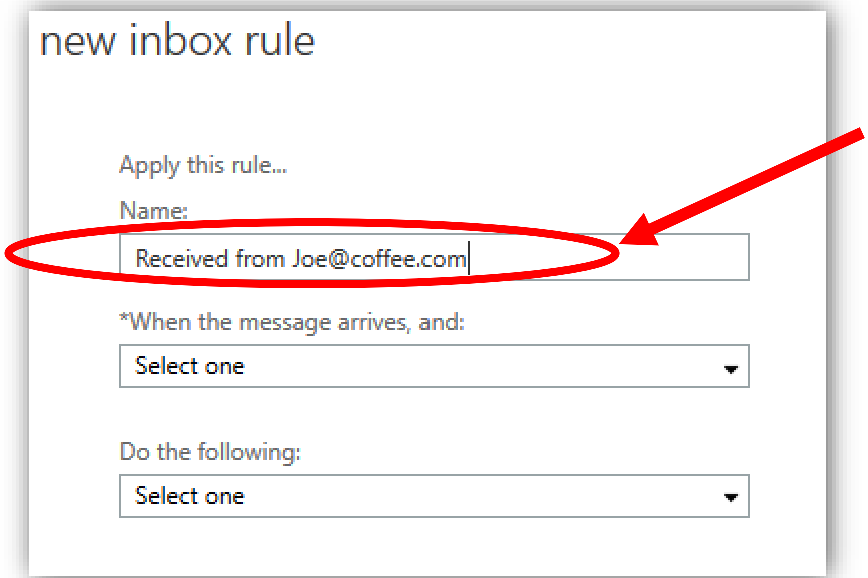
- Choose **organize mail** on the left to view the inbox rules



Create a new rule



To create a new blank rule using the **Inbox rules** page, choose new



1. Type name for the Rule

When the message arrives and:	Use this box to select criteria for your rule. Use the down arrow to view and select the criteria you want to use. If the criteria have additional options, enter them in the window that appears.
Do the following:	Use this box to select the action you want taken when a message arrives that meets the criteria you selected.

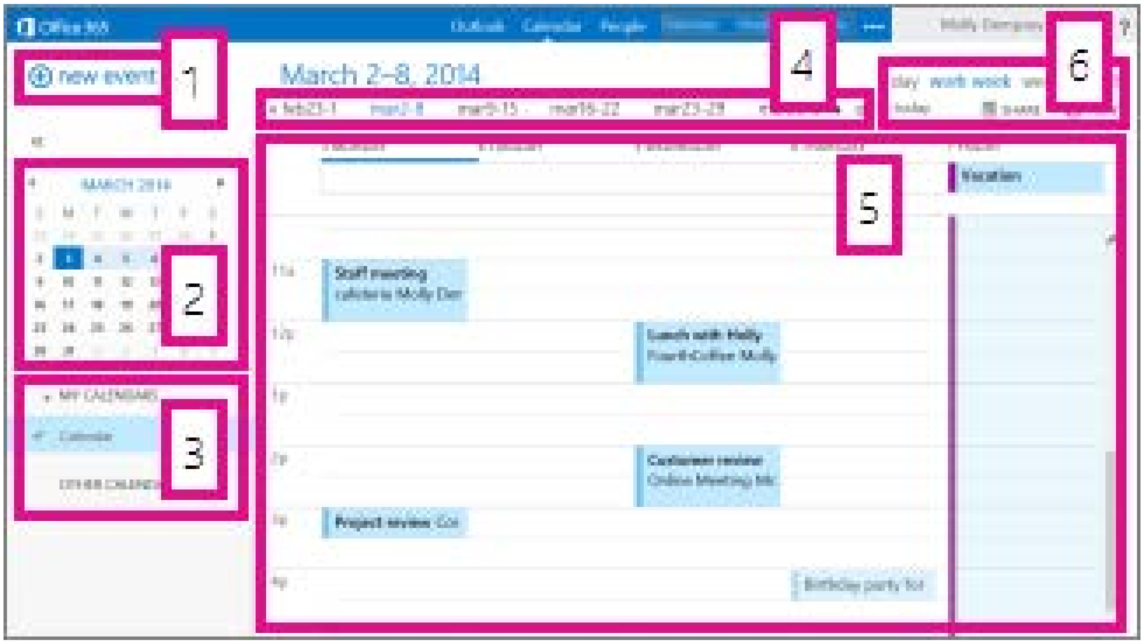
Edit a Rule

You can edit any rule by selecting it and choosing edit to open the rule so that you can change the conditions or actions of the rule.

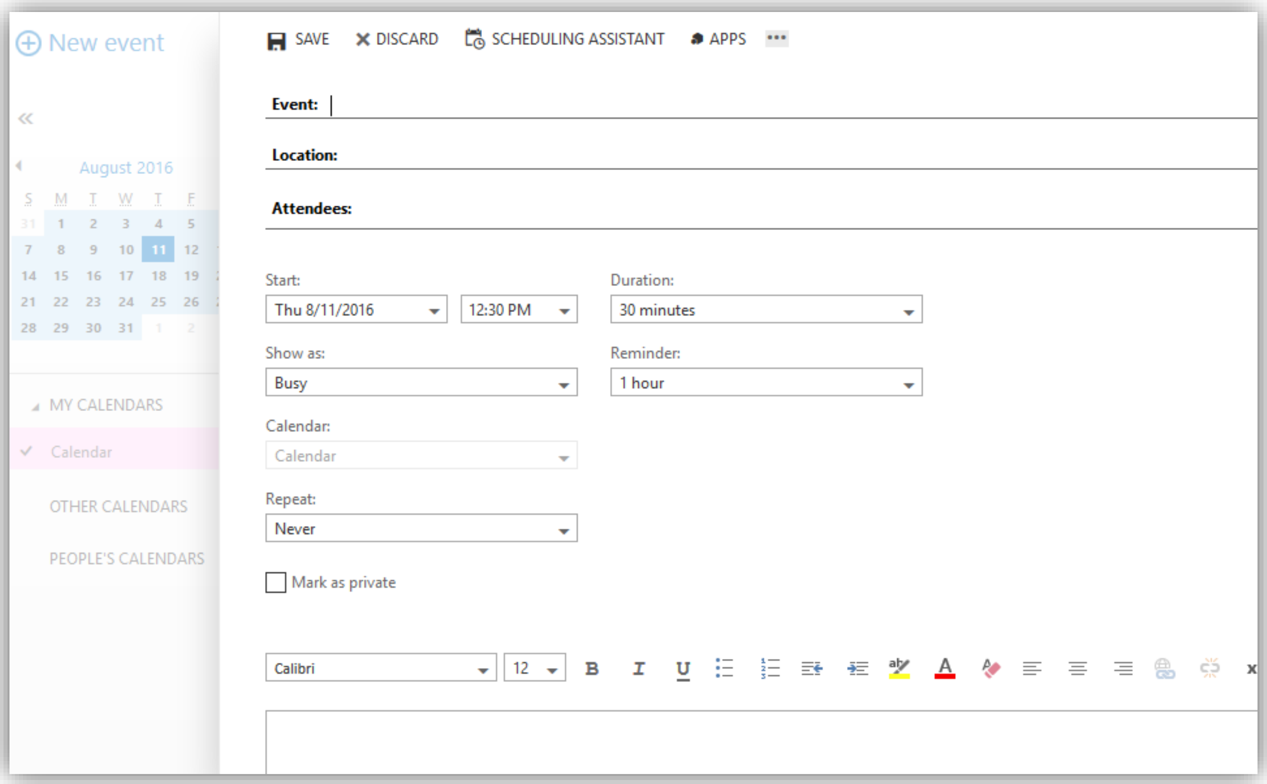
Delete a Rule

If you have a rule that you no longer want, you can select it and then click delete to remove it. If you just want to turn the rule off for a while, remove the check mark next to the rule.

Calendar



1. Create a new event by clicking **new event**.  An event can be an appointment, a meeting, or an all-day event.



2. Use the calendars to navigate from one date to another. Shading will show you what week you're currently viewing, and darker shading marks the current date. You can use the calendar icon at the top to collapse or expand this side of the calendar view.
3. You can view more than one calendar at a time. This section lets you add other people's calendars and select which to display.
4. This is another area that you can use to navigate from one day to another. Click on any of the dates to jump to that date. Or click on the arrows on either end to see the dates before or after what's displayed.
5. The main window, where calendars will be displayed.
6. Select the view you want, and share, or print your calendar.

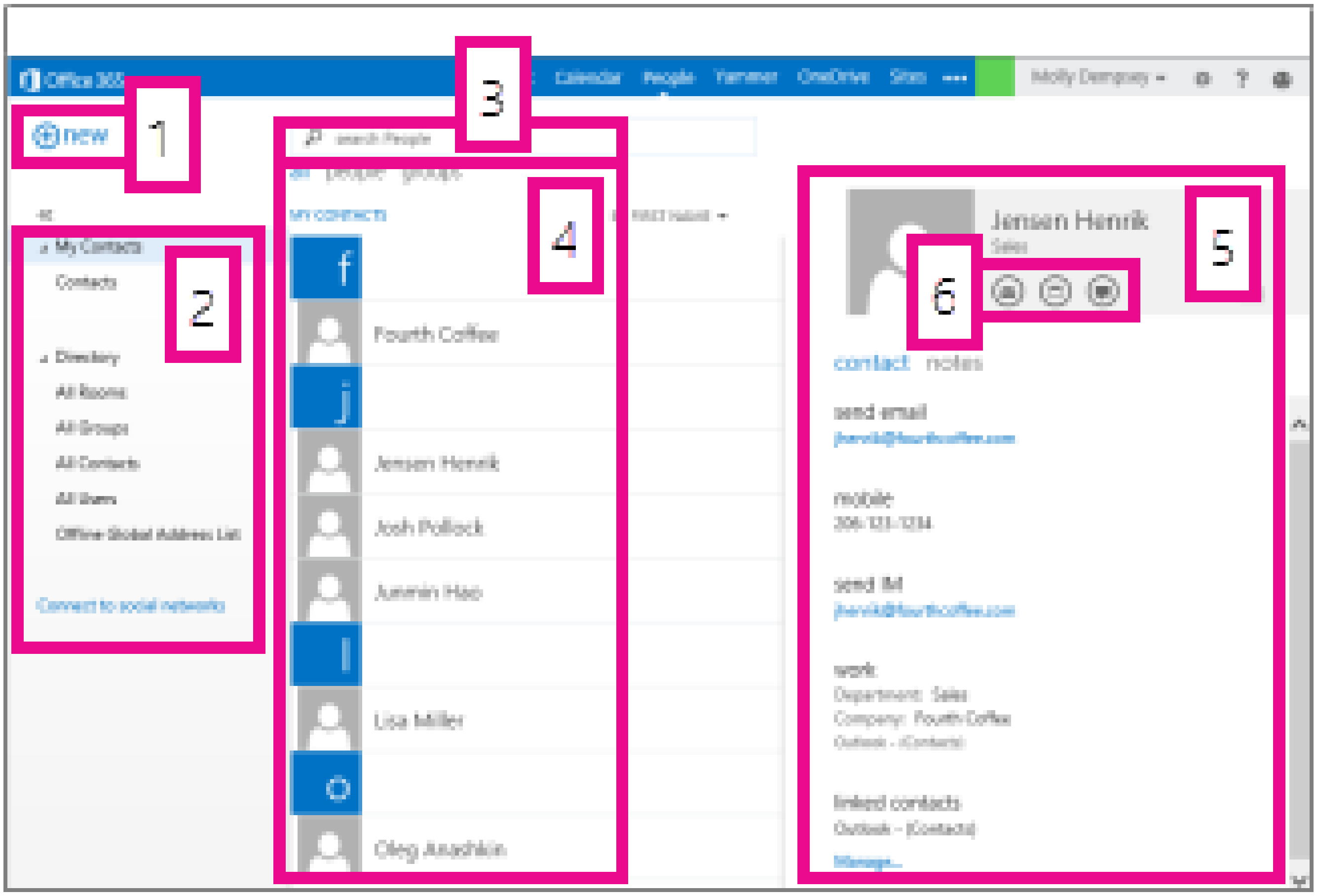
Month View

The month view can be very crowded. To make it more usable, there’s now an agenda displayed for the selected day:

1. Shading shows the current date.
2. Slightly lighter shading shows the selected month.
3. Shading shows the selected day and the number tells how many non-displayed items there are on each day. Double-click an item to open it. You can create a new event on any date by double-clicking the white space on that date.
4. Shaded item is an all-day event.
5. The agenda for the selected day. You can create a new item on the current date by double-clicking the white space in the agenda.

People

This is where your contacts are stored. From here, you can find, create, and edit your contacts. Also, you can search for contacts in your organization's directory.

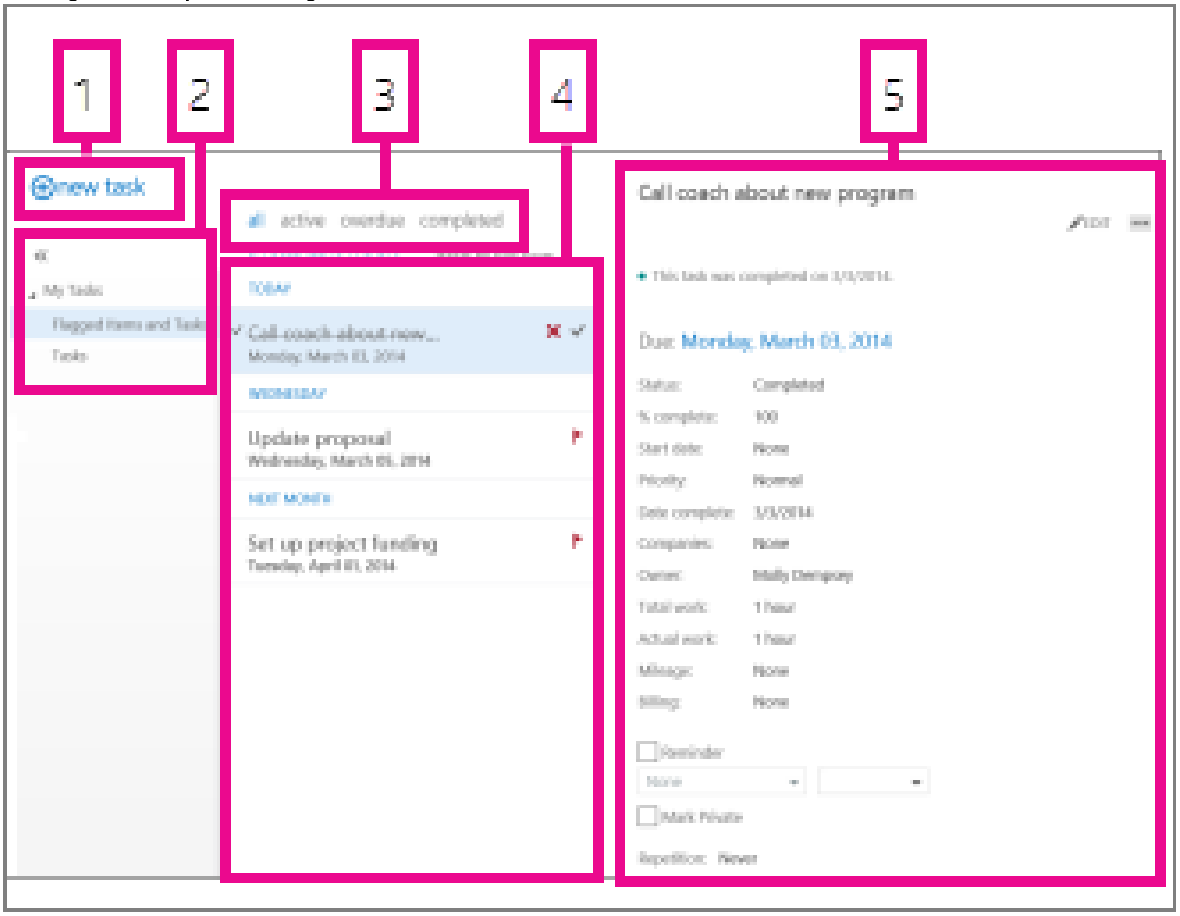


1. Create a new contact by clicking  **new contact**.

2. All the places you can find contact information.
3. Search. Type a person's name here to search for them in your contacts and in your organization's directory.
4. List of all contacts in the current folder.
5. The contact card for the selected person.
6. Actions you can take directly from the contact card. Click on the icons to send a message, start a chat session, or create a meeting request.

Tasks

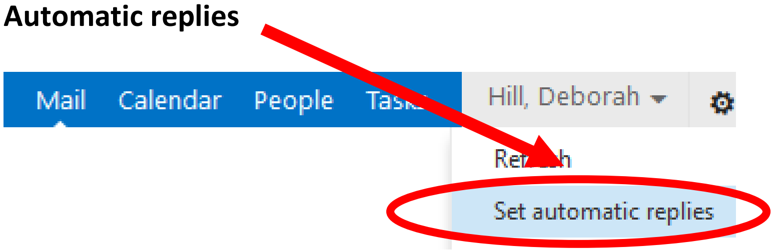
Tasks stores tasks that you create or that are sent to you, and also messages that you've flagged. When you view your tasks, the default view is **Flagged Items and Tasks**. You can change that by selecting **Tasks** in the folder list to the left.



1. Create a new task by clicking **new task**.
2. Use this column to view flagged items and tasks, or just tasks.
3. Filters. Select the filter depending on what items you want to see. Tasks and flagged items that don't have a date associated with them and that aren't completed will appear only when you select **all**.
4. List of items that meet the current filter criteria. Click on any item to view it in the reading pane. You can use the controls in the list view to make changes to an item's status. For example, you can mark a task as complete, or remove a flag from a message.
5. The reading pane, where the content of the items you've selected is displayed. You can use the controls in the upper corner to make changes to the item if it's a task. If it's a message, the controls will be the same as you would see while reading your mail.

Out of Office Assistant in Outlook

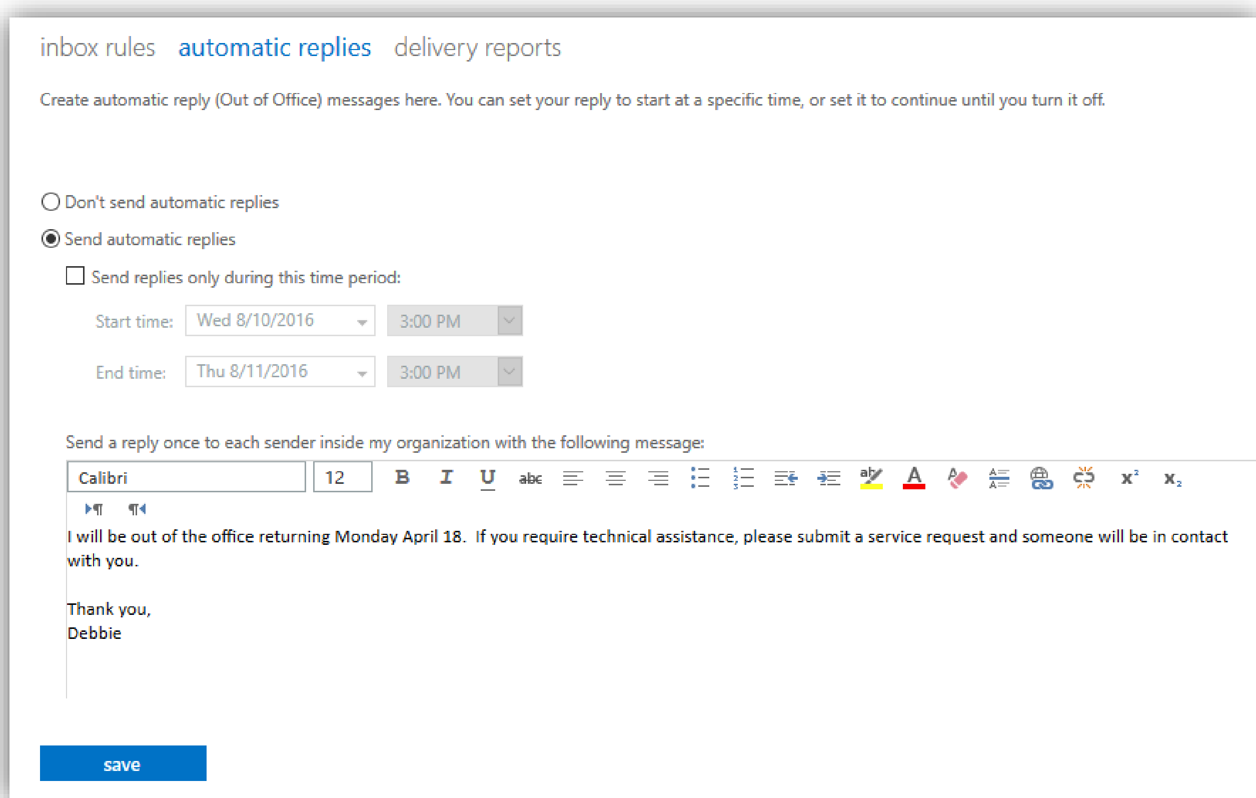
To set the Out of Office reply click your Name in the Right hand corner and choose Set Automatic replies



Check the **Send Automatic replies** button,
There are 2 types of replies: Within the Organization and Outside the Organization

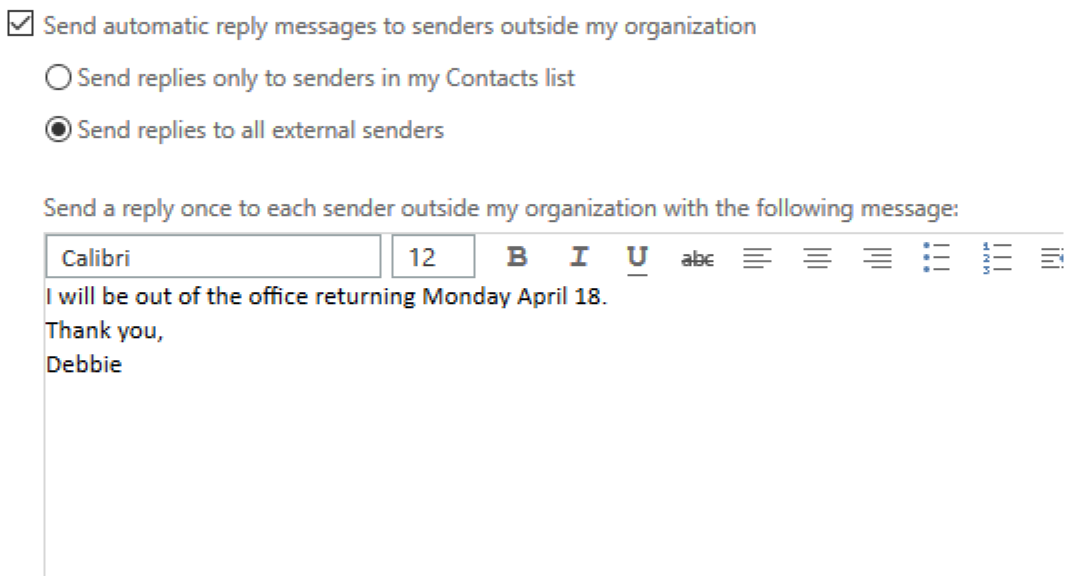
WITHIN THE ORGANIZATION:

Set the date and time period to turn this on
Compose the message that you want to automatically send

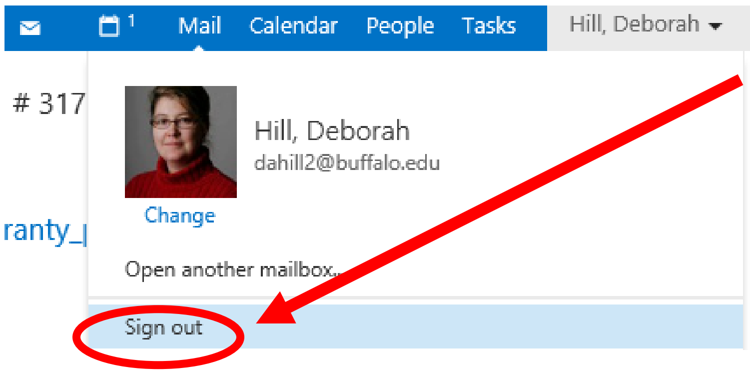


OUTSIDE OF THE ORGANIZATION:

Set the date and time period to turn this on
Compose the message that you want to automatically send to those **outside of your workplace**



When finished Click Save.



When you are finished viewing your email, Sign out by clicking your name in the right hand corner and choose "Sign out" on the drop down menu.

Mileage Reimbursement – Note from Director

Current Mileage Rate $0.545 (Updated January 2018)

Please find the **three forms** you must submit together for mileage reimbursement. These forms are submitted to the Field Director for final approval/ signature. Feel free to call for assistance.

1. Field Visit Memo
2. State Travel Mileage Statement
3. Receipts for Tolls and Parking

Please note the following:

All mileage is calculated using the University as the start and end address. For individuals traveling directly to a sight, you are required to subtract your normal commuting miles prior to making the calculation.

Mileage is rounded down to the nearest mile.

All forms should be signed and dated.

These forms are submitted to the State, and the State can be very, very particular about these details.

All mileage must be submitted before the end of the academic year to be reimbursed. Any late submissions will not be reimbursed. Please try to submit mileage monthly to help ensure timely payments.

Thank you!

Allowable Mileage and Per Diem Expenses

ON THIS PAGE:

- Driving Your Personal Vehicle for Approved Business
- Per Diem Expenses
- Contact an Expert
- Related Forms, Guidelines, Training

UB follows New York state, Research Foundation and UB Foundation guidelines when applying the IRS rates for personal vehicle use, daily meals and lodging.

Driving Your Personal Vehicle for Approved Business

- Vehicle Insurance
- What Can Be Claimed?
- Mileage Rates for Business Travel

Mileage reimbursement rates are determined by the IRS and collective bargaining agreements.

MILEAGE RATES FOR BUSINESS TRAVEL

Rates for miles driven during these times:	
Driving Period	**Allowable Cost Per Mile**
Starting 1/1/2018	$0.5450
1/1/17-12/31/17	$0.5350

- Tolls, Parking, Taxis and Public Transportation
- Federal Mileage Allowance Inclusions
- Frequent Destinations

Per Diem Expenses

Know What Is Reimbursable

Some travel expenses are not reimburseable. See examples of non-reimburseable expenses.

Make Photocopies

Make photocopies of all your travel documents in case of emergency or if your documents are lost or stolen, such as:

- Passport ID page
- Foreign visa
- Itinerary
- Hotel confirmation
- Airline ticket
- Driver's license

Travel Status Means...

When the employee is:

- Engaged in official university business
- At a distance of more than 35 miles from the designated official station and place of residence

https://www.buffalo.edu/administrative-services/business-travel/mileage-and-per-diem.html

Printed 04/30/2018

University at Buffalo
The State University of New York

School of Social Work

MEMORANDUM

TO: **Travel Dept.**

FROM: **School of Social Work**

RE: **Travel for Field Visits**

Field Education requirements in the School of Social Work:

The School of Social Work is a professional school. A significant component of the curriculum involves field education. All students are required to complete field placements at agencies in the community that provide social work services. Students are in placement at agencies where they experience learning through practice. They remain in the field agencies for two semesters. The majority of our students are required to complete two field placements during their time in our MSW program. The accrediting body for our School requires that faculty oversee the field placement experience for our students. As a result, using their personal autos, faculty are required to travel to field agency sites at least once/semester to meet with the student and on-site field educator. If a student is having problems in the field placement a faculty may need to make more frequent visits in order to assist in problem-solving. The School of Social Work has students at four different campuses in New York State. Students are placed in Field agencies throughout New York, Pennsylvania and southern Ontario

685 Baldy Hall, Buffalo, NY 14260-1050
Tel: (716) 645-3381 Fax: (716) 645-3456

University at Buffalo
Travel Services
Crofts Hall, North Campus
for the current mileage rate click here
Current mileage rates

Statement of Automobile Travel

File With Travel Voucher

Traveler Name ______________________ Account # 910056

Department School of Social Work Campus Address 685 Baldy Hall

Date	Origin	Destination	Round Trip? Yes/No	Time of Departure	Time of Arrival	Miles Traveled
	UB North					

Comments:

Total Miles * 0.0

*If applicable, will be rounded down on travel voucher AC132

I hereby certify that the travel indicated was necessary and on official business of the University.

____
Signature of Traveler

AC 160 (Revised 11/92)

FORWARD TO TRAVEL SERVICES: RETAIN COPY FOR FILES

University at Buffalo
The State University of New York

Travel and Expense Reimbursement

Setting Up Your Concur Profile

- Log in to Concur

Access Your Profile

- On the Concur home page at the top right, click **Profile,** then click **Profile Settings.** Click on **Personal Information**.

Complete and Update Your Profile

- It is possible your personal information was carried over from a previous system and may be incorrect.
  - Update and correct your information as needed.
- Complete the following information in your profile and click **Save** after each section:

Name — Required

- Your **First and Last Name** will be populated from your UB Human Resources (HR) record.
- It is required you add your **Middle Name** or check the box **No Middle Name**.
- If applicable, add your Suffix to **match your government issued photo ID** which you will present to airport security when traveling.

Company Information — Pre-Populated

- This is pre-populated from your UB HR record.

If your **Name** or **Company Information** are incorrect, email ubs-travel-expense-support@buffalo.edu.

Work Address — Optional

Home Address — Required

- Verify that your home address is correct. If not, manually change it.

Contact Information — Required

- Enter a **Work Phone** and **Home Phone** number.
  - If you do not have a home phone, enter your **cell phone** number.
- **Register Mobile Devices — Recommended**

Register your mobile devices to receive text messages from Concur alerting you to canceled or delayed airline flights and potential risks in your travel area.

- Click **add a new device.**
- Enter a **Device Name** and select the **Device Type**.
- Choose the correct **country code** from the dropdown.
- Enter your **Mobile Phone Number**.
- Check the boxes **Primary Mobile Phone** and **I agree.** Click **OK**, then click **Save**.

Verify Your Email Addresses — Required

Your @buffalo.edu email address is already populated in your profile. Verifying your email address allows you to:
- Email your receipts to receipts@concur.com
- Forward travel plans to plans@concur.com

- Click the Verify link:
  - A **code** will be sent from Concur to your email address. It may take several minutes to arrive in your inbox.
  - When you receive the email, copy the code.
  - Return to your profile. Paste the code into the **Enter Code** box, then click **OK.**

Emergency Contact — Optional

- Enter your emergency contact's information.
- If their address is **different** from yours, **uncheck** Address same as employee.

Travel Preferences — Optional, but recommended for frequent travelers

- Enter air, hotel and car rental preferences.
- If you participate in Frequent Traveler Programs, click **Add a Program.**
- **TSA Secure Flight — Required**
  - Enter your **Gender** and **Date of Birth.** This is required even if you do not plan on traveling.
  - If you have a **TSA pre-check number**, enter it.
- **International Travel: Passport and Visas—Recommended**

Assistants and Travel Arrangers — Optional

- Add assistants and travel arrangers and give them access to perform travel functions on your behalf.

Credit Cards — Optional

- If desired, enter your personal credit card to use to purchase airfare, book hotel rooms and reserve car rentals.

For Concur Support, email ubs-travel-expense-support@buffalo.edu

Link to Recorded Training Session - approx 28 minutes:
https://www.dropbox.com/s/0ta1fclkztk5liu/Concur%20training%20for%20liaisons%203.6.18.m4v?dl=0

CONCUR – FIELD TRAVEL

Electronic Travel & Expense Reimbursement System

University at Buffalo | School of Social Work

University at Buffalo | School of Social Work

Intro – 3P's

Purpose
- UB Implementing Concur to All Schools
- Introduction of Concur to SSW

Picture
- Comfortable Using Concur
- Hopeful users will see the benefit of using an electronic system and its efficiencies

Plan
- Intro Sessions
- Provide SSW specific tools to reference

2

University at Buffalo | School of Social Work

Concur – Overview

- **Who should be using Concur?**
- **Concur Demo**
  - ❖ Update Profile/Verify Email Address
  - ❖ Mileage Reimbursement
- **Other Concur Tips**
- **Q & A**

3

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Who should be using Concur?

❖ **All Faculty & Staff** – All travel and expense reimbursements should now be submitted through Concur.
  - ❖ Concur replaces Travel Vouchers.
  - ❖ **Expense Report** replaces the term Travel Voucher in Concur.

❖ **Non Employees & Students** – At this time, should submit paper Travel Vouchers.
  - ❖ Travel Services is working on a process to move all individuals to Concur.

4

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Concur – Overview

- **Who should be using Concur?**
- **Concur Demo**
  - ❖ Update Profile/Verify Email Address
  - ❖ Mileage Reimbursement
- **Other Concur Tips**
- **Q & A**

5

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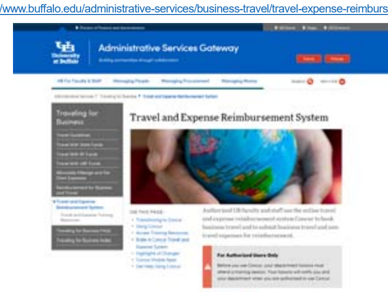
Concur – Update Profile/Confirm Email Address

http://www.buffalo.edu/administrative-services/business-travel/travel-expense-reimbursement-system.html



http://www.buffalo.edu/content/dam/www/administrative-services/Travel/Concur%20Tip%20Sheets/Setting%20Up%20Your%20Concur%20Profile.pdf

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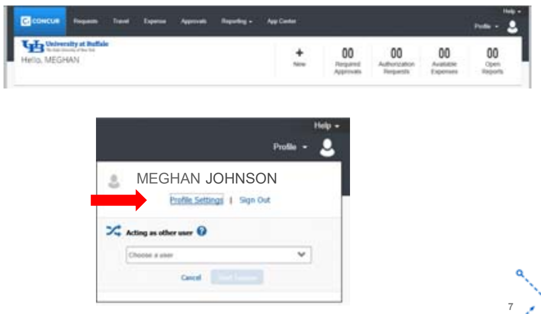
Concur – Update Profile/Confirm Email Address



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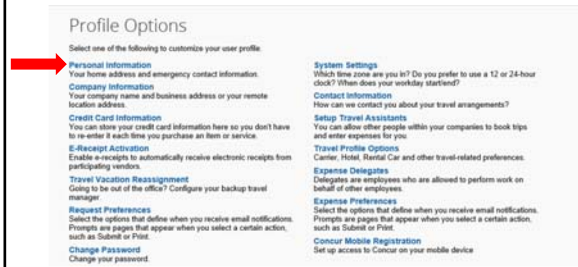
Concur – Update Profile/Confirm Email Address



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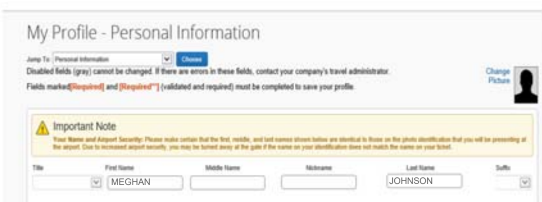
Concur – Update Profile/Confirm Email Address



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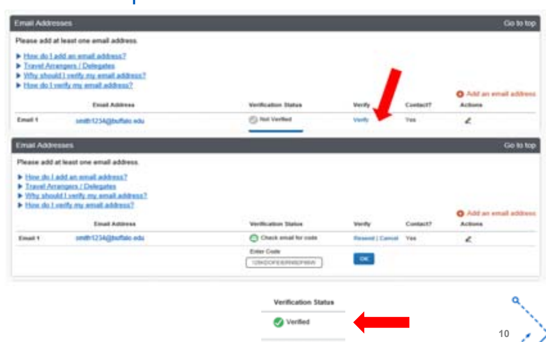
Concur – Update Profile/Confirm Email Address



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Concur – Overview

- **Who should be using Concur?**
- **Concur Demo**
  - Update Profile/Verify Email Address
  - Mileage Reimbursement
- **Other Concur Tips**
- **Q & A**

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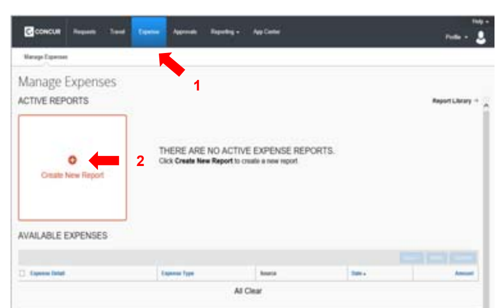
Concur – Mileage Reimbursement



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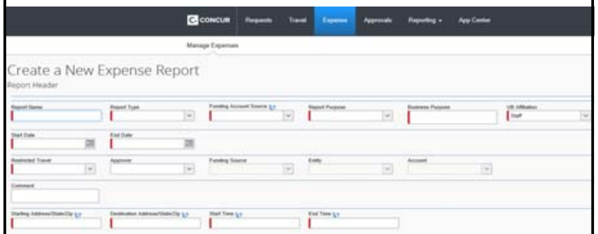
Concur – Mileage Reimbursement



- Complete all items in red and comment box.
- Report Name: "Mileage" & Event/Dates
- Comment Box: Indicate "Field Mileage".

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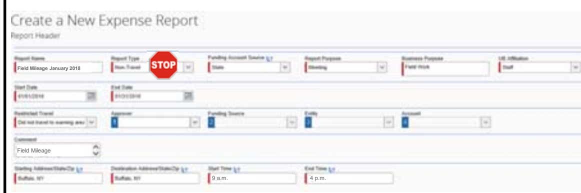
Concur – Mileage Reimbursement



- To avoid travel dates being blocked out and to skip the meal per diem section select "Non-Travel". STOP
- Select "Next" on bottom right hand side of the screen. Next >> Cancel

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Concur – Mileage Reimbursement

- Concur does not allow the same travel date to be used twice. To avoid conflicts with conference travel and monthly mileage logs, submit the mileage expense report as a non-travel report. STOP
- This will also by-pass the meal per-diem section expediting the submission process.

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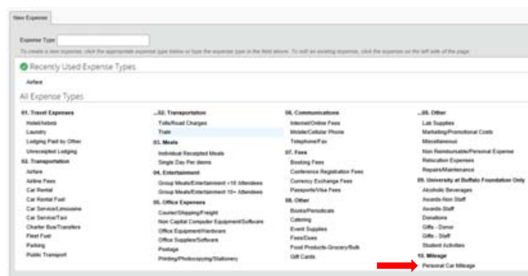
Concur – Mileage Reimbursement



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Concur – Mileage Reimbursement

http://www.buffalo.edu/administrative-services/forms-catalog/procurement/auto-travel-mileage-for-state.html

- Enter name and track mileage on travel log.
- Travel log will be attached to expense report.

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Concur – Mileage Reimbursement

- From Location: Most common departure location.
- To Location: Most common destination.
- Distance: Enter mileage total from travel log.
  - Be sure to round down.

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Concur – Mileage Reimbursement

2 1

- Attach Single PDF File:
  - Travel Log
  - Business Purpose
    (Ex. Field Memo, Emails, etc.)

Mileage has been added.

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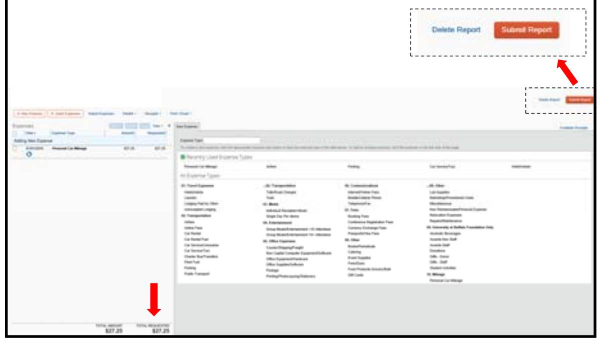
Concur – Mileage Reimbursement



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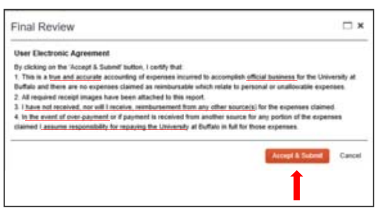
Concur – Mileage Reimbursement



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Concur – Overview

- **Who should be using Concur?**
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- **Other Concur Tips** To Ensure Prompt Reimbursement
- **Q & A**

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Other Concur Tips

**You can attach any of the following: jpeg; png; pdf; html; tif

- **Field Travel Memo** – Attach along with other receipts.
- **Yellow Warning** – This symbol will not prevent submission.
  - Examples:
    - Message that asks for an account allocation – will be done by account approver.

- **Red Warning** – This symbol will prevent submission.

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Other Concur Tips

- **For Concur Related and/or Concur App Questions Contact:**
  - ubs-travel-expense-support@buffalo.edu
  - (716) 645-4500 ext. 2
  - If you do not receive a timely response please contact RM. sw-resourcemgt@buffalo.edu

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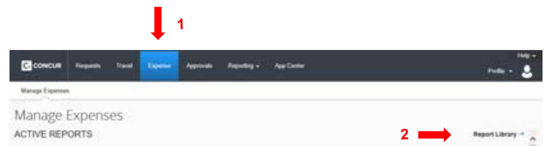
Other Concur Tips

- **Report Library**
  - Allows individual to view status of active, pending, recent and/or approved expense(s).



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Other Concur Tips

Report Library

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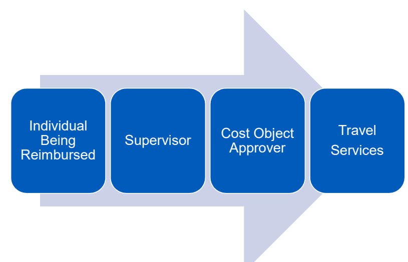
Other Concur Tips

Workflow



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Concur – Overview

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Q & A

?

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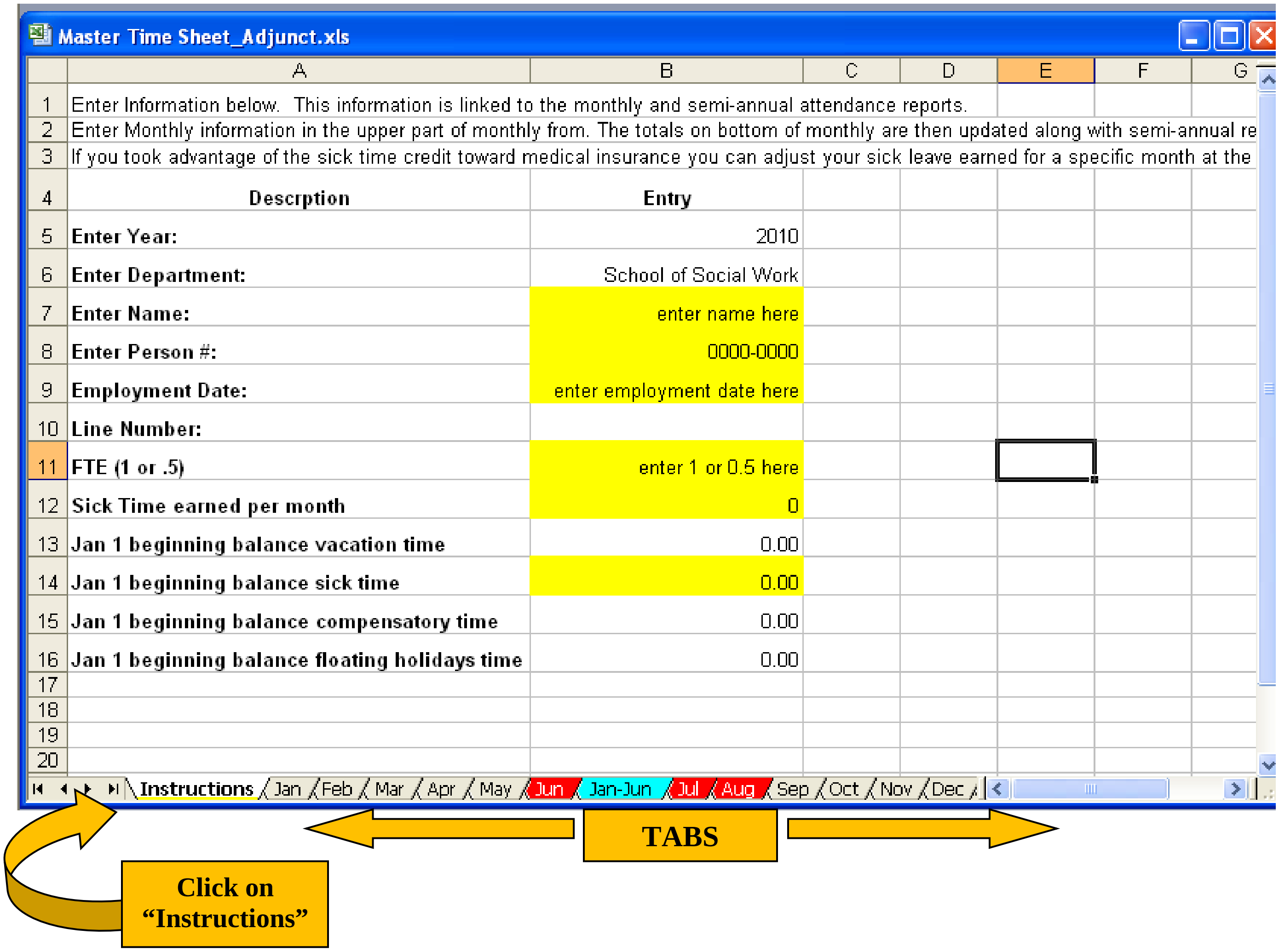
Note: An electronic version will be emailed to you.

Timesheet (Adjunct) Instructions (Two Easy Steps):

Step 1:

When you open the Timesheet document, you will see a series of tabs along the bottom. **Click on “Instructions” to see the following page.**

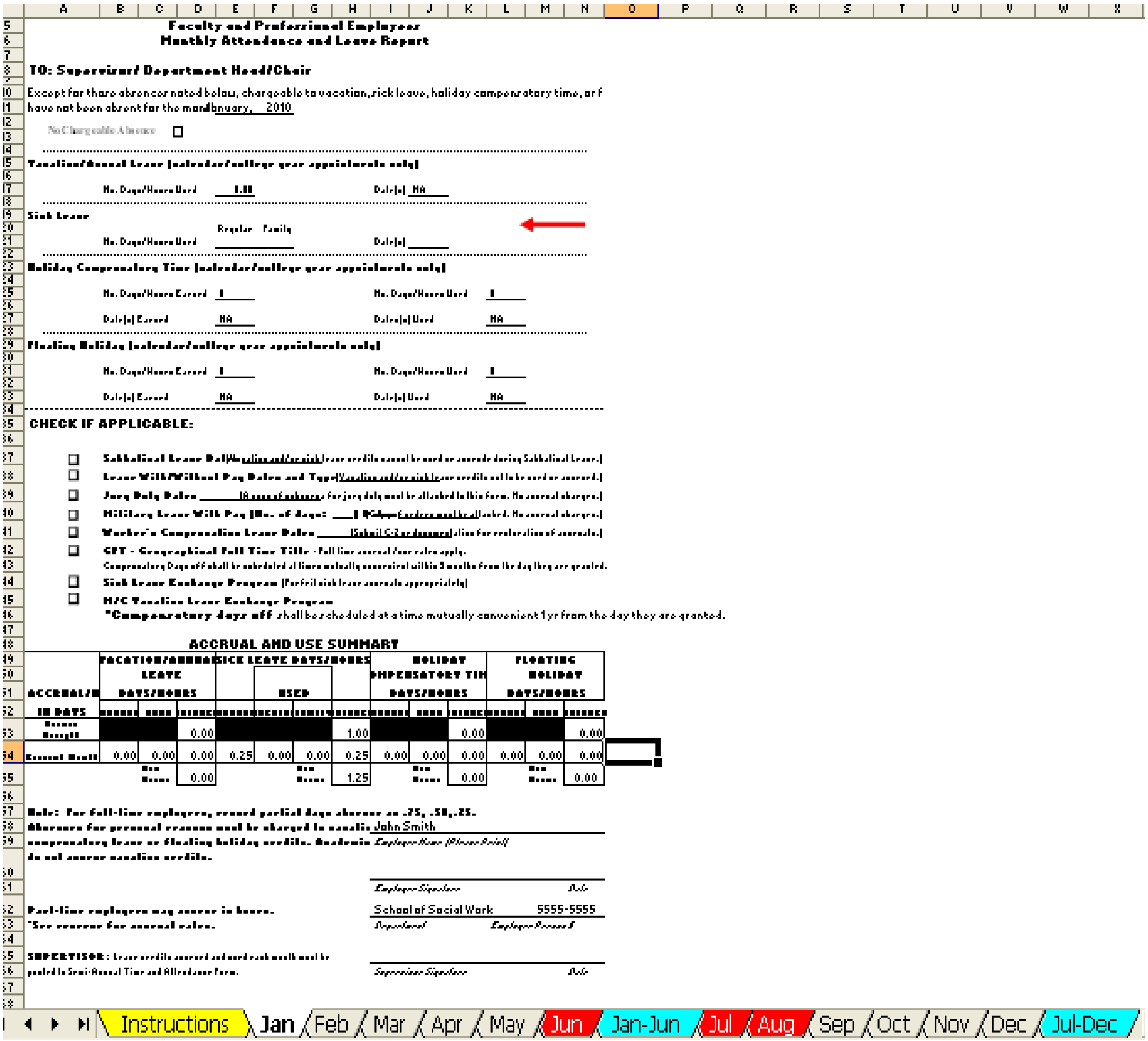


Fill in all of the highlighted fields. This info is automatically added to every subsequent tab/page.

[Email Marcia Arbutina at arbutina@buffalo.edu at the SSW to obtain your person number and accrual rates. Adjuncts generally accrue **.25** sick time and have a **.5** position.]

Step 2:

Now click on the next tab (moving to the right) to see the timesheet for the current month. The info you entered on the instruction page will be pre-populated. Print,sign your name and date.



Timesheets are due to the SSW by the 5th day of the following month.
For example, January timesheet is due to the SSW by February 5$^{th.}$

Submit your timesheet for final approval to: Field Director, 685 Baldy Hall, Buffalo, NY 14260

One final consideration: *In* <u>June</u> & <u>December</u> *you must also submit a semi-annual summary form*. See tabs above.