FACILITY PROGRAM OPENING POLICY

______________________	______________	______________________________
Facility Name/Department Code	Opening Date	Address/ street, city, zip code

PURPOSE

To outline the procedure for ensuring the completion of all issues related to the opening of a new facility or program so that once opened, LADD staff and management are prepared to provide the highest quality of services to the people who have chosen our supports making a very positive difference in their lives, their families, contract agencies and the community at large.

SCOPE

This policy applies to all Licensed and Supported Independent Living locations where LADD provides staffing supports and new contractual services.

POLICY

It is the policy of LADD to open service locations with efficiency and high satisfaction while insuring quality and keeping positive, effective communication with all stakeholders with people supported choosing LADD to be their provider of support services.

PROCEDURE

When looking for a home/apartment it is essential to have someone with property/maintenance experience present at the visit to ensure quality and ability to maintain financially. The Director of Operations and Development (DOD) will facilitate the visit. The DOD prior to a facility opening the will ensure coordination of meetings and other forms of communication with the Contract Agency, families/guardians, LADD employees and Departments, people supported and any other Agency Providers involved to provide for the coordination of services:

Records – Coordination of receipt of records prior to opening date (copies remain or are provided for the person served) Plan to Obtain needed records: ____

- Medication sheets and scripts, Goals and Objectives, Behavior data etc.
- Current PCP, BTP, Assessments
- Personal funds, bank account information, budget (sign for any money)
- Doctor, dentists, any specialists, current scripts and/or upcoming medical appointments
- Landlord Information, Name Address, Phone Number, Payment information: ____
- Utility Information – Providers, Names on accounts and account numbers document below, check for internet service in the area note options in the area below.
- Food Assistance Benefits –See if person was getting Food Assistance Benefits and ask if they have a Bridge Card. Obtain remaining balances and Bridge Card if they person is authorizing/choosing LADD to assist. LADD will reapply/transfer Food Assistance Benefits to include LADD on the card with the person. The person's card without LADD on it should be kept locked up at the office and returned to them if they choose to maintain their own budget/benefits.
- In SIL programs see if person has Home Help if so notify Finance Supervisor so LADD can apply to be the Home Help Provider for the person.

Regional Directors (RD) are the 'point person' for anything that happens within their county. Therefore, any time an opening or closing of a facility is taking place; the RD will coordinate with the DOD using the Opening or Closing Facility form and begin completing the steps together as indicated below; with the DOD directing and assisting in the process insuring clear, concise, open communication to all stakeholders:

1. Prior to a facility opening the DOD will set up a Planning calendar (i.e. 60 day and 30 day) identifying a schedule of what all needs to occur before the Start Date.

Calendars are to include the following information:

____ Complete a licensing application if applicable.
____ Coordinating Staffing needs with HR- i.e. plan to hire current staff, plan to hire new staff and get staff trained prior to identified start date of new program.
____ Identify and set up Management Specialty teams to train new Management and employees as needed.
____ Setup plan to 'Meet and Greet' Guardians/Family and person – Plan to complete all Info. Packets – team approach the best; i.e., Manager, Supervisor, RD and Director of Operations and Development (DOD) if necessary.
____ If taking over a program set up meet and greet with existing staff via Contract Agency approval, keep HR informed of this meeting date.
____ Coordinate/identify team to coordinate the process of cleaning (if needed) ________________________
____ Coordinate/identify who is purchasing and setting up Records and Books. ________________________
____ Coordinate/identify who is purchasing items needed for the location such as equipment, furniture and supplies and coordinate delivery/pick up to include set up and assembly at new location. ________________________
____ Organize with Contract Agency, Legal Guardian, person supported, and providers to ensure records are ready and sent prior to the move in date and are available to be used for training. (scripts)
____ Set up Formal Training Plan of all employees in the books, documentation, people specific information, Training Tool Box, electronic health record, etc.
____ Pictures are to be taken of the home conditions on day one of opening
____ Contact Director of Business (DOB) to discuss vehicle needs and identify vehicle for program. Ask DOB to contact Insurance Company to get new program added to insurance certificate and to notify Workers Compensation Company of new location. A description of the facility will be required as well as anticipated staffing levels. DOB to send certificate of insurance with new location added to the Contract Agency.
____ Contact the DOB to determine if the location meets the criteria for CARF notification. A CARF Ongoing Communication of Administrative Items and Significant Events form is to be completed and forwarded to CARF.
____ Contact DOD to obtain new Department Code, FTE's and Budget for the new program.
____ Contact Director of IT to notify of new service location and coordination of Computers, Printer, Fax and Internet for new service location. Specify if there are additional equipment needs. Computer, phone, fax and printer locations must be approved prior to requesting install. IT equipment must be set up on appropriate desks/locations and will not be installed don the floor.
____ Contact QA Dept. and Finance Supervisor to notify them of new Program, Address, Phone Number, and Department Code and request they add new program to Emergency Procedures and Responsible Persons List.
____ Contact DOB to set up new Petty Cash Account. DOB works with Executive Director if necessary.
____ Once program state date is identified, set up 30-day calendar for Management Team shadowing for the first 30 days of new service/program.

2. Purchases of equipment and services should be coordinated between Area Supervisors and Directors in order to maximize efficiency. Check with other programs for extra supplies; determine what the people moving in will be bringing with them and what type of funds are available for housing needs. Debit Cards, company credit card, check requests and in some cases, charge accounts can be utilized for payment. Authorization for purchases must be obtained via the Flow of Information/Chain of Command.

West Location	Central Location
1. Lowes	1. Sam's Club / Costco
2. Camden Appliances	2. Art Van
3. Big Lots	3. Lowes
4. Sam's Club / Costco	

Communicate this information to the group identified to shop and set up new program:

____ Kitchen (Coffee pot, can opener, silverware, microwave, dishes, pans, dishtowels, oven mitts, flour, salt/pepper, oil, etc.)
____ Garage- (salt for walks (winter), shovels, broom, etc.)
____ Living Room (TV, Stereo, DVD player or some type of entertainment) Identify if there will be furniture available or if it will need to be purchased.
____ Program equipment or Special Equipment– (specific to persons served – food processor, shower chair, Hoyer lift, hospital bed etc.)
____ Bathroom supplies – (Bath and Hand Towels, Washcloths,)
____ Office supplies – Paper, Pens, Folders, Notebooks, etc.
____ Bedrooms (Follow Bed Bug Procedure)- Ensure Adequate Sheets, Bedding, Pillows, blankets.
____ Emergency supplies – Personal Protective Equip/OSHA materials, First Aid supplies/kit, CPR masks, water, and emergency bag filled with all needed contents.
    ____ Emergency Bag for program and for van.
    ____ Sharps containers
    ____ Risk/BBP Spill Kits for program and for vehicle
    ____ Emergency equipment for the van, First Aid Kit, Winter Supplies
____ Dining Room – Table and chairs enough to accommodate people and staff for family style dinner
____ Laundry Room- Have a plan in place to get clothing washed if washer/dryer is not available or set up. Follow procedure for Bed Bugs- use laundry mat/have staffing in place.
____ Medication Cabinet- ready with locks, Gloves, Medication Cups, etc.
____ Cleaning Supplies, Mop, Bucket, Dust Pan, Garbage Bags, Cleaning Supplies etc.
____ Outdoor Items
____ Activity Items- movies, games, supplies for PCP goals.
____ Management items: desk/ computer hutch, file cabinet, supplies.
____ Ensure all posting are up or in appropriate books – See Managers Manual for list of postings
____ A supervisor and maintenance person will inspect all areas for compliance and satisfactory condition.
____ The Supervisor will review any special needs or considerations with the Contract Agency.
____ A Special Needs Survey is completed and reviewed with local first responders.
____ The bedrooms are personalized and ready for move in; curtains, closets, painting, bedding, hangers. Making sure to work with the people who will be living there in choosing their room décor as much as possible.

3. The following utilities and service companies are set up by contacting the Business Department and providing them with the names and social security number of the people who are having the utilities set up in their name for an SIH. For Licensed Programs utilities will be set up utilizing LADD's Name.
    ____ Electric: Name: ____________________
    ____ Gas: Name: ____________________
    ____ Telephone: Name: ____________________
    ____ Cable Television: Name: ____________________
    ____ Internet – Bus. Depart. will coordinate with IT Dept. Internet Options:____________________
    ____ Network Source One- IT Department will notify them
    ____ Water Systems if applicable: ____________________

____ Pest Control –if needed: ____
____ Garbage: Name____
____ Mail
____ Lawn/Snow Removal: Name: ____
____ Rental agreements obtained: ____

4. Use the Admission Checklist for each person moving into the home.
5. Programming Books are to be set up following the Table of Contents for each of the books in the following Location O:\01. Management Manual\LADD FORMS and PROCEDURES\QA. Safety. Emergency\Posting and Book Contents. Each book has a table of contents listing each policy/procedure or form that should be in the book.
   ______________________________Group assigned to completing books and completion date to coincide prior to training dates for all employees to be trained on book use/documentation.

BOOKS IN THE PROGRAM

This section is used to review all areas of service in detail. Trainer will ensure complete information is given/reviewed and understood.

______Review the location of the books, Pull each book and review all of the following
______Review the table of contents and use for each section and form.
______Review of what books, records, items must be locked up.

a. _____Goals/Objectives Books
   - Person Centered Plan/BTP and each Objective (use of electronic health record)
   - Personal progress notes (in electronic health record)
   - My Life Story, My Personal Profile- All About Me, My PCP Information & Documentation Sheet
   - Home Help – Data Sheets
b. _____Staff Communication – review this is a legal document and can be used in court, documentation should be clear, direct and professional. Documenting in staff communication: Management notes, reading and initials for previous staff entries.
   - Sign cleaning sheets for completed duties. Cleaning sheets should be program and person supported specific.
c. _____Tool Box Books-
   - Manager responsibility.
   - How to complete training for new hires.
   - Online system
   - Electronic system location of Tool Box Tests and all Person/location specific worksheets. R:\001 Toolbox Test
d. _____Occupancy Log - Review location in electronic system- R:\002. Electronic Occupancy Logs
   - Review deadlines specific to your county. (Add to outlook calendar now)
   - Review the purpose and importance of occupancy logs.
   - Review the difference from being out of the home or at another billable location
e. _____Home Help Logs - Review location in electronic system- R:\002. Electronic Occupancy Logs
   - Review deadlines specific to your county. (Add to outlook calendar now)
   - Review the purpose and importance of home help logs.
f. _____Menu Guide Book
   - Review the location specific Menu planning process
   - If Licensed review the requirements to meet licensing standards (Menu's, substitution sheets etc.)
g. _____HCC Book
h. _____Medication Records Book- All scripts, protocol orders and documentation is set up using the Admission Checklist.
i. _____Medication Resource Book- All information is complete using the Admission checklist.
j. _____HIPPA Log- importance of documentation for visits and choice as well as interviews and outcomes. Signed by all visitors, direct them to read the confidentiality statement.
k. _____Petty Cash Book- location of records in electronic system R:\003 Petty Cash Ledgers
l. _____Personal Allowance Book- location of online records in the electronic system. R:\008 Personal Allowance

m. _____Service Register- SIL/CLS and Resident Register- Licensed- importance of documentation of choice.

n. _____Vehicle Log – Ensure it is in vehicle and has all contents. Location on online records in electronic system R:\005 Vehicle Log

- Maintenance
- Mileage – importance of documenting every time vehicle is driven.
- Gas – not less than half of tank
- Tires- maintain safety ensure tread and air is adequate for the vehicle.

o. _____Maintenance Log

- Keep Supervisor informed of larger maintenance issues.
- What is landlord/maintenance responsibility vs management responsibility.
- Review maintenance and utility emergency numbers and where they are maintained.
- Review location of Breaker Box and Lock Out Tag Out Procedure and how to complete.
- Review location of water main shut off valve.
- Review the on-line Maintenance Ticket System.

p. _____Personal Records Book (Administrative Book)

q. _____ Purge Book

r. _____Employee Training Book/Monthly Family Staff Meeting Agenda's

s. _____Emergency Guide Book

- Review how to schedule and complete monthly Fire Drills (one per shift per quarter) and check smoke alarms. Review what deepest hour of sleep is. Note on Outlook Calendar as a pop-up reminder.
- Review how to schedule and complete Tornado Drill (March-October). Outlook Calendar reminder.
- Review evacuation maps and purpose
- Review Evacuation Score packet how and when to complete. E-Scores must be calculated annually or when there is a change in the program (change in health of a person, change in physical plant, etc.)

t. _____IR Book

- Review policy on Incident Reporting/Policy on Investigating Unusual and Critical Incidents.
- Review when to report to Supervisor.
- Review responding to incidents (corrective actions) Need to be submitted to Recipient Rights within 24 hours of incident, and Supports Coordinator must also be notified of incident via phone call or email.
- Review how to file the appropriate copy of the Incident Report in the IR Book / staff log
- Review who receives copies of the IR and when they must be sent. When and where to mail to Licensing, Contract Agency, Guardians, etc. Supervisor gets originals to turn in to QA by the 15th of every month.

Director of Development and Operations will check in w/ Director of Business to ensure completion of any outstanding items regarding, budgets, billing, FOI, CARF notification, etc. so they work together to tie up any loose ends.

DOD submits the completed checklist to the Director of Quality Improvement Systems.

_______________________________   _______________________
Director of Development & Operations   Date

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Date Received by DQI/ Initials