



Orientation Checklist - Direct Care Staff

\* To be completed on or before initial shadow shift

Name of Facility/Home: Trolley Center

Employee Name: Zah'Nay Thomas Date: 3/26/2020

Instructions: Check each item AFTER going over it with the Employee. The Employee and Home Manager will sign and date the form and then it is filed in the Employee's Training file.

NOTE: The DCS will not be ALLOWED to work ALONE with the Residents until this form, the Competency Assessment and all trainings are complete.

Confidentially, HIPAA, Recipient Rights and Organization Review

Initials:

- ZT ✓ Confidentiality Review
- ZT ✓ HIPAA Review
- ZT ✓ Organizational Structure and Chain of Command
- ZT ✓ Mission Statement/Philosophy of the Organization
- ZT ✓ Tour of Facility - form given to DCS, if applicable
- ZT ✓ Review of AFC Licensing Rules Act 218 and Location of Book
- ZT ✓ Recipient Rights Review (Schedule class if one hasn't been scheduled yet)
- ZT ✓ Review Abuse/Neglect/Confidentiality/Chapters 7&7A
- ZT ✓ Review DCH Incident Report Form, Location & Use
- ZT ✓ Review Licensing Incident Report, Event Tracking Tool, Location and Use in Electronic Resident Record
- ZT ✓ Initial Training and Employee Database Complete with all Required Documentation
- ZT ✓ House Rules Review and Location of Poster
- ZT ✓ Corporate Compliance Plan Review and Training
- ZT ✓ Electronic Medical Record Review and Password Given
- ZT ✓ Electronic Resident Record Review and Password Given

Date Completed:

- ✓ Classroom Mental Health/Gentle Teaching Training with Inga
- ✓ If not complete, when is it scheduled? Date: 3/18
- ✓ Classroom CPI & CPR/First-Aid Training
- ✓ If not complete, when is it scheduled? Date: 3/17/20
- ✓ Classroom Recipient Rights Training at CMH or with Sue
- ✓ If not complete, when is it scheduled? Date: 3/18/20



## Orientation Checklist - Direct Care Staff

### Personnel Policy/Procedure Review

Initials:

- ZTL ✓ Personnel Policies Location on Website
- ZTL ✓ Employee Handbook Location on Website
- ZTL ✓ Benefit Information/Employer Required Notices Location on Website
- ZTL ✓ Payroll/Time Cards
- ZTL ✓ Make Employee Badge
- ZTL ✓ Mandatory Reporting of Tickets and Arrests
- ZTL ✓ Training and In-Services Mandatory and Annual
- ZTL ✓ Absence/Tardy Review
- ZTL ✓ Substance Abuse Policy Review
- ZTL ✓ FMLA Policy/Procedure Review
- ZTL ✓ Level System Review
- ZTL ✓ Progressive Action Procedure Review
- ZTL ✓ Workers Comp-Injury Reporting/Drug Testing
- ZTL ✓ Transportation Policy Review
- ZTL ✓ Sleeping on Duty will Not be Tolerated
- ZTL ✓ Attendance and Work Schedule Policy Review
- ZTL ✓ "Call Off" Procedure
- ZTL ✓ Bullard-Plawecki Act/"Right to Know" Act (written request to HR for copy on file...third party agencies' right to information from file) ex: when an allegation is substantiated and a progressive action is given to the external agency
- ZTL ✓ Unauthorized Leave of Absence (AWOL)
- ZTL ✓ Personal Care/CLS Log
- ZTL ✓ Shift Duties and Cleaning Schedule Review
- ZTL ✓ Resident Assignment Sheet and Transfer Protocol
- ZTL ✓ Visitor Protocol and Log Book
- ZTL ✓ Employee Phone/Cell Phone Use and Directory of All Employees
- ZTL ✓ Social Networking Policy Review
- ZTL ✓ Person Center Plan (PCP) and Behavior Plan (BP) Review
- ZTL ✓ Scheduling is at the need of the Organization first / Staff Meetings are Mandatory



## Orientation Checklist - Direct Care Staff

### Medical Review

Initials:

- ZT Resident Medications Locations (PRN's, OTC, Controlled Substance, etc.)
- ZT Universal Precautions
- ZT Universal Precaution Supplies Locations
- ZT Medication Sheets and Why We Use Them (Back up for EMAR)
- ZT Seizure Protocol
- ZT Health Care Appraisals - What are they and where are they located?
- ZT Vitals Chart and How Often Completed
- ZT Weight Log and How Often Completed
- ZT Influenza Vaccine
- ZT Hypo-Hyper Glycemic Protocol

Date Completed:

- \_\_\_\_\_ Medical Training with Nurse Manager
- \_\_\_\_\_ DMA Training
- \_\_\_\_\_ If not complete, when is it scheduled? Date: \_\_\_\_\_

### Site Orientation, Menu Planning, SDS and Fire Safety

Initials:

- ZT Orient to Where things are Kept and Located
- ZT SDS Book and Revised Poster Location
- ZT Utility Shutoffs
- ZT First-Aid Kit
- ZT Door Alarm Shutoffs and Code
- ZT Bio-Hazard Kit
- ZT Fire Alarm Shutoffs
- ZT Emergency Numbers
- ZT Secured Cleaning Supplies
- ZT Secured Resident Storage and how is it maintained
- ZT Labeling/Dating Food/Fridge
- ZT Food Preparation and Substitutions and Where to Document
- ZT Resident Diets/Menu and Where to Document
- ZT Emergency Preparedness Log Book
- ZT Fire Drills and Place of Safety
- ZT Tornado Drills and Place of Safety
- ZT CPR Masks Location
- ZT Evacuation Plans and Location of Safety
- ZT All Hazards Commander
- ZT Resident Case Book Location, if applicable



**BEACON**  
Specialized Living

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Vehicle Orientation

Initials:

- ZT Weekly Vehicle Inspection
- ZT First-Aid Kit and Fire Extinguisher
- ZT Mileage Log
- ZT Insurance and Registration Location
- ZT Cell Phone Policy
- ZT Outing Log (In House)
- ZT Van Accident Reporting
- ZT Food, Drinks and Smoking Prohibited
- ZT Posted Speed Limit
- ZT Driving Requirements/Obeying the Law
- ZT Valid Driver's License
- ZT Report Speeding/Driving Violations
- ZT Turning Corners and Wheelchairs
- ZT Tie-Downs in Vans with Wheelchairs
- ZT Seat Belts for ALL must be buckled
- ZT Emergency Supply Contents Location
- ZT Orange Cones Use

Date Completed:

ZT Driver Training with Facility Maintenance Manager  
If not complete, when is it scheduled? Date: \_\_\_\_\_

I acknowledge orientation training of the above with Beacon Specialized Living and have been thoroughly in-serviced. I understand that I have full access to Beacon's policies on the website at [www.beaconemployee.com](http://www.beaconemployee.com)

I understand that I have 30 days to complete the Competency Assessment and turn it in to my Home Manager and J2S Human Resources Department (if applicable) when complete. I also understand that if the Competency Assessment is not complete within 30 days of the initial shadow shift, I may be removed from the schedule until it is complete. (At any time during the Competency Assessment period, I may ask to meet with the Home Manager to address any issues or concerns related to the assessment.)

Both the Orientation Checklist and Competency Assessment are to be uploaded into the Employee Database immediately when complete.

Zannay Thomas  
Employee Signature

3/26/20  
Date

Yolanda Cooper-108  
Home Manager Signature

3/26/20  
Date