



# BEACON Specialized Living

## Orientation Checklist - Direct Care Staff

\* To be completed on or before initial shadow shift

Name of Facility/Home: Anchor Point

Employee Name: Jessie Ballard Date: 2-24

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:

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

Date Completed:

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



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### Personnel Policy/Procedure Review

Initials:

- BSG Personnel Policies Location on Website
- BSG Employee Handbook Location on Website
- BSG Benefit Information/Employer Required Notices Location on Website
- BSG Payroll/Time Cards
- BSG Make Employee Badge
- BSG Mandatory Reporting of Tickets and Arrests
- BSG Training and In-Services Mandatory and Annual
- BSG Absence/Tardy Review
- BSG Substance Abuse Policy Review
- BSG FMLA Policy/Procedure Review
- BSG Level System Review
- BSG Progressive Action Procedure Review
- BSG Workers Comp-Injury Reporting/Drug Testing
- BSG Transportation Policy Review
- BSG Sleeping on Duty will Not be Tolerated
- BSG Attendance and Work Schedule Policy Review
- BSG "Call Off" Procedure
- BSG 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
- BSG Unauthorized Leave of Absence (AWOL)
- BSG Personal Care/CLS Log
- BSG Shift Duties and Cleaning Schedule Review
- BSG Resident Assignment Sheet and Transfer Protocol
- BSG Visitor Protocol and Log Book
- BSG Employee Phone/Cell Phone Use and Directory of All Employees
- BSG Social Networking Policy Review
- BSG Person Center Plan (PCP) and Behavior Plan (BP) Review
- BSG Scheduling is at the need of the Organization first / Staff Meetings are Mandatory



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### Medical Review

Initials:

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

Date Completed:

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

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

Initials:

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



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Vehicle Orientation

Initials:

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

Date Completed:

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

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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.

Jessie Ballara  
Employee Signature

2/26/21  
Date

[Signature]  
Home Manager Signature

2-26-21  
Date