



Residential Direct Support Professional  
Level System Level IV to Level V - Lead

Recommended to obtain Lead Training from:  
 two residents     two team members     Home Manager

Successfully completed Beacon Lead Training  
Date \_\_\_\_\_

Has an evaluation been completed within the last 6 months?  
If not, you must complete one: Date 3/3/21

Enrolls and completes a minimum of two Corporate Leadership Training Modules  
Name of training completed: \_\_\_\_\_ Date: \_\_\_\_\_  
Name of training completed: \_\_\_\_\_ Date: \_\_\_\_\_

All training requirement met in accordance to Beacon Specialized Training Grid

Opening for Lead: \_\_\_\_\_

Recommendation from Home Manager Completed within Clarity Form follow-up communication for promotion to Lead

Completion of at least four clinical modules located under "training" on the Employee Website  
Name of training completed: Autism Spectrum Date: 3/3/21  
Name of training completed: Bipolar Disorder Date: 3/3/21  
Name of training completed: Borderline Personality Date: 3/3/21  
Name of training completed: Grief, Trauma Date: 3/3/21

Consistent practice in Culture of Gentleness and DBT concepts and techniques and can also serve as a mentor with those just learning

Full ability to train new staff, on computer applications:  
 Clarity     NextStep     ADP     Facility Dude     Makeshift

Full ability to train new staff in Home Orientation Check Sheet, Tour of Facility Checklist and Shadow Shift training criteria  
Ability to serve as a training resource, mentor, and model of solid employee behavior to all staff Capable of

Can perform all core job requirement listed in the Lead Job Description

Can create and maintain all home binders and postings and can demonstrate how and when to refer to these materials to current staff

Can facilitate the process of shift change and resident morning meetings



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Is fully competent to update the materials and train on the importance of the content on the "high alert boards"

Any outstanding or current substantiated recipient rights or licensing violations reviewed and discussed with VP of Operations and HR

No active progressive actions while in Level IV (written/suspension)

Full ability to train others in Medication Administration and be a resource for staff and leadership, able to trust through verification

No medication errors

Successfully passes a minimum of two medication passes in the past 90 days

Date of Med Pass One 2/22/21 Date of Med Pass Two 3/3/21

Good attendance record (e.g. no unexcused call-off's and attendance to all mandatory meetings or excused absence)

Displays honesty, integrity, trustworthiness

Leads by example and can mentor "I" Care Philosophy in daily work environment to other staff (Integrity, Compassion, Advocacy, Respect and Excellence)

Full ability to train staff on paperwork and computer applications  
Able to follow-through on tasks uses trust yet verify techniques on current staff Required paperwork is complete, accurate, factual, timely, and neat

Ensures compliance on the application of HCBS Guidelines

Has earned the respect of staff and Residents through consistently exhibiting solid leadership qualities in leading by example



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- Able to confidently respond to all crisis situations and direct or redirect staff calmly and confidently to achieve positive resident outcomes
- Able to recognize escalating situations, identify triggers, and antecedents before negative behaviors erupt  
Can mentor and debrief staff in understanding what those identifiers are to enable the home staff to become proactive rather than reactive
- Can demonstrate a reduction of use of On-Call Procedures due to enhanced skills and decision making:
  - Medical
  - Clinical
  - Maintenance
  - Home

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- Full ability to train staff on the application of all policies/procedures, including but not limited to TJC, personnel, Environment of Care, medical, site inspection, audits, emergency preparedness Resident intake/discharge/transfers/LOA's, employee hiring process, employee code of ethics, staff workplace violence and behavioral emergency safeguards, Resident storage policy, voting, visitor, advanced directives, etc
- Willing to take on additional responsibilities when requested with a smile
- Actively assists home manager in building a positive team supporting staff retention  
Help new staff to gain confidence in their direct care role and patiently assisting them in becoming fully competent in their position
- Can train others on Menu and Food Substitution Process
- Full understanding and assistance with the Coordination of Care process through Admission, LOA, Transfer, and Discharge
- Full participation and training in CPRT Team Meetings, Root Cause Analysis and Medication Non-Compliance Intervention Processes

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- Able to provide clear directions and works well with other staff and other departments  
Consistently displays a positive attitude; able to make level headed decisions, solution focused A consistent resource for staff

**WAGE: \$13.00**

Each level will have an advancement evaluation, advancement competency test addressing objective and subjective elements, and recommendation by the site supervisor. Candidate must successfully pass the competency test and evaluation. Each candidate must pass a drug test/criminal/vehicular background check. Shift changes may be required.



**EVALUATION FORM**  
Direct Care Staff

Date of Hire: 5/22/19 Name: Royanne Swank Date: 3/14/21

A. The following categories represent the major scope of the employee's responsibilities. Each area is to be rated by the employee's supervisor. Based on the 3 items listed below, please check the rating box for each category which most closely identifies the employee's annual performance and competency levels.

1. YES (Y): All standards/expectations are met in that Category.
2. NO (N): None if the standards/expectations were met in that Category.
3. INCOMPLETE (I): Some of the standards/expectations were met in that Category.

Competency Category	Y	N	I	Explanation of Rating
Employee Attendance: On time, no call offs, work attendance within policy guidelines. As evidenced by Time Sheets.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Has Done Very Well
Completes electronic & paper documentation correctly at the end of each shift. As evidenced by incomplete documentation. (unfinalized notes, unsealed forms, incomplete data on paper documentation)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Royanne does well with All documentation
Mandatory Reporting is done on time, when required. (ie: abuse, neglect, AWOLs, etc..) As evidenced by Incident Report or Reports from internal or external parties.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Reports when needed
Follows all company Policies and Procedures. As evidenced by no Progressive Actions.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Has had none
Completes assignments from Management Staff. As evidenced by Home Manager or no Progressive Actions.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Goes above
Complete shift duties, including daily cleaning tasks, assists & interacts with residents and follows activities schedule. As evidenced by Progress Notes, no Progressive Actions and appearance of home.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Prepares, implements and follows the Dietary needs of all residents. (Menus, Diet Orders) As evidenced by documentation on menus and observation of meals being served.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Mandatory meetings and trainings attended. As evidenced by Sign-in Sheets or Training documentation.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
For assigned Residents, adheres to the Treatment and/or Behavior Plans goals and objectives. As evidenced by Progress Notes.	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	and will help with Residents not assigned too



**EVALUATION FORM**

Direct Care Staff

Strengths:

1. Has a great understanding of all paperwork
2. Problem Solving

Areas for Development:

1. arrive a few minutes earlier for work duty
2. work on interpersonal skills to work with difficult co-workers better.

B. Please state at least two goals/objectives you would like to accomplish in the next year:

1. Goal: learn better Communication Skills  
 How will I get there?: Listen more.

2. Goal: Becoming more organized.  
 How will I get there?: make notes, create lists, declutter things around me.

Are annual In-Service Trainings complete?  Yes  No  
 If no, when are they scheduled? \_\_\_\_\_

Is TB test current (3 years)?  Yes  No  
 If no, one needs to be scheduled immediately.

Is Annual Health Review Form current?  Yes  No  
 If no, one needs to be filled out immediately.

Is Driver's License current/valid?  Yes  No  
 If no, needs to be renewed immediately.

Raymond Swank  
 Employee Signature

3/4/21  
 Date

Deh Pierce  
 Evaluator's Signature

3/4/21  
 Date