

This form **MUST** be complete within 30 days of the shadow shift and turned in to the Home Manager

Name of Facility/Home: The Oaks
 Employee Name: Nate Fanger
 Date: 7/30/21

Instructions: The Employee must check off each item listed below as they become competent in that particular area. The Home Manager must review, sign and date each group when they have met with the DCS and that DCS can demonstrate competence in each area. Competency is demonstrated by the Home Manager reviewing the items below and being able to document the DCS response in detail. If competency is not achieved or this form is not complete within 30 days, the DCS may be taken off the schedule until competency is met.

Note: The DCS will not be ALLOWED to work ALONE with the Residents until this form, the Orientation Checklist and all trainings are complete.

Confidentially, HIPAA, Recipient Rights and Organization Review

Initials	NE
What is Confidentiality?	NE
What is HIPAA?	NE
What is the Organizational Structure and Chain of Command?	NE
What is the Mission Statement/Philosophy of the Organization?	NE
What is AFC Licensing Rules Act 218 and where is the book located?	NE
What are Recipient Rights?	NE
What is the Corporate Compliance Plan? What is its purpose?	NE
Who is the Corporate Compliance Officer for Beacon?	NE
What is Abuse/Neglect/Confidentiality/Chapters 7 & 7A?	NE
Where is DCH Incident Report Form kept and why do we use them?	NE
Incident Report/Event Tracking Tool/Location and when is it used?	NE
What is House Rules and where is it located?	NE
Electronic Medical Record Review	NE
Electronic Resident Record Review	NE

Date Completed: 7/30/21
 Classroom Mental Health/Gentle Teaching Training with Inga 7/30/21
 Classroom CPI & CPR/First-Aid Training 7/30/21
 Classroom Recipient Rights Training 7/30/21
 Competence for the above items was demonstrated to the Home Manager/Trainer by way of the following:



Competency Assessment

Personnel Policy/Procedure Review

Where are the Personnel Policies located?	NE
Where is the Employee Handbook located?	NE
What is Payroll, when are time cards due, and how are they to be filled out?	NE
Walk Home Manager through the website	NE
What is the mandatory reporting of Tickets and Arrest?	NE
How often is Training and In-Services?	NE
What is the Absence/Tardy policy?	NE
What is the Substance Abuse policy?	NE
What is the Transportation policy?	NE
What is the "Sleeping on Duty" policy?	NE
What is the "Stay Until Relieved" policy?	NE
What is the "Call Off" procedure?	NE
What is the Bullard/Plaweck Act/"Right to Know" Act?	NE
What is a Resident Leave of Absence?	NE
What constitutes an Unauthorized Leave of Absence (AWOL)?	NE
When and how is the Personal Care/CLS log used?	NE
What are Shift Duties and the Cleaning Schedule?	NE
What is the Resident Assignment Sheet and Transfer Protocol?	NE
What is the Visitor Protocol and Log Book?	NE
What is Employee Phone/Cell Phone Use and Directory of All Employees?	NE
What is the Social Networking Policy?	NE
What are Person Centered Plans (PCP) and Behavior Plans (BP)?	NE

Date Completed: 3/30/21

Competence for the above items was demonstrated to the Home Manager/Trainer by way of the following:



Competency Assessment

Vehicle Orientation

Initials	What is the Weekly Vehicle Inspection?	Where is the First-Aid Kit and Fire Extinguisher?	What is the Mileage Log?	Where is the Insurance and Registration Located?	Cell Phone Policy	Where is the Outing Log (in House)?	How do you report a Van Accident and where is the form located?	Why are Food, Drinks and Smoking prohibited?	Following the Posted Speed Limit	Following Driving Requirements/Obedying the Law	☒ Y ☐ N Do you have a Valid Driver's License?	When and How to Report Speeding/Driving Violations	How to Turn Corners and why is it important with Wheelchairs	How do you use Tie-Downs in Vans with Wheelchairs?	When do you wear seat belt and do you drive or leave the location if everyone isn't buckled?	What are the Emergency Supply Contents and where are they located in the van?	When do you use the Orange Cones?
NE	NE	NE	NE	NE	NE	NE	NE	NE	NE	NE	NE	NE	NE	NE	NE	NE	NE

Date Completed: 4/30/21
Driver Training with Facility Maintenance Manager 4/30/21
Competence for the above items was demonstrated to the Home Manager/Trainer by way of the following:

Site Orientation, Menu Planning, SDS and Fire Safety

Where is the SDS Book and Revised Poster Location?

Where are the Utility Shutoffs and when are they used?

Where is the First-Aid Kit and when is it used?

Where are the Door Alarm Shutoffs and the code, if applicable

Where is the Bio-Hazard Kit and when is it used?

How do you use the Fire Alarm Shutoffs?

Where are the Emergency Numbers?

Where are the Secured Cleaning Supplies kept?

Where is the Secured Resident Storage and how is it maintained?

How do you Label & Date Food?

Where do you document substitutions to the menu?

What do you do in order to prepare for meals and what is to be worn?

What are the Resident Diets and where would you find them?

Where is the Emergency Preparedness Log Book?

☒ Yes ☐ No Have you participated in a Fire Drill? Where is the place of safety?

Any time fire alarm goes off

Where are CPR masks located?

What is the Evacuation Plan for your home and where are the postings?

Who is the All Hazards Commander?

Where is the Resident Case Book located (if applicable)?

Date Completed:

Competence for the above items was demonstrated to the Home Manager/Trainer by way of the following:



Competency Assessment

Medical Review

Initials: VF
Where are Resident Medications located (PRN's, OTC, Controlled Substance, etc.)? VF
What are Universal Precautions? VF
Where are Universal Precaution Supplies located? VF
When do we use Medication Sheets vs EMAR? VF
What is the Seizure Protocol? VF
What are Health Care Appraisals and where are they located? VF
What are Vitals and how often are they taken? VF
When are Weights completed? VF
Did you receive the Influenza Vaccine? Why or why not? Yes
What is the Hypo-Hyper Glycemic Protocol? VF

Date Completed: _____

Medical Training with Nurse Manager _____

DMA Training - If not completed, when is it scheduled for? _____

Competence for the above items was demonstrated to the Home Manager/Trainer by way of the following: _____



Competency Assessment - Direct Care Staff

I understand that I have 30 days to complete the Competency Assessment and turn it in to my Home Manager when complete. I also understand 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 the Competency Assessment are to be uploaded into Employee Data Base, immediately when complete.

Employee Signature

Home Manager Signature

Date 7/30/21

Date 7/30/21



Competency Assessment - Direct Care Staff

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Employee Name: _____ Date: _____

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Confidentially, HIPAA, Recipient Rights and Organization Review

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What are Recipient Rights?

What is the Corporate Compliance Plan? What is its purpose?

Who is the Corporate Compliance Officer for Beacon?

What is Abuse/Neglect/Confidentiality/Chapters 7 & 7A?

Where is DCH Incident Report Form kept and why do we use them?

Incident Report/Event Tracking Tool/Location and when is it used?

What is House Rules and where is it located?

Electronic Medical Record Review

Electronic Resident Record Review

Date Completed: _____

Classroom Mental Health/Gentle Teaching Training with Inga

Classroom CPI & CPR/First-Aid Training

Classroom Recipient Rights Training

Competence for the above items was demonstrated to the Home Manager/Trainer by way of the following: