



Direct Support Professional

In-Home Orientation Checklist for Shadow Shifts

Learner Guide

Roles & Responsibilities

Learners will take a hands-on learning approach with the Assigned In-Home Trainer. Learners will actively participate in home activities, ask questions to seek clarification, and deep dive into policies and procedures, as well as individualized Person-Centered Plans and Behavior Plans during their Shadow Shifts. The Learner is responsible for the successful completion of all assigned Toolbox Trainings, as well as CPI and CPR/First Aid In-Person Skill Sessions, DMA Training, Recipient Rights Classroom Training, and In-Home Orientation Checklist within 30-days from hire to be licensing compliance. The Learner will be evaluated on the material covered during their In-Home Onboarding by their Home Manager, so ask questions as needed.

In accordance with the various regulatory agencies, the assigned **In-Home Trainers** must have sound knowledge and the ability to teach of each topic within the checklist. The In-Home Trainer is responsible for verifying and validating the Learner comprehension and readiness for the DSP role by asking open-ended and clarifying questions. The Assigned In-Home Trainer will demonstrate, in a show and tell manner, how to complete each task on-the-floor, in real-time.

The Learner's **Home Manager** will monitor the Learner's progress to ensure the Competency Assessment, as well as all assigned Toolbox Trainings, CPI and CPR/First Aid In-Person Skill Sessions, DMA Training, Recipient Rights Classroom Training, and In-Home Orientation Checklist is completed within 30 days from hire and to answer any questions they may have regarding the information they are receiving during their onboarding. The Learner's Home Manager will make themselves available to address any issues or concerns related to the assessment or an on-time completion of required learnings. The Home Manager is responsible for documenting training upon completion.

Beacon's **Learning & Development** will provide ongoing support for Field Operations, Assigned In-Home Trainer, and the Learner throughout the Onboarding Experience. If at any point additional assistance is required, or if either party has questions, comments, or concerns regarding the material contained here, in virtual sessions, or via Star Services (LMS), please feel free to reach out to your onboarding Trainer, the assigned Trainer for your district, or email: Trainers@BeaconSpecialized.org.

Contact Information

Assigned In-Home Trainer:

Home Manager/Acting:

District Director/Acting:

Address of Residential Home for Shadow Shifts:

Learner's Name:

Onboarding Training Status

- Learner's Hire Date:
- Toolbox/LMS Trainings
 - Trainings to be Completed:
- CPR/FA Skills
 - Scheduled:
- CPI Skills
 - Scheduled:
- RR Classroom Training
 - Scheduled:
- DMA Virtual Classroom Training
 - Scheduled:
- Medical Training
 - Contact Medical Nurse to Schedule
- Next Step Username and Password:
- Initial Training & Employee Database with all Required Documentation –

TELL all onboarding training are required to be completed within the first 30 days from hire. If training is not completed within the first 30 days, Learning & Development may recommend removal from schedule until training is completed. REVIEW remaining trainings with new DSP and discuss a game plan for completion. REINFORCE the importance of attending the RR Classroom Training as scheduled. RR Training requires a consistent internet signal, constant engagement in the class, an active video camera, and the completion of a quiz at the end. If the RR completion certificate is sent to your email, please forward to your Home Manager to upload into your training compliance file.

By signing the acknowledgement below, the Home Manager confirms that the above information about Initial Training & Employee Database with all Required Documentation was reviewed.

Roquenshia McCulloh

Learner

Date

Evelyn Northrop

Home Manager

Date

Definitions

Arm's Length	A distance approximately equal to the length of an adult human's arm, no matter where they are.
Assist	To help someone, typically by doing a share of the work. (e.g., some hand over hand, prompting, guiding, or reminding).
Assistive Device	Any device that helps someone do something they might not otherwise be able to do on their own. These may be items used to promote, achieve, or maintain an individual's independence. (e.g., wheelchairs, adaptive switches, canes, walkers, communication device).
Event Report	<p>Event Reports are written following an occurrence that is either significant or unusual. These reports are communicated to outside agencies, such as the Licensing Division, Recipient Right Office, Case Manager, and Guardian. Reports must be completed before the end of the shift and must be written by the staff who observed or was involved in the situation.</p> <p>Event Reports are written for medication errors, refusals, or running out of medication; for any unexplained injury, fall and/or accident that could have caused injury to the resident; elopement from the home (Resident still in line of sight from staff); and any "unusual incident." Examples include, but are not limited to,; stealing, environmental emergencies that could have resulted in a need for medical care but did not, problem behavior not addressed in their plan such as aggression, smoking in the home, etc.; inappropriate sexual acts, such as public masturbation, etc.,; and aggressive behaviors that disrupt the home but did not result in serious injury.</p>
Hand Over Hand	Direct Support Professional (DSP) performs task(s) along with the individual by guiding their hands through the process.
Incident	An unusual or significant event that disrupts or poorly affects the course of treatment or care of an individual. Incidents may include but are not limited to behavioral incidents, physical intervention use, individual death, any accident, or illness that requires hospitalization, displays of serious hostility, attempts at self-inflicted harm or harm to others, instances of destruction to property, the arrest or conviction of an individual, refusal of care, or medication, etc.

Incident Reports Event Reports are written following an occurrence that is either significant or unusual. These reports are communicated to outside agencies, such as the Licensing Division, Recipient Right Office, Case Manager, and Guardian. Reports must be completed before the end of the shift and must be written by the staff who observed or was involved in the situation.

Incident Reports are written for: death of a resident; hospitalization of resident; emergency department visits; attempts at self-inflicted harm or harm to others; instances of greater property destruction; arrest or conviction of a resident; resident AWOL (Resident out of line of sight and hearing range or unknown whereabouts); any use of physical intervention/CPI; any suspected abuse or neglect of a resident (this is followed by an immediate call to ORR); and calling 911/police contact.

Legal Representative

A legal representative is defined as any of the following:

- 1) A court-appointed guardian.
- 2) A parent with legal custody of a minor individual/resident.
- 3) In the case of a deceased individual, the executor of the estate or court appointed personal representative.
- 4) A patient advocate under a durable power of attorney or another advanced directive.

Line of Sight The staff member always has a clear view of the individual/resident.

Observe To notice or view, carefully and with attention to detail.

Prompt A reminder or cue; could be both verbal and with hand over hand assistance.

Remind To cause a person to remember; to cause a person to think of someone/something; to make someone aware.

Significant Change Observation or event that is out of the ordinary and may mean a change or potential risk.

Source: Some definitions were provided by Community Mental Health Partnership of Southeast Michigan, Standards for Community Living Support Services 2020, page 5 & 6.

Day One

Residential Home Tour

- Emergency Preparedness
- Telephone Etiquette & Expectation
- Emergency Phone Numbers
- All Hazards Commander
- Bomb Threats
- Evacuation Routes
- Fire Exits
- Fire Extinguishers
- Exterior Rally Point/Safe Locations for Fire & Evacuations
- Interior Rally Point/Safe Locations for Tornado
- In-Shelter Emergencies
- First Aid Kit
- Biohazard Kit
- CPR Masks
- Emergency Utilities
- Window Alarm Codes (if applicable)
- Fire Alarm Systems & Codes (if applicable)
- Special Needs Poster
- Binders
- Chemical Storage
- Safety Data Sheets (SDS)
- Secured Residential Storage
- Environment of Care
- General/Replacement Work Order & Repair
- Facility Dude

- Residential Home Temperature
- Computers & Usage
- Mealtimes & Locations

Safety

- Walks, Steps, and Ramps
- Ladders, Stepstools, and Stairs

Confidentiality, HIPAA, and Recipient Rights

- Confidentiality
- HIPAA
- Mental Health Code Resources & CMH Manuals
- Recipient Rights and Responsibilities
- Language Translator - Interpreter
- AFC Licensing Rules Act 218 and Location of Book
- Abuse/Neglect/Confidentiality/Chapters 7 & 7A
- Licensing Incident Report, Location, & Use of Clarity
- Resident Security
- Person Center Plan (PCP)
- Behavior Plan (BP)
- Bed Checks
- Unauthorized Leave of Absence (AWOL)
- Corporate Compliance Plan Review

Review Resident Treatment Plans Activity

- Learner will review and sign off on Person Center Plans and Behavior Plans.

Meet & Greet Activity

- Resident Meet & Greet Activity with In-Home Trainer (30-60 minutes)
 - Hot Chocolate Social
 - Board or Card Game
 - Craft Activity
 - Join Mealtime with Residents

Day One Assessment

Day Two

Organizational Review

- Mission Statement - Our mission is to provide high quality, gentle, compassionate, evidence-based care to help the people we serve reach their goals and live rich lives.
- [Beacon's Purpose](#)
- [iCare Values](#) We believe that everyone, regardless of their abilities, deserves to be a full member of their community.
 - Integrity: Act honestly, speak the truth, and deliver on promises.
 - Compassion: Be compassionate, caring, and gentle in all that we do.
 - Advocacy: Encourage and invest in new ideas that elevate equality and community.
 - Respect: Encourage a variety of thoughts that reflect the diversity in our markets, customers, and workforce.
 - Excellence: Consistently deliver high quality services that have a positive impact.
- [Beacon's Services](#)
- Organizational Structure
- [Beacon Systems & Process Index](#)
- [Tell Me Hows \(TMHs\)](#)
- Chain of Command

Tour of Med Room

- Resident Medication Locations
 - Schedule
 - PRN
 - OTC
 - Controlled Substances
 - CLIA Certificate
 - Medication Storage Policy

- Hypo-Hyper Glycemic Protocol
- Seizure Protocol
- Universal Precautions & Supplies
- eMAR
- Paper MAR
- NextStep
- Health Care Appraisals
- Vitals Chart & Weight Log
- Clinical and Medical On-Call Policy
- Influenza Vaccine
- COVID Screening Residents, Visitor, & Staff
- COVID Vaccine Policy
- COVID Testing

Public Outing Activity

- Learner will shadow other DSPs and Residents during a public outing in the community. This activity could be to a public park, grocery or other big box store, or recreational facility, i.e.: bowling, fishing, etc.

Remember the residents should choose the outings. Often the IPOS will contain suggestions of outings for an individual.

Day Two Assessment

Day Three

Human Resources

- [BASECAMP](#)
- [Personnel Policies](#)
- [Employee Handbook](#)
- [Benefit Information](#)
 - Benefits Informational Virtual Session are held every Tuesday. If you were unable to attend one, please reach out to your Beacon Operations Trainer for an invite.
 - Newly hired full and part-time employees have 30 days from their hire date to enroll or waive benefits via ADP. Failure to elect or waive benefits within that timeframe will constitute a waiver of all benefits.
 - Questions? Benefits@BeaconSpecialized.org
- Employer Required Notices
- Bullard-Plawecki Act “Right to Know” Act
 - Employee Handbook: Written Request to HR for Copy of Employee File
 - Third Party Agencies Right to Information
- Training Requirements & Annual Refresher Training
- LEAP Program
- Payroll/Timecard/Verify ADP Login
- Directory of all Employees
- Scheduling
- Staff Meetings
- “Call Off” Procedure
- Absence/Tardy
- Leave of Absence & FMLA
- Paid Holidays

- On-Call Policy
- Workers Compensation
 - Injury Reporting/Drug Testing/Clarity
- Substance Abuse
- Progressive Action (PA) Procedure
- Transportation Policy
- Criminal Convictions & Criminal Charges
 - Reporting Misdemeanor, Felony, and Vehicular Violations
- Sleeping on Duty
- Personal Care/CLS Log
- Shift Duties and Cleaning Schedule Review
- Resident Assignment Sheet and Transfer Protocol
- Visitor Protocol and Logbook
- Employee Phone/Cellphone Use
- Social Media and the Workplace
- Smoking Policy

Nutrition & Food Safety

- Food Safety
 - Refrigeration & Freezer Temperature Logs
 - Labeling & Dating Food
 - Safe Food Handling Practices & Storage
 - Hair Net, Gloves, and Handwashing
 - Food Handling and Storage Policy
- Resident Diets
 - My25

- Menu Planning and Documentation
- Consumption Logs
- Allergy & High Alert Board
- Food Preparation, Substitutions, & Documentation

Vehicle Orientation

- Weekly Vehicle Inspection
- Vehicle First Aid Kit and Fire Extinguisher
- Emergency Vehicle Tote
- Mileage Log
- Insurance and Registration Location
- Vehicle Cell Phone Policy
- In-House Outing Log
- Vehicle Accident Reporting
- Food, Drinks, and Smoking Prohibited
- Posted Speed Limit
- Driving Requirements/Obeying the Law
- Valid Driver's License
- Report Speeding/Driving Violations
- Turning Corners and Wheelchairs
- Seatbelt Usage
- Usage of Orange Cones
- Vehicle Service

- Driver Test with Home Manager
 - Date Scheduled:
 - Date Completed:

Doctor's Appointment Activity

- Learner will shadow other DSPs and Residents during a doctor's appointment. During the appointment they will learn how to document visits and medical instructions, as well as being an advocate for the Resident.

Day Three Assessment

Training Acknowledgement

- Toolbox Trainings
- CPR/FA Skills
- CPI Skills
- Recipient Rights Classroom Training
- DMA Virtual Classroom Training
- Medical Training
- DMA In-Service Training
- Shadow Shift Daily Assessments
- Competency Assessment
- Competency Assessment Uploaded into LMS/Star Services

In signing this document, I acknowledge that I have completed Beacon Specialized Living's Onboarding requirement, including Beacon's Toolbox Training, CPI and CPR/First Aid In-Person Skill Sessions, DMA Virtual Training, Recipient Rights Classroom Training, In-Home Orientation Checklist, and Competency Assessments.

I agree to abide by the policies and procedures that were explained in this training. I understand that if I have any questions about the training, materials presented, or information not addressed in the training, or if I encounter any problems, it is my responsibility to seek clarification from my Home Manager and/or District Director.

 _____	_____
Learner	Date
 _____	_____
Assigned In-Home Trainer	Date
_____	_____
Home Manager	Date

- In-Home Orientation Checklist Uploaded into LMS/Star Services by HM
- Training was completed within 30 days from Learner's Hire Date.
- Training was not completed within 30 days from Learner's Hire Date.

Day One Notes

Day Two Notes

Day Three Notes