PHYXIUS

Program Leader

ORIENTATION OUTLINE

EMPLOYEE NAME Angela Raine

Program Leader Start Date ~~1/30/21~~ Error 1/6/22

The following tasks need to be completed as part of Program Leader Orientation. The Trainer should INITIAL AND DATE each area as they are completed. The tasks to complete are as follows.

Tour of Program

- Show all of the client bedrooms
- Give a brief summary of the clients
- Go through closets, cupboards, show where supplies are located
- Books (identify each and content)
- Keys, what they are for and where the spare keys to the house is located
- Furnace, water shut off valves, electrical box, thermometer, clogged toilet

JY

Complete all paperwork for Employee File. Explain the guide stapled to back of file folder.

Read Employee & Client Policy Book. Importance of knowing the policy book

On-Call Schedule & Procedures

- See Employee Policy Book

OY

Place signed Program Leader Job Description in the employee file.

Completing Timecards/Payroll

- Total up employee timecards using TIMECARD CALCULATOR on Lexar drive.
- Keep track of each employee's hours to ensure they are not going into overtime- OT results in you losing your $25 per pay period bonus
- Write totals of each shift beside the day, write grand total at the bottom
- Separate hours into regular, holiday, vacation, on call, in home, and training
- Staff should use 2 timecards if they work at both Delta, and Gamma.
- Bring time cards to the office each Wednesday morning by 9am.
- Let Office Advisors know if any employees don't have hours a certain week

Wy

Review Scheduling of Hours

- Complete the schedule every two weeks – there should be 6 weeks of schedule out at all times
- Have a DCS proof the schedule to make sure there are no errors, every shift is covered, no one is in OT, etc.
- Ensure that each employee has a somewhat consistent number of hours each pay.
- Specialist employees need 60 hours per pay period, staff meetings can be included
- No one should be scheduled more than 40 hours per week
- Variable employees should not be regularly scheduled for 30 or more hours/wk. They can pick up hours but shouldn't be scheduled that many.
- Check schedule regularly for time off requests and shift exchanges
- Check timecards against the schedule for deviations. We do not pay staff for time they punched in early or out late without it being justified. Cross the time off on the timecard if that happens.
- Have employees fill out availability sheets when they are hired and every school semester.
- Holiday schedule completed in Oct. picking order/number of shifts required based on seniority. Refer to the policy book for more detailed protocol.

ok

Program Leader Hours

- Operations Advisors complete your schedule
- Hours worked will vary depending on the needs of the house
- Program Leaders non-direct care hours typically last 2 hours a day at the office M-F.
- Inform an Operations Advisor if you are ill or will not be able to make it in.
- Time off requests go to the Operations Advisors
- Program Leaders are hourly employees and NEVER authorized for overtime. Hours should total 60-80 hours in a 2 week period.

ok

Holiday Working Requirements

- Program Leaders are not required to work holidays
- This includes New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving, Christmas Day, Easter, and the Program Leaders birthday
- Program Leaders will be paid for holidays at regular time for 6 hours.

ok

Add Name and cell phone to Employee Phone List

ok

Staff Communication Log

- Read the communication log daily when you come to the house
- Write any important notes for staff in the communication log – be as detailed as possible. The com log may be considered a legal document.
- When asking staff to complete specific tasks, designated staff by name, and assign a set due date so you can hold the individual accountable.
- Make sure entries are appropriate and thorough
- Make sure the com log offers a balance of both positive support, and areas that need improvement. We don't want the log to turn into a joke, or a gripe log.

ok

Petty Cash

- Petty cash gets sent to the office at the end of each month. The Office Advisors only reimburse petty cash the 1st of each month, so if you don't get your receipts and ledger in on time, you may miss reimbursement for that month.
- Audit to make sure all transactions are recorded, have receipts, and all math is correct
- **Every transaction from petty cash needs to be debited from the Monthly Budget Ledger.**
- Cross check to make sure entries in petty cash and the budget ledger match budget categories
- Audit the $ ensuring that all receipts and cash is correct at least twice a week (once on Monday, once on Thursday or Friday)

ok

Client Financials

- Check CSSP or Comprehensive Consent to see how often financial records should be sent to guardians/social workers
- Audit to make sure all transactions are recorded, have receipts, and all math is correct
- Audit the $ ensuring that all receipts and cash is correct at least twice a week (once on Monday, once on Thursday or Friday)
- Ensure that all client bills are being paid on time (pharmacy, any medical bills, etc)
- Fill out client GRH housing forms monthly if necessary
- Keep in contact with social worker about how much money clients have in their social welfare funds – clients may need to occasionally "spend down" money

ok

Monthly Budget Ledger

- Check budget ledger regularly to make sure the house is staying under budget
- If you find yourself going over in one area, try to save some money in another area if possible.
- Ask for preapproval from John/Amy for large purchases that will cause you to go over budget.
- Audit at least twice weekly to make sure math is correct and all transactions have been recorded

ok

- At the end of the month, submit the budget ledger to the office. The more often it is updated/ audited during the month, the easier it is to finalize at the end of the month.

Calendar

- Set up activity calendar monthly
- Periodically check if new pictos are needed
- Write all client appointments and activities on calendars so that all staff have easy access to what is going on at the house, and with the clients

Review Cleaning List

- Check cleaning list regularly to make sure tasks are getting done
- Review and make changes to cleaning list as necessary

Groceries/Supplies

- Make a menu for the house.
- Grocery/supply shopping is done weekly at Sam's Club, or other stores that you/staff select.
- Use a Credit Card or Sam's Club check from the office for these purchases.
- Enter purchases on the budget ledger in the appropriate column, Sam's Club Checks included.
- Checks and receipts should be sent to the office following the shopping trip.
- Coupon clip, use sales to help make the weeks menu, and shop around for good deals. Find good values.

Progress Notes/End of Shift Documentation

- Check progress notes when you come in for your shift
- Make sure that staff members are documenting in a professional manner
- Make sure that progress notes are thorough and include pertinent details
- Staff should start the progress notes with their name, and shift in parenthesis; they should end their note with their signature and a straight line to the end of the page.
- No empty lines can be left in the progress notes pages
- 24 hour account for each individual, needs to be all inclusive.

Incident/ Emergency Reports & EUMR Book

- Review all incident/emergency reports & EUMRs that have been filled out for errors and accurate information – contact staff if changes need to be made prior to submitting paperwork to DC/DM.
- Make sure appropriate charting has been made in progress notes, etc.
- Ensure all parties have been notified within 24 hours (guardian, family, SW, other license holders)
- Send to DC/DM for review/signing within 3 days
- Mail copies to SW, guardian, family, other license holders (No later than 5 days for Incident/ Emergency Reports)
- Original goes in Incident/Emergency & EUMR Report Book

First Report of Injury (form & treatment) for staff injuries

- Contact an Operations Advisor as soon as possible when a staff is injured. The Operations Advisors will contact Amy/Amber for further direction.
- Workers Compensation file in the cabinet have the forms that staff need to complete when injured.
- There is a highlighted guide indicating what the staff, Program Leaders, Operations Advisor and Amy/Amber will complete.
- If staff seeks medical attention they cannot return to work without the Workability form completed from their physician.
- If staff doesn't seek medical attention they should write "Incident Only" on the top right corner of the First Report of Injury. This will protect both the staff and company if the need for medical attention arises in the future.
- Staff are welcome to seek medical treatment wherever they choose. St Cloud Medical group is familiar with our company, so there will be less paperwork to complete if they go there. After hours staff can go to CentraCare Urgency Center.
- Refer to the Workers Comp file and ask an Operations Advisor or Amy/Amber if additional questions come up.

Client Dr. Appointments/ER

- Schedule client appointmnents as needed – keep track of annual appointments and when they are due
- Make sure all medication changes are sent to the pharmacy, medications are delivered, and appropriate changes are made to the MAR.
- VHP should be brought to appointments and filled out by medical professional, then recorded in Visit to the Health Professional log in the big book
- Medical appointments should be charted in the progress notes
- For psych appts, fill out Psychiatric Summary, and have Dr. sign all medication related forms that need to be signed (Physicians Orders, Poly-pharm Justification, Current RX)

- Do not send just any staff on appointments. Send someone who will listen and report back accurate information.
- Psychiatric appointments need to have a Program Leader present.

Review Fire/Storm Drills/Emergency Exit

- Fire AND storm drills are conducted monthly (storm rules have changed, they are during "storm season" which hasn't been clearly identified, so we want to do them monthly just to be safe.
- Locate all emergency exits
- Make sure you complete the Fire/Storm drill reports and logs in their entirety.

Review Home Maintenance

- Inform Sabrina by Email when maintenance issues arise or repairs are needed in the house.
- Show maintenance log for staff to fill out if they find problems
- John or Amy must be notified of all large house problems (water in basements, large changes to the house, anything requiring immediate attention.)
- Check periodically if maintenance issues are getting resolved
- Some staff will volunteer to fix things. Talk to John or Amy before authorizing staff to complete jobs.

Van Maintenance

- Bring van in for regular oil changes (every 3000-4000 miles) – tires should be rotated every other oil change
- We go to Dyre Enterprises since it is convenient and provides great service. Todd 320-241-0886. Leave message with number to call back. Let him know you are calling from Phyxius. He does not know houses by name such as Beta, Gamma, etc.
- Notify John/Amy of any other vehicle issues prior to making the appropriate appointments
- Fill out vehicle maintenance log as needed
- File van mileage logs and refill as needed
- Free engine check up at Auto Zone

End of month tasks

- Print MARs for each client – make sure month/year is appropriate, make any necessary changes. Put current copies of MARs in the Vehicle Book as well.
- Complete census and send to the office when requested by Lisa - keep a copy at the house

- Print data sheets for all clients, log and file previous month's data
- Send petty cash report and budget ledger to office
- Send credit card receipts and log to office (1st and 16th of each month)
- Audit and file client financial records – send any necessary copies out to appropriate parties
- Check that fire/storm drill has been completed, and forms filed in Safety Book

OK

House parties

- Organize a "house party" once a year
- Invite client friends, family, and social workers
- Think of a fun "theme". Food, decorations, games, etc all can coordinate
- Involve the clients in the process as much as possible

OK

Staff meetings

- Use template (Staff Meeting Attendance Sheet) on jump drive to write staff meeting agendas. This has some required items we need to address each meeting like Safety.
- Have staff sign in on the template (Staff Meeting Attendance Sheet)
- Include items discussed at Program Leader meetings
- Keep notes throughout the pay period on items you want to discuss at the meeting
- Delegate a staff member to notes during the meeting for staff who are unable to attend
- Place meeting notes in Training Book after the meeting is over
- Record all training hours on staff training logs (1 hour for attendees, ½ hour for reading the information)
- Staff Meetings are the best way for your staff to get the required training hours they need.
- Staff unable to attend need to contact the Program Leader prior to each meeting since they are mandatory. Absences from the staff meetings are reflected in the employee counseling log the same way shift absences are reflected.

OK

Program Leader meetings

- Meetings are lead by the Operations Advisors following Staff Meetings.
- Come with your planner
- Take notes throughout the meeting, and keep the Program Leader Meeting Agenda the Operations Advisor hands out. This is full of information to refer back to.
- Record all training hours in your training logs
- Come to the meeting with your planner, pen, paper, any anything else the Operations Advisors have requested.
- Pot Luck!! Every Meeting. Sign up for what you will bring in the Email.

OK

New hires

- Amy and the Operations Advisors will review resumes, interview, and hire staff as needed
- Program Leaders are responsible to keep Operations Advisors informed of specific needs of your program so we know what weekend shift the new hire will be working, and details about the weekday hours the program has available so we can hire someone who will be of relevance for you.
- If you need someone who has morning availability Operations Advisors must know this.
- Once staff has been hired the Operations Advisor will set up their first day of training with the Office Advisors, and send you an email. The email will contain brief info about the staff, confirm their weekend shift, and will ask you to stop by the office when they meet with Operations Advisors and Office Advisor for in office training.
- Meet new staff at the office – introduce yourself, give them an overview of the house and the clients
- Set up a training schedule for them – include med training, first aid training, orientation packet, reading time, and shadowing shifts
- Let them know when their first scheduled shift/weekend will be
- Give them contact phone numbers for the house, yourself, and the Operations Advisors
- Be welcoming and friendly! It's hard starting a new job.
- After they start working, contact them to see how things are going, and if they are feeling comfortable.
- Good communication is key to keeping our new hires on track.
- Keep the Schedule Blocks current. This is the tool we use to hire for your home.

ok

Staff Training

- Maintain staff training logs
  - (Staff are required 30 hours of training within 60 days of hire, 24 hours per year for their first 5 years of documented experience, and 12 hours per year after 5 years of documented experience.)
- Staff need to complete Maltreatment of Minors, VA, HIPAA, OSHA, TI, and Core Training yearly, in addition to reading and reviewing the Service Recipient Rights
- Schedule full-speed TI semi-annually with Operations Advisor
- After annuals, staff need to read and sign off on a client's PSTP/ABP, CSSP (A), IAPP, and Self-Management Assessment as well as after any changes are made
- Program Leader manage, and document in their own training files.

ok

Staff Wage Increases

- Office Advisors track staff's hours worked and give staff raises as they hit the designated hour milestones, specified in the policy book.
- Employees get a company sweatshirt after working for 2000 hours. The Office Advisors will track hours and reward these accordingly.

Employee counseling

- Inform the Operations Advisors about any staffing issues you observe yourself or that are reported to you by other staff
- Discuss the issue with the employee and devise a plan for improvement
- Record the conversation in the employee counseling log
- Be specific when recording tardies, absences, etc. in the employee counseling record. Include date of shift, time shift was supposed to start, and when staff actually showed up
- Have balance with your staff. You want to talk to them about things they are doing well, in addition to areas that need improvement.

ESF Changes

- Email Lisa, Sabrina and Amy with all ESF changes
- ESFs should be updated with any change in employee status (Specialist, Variable, LOA, return from LOA), position change (Program Leader), change in home house), raise, address, phone number, or name change
- New ESFs go in employee file – staple to old ESF

Client Medications

- Most medications are delivered on a four week cycle
- Some medications (OTC, creams, laxatives) need to be ordered when they are low.
- Check all medications when they arrive to make sure they match the MAR, that there are the correct number of pills, that all medications are accounted for, etc
- **Make sure you have current prescriptions for every medication, and it matches the instructions in our MAR.**
- Update the MAR with any medication changes made at client appointments
- Review the Medication Administration Policy Book periodically to refresh yourself on the information Juleena is teaching in her Med Admin class.
- Contact the pharmacy to double check they have received new orders for medications
- Review the Medication Administration Policy Book regularly for revisions.

Medication Errors

- Staff discovering medication errors should fill out the medication error report
- Report errors to Operations Advisors when clients didn't get the medication at all, or if they got the wrong medication.

- Go over the error with the staff who made it – there is a section for them to fill out and a section for the Program Leader to sign
- If excessive errors are occurring, re-training on medications may be necessary
- File medication error reports with the employees file who made the mistake
- Missed documentation, call the staff and inform they have 24 hours to sign
- Never file a MAR that is missing documentation

Medication Administration Review Record

- These are found in your filing cabinet under (Medication)
- Must be done at the end of every month.
- Before you file MAR's away you need to identify all medication administration Errors discovered during the month for each client in your program.
- To make this easy to identify. When you discover a Med Error and you write up a medication administration error report just make a copy of it. Original goes into employee file and copy you keep until you transfer that data onto Medication Administration Review Record at the end of the month.

Client Programs

- Review client programs to make sure they are still relevant, effective, etc
- Work with Operations Advisor to revise programs when changes are necessary
- Make sure staff are reading and signing off on all changes, and after annual meetings
- Update objectives in relevant documents (CSSP (A), ABP/PSTP) after each quarterly report since your criteria more than likely changed.
- Staple the new sheets on top of the old sheet when you are just modifying the Objectives. When you have procedural changes you may need to reprint the entire program.

Quarterly Reports

- Need to be completed every three months.
- They should have the date of the report (Sept 19, 2011), the date range of the report (June-Aug 2011), and the quarter indicated (2nd Quarter), all on the first page.
- If you are not a DC/DM, you need to have an Operations Advisor's name on the report as well.
- Review program data and objectives, make recommendations based on data
- Send to Operations Advisors to review before mailing out
- Change objectives on client programs if necessary
- Collect data.

Annual Meetings

- Refer to "Annual Meeting Prep" sheet on jump drive as a reference for paperwork that needs to be completed
- Coordinate with EIDT to set up a time for annual meeting at least two months in advance.
- Review client IAPP, CSSP (A), and Self-Management Assessment and coordinate any changes with day program
- Modify the PSTP/ ABP to be consistent with your Annual Assessment recommendations. Have Operations Advisors review before mailing out and getting signatures.
- Complete Annual Assessment, and the 4th Quarterly, recommend program changes based on current behavior data and service outcomes
- Update Client Information Sheet, Annual Consents and Policies, IAPP, CSSP (A), and Self-Management Assessment, PSTP/ABP, County Annual Medical Review, Service Providers for all members of the EIDT.
- Sort all paperwork into nice piles prior to the meeting. You should have a pile of papers for the family/guardian, social worker, client, John/Amy, Operations Advisor, work, and yourself. Put flags/highlight areas that you need signed and returned to you. This will insure a signature isn't missed.
- Following the meeting go through the clients' big book, and pull out all the old consents and paperwork, and replace it with all the new stuff. This will allow you to double check you have everything. File the old stuff in the overflow.
- When presenting at the Annual Meeting speak clearly, confidently, loud enough for everyone to hear, and present the information in a positive upbeat manner. Remember you are talking about someone's child/relative. The team wants to hear the fun stories, and good things the client is doing.
- Be organized, ready to answer questions, and on task to keep the flow of the meeting moving along nicely. We don't want to rush the meeting, but we also don't want long pauses of silence.

Communication

- Keep Operations Advisors in the loop with any staffing issues, client behaviors, guardian's concerns, etc.

- Use the Client/Guardian Complaint/Concerns Binder in the office to store printed emails, documented phone calls, etc.

- Contact family/guardians at least every other week by email or phone call (some families will require more frequent contact) to update them on how the clients are doing. Include concerns, good things, cute stories, ect. – Contact more often if any issues arise. If you choose to call, sum up your chat and email the Operations Advisors

- Email social workers (include Operations Advisors) at least every other week to update them on how the clients are doing. Include concerns, good things, cute stories, ect. – Contact more often if any issues arise. Get reports from staff on how things are going with both the other staff and the clients during times you are not at the house yourself. Remember HIPAA privacy. Don't include "Protected Health Information" (ex. diagnosis, med changes, doctor visits, date of birth, social security number, address, client name, etc) in an email. Try to refer to the person as "him", "her", or their initials if absolutely necessary. All updates that would include Protected Health Information should be done over the phone.

- Stay in touch with your staff. Try to see them face to face as much as possible. Be flexible with your schedule to allow opportunity to connect with all your staff, especially new staff, and anyone we have concerns about. You are the "main connector" between the staff and the rest of the team (clients, families, social workers, Operations Advisors, and John & Amy), so be approachable, available, and friendly.

- In person, phone and email are approved methods of communicating with your staff members, and your co-workers. If a staff text messages you, please kindly remind them that you can receive their texts, but not respond to them. Text messaging is still not an approved form of appropriate communication in the workplace.

Ownership of Your Home

- Take pride in you house!
- Take it personal.
- Responsible for the success of the program.
- The house and staff are a reflection of you.
- Have a critical eye and personalize your program.

House Rules

- Each house has a list of rules. These rules serve as guidance and structure for our clients. These rules can be updated or modified on a regular basis, depending upon the needs of the clients.
- At times it may be nice to talk with your staff about the rules. What's working, what's not? Getting input from your staff is crucial to developing effective structure.

Dealing with House Drama

- Address concerns as they arise. The longer a concern exists, the more impact it will have on the morale of the house.
- Stay in contact with your staff. Ask what is working, what is not.
- Ask the questions you do not want the answers to. Doing so will bring clarity and insight into how your staff feel about the work environment and their co workers.

- If an issue has been addressed with an employee, but you do not see any improvement. Bring the concern and discuss it with an Operations Advisor.

Completing Client Taxes

- Taxes are completed every year for our clients.
- Program Leaders will delegate a staff to take each client to get their taxes completed.
- There are several places that offer free tax preparation for our clients. Salvation Army, Catholic Charities, St. Cloud Technical college. Call ahead for an appointment.
- Bring something to keep the client occupied as it can be a long wait time.

County Licensing Packets

- The programs are relicensed by the county on a yearly basis. Every other year, the program will have a paperwork relicensing while opposite years will have a site visit.
- Prior to a site visit, make sure the program is clean and presentable, make sure the staff working that day knows licensing will be coming.
- John will receive the packet and fill out his portions. He will then pass the packet down to an Operations Advisor. The Operations Advisor and Program Leader will complete the licensing packet and return it to John.
- Keeping employee files current will assist you in making the relicensing process easier.

First Aid/Tornado Kit

- Both first aid and tornado kits must be gone through monthly. Anything missing or expired must be replaced.
- Lists for both kits are located under the 245D file under the misc. file. When having a staff audit these kits, make sure they utilize a list to ensure accuracy.

Direct Care

- Program Leaders are expected to work Direct Care hours. The amount of Direct Care you will be required to work is between 20-30 hours per week. Operations Advisors will schedule your Direct Care hours and your Non Direct Care hours based off your preference calendar that you turn in.
- Sometimes the quickest way to build a team, and gain the respect of your staff is to help them out when they are in a pinch. We don't want you taken advantage of, but if all other options have been exhausted and someone needs a favor, for the Program Leader to help out goes a long ways for the entire house. Be open to working a variety of shifts for your team.

- As a Program Leader you will need to assist in cleaning the house, performing client cares, etc to teach your staff, as well as demonstrate leadership skills. As a leader you should not expect your staff to perform a task that you are unwilling to do yourself, or that you do not know how to do yourself. Although you will not routinely have to do each job, you are expected to be able to perform every job in the house. You have to be the expert in your house.

Attitude

- A positive, upbeat, attitude is KEY to your success as a Program Leader.
- Your employees are your biggest asset. You are only as good as your worst employee. Remember that, and strive to bring those individuals up to the level we find acceptable.
- Not every employee will be good enough to be a Program Leader, an Operations Advisor, or an owner. That is not a bad thing. We hire a range of employees and appreciate the balance.
- Each employee has positive attributes. Part of your job as a Program Leader, is to extract those strengths and run with it. Not everyone will be like you, look like you, or think like you. Again, that is a good thing. We want diversity, and different ways of thinking, acting, and performing. The only quality we ask ALL our staff to possess is a positive attitude. The only job function we ask ALL our staff to perform is to take exceptional care of our clients.

I have read and reviewed the information outlined above. The issues have been reviewed by me and the Operations Advisor. All of my questions have been answered. I agree and accept to the following of these guidelines and perform the duties in my Program Leader Orientation Training.

Date of Final Completion 3/30/22

Angela L R[illegible]ne (Jul 7, 2022 17:19 CDT)

Program Leader Signature

Cassandra [illegible]

Operations Advisor Signature
(The Operations Advisor that reviewed this packet, ensuring all items have been signed off, and trained on)

Angela Raine

Specialist Competency Key

Hello Program Leads. This is a guide and explanation for our new Specialist Competency Guide. This is a guide we are incorporating to help you train your specialists in quicker, more thoroughly, and ensure they are ready to start doing training with Cass. Below I will further expand on each item on the Competency List, so you know what we are looking for.

Financials- We are looking for Specialists to know how to get financials in halfway through the month, turning in credit card logs, petty cash log and able to complete the Monthly Budget Ledger each month.

Date Trained: 11/29 *Trainer:* Christina Anderson *Signature* Christina Anderson

Date of Competency: 2·8·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Proficient in Word/Excel- Everyone learns at different speeds and has vastly different levels of skill when it comes to technology. What we are looking for is that they can complete tasks on these programs without constant assistance. It's not a good use of time for Cass to be teaching these Specialists the basics of these programs.

Date Trained: 11/29 *Trainer:* Christina Anderson *Signature* Christina Anderson

Date of Competency: 1·27·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Data Collection- A good time to collect data when they take last months data to the office. This is the data collected for their goals, and outcomes. A good way to collect data each month and have it ready for when you make a progress report is to put a sticky note on the front of their charting that labels the data collection totals, percentages, etc. This is not only a good habit but also is great for them to learn the programs and some of the things we do as a PL. They should learn and be knowledgable on how each outcome is calculated.

Date Trained: 11/29 *Trainer:* Christina Anderson *Signature* Christina Anderson

Date of Competency: 1·27·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Client Tracker- These are every two weeks. They should be aware of these and how to complete them.

Date Trained: 11/29 *Trainer:* Christina Anderson *Signature* Christina Anderson

Date of Competency: 1·31·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Appointments- The Specialist should have a good handle on appointments, how to handle them, and filling out the proper paperwork. They don't have to know the exact paperwork for a Psyche/Neurologist appointment, but they should be able to complete these appointments with your guidance.

Date Trained: 11/29 *Trainer:* Christina Anderson *Signature* Christina Anderson

Date of Competency: 2·9·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Angela Raine

Monthlies- They should be able to do this on their own. They should also be comfortable with the monthlies format and how to change data collection sheets or create new ones when needed.

Date Trained: 12/29 *Trainer:* Christine Anderson *Signature* Christine Anderson
Date of Competency: 1·31·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Good Communication- We don't want to consider someone for a PL position if they are hard to get in contact with. It's a huge time waster. Please emphasize the important of great communication to them and ensure they do in fact have good communication before considering them for a PL position.

Date Trained: 11/29 *Trainer:* Christine Anderson *Signature* Christine Anderson
Date of Competency: 1·31·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Missing Signatures- They should know how to do missing signature lists for the MAR and Progress Books, also should follow up to ensure the signatures are completed.

Date Trained: 11/29 *Trainer:* Christina Anderson *Signature* Christina Anderson
Date of Competency: 1·31·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Good Progress Notes- Please check their progress notes, offering feedback, guidance, and following up with them if necessary. It's important to be able to write a good progress note as a Program Leader to set an example for your staff and the quality expected from them.

Date Trained: 11/29 *Trainer:* Christina Anderson *Signature* Christine Anderson
Date of Competency: 2·2·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Medication Reordering- They should know how to contact the Pharmacy to reorder medications, discuss medication concerns, bills payment for individuals, etc.

Date Trained: 12/2 *Trainer:* Christine Anderson *Signature* Christine Anderson
Date of Competency: 2·9·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Incident Reports/EUMRs- They should have a good idea of what constitutes as an Incident and that it's required to contact Guardian and Social Worker with 24 hours and be able to fill out an Incident Report in a timely fashion. They may still need some guidance on filling out Incident Reports but it's important they understand the urgency of them and the process.

Date Trained: 12/2 *Trainer:* Christina Anderson *Signature* Christine Anderson
Date of Competency: 2·10·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Medication Error Reports- They need to know the protocol of what to do when a Medication Error occurs and how to do Medication Error Reports.

Date Trained: 12/2 *Trainer:* Christine Anderson *Signature* Christine Anderson
Date of Competency: 2·10·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Angela Kain

Knowledge of Program- They must be able to run the program and have a good understanding of it.

Date Trained: 11/29 *Trainer:* Christina Anderson *Signature* Christina Anderson

Date of Competency: 2·23·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Scheduling Basics- They should work on scheduling with you to learn the basics and process of how it works before training with Cass.

Date Trained: 12/29 *Trainer:* Christina Anderson *Signature* Christina Anderson

Date of Competency: 1·31·22 *Assessor:* Cass Lemke *Signature:* Cassandra Lemke

Additional Criteria to be Assessed before training with Cass:

Interested in PL- Please make sure they are interested before setting them up with Cass. If they are just curious or have a bit of interest, it's best to train them more yourself and check in periodically about where they are at.

Date Interest Confirmed: 12·19·22 Name of person they spoke with Christina Anderson

Driver- You need to be a driver for the company to be a PL.

yes Verified driver? Date: 12·19·22 Signature of person verifying: Christina Anderson

1,000 hours worked- Specialist needs to have worked 1,000 before training to become a PL

Date hours verified: 12·19·22 Person Verifying: Christina Anderson

Check Counseling Records- Specialist must not have any serious performance issues for 3 months or any attendance or minor performance issues for 4 weeks prior to training with Cass

Date counseling record was checked and to standard: 2·23·22 Person Checking: Cass Lemke

Training with Cass is an 8 week training curriculum (4 weeks of training on material, 4 weeks of running the house)