PHYXIUS

Program Leader Orientation Outline

Employee Name: Lisa Towle. **Training Start Date:** 3/31/25

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.

PL TRAINING ORIENTATION DAY

3/31 CA
- Professionalism
- Day to day attire
- meeting attire - Annuals; how to dress
- Relationships with co workers and staff - Personal Relationship Agreement
- social media
- Grievances
- Driving policy and when you may use your own vehicle
- TI training. Be competent. If you need a refresher just ask. You need to have good verbal and physical skills as a PL.
- Planner
  3/31 CA
  - On Call Schedule, client tracker, financials, monthlies, overnight checks, john updates, team updates, quarterly house meetings, annual/team meetings, PL meetings, client appointments, pay periods/pay dates
- Attitude
  3/31 CA
  - 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, a Director, 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.
- Ownership of Your Home
  3/31 CA
  - Take pride in your 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.
- Email/Samepage/Deputy
  3/31 CA
  - Email updates to team based on how frequent they would like them and include fun pictures.
  - Email John, Amy, and DC/DM update on your house every 2 weeks on Wed. of wk 2 (same week as pay day Friday and client tracker Tuesday)
  - Check Deputy/Samepage multiple times a day and use these tools to communicate effectively. You will be notified of new hires on there, items added to your to do list and ESJ's.
  - See/print "Communication Platforms" under PL things folder for guidance

STAFF & SCHEDULES

- New Hire Orientation

4/18 CA

  - Meet new hires person. Schedule client book reading, house orientation, shadow shifts, written van test, driven van test, Medication Demo checklist.
  - Update phone list when new hire arrives
  - Use Samepage New Hire Orientation checklist (items in blue on "new hire & annual training for staff")
  - all new staff need to complete ALL training within 60 days of hire
  - staff can only work training shifts at the house while waiting for their background studies to clear (besides delta and spiti).
  - check background study page daily to see when new staff have cleared. once all training is done, send Nick paperwork before they work their first shift worked unsupervised
  - Scan completed new hire items to Nick: first aid certificates, dpf25 and orientation packet for each client, med demo checklist

4/18 CA

- Employee Files
  - Keep up to date on all the training dates, make sure they signed DPF25, TI refreshers annually
  - Closing out files
- Delegated Task List

4/11 CA

  - all Specialists in your house should have a list of extra duties they complete for the house. Follow up regularly to ensure they are completed
  - delegate out checking for expired or missing first aid items, standing order bin, tornado kit, and fire storm drill, van maintenance to name a few examples.
  - list tasks on difficulty from 1-5, then do the same with staff based on experience. rotate frequently so everyone is competent in all areas
- Dealing with House Drama

4/11 CA 4/17

  - 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 coworkers.
  - If an issue has been addressed with an employee, but you do not see any improvement. Bring the concern and discuss it with DC
- Staff Counseling /Journals

4/11 CA 4/17

  - Inform the DC about any staffing issues you observe yourself or that are reported to you by other staff
  - keep track of negative and positive interactions with staff. Also document leave of absence requests. Anyone who has access to that staff can add to their journals on deputy.
  - DC's may add counseling issues to same page to do list to help you keep track. mark 25% once read and mark off once complete
- ESJ

MMJ 4/11/15

  - Update journal on deputy for any employee status changes
  - See the ESJ Communication Guide on Samepage to know which things qualify for an ESJ to be made
  - Add a subtopic on the mindmap with the employee's name and date of status change
  - Create a task to correlate with that subtopic
  - Tag all appropriate parties in the chat bar on that task

- House Schedule

4\17 CA

  - Schedule posted 4-6 weeks out
  - No open shifts for next 3 days
  - How to fill shifts last minute/force schedule
  - 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.
  - Specialist employees need 60 hours per pay period, staff meetings can be included
  - No one should be scheduled more than 40 hours per week
  - Check schedule regularly for time off requests and shift exchanges. Do not schedule/go into overtime without prior Director approval
  - Understand unavailability vs leave requests vs what needs an LOA
    - LOA requests need to be approved by DM
  - make sure your home house staff have hours, only utilize cross trainer when necessary and communicate with Home House PL
  - Holiday schedule- due in October
  - go over cross train requests
  - show them how to copy shifts, make templates, clone etc.

- PL Schedule

4\17 CA

  - 10 office hours unless approved for more
  - 20-30 hours at the house
  - we expect you to be at 40 hours if your house has overtime - Program Leaders are hourly employees and NEVER authorized for overtime.
  - Inform a DC if you are ill or will not be able to make it in.
  - Time off requests go to the DC
  - help each other out, don't horde staff.
  - Pl's don't need to cross train, give your staff more hours and go pick up that open shift at your sister house if needed
  - keep track of what week it is in your planner to make sure staff are scheduled on correct weekends
  - 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.
  - 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 way 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.
- Time sheets- Michelle

MW 4/8/25

  - Approve shifts daily by 10am
  - Timesheets must meet or overlap – no gaps in time
    - Investigate gas or anything questionable -Adjust timesheet if necessary – must comment
  - Splitting Timesheets
    - Tuesday overnights and holidays at 12am. 6pm for Christmas and New Year's Eve
    - First 6 hours of birthdays worked
    - Omega overnights
  - Trainings – New Hire – Office/Remote - House

MM
4/8/25

- Auto clock outs – investigate and adjust if necessary – must comment
- Unapproved shift exchanges
- Discard unsubmitted timesheets
- Check for employee comments to adjust timesheets
- Overtime – what shift put them into ot?
    - $25 bonus
- Send Michelle and Jen Deputy message
    - Claim any overtime that is yours
    - note who had office training
    - list any staff who worked on their birthday

<u>MEETINGS & COMMUNICATION</u>

- Communication

4/28 CA

    - Keep DC in the loop with any staffing issues, client behaviors, guardian's concerns, etc.
    - Email John every two weeks with an update on the clients and house – request a clinical if one is needed
    - 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 DC/DM.
    - Email social workers (include DC/CM) 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, DC/DM, 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.

- Staff meetings

4/28 CA

    - Staff meetings need to be scheduled quarterly or semi-annually – see chart where months are assigned on Samepage
    - Keep attendance for timesheets
    - Include items discussed at Program Leader meetings
    - Keep notes continuously 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 Com Log after the meeting is over
    - Staff Meetings are the best way for your staff to stay informed and up to speed on clients.
    - 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 journals the same way shift absences are reflected.

- Program Leader meetings

4/14 CA

  - Meetings are led by the DC/DM.
  - Come with your planner
  - Take notes throughout the meeting and keep the Program Leader Meeting Agenda the DC/DM hands out. This is full of information to refer back to.
  - Refer to zoom etiquette page on samepage
- Annual Meetings

4/14 CA

  - Refer to "Service Plan Review Meeting Prep" sheet on Samepage as a reference for paperwork that needs to be completed
  - Coordinate with team to set up a time for annual meeting at least two months in advance.
  - Review client IAPP, SP(A), and Self-Management Assessment and coordinate any changes with day program
  - Create a progress report and recommendations regarding how the last year went and reviewing the outcomes
  - Modify the PSTP/ PSS-15 to be consistent with your Annual Assessment recommendations. Have DC review before sending out and getting signatures.
  - Scan in and send all paperwork to your DC/DM prior to the meeting so it can be sent out to attendees.
  - 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.
- Progress Reports/Service Plan Meetings

CA 4/14

  - Rough drafts due to Designated Coordinator by 15th of the month at least 1 month prior to mtg
  - Schedule team meetings the last week of month
  - Data collection: on last day of month have staff tally up all target behaviors and objectives for each client and put on a sticky note on front page
  - Refer to "step by step service plan meeting guidelines" in PL things folder on samepage for planning and preparing an annual service meeting
  - Annually obtain all needed consents and policies at the service plan meeting. Refer to "Service Plan Review Meeting" and "Step by Step Service Plan Meeting Guide" in the PL things folder for details
  - practice to avoid fluff words, leave time to get through everything, and have time for questions
  - dress professionally and come prepared
  - speak loudly and clearly
  - set up service plan meetings for staff to go over any changes and to sign off on the dpf 025's
  - all staff need a dpf 025 after each annual

CLIENT THINGS

- Client Programs

CA 4/14

  - Review client programs to make sure they are still relevant, effective, etc
  - Work with DC/DM to revise programs when changes are necessary – usually doing annual meeting times or sign up for clinicals

4/14 CA

  - Make sure staff are reading and signing off on all changes, and are attending service plan meetings after annual meetings
  - Update objectives in relevant documents (SP(A), PSS-15/PSTP) after each annual report since your criteria more than likely changed.
- Client Medications

4/14 CA

  - 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
  - Delegate one person to regularly check meds (weekly) and re-order needed medications
  - 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 STAR is teaching in their 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.
- Client Financials

4/14 CA

  - Check Funds and Property Authorization Form 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
- Completing Client Taxes

4/14 CA

  - 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. Around tax time, you will be given a list of local places that perform these services. Call ahead for an appointment.
  - Bring something to keep the client occupied as it can be a long wait time

- Appointments

4/14 CA

  - Medical referral form and MAR to every appointment.
  - Dental referral to dentist.
  - Mental Health referral to psych
  - Annual Physical Exam, Medical Referral, Standing orders, Seizure Plan of Care (if seizure diagnosis), Psychotropic PRN Protocol (if they use a psychotropic PRN) are all forms that need to be brought to Annual Medical appointment once a year.
    - Ensure all forms are completed and signed prior to leaving appointment.
    - Contact pharmacy and make any needed changes to MAR
    - File forms in client office book
    - Annually (or whenever new med added) fill out Medication Details form. add to Client book at the house.
  - You attend all Psych and Neurology appointments
  - Dental Referral to all dental appointments
  - Mental Health Referral to all Psych appointments
  - Fill out the Health Care Provider Appointment Schedule quarterly in OneDrive. Keep track of all upcoming and annual appointments.

- Client Tracker
    - 4/8CA It's on Samepage. Complete for your house every other Tuesday by 8am (same week as John updates and payday)
    - know when your client leaves/returns during the week so you can fill it out correctly

HOUSE THINGS

- Menu/Groceries/Supplies
    - 4/8CA Make a weekly menu for the house.
    - Make shopping list based on menu
    - Delegate out shopping trips
    - Order credit cards for multiple trusted staff; email: Michelle, Lisa, DC, DM
    - Encourage home cooked meals, and eating with clients when possible
    - Get staff input on good recipes they enjoy making. Otherwise use Google to search up recipes/menu ideas, ask clients what their favorite meals are to get them more involved
    - No ordering food to the house. if you bring in food from a restaurant, disguise it
- Activity Calendar
    - 4/8CA Set up activity calendar monthly
    - mark off no school/work, client appointments, fun activities, pay days, meetings, etc.
- Home and Van Maintenance (Michelle)
    - 7MWA Use Samepage to notify Office Advisors of repairs. Include pictures and details.
    - 4/11/25 Understand water mitigation procedure
    - Check back regularly to see the progress
- Com Log
    - 4/8CA Read and sign 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.
- Progress Notes/End of Shift Documentation
    - 4/8CA 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.
- Tour of Program/House Orientation
    - 4/8CA 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
    - Know how to shut off water/gas in main pipes as well as under each sink/toilet area. Ensure they are labeled and train staff on the locations
    - Refer to the "Postings At All Houses" to make sure your house has all required state and federal posters on a wall somewhere. It can even be a garage area if the client targets them.

- Fire and storm drill
  4/18 CA
    - 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.
    - Both first aid and tornado kits must be gone through monthly. Anything missing or expired must be replaced.
    - Lists for both kits are located on one drive. When having a staff audit these kits, make sure they utilize a list to ensure accuracy.

PAPERWORK/REPORTS

- Incident/ Emergency Reports & EUMR
    - 4/28 CA 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 Client Book at the office
- First Report of Injury (form & treatment) for staff injuries
    - 4/28 CA Contact DC/DM as soon as possible when a staff is injured.
    - 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, and DM 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 DM if additional questions come up.
- 4/18 CA Emergency Response, Reporting & Review Policy
- 4/17 CA internal review
- Medication Administration Review Record
  4/14 CA
    - These are emailed monthly by your DC/DM
    - 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.
    - Medication Errors
        - 4/14 CA Staff discovering medication errors should fill out the medication error report

4|14 CA
- Report errors to Program Leader 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

- Monthlies
  - 4|28 CA print program data tracking, progress notes, MAR, MAR Review Record, cleaning list
  - Ensure they are at the house in the appropriate binder by the 1st of each month.
  - file old monthlies in the filing cabinet and at the house
  - Check that fire/storm drill has been completed, and forms filed in Safety Book

- Financials- Michelle
  - MCA credit card logs are due the 1st and 16th of the month
  - petty cash is due the 1st of the month
  - 4/16/25 monthly budget ledger due 5th of the month
  - check samepage for updates from Michelle for any missing receipts or documentation you may have missed

- Filing
  - 4\16 CA Every form in the company has a "home" either in a binder or file cabinet. review the key to the file cabinet and Client Book chart order
  - End of the year all items are purged and brought to main office. see the how to purge guide.

I have read and reviewed the information outlined above. The issues have been reviewed by me and the DC. 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 position.

Date of Final Completion: 5-7-25

Program Leader Signature: Lis Towle

DC Signature: Christina Anderson