

PHYXIUS

Assistant Program Leader- Client Supports Orientation Outline

Employee Name: Kaitlyn Von Eschen Training Start Date: 7-22-25

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

CLIENT THINGS

1. Client Check in's
 - You should make sure you are checking in with your clients weekly. You can do this at any time when working your direct care shifts.
 - Find out how things are going. Schedule events or activities that they would like to attend. Are there any new or existing medical concerns to be addressed?
 - ☒ Reviewed Materials ☒ Practiced Skill MOA Trainer Initials
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2. Activity Calendar
 - Set up an activity calendar monthly
 - Mark off no school/work, client appointments, fun activities, pay days, meetings, etc.
 - A few different activity programs offered in our area; Project Challenge & Special Olympics
 - ☒ Reviewed Materials ☒ Practiced Skill MOA Trainer Initials
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3. Client Mail
 - Check for client mail at both the house and the office.
 - Mail could include; Bills, Medical Appointment reminders, SS or SSI statements, etc.
 - You will need to file all client mail in the appropriate areas either the overflow filing bin or the client's office book.
 - ☒ Reviewed Materials ☒ Practiced Skill MOA Trainer Initials
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4. Client Books- Office Book, House Book, Progress Book
 - Progress Book: You should review your client's Progress Book each time you work at the location.
 - Locate any errors made to charting.
 - Keep track of missing signatures and post any missing signatures you have found in the office of the location.
 - Make sure you are following up with staff to complete missing documentation.
 - Client House Book (info to read): It will be your responsibility to maintain and update your client's information to read books kept at the locations.
 - You can find a KEY to your client's book on Sharepoint

- Keep your client's book up to date.
 - After each annual period, you will need to make sure that all the books have the most current annual paperwork. This is important as we use this book specifically for staff training.
- ☒ Reviewed Materials ☒ Practiced Skill MOA Trainer Initials
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- 5. Client Office Book: It will be your responsibility to maintain and update your client's office book when needed
 - You can find a KEY to your client's office book on Sharepoint.
 - Inside your client's office book is where we file many important documents including; annual policy's and consents, clients important documents (birth certificates/Social Security cards, Medical Referral forms, etc.
 - After each annual period, you will need to make sure that all the books have the most current annual paperwork.
- ☒ Reviewed Materials ☒ Practiced Skill MOA Trainer Initials
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- 6. Big Book Purge
 - Purge happens at the end of the year for all client's overflow filing bins, Client Office Book, and Client House book Info to read.
 - Please refer to the how to purge outline for further details.
 - ☒ Reviewed Materials ☐ Practiced Skill MOA Trainer Initials
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- 7. Client Medications/MAR
 - You should review your client's Medication Administration Record (MAR) every time you are at your location to ensure all medications are being passed correctly and signed off on.
 - Most medications are delivered on a four-week cycle and are always delivered to the main office. Once the medications are delivered it is your responsibility to bring the medications to the location.
 - Check all medications when they arrive to make sure they match the MAR, that there are the correct number of pills, and that all medications are accounted for. Once you have checked, you can start to date the bubble packs.
 - Some medications (OTC, creams, laxatives, PRN's) need to be ordered when they are low.
 - You should 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.
 - After appointments contact the pharmacy to double check they have received new orders for medications.
 - Update the MAR with any medication changes made at client appointments. Make any changes to the MAR at the location right away. Then Update the Medications in your monthly, so it is prepared for the following month.
 - Review the Medication Administration Policy Book periodically to refresh yourself on the information STAR is teaching in their Med Admin class.
 - Review the Medication Administration Policy Book regularly for revisions.
 - ☒ Reviewed Materials ☒ Practiced Skill MOA Trainer Initials
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8. Medication Administration Review Records

- Medication Administration Review Records are completed monthly for the previous month. This document is sent directly to you by email from your DC's
 - You can complete this at any time during the month.
 - You will need to complete one for each client you have at the location.
- When completing the MAR review
 - You will always need to review the physical MAR and the client's bubble packs.
 - This review will ask if there were any Medication Errors during the month. it is important to note that documentation errors are included as medication errors. You need to specifically indicate if the medications were passed and if these errors were just from the failure of staff to sign off.
- ☒ Reviewed Materials ☒ Practiced Skill MCA Trainer Initials

9. Appointments

- It will be your responsibility to keep track of all upcoming and annual appointments.
- Notify your Program Leader of any appointment/medical changes the client may have.
- Medical referral form and MAR to every appointment.
- Dental referral to all Dental Appointment
- Mental Health referral to all psych appointments
- Annual Physical Exam
 - Annual Physical Exam Form, Standing orders, Seizure Plan of Care (if seizure diagnosis) are all the forms that need to go with to an annual exam.
 - Ensure all forms are completed and signed prior to leaving appointment.
 - Contact the pharmacy and make any needed changes to MAR
 - File forms in the client office book
- You attend all Psych and Neurology appointments.
- Fill out the Health Care Provider Appointment Schedule quarterly.
 - This document is located on Sharepoint
 - Once completed, file this document in the client house book.
- ☒ Reviewed Materials ☒ Practiced Skill MCA Trainer Initials

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10. Client Programs

- Review client programs to make sure they are still relevant, effective, etc
- Work with PL/DC/DM to revise programs when changes are necessary – usually doing annual meeting times or sign up for clinical's with your PL/DC/DM & John.
- 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.
- Rough draft of documents should be uploaded to the program leader- write, Client Drafts folder
- ☒ Reviewed Materials ☒ Practiced Skill MCA Trainer Initials

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11. Client Financials

- Audit to make sure all transactions are recorded have receipts, and all math is correct
- Audit the money 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)
- Check Funds and Property Authorization Form to see how often financial records should be sent to guardians/social workers
- 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
- ☒ Reviewed Materials ☒ Practiced Skill MLA Trainer Initials

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MEETINGS & COMMUNICATION

12. Communication

- Keep PL/DC in the loop with any staffing issues, client behaviors, guardian’s concerns, 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 PL/DC/DM.
- Email social workers (include PL/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 the 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.
- ☒ Reviewed Materials ☒ Practiced Skill MLA Trainer Initials

13. John Updates/ Clinical Meetings

- Email John every two weeks with an update on the clients, house and staff.
- This email should be informational to keep John in the loop about how the location and clients are doing.

- request a clinical if one is needed due to changes in client behaviors or adjustments in programming.
 - If you are requesting a clinical you can locate the clinical meeting schedule on Samepage. These meetings take place on Wednesday of Wk 2.
 - Come prepared with notes and client data to share. Tracking the frequency of targeted behaviors to present.
- ☒ Reviewed Materials ☒ Practiced Skill *JS* Trainer Initials

14. Annual Meetings

- Refer to “Service Plan Review Meeting Prep” sheet on Samepage as a reference for paperwork that needs to be completed.
- Coordinate with the support team to set up a time for the annual meeting at least two months in advance.
- Data collection: on the last day of month have tally up all target behaviors and objectives for each client and put a sticky note on front page of your monthlies. We will use this data to complete your progress report and recommendations.
- Review client IAPP, SP(A), and Self-Management Assessment and coordinate any changes with the client’s day program if they have one.
- Create a progress report and recommendations regarding how the last year went and review the outcomes
- Modify the PSTP/ PSS-15 to be consistent with your Annual Assessment recommendations.
 - Rough draft of documents should be uploaded to the program leader- write, Client Drafts folder
- Have PL/DC/DM review before sending it out and getting signatures.
- dress professionally and come prepared
- 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.
- 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 client overflow bin.
- Your DC’s will send out a Meeting Notes and Attendance sheets for all who partake in the meeting to sign
- ☒ Reviewed Materials ☒ Practiced Skill *JS* Trainer Initials

15. Semi-Annual Meetings

- Coordinate with the support team to set up a time for the annual meeting at least two months in advance.

- Data collection: on the last day of month have tally up all target behaviors and objectives for each client and put a sticky note on front page of your monthlies. This is important for completing your Progress Report and Recommendations
- You do not need to make any changes to previous Annual Documents, But you should always review client IAPP, SP(A), and Self-Management Assessment
- Create a progress report and recommendations regarding how the last year went and review the outcomes
 - Rough draft of documents should be uploaded to the program leader- write, Client Drafts folder
- Have PL/DC/DM review before sending it out.
- dress professionally and come prepared
- When presenting at the 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.
- Following the meeting, you will add your Semi-Annual Progress Report and recommendation to the client book at the location.
- Your DC's will send out a Meeting Notes and Attendance sheets for all who partake in the meeting to sign
- ☒ Reviewed Materials ☐ Practiced Skill BS Trainer Initials

PAPERWORK/REPORTS

16. Incident/ Emergency Reports

- Review all incident/emergency reports 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
- Email copies to SW, guardian, family, and other license holders (No later than 5 days for Incident/ Emergency Reports)
 - A copy also goes in the Client Book at the office
- ☒ Reviewed Materials ☐ Practiced Skill BS Trainer Initials

17. Emergency Use of Manual Restraint Report (EUMR)

- Review all EUMRs that have been filled out for errors and accurate information – contact/ interview all staff involved for further details if changes need to be made before 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)
- Once you have completed your report you will need to place it in the Program Leader- write (pending EUMR) drop box on SharePoint.
- Once all parties have done their part, a BIRF and copy of the report will be created to send to Case Managers, Guardians, and other license holders.
- ☒ A copy will also be filed in the Client Book at the office.
- ☒ Reviewed Materials ☐ Practiced Skill SL Trainer Initials

18. Monthlies

- print program data tracking, progress notes, MAR, and cleaning lists.
- Be sure to make any changes and Updates to your monthlies each time as needed.
- Ensure they are at the house in the appropriate binder by the 1st of each month.
- Collect your previous month's monthlies from the location and file them at the office in the overflow filing bins.
- ☒ Reviewed Materials ☒ Practiced Skill SL Trainer Initials