



**Administrator and Assistant Administrator
Training Plan and Orientation**

Employee Name: _____

A. General Orientation was completed on: _____

B. Job Specific Orientation below.

Criteria	Information Source	Employee Signature	Instructor Signature	Date
Introductions				
1.) Introduction to facility staff and managers with a direct reporting relationship. <i>(Works at least a half day with the following individuals.)</i> Director of Nursing AR AP Receptionist Human Resources Admissions Coordinator Staff Development Nurse Infection Preventionist Nurse Treatment Nurse Night Charge Nurse Certified Nursing Aide Therapy Department Dietary Manager Laundry/HSKP Supervisor Maintenance Director Activity Director Social Service Director	Chief Operating Officer (COO) or Director of Quality Assurance (DQA) Organizational Chart		DON _____ AR _____ AP _____ Receptionist _____ Human Resources _____ Admissions Coordinator _____ Staff Development Nurse _____ Night Charge Nurse _____ Certified Nursing Aide _____ Therapy Department _____ Dietary Manager _____ Laundry/Housekeeping Supervisor _____ Maintenance Director _____	

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			Activity Director _____ Social Service Director _____	
2.) Introduction to residents and family members/sponsors	DON or Social Service			
3.) Introduction to Medical Director, Attending Physicians and CRNP	COO, DQA or DON			
4.) Introduction to home office staff and their roles – Division of duties between the CFO and the COO	COO Home Office Organizational Chart			
5.) Introduction to vendors	COO			
6.) Introduction to advocacy groups – Local Area Ombudsman	Social Service			
7.) Introduction to community leaders <ul style="list-style-type: none"> • Mayor • Chief of Police • County Sheriff • Hospital Administrator • Civic Leaders • Area Legislator 	COO			
8.) Letters sent to ADPH and ANHA with notification of administrator change	COO or DQA			

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Facility Operations & Physicians Services				
9.) Review of Operations & Physicians Manual and Policies	COO or DQA			
10.) Policy changes – how to implement a new policy, place in policy manuals, and retaining of old policies	COO or DQA			
11.) Morning Meetings	COO or DQA			
12.) Making Rounds	COO or DQA			
13.) Review of Contracts and Agreements	COO or DQA			
14.) Weekend Manager Rotations and Who’s in Charge	COO or DQA			
15.) Review of the facility’s disaster plan, emergency preparedness procedures, and inclement weather policy	COO or DQA Facility Policy and Procedures Employee Handbook			
16.) Administrator’s role in routing of incident reports	COO or DQA			
17.) How and where to file facility investigations – Reportable and Non-reportable investigation log maintenance	COO or DQA			
18.) On-Line reporting procedures to the ADPH	COO or DQA			
19.) Facility Corporate Compliance Program	COO or DQA			
20.) Facility Internal Audits	COO & CFO			

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21.) Customer Satisfaction Surveys	COO or DQA			
22.) Compliance with Civil Right's Policies and Procedures	COO or DQA Policies in Operations Manual, Nursing Services Manual, Resident Handbook and Employee Handbook			
23.) Physician Credentialing	COO or DQA			
24.) Physician Visits	COO or DQA			
Resident Centered Care				
25.) Review of Care Planning and assessment processes <ul style="list-style-type: none"> • Scheduled CP Meetings • Required Meeting Attendance • Time Frames for Completion of MDS/Care Plans • Software used for MDS/Care Plans • Transmission of MDS • Introduction to Software Programs used for MDS and transmission processes 	DQA, DON or RN Assessment Coordinator			

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26.) Review of facility care policies/manuals <ul style="list-style-type: none"> • Nursing Procedures Manual • Infection Control Manual • Incontinence Care Manual • Wound Care Manual • Dementia Care Manual • Medical Records Manual • Bariatric Program Manual • Quality Assurance and Risk Management Manual • Restorative Nursing Manual 	DQA or DON			
27.) Resident and Family Grievance Processes	COO or DQA			
Quality Assurance and Risk Management				
28.) QA processes, problem identification, root cause analysis, surveillance and monitoring Performance Improvement Projects (PIPs)	DQA			

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29.) Required QA Meetings and Sub-Committee Meetings	DQA			
30.) Quality Improvement Analysis (QIAs)	DQA			
31.) Review of insurance carriers risk management surveys with responses	DQA			
32.) Schedule Risk Management Certification with Insurance company Date: _____	DQA			
Human Resources				
33.) Review of HR Manual	COO			
34.) Review of Employee Handbook, Leave Schedules and Policies	COO			
35.) Review of All Employee Orientation & Training Programs – both initial and annual training requirements – Administrator’s role in General Orientation	COO or DQA Staff Development Orientation and Training Program Manual			
36.) Review of Facility Time Clock, Software and Procedures	CFO and/or HR Director			
37.) Personnel Files, where they are maintained and how they are organized	Director of Operations and/or HR Director			

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38.) Employee Counseling and Disciplinary Processes/Forms	Director of Operations and/or HR Director Forms			
39.) Review of employee exit interviews: 1.) Corporate Compliance Exit Survey 2.) Employee Exit Interview	Director of Operations and/or HR Director Interview forms			
40.) Scheduling and completion of annual performance evaluations and merit raises	Director of Operations and/or HR Director Evaluations			
41.) Recruitment, staff development and employee retention programs, employee appreciation awards, years of service recognition and discretionary funds budget Staff Retention Programs	Director of Operations SDC			
42.) Review and location of all facility job descriptions and Orientation Programs	Director of Operations and/or HR Director Job Description Notebook			
43.) Employee Grievance Process	Director of Operations Employee Handbook			

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44.) Internal Job Postings	Director of Operations and/or HR Director Employee Handbook			
45.) Workers Compensation Requirements	CFO			
46.) Unemployment Benefits	CFO			
47.) Laws Affecting Human Resources Recruitment and Management <ul style="list-style-type: none"> • Social Security Act • Fair Labor Standards Act • Civil Rights Act • Immigration and Reform and Control Act • Uniformed Service Employment and Reemployment Rights Act • Pregnancy Discrimination Act • Patient Protection and Affordable Care Act • Consolidated Omnibus Reconciliation Act 	Director of Operations Handout summary of laws with reference materials OSHA Manual HIPPA Manual			

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<ul style="list-style-type: none"> • Age Discrimination in Employment Act • Americans with Disabilities Act • Family and Medical Leave Act • Fair Credit Reporting Act • Employee Retirement Income Security Act • Health Insurance Portability and Accountability Act • Occupational Safety and Health Admin. 				
48.) Compensation Guidelines – Wage Scales	Director of Operations and/or Human Resources Wage Scales			
49.) Employee benefits and relationships with benefit providers	Director of Operations and/or Human Resources			
Financial				
50.) Review of Business Office Manual	CFO			
51.) Overview of Medicare Part A, B and D Coverage, Medicaid Program, Alabama Bed Hold Policy	CFO Resident Handbook			

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52.) Budgeting and participation in annual budget preparation: Chart of Accounts, Census, Revenue, Expense and Capital Budget Preparation	CFO			
53.) Review of the Statement of Income, Revenue and Expense Analysis, Trial Balance, Journal Entries, AP, Aging and Check Register	CFO			
54.) Understanding PPDs, how they are used, why and how to calculate	CFO			
55.) Review of Medicare Part A – RUGS and Fee Schedules	CFO			
56.) Understanding of Medicaid Cost Centers	CFO			
57.) Billing and Accounts Receivable Processes – Understanding days in AR and aging of AR	CFO			
58.) Accounts Payable Processes and Purchase Orders	CFO			
59.) Capital Requisition Processes	CFO			
60.) Review of facility established contracts and order guides with major vendors including Pharmacy, Therapy, Food Service, Rental Beds/Overlays,	CFO			

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Housekeeping, Laundry, & Hospice.				
Maintenance & Environment				
61.) Review of Maintenance Manual <ul style="list-style-type: none"> • Maintenance of Building • Maintenance of Facility Grounds • Maintenance of Equipment • Maintenance of Facility Vehicles 	CFO and Maintenance Director Maintenance Policy Manual			
62.) Review of Regulations governing facility construction, renovation and maintenance: <ul style="list-style-type: none"> • LSC Requirements • Americans with Disabilities Act • National Fire Protection Association • Occupational Health and Safety 	CFO and Facility Maintenance Director			
63.) Replacement Programs and Capital Requisitions	CFO			
64.) Maintenance of a clean, attractive, safe and homelike environment for residents, staff and visitors.	CFO			

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65.) Personalizing the resident's environment and limitations to personalization	CFO			
66.) Maintaining an environment free of hazards	CFO			
Other Departmental Reviews				
<p>67.)</p> <p>Dietary Review of dietary policies, menus, meal times and schedules. Introduction to dietary service software programs</p> <p>Social Services Review of social service manual, scheduling of resident appointments, driver and transport aides training and requirements.</p> <p>Activities Review of activity manual, activity calendar and volunteer programs.</p> <p>Staff Development See #41.</p> <p>Centralized Inservice Filing System</p>	<p>Director of Operations and/or Certified Dietary Manager Dietary Policy and Procedure Manual</p> <p>Director of Operations and/or Director of Social Services Social Service Policy and Procedure Manual</p> <p>Director of Operations and/or Activity Director Activity Policy and Procedure Manual</p>			

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68.) Leadership and Management Expectations	Director of Operations			
69.) Review of State and CMS Regulations governing nursing facilities. <ul style="list-style-type: none"> • Survey Protocol for LTC Facilities - Appendix P • Guidance to Surveyors for LTC Facilities – Appendix PP • Survey Forms • Quality Indicators and Quality Measures • Life Safety Code Regulations • State of Alabama Licensure Requirements • Understanding Survey Letters from State Agency and CMS 	Director of Operations The Long Term Care Survey Manual with Appendix P and PP Life Safety Code Regulations State of Alabama Licensure Rules			
70.) Review of OSHA Standards and Enforcement <ul style="list-style-type: none"> • Required OSHA reporting • Required OSHA postings 	Director of Operations Maintenance Director			

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71. Job Description Review				

Other:
