



**Admissions Coordinator and/or Case Manager
Orientation Check List**

Employee Name: _____

A. General Orientation was completed on: _____

B. General Orientation for Nursing Services completed on: _____

C. Job Specific Orientation below.

Criteria	Information Source	Employee Signature	Instructor Signature	Date Completed
1.) Review of Admission Policy and Procedures	DON/SDC Nursing Policy and Procedure Manual Physician Services and Operations Policy and Procedure Manual			
2.) Referral Process <ul style="list-style-type: none"> • Receiving Referrals from Different Sources • Capabilities of Facility • Turn Around Time • Clinical Review • Financial Review • Communication with Referral Source 	DON/Administrator/ Business Office			
3.) Pre-Admission <ul style="list-style-type: none"> • Pre Admission Checklist • Day of Admission • Level 1 Screening Form 	DON/Nurse Quality Advisor OBRA Office National Sex Offender Data Site			

Criteria	Information Source	Employee Signature	Instructor Signature	Date Completed
<ul style="list-style-type: none"> • Level II Screening • Background Check • Admission Conference with Resident/Family to Identify Special Physical and/or Cultural Needs • Facility Tours • Room Assignment 				
<p>4.) Medicare Part A & HMO Admissions:</p> <ul style="list-style-type: none"> • Available Days • Skilled Care • Pre-Authorization for HMOs 	DON/Nurse Quality Advisor/Business Office			
<p>5.) Admission Process:</p> <ul style="list-style-type: none"> • Admission Agreement • Arbitration Form • Resident Handbook • Realistic Expectations • Physician Selection • Advanced Directives • Vaccination Record • HIPPA Agreement 	DON/Business Office/Nurse Quality Advisor			
<p>6.) Daily Census:</p> <ul style="list-style-type: none"> • Census by Payor Source 	Business Office/DON			

Criteria	Information Source	Employee Signature	Instructor Signature	Date Completed
7.) Marketing: <ul style="list-style-type: none"> • Facility Brochures • Local Organizations • Referral Sources • Specialized Services • Community Events • Facility Tours 	Administrator/DON/ Therapy Team Leader			
8.) QA/QAPI Process <ul style="list-style-type: none"> • Reports for QA • TQI Report • PIP Process 	QA Coordinator/Director of Quality Assurance QA Policy and Procedure Manual			
9.) Review of State and Federal Regulations Related to Admissions	Director of Quality Assurance			
10.) Survey Process: <ul style="list-style-type: none"> • Survey Assignments • Survey Reports • Survey Readiness Binder 	Administrator/DON			
11.) Manager of the Day Duties	Administrator			
12. Job Description and Sign	DON/SDC			

D. Nursing Skills Check Completed on : _____

(Attach skills check to this orientation.)