

Training for New Program Managers

* Training must be completed within 90 days of manager hire date

Initial Training (within the first 30 days)

- Meet with your Program Director to review your caseload and expectations/responsibilities.
- Schedule a training to review fiscal and billing responsibilities.
 - o Billing administrator, consumer benefits specialist, and the fiscal support specialist
- Schedule a training to review the medication administration process, pharmacy issues, and Quick Mar with the CICL nurse.

Daily Responsibilities

- Ensure staff schedules are current and shifts are covered. Send any openings to the HR Recruiter. Fill out a paper PAF if staff's status changes from FT, PT, or sub which affect benefit eligibility, transfers/program changes. Director will submit the electronic copy.
- Fill vacation / PTO hours and open shifts.
- Once you reach your assigned hours, utilize floaters and fill with part time DSP's if possible.
- Enter work into Provide. Identify all OBO time. See OBO list for examples.
- Check in medications, order medications/ prn medications, check expirations dates (OBO).
- Accept and respond to calls (track calls that are OBO).
- Check and respond to emails.
- Conduct or assign all medical appointments including annual physicals and other annual appointments.
 - o Medical appointment form expectations
 - Review for thorough documentation.
 - Ensure next appointment is scheduled and placed on home calendar. Add to the medical/dental tracking form.
 - Communicate with the pharmacy about new/discontinued meds.
 - Turn into Program Director for review (then form will be scanned into Provide).

Tuesday by 4pm

- Approve all work records for the prior week. Contact staff with incomplete or inaccurate work reports. Ensure outcomes are met. Late work
- Compare mileage sheets to Provide for accuracy. At the end of the month, forward all sheets to the billing administrator.
- Late work (after payroll is run) must be emailed to the CFO and billing administrator for payment. Director has to request for the system to be unlocked before late work is entered.

Weekly Responsibilities

- Complete UI/MUI reports.. All MUI's need to be reported to consumer safety within 4 hours of the incident and finalized by a director by 3pm the next day. Training video under HR tab.
- Run the audit report. Review for completeness and accuracy. Contact and take any needed disciplinary action with staff. Monitor client outcomes. If a client refuses, the box should still be checked and then document the reason for the refusal.
- Shop for all needed food and supplies. Create a weekly menu (OBO).
- Review the MRC dashboard. Talk to a director if under or over by 5 hours/average. Don't forget to add any OBO hours.
- Check the Quick Mar for medication errors: "clicking" instead of scanning, blank spaces, controlled substance counts.
- Check home for maintenance issues and complete a ticket if necessary. See help tab.
- Collect receipts and allocate charges online weekly.
 - o On each receipt, there should be the program number, code breakdown, client initials (or all) and staff initials.
- Review program book. Keep all information up to date.

Monthly Responsibilities

- Allocate any remaining receipts. All receipts and fiscal documentation must be turned into the Director by the 5th of the month.
 - o Complete all fiscal forms: In home meal count, shared food, staff activity, and petty cash.
- Pay invoices on or before the 20th of each month. (OBO)
- Reconcile all bank statements before the 20th of each month and turn into the Program Director for review.
- Turn Mars and Audit Reports into your Director by the 20th of each month for review.
- Update Provide information for clients: Demographics, page 1 and page 2, contacts, user and client lists, etc. Print demographic page and place in the program book.
- Clean the inside and wash the program van.
- Complete the activity schedule.
- Attend manager meetings (second Wednesday of the month in Jan, Mar, May, Jul, Sept, Nov)
- Run reports (MRC Report, Lock Out Report, Nearing Lock Out Report, etc.)

Quarterly Responsibilities

- Fire drills and severe weather drills should be completed 4 times a year. One fire drill should be done during sleep hours. Change batteries in smoke detectors at the time change.
- There should be an escape plan in every home, which identifies smoke alarms, CO2 detectors, extinguishers, primary and secondary exits, and the designated meeting place.

Ongoing Responsibilities

- Have follow up meetings with your Program Director.
- Conduct staff meeting for your programs.
- Monitor staff performance and attendance. Follow the performance improvement process:
 - o Verbal Warning, Written Warning, Suspension, and Termination. Contact HR. Ongoing documentation can be kept in Provide.
- Complete all incident reports. Update/submit POC's. All reports should be submitted to the Program Director no later than 7th of the next month. If there is an MUJ, go back and include the assigned MUJ number at the end of the report.
- Identify staff training needs and plan training opportunities. Include team building activities.
- Training in Provide/Accel Trax.
- Review the website and navigate links that are accessible for managers.
- Seasonal responsibilities – salt, shovel, and other supplies are purchased in winter month, the hoses are detached from the faucets in late fall, gutters kept clean, lawn care, etc.
- Order supplies: Attends, gloves, masks, wipes, chucks, etc.
- Train new hires
 - o Home tour. Meet the clients. Review the program book. Read ISP's.
 - o Ensure any new staff sign the individual specific training form for each client, program specific form, van training (if applicable), individual specific training form for medications.
 - Reach out to the CICL nurse if staff come with a medication administration certificate to get barcode to scan meds. Verification should be done by HR in their processing step of onboarding.
 - o Complete the med check off list for any new employee once they have passed the med admin class. Nursing will add them to Quick Mar.

Annual Responsibilities

- Attend annual ISP meeting and take notes.
 - o Complete any follow up tasks and staff training as needed.
 - o Ensure staff have signed new ISP or any revisions that might occur.
- Update Provide.
- Review task elements once 19 Services has entered them into Provide for accuracy.
- Schedule annual physicals.
- Update the consumer inventory record (OBO).
- Renew or obtain a state ID.
- Taxes are filed, if necessary (OBO).

Manager Signature: _____ Date of first training: _____

Director Signature: _____ Completion Date: _____

OBO Examples

See Fiscal Director for the OBO template.

Choices in Community Living will provide assistance in opening the house in preparation for her return from day program.

Choices in Community Living will provide assistance to communicate with employer or DayHab provider.

Choices in Community Living will provide assistance to communicate with friends and family.

Choices in Community Living will provide assistance to order medications, medical supplies, monitor the accuracy of the MAR and administration and to communicate with Pharmacy.

Choices in Community Living will provide assistance to locate and schedule medical appointments and to communicate with medical provider.

Choices in Community Living will provide assistance to complete all needed housekeeping activities, to maintain home in an adequately clean and neat condition.

Choices in Community Living will provide assistance to provide and coordinate home and equipment repair and maintenance.

Choices in Community Living will provide assistance with paying bills, budgeting, tracking receipts, distributing money, reconciling bank statements, CTL reporting, trouble shooting financial problems, filing taxes, reconciling ledgers, and communicating with the bank and other financial institutions.

Choices in Community Living will provide assistance with shopping for groceries, supply, bulk, or miscellaneous.

Choices in Community Living will provide assistance to obtain and maintain entitlements including appointments, obtaining and tracking paystubs, generating, reviewing, and responding to entitlement correspondence and phone calls.

Choices in Community Living will provide assistance in preparing and attending Medicaid redetermination appointments.

Choices in Community Living will provide assistance in locating, obtaining, and repairing adaptive and safety equipment.

Choices in Community Living will provide assistance to clean and complete shift work after the individuals leave for day programming.