



ADMINISTRATOR HANDBOOK



Table of Contents

1) Introduction

- Mission Statement & Motto pg. 2
- Letter from the CEO (Chief Executive Officer) pg.3
- Letter from the President/COO pg.4-5
- Company Culture pg.6
- Overview and Intent of Handbook pg.7
- Email and/or Call Priority List pg. 8
- Employee Organization Chart pg.9

2) Introduction of Departments and Leaders

- Chief Financial Officer pg.10
- Director of Operations pg.11
- Role as Administrator pg. 12-13
- Administrator Job Description pg. 14
- Chief Marketing Officer pg. 15-16
- IT Manager pg. 17-18
- Director Of Fun pg.19
- Office Manager pg. 20
- Project Manager pg. 21-22
- Facility Nurse pg. 23-24
- Current Phone List pg. 25-28

3) Frequent Forms used by Administrators

- Resident Information Sheet (How/Why & Example) pg.29
- Level Of Care Assessment (How/Why & Example) pg. 30-31

4) Programs, Information, &Resources

- Think Smart Work Safe Program pg. 32
- Workmen's Comp & Forms pg. 33-36
- Unemployment Information pg. 37
- Never Too Old To Dream Program& Give Back Program pg. 38
- Equipment & Software Resources pg. 39
- Misc. & Other Important Things To Know pg. 40-44
- Closing Statement pg. 45

MISSION STATEMENT

The Cottages Mission Statement in essence has been the example—an endeavor of hundreds of hard-working caregivers and Cottage employees since the very first building was opened in 2001, but the mission statement was officially adopted during the October 2012 Annual Meeting. When asked what our current Mission Statement was, no one in the room could recall it. So although we technically had one in place, it was evident that it wasn't serving its intended purpose. It was with much deliberation that the Management Team decided four words really best describe our mission. They are: **We Treat People Right**. This relates to the way we treat our residents, their families, our community partners, and those who market us and each other. It needs to be at the heartbeat of every decision we make on behalf of The Cottages and its affiliates. It is simply our gauge that determines why we do what we do and how we do it.

Motto

Our Motto Statement is **Assisted Living at Its Best**. The founders, the Maxfields, never intended for The Cottages to be the biggest assisted living company; they simply want us all to continue to strive to be the best. Measuring how we are doing takes on many different forms. We listen to people. This includes our residents, their families, our employees, and our community partners. We send out routine surveys asking for feedback. We conduct monthly and yearly meetings where we, as a company, review surveys and plan goals for the future. Assisted Living at its best is more than a statement; it's the very foundation of everything we are and is the underlying principle that drives our outcomes. The wise administrators who incorporate both the mission statement and the company motto into who they are will be successful administrators.

A WORD FROM OUR FOUNDER AND CEO



Garold Maxfield

Dear Administrator,

Hello! I am pleased to know that you have been given this administrator training manual. Just that fact alone tells me a lot about you because I know that Mark & Kathleen only allow those caring people whom they think already have, or can soon achieve, the high level of accomplishment that we expect from our administrators. Thank you for being that type of person and leader, and thank you also for desiring to get even better. That is what our training and mentoring is all about. After all, we aren't perfect either, but we are always trying to get better.

I started The Cottages in 2001 with our first building in Emmett. We have now grown to 13 buildings here in SW Idaho, with some more new ones in the pipeline. In addition, we have other operations in Texas and Missouri, and we have significant growth opportunities there and elsewhere. None of this would have been possible without the dedicated team of great people that we have with the companies. Congratulations for being added to that team. We often talk about being "on the bus," or in other words being a contributing member of a positive team experience. I hope you enjoy the "bus ride." I look forward to positive interaction with you.

Excuse me now, I need to catch the next bus.

Garold Maxfield
Founder/CEO

LETTER FROM PRESIDENT/COO



Mark Maxfield

To the New Administrator,

First off, welcome! If you are reading this, then you have been selected from many qualified candidates to represent The Cottages organization in the capacity of an administrator over one or more of our beloved communities. You will soon find out that your task, while difficult at times, will bring you an immense amount of joy and satisfaction. You can certainly find easier things to do, but I guarantee that as you develop in your position, you will grow to love your job, your staff, and certainly your residents. You will find out, as many do, that being an administrator is more than a job.

You will work with a very talented executive and corporate team who has one goal overriding all others: Help you be successful! In addition, you will get to know your colleagues and fellow administrators intimately at Management Meeting and other various work groups that I hope you will involve yourself in. You will find this group of dedicated individuals extremely passionate, knowledgeable, compassionate, and most of all, committed to the great work we all do here at The Cottages. You will also have the opportunity to work with many wonderful caregivers who labor tirelessly day in and day out because of their commitment to and love for our residents. Embrace this position and the authority you have been given to develop your staff. They will look to you for leadership and as a professional model in their own lives. Many of them want to be administrators themselves someday. What better way to develop yourself than to leave a legacy of excellence with all whom you work with?

By now, you've learned that the mission of The Cottages is: We Treat People Right. Without complicating it too much, it simply means to do the right thing in your interactions with everyone you meet. This is the number one expectation of you as an administrator. Whether at work or not, the hallmark of a successful administrators is when they can be counted on to represent themselves and the company with dignity and excellence at all times and in all places. You will learn this is first and foremost your most important marketing message! Anything else you might have to say comes second.

The Cottages opened the first home in December of 2001, and we continue to build new homes in additional communities as the market dictates. This results in a fast-growing company in an ever-changing industry. Needless to say, there is much opportunity for growth. Many of our current administrators started their employment with The Cottages working part-time shifts as a caregiver. By paying attention to detail, treating others kindly, and always giving their best, the better ones were quickly recognized and were promoted up the ranks. Some of our leaders on our executive team were once caregivers and administrators like yourself. As you learn and give of yourself and continue to expand your knowledge in the industry and the company, you too will have the opportunity for additional opportunities if you wish. I wish you success in all that you do while employed at The Cottages.

As President and Chief Operating Officer of The Cottages, my primary goal is to oversee the successful operations of all the entities of The Cottages. I am keenly aware that this will happen if you have the tools necessary to do your job. I have a particular interest in you and your staff. Please never hesitate to reach out to me if there is something I can do to help you be successful. I enjoy meeting your residents and staff and never turn down an invitation to visit and speak/present at any of your staff meetings and trainings. I will never forget that the true magic of what happens at The Cottages are the miracles that take place every day in the homes and with the residents we love. You will see that is what makes us great. It's the residents after all who are the real reason we are in this business. They are the very essence of why we do what we do. I am also acutely aware that none of the miracles happen without the hardworking employees of The Cottages like yourself and your staff. It is for this reason that I feel my staff is Number 1. I know that if I treat my staff as Number 1, they in turn will treat my residents as Number 1. I urge you to adopt this same mindset as you endeavor to run a successful home.

In summary, please know that an incredible amount of resources, time, energy, and thought has gone into the organization you see before you. My hope is that you too will learn to love and appreciate it. I pray that you will find joy as you labor! Here's to you and your success!

With much respect,

Mark Maxfield President/C.O.O.

COMPANY CULTURE

Our company culture consists of hiring qualified people who possess integrity and a will to Treat People Right. It doesn't mean that we are perfect, but it does mean that we consciously focus on how we can improve the quality of life for our seniors and each other. This is more readily accomplished by treating one another right. In fact, most of us know or have a feeling when we haven't been treated right, and it often leaves us with a feeling of dissatisfaction and a desire to take our business elsewhere.

Treating one another right, for example, consists of answering phone calls and e-mails in a prompt manner to the way we greet someone at the front door. It is also evident in our general response to issues that could be viewed as problems and in the sincerity we exhibit when someone is hurting either physically, mentally, or emotionally.

The Cottages is based on a strong spiritual foundation that honors God, and we are not ashamed of that. We believe we have been blessed by God, and we follow Him as always as we move forward.

We promote a positive and optimistic attitude. Our President and COO Mark Maxfield often says, "It's the skill that got you the job, and it's your attitude that will help you keep your job. Remember that your integrity and compassion, more so than your competence, is what will determine your success at the Cottages!"

We promote healthy lives; therefore drinking will not be promoted at any company sponsored event. Our promise to the health and wellbeing of our residents is further promoted by a No Smoking Policy for our employees. In addition, we perform drug testing, and we conduct thorough background checks of all of our employees who have direct contact with our residents.

Our dress conduct and actions should always reflect a level of professionalism and a readiness to do business any day of the week. Please refer to the employee handbook for further explanation. If you work for The Cottages, you rest assured that you were hand-picked to represent a company culture that embodies the very most that society expects from an assisted living company. You should be proud! Serve with humility, but always carry this pride with you in your heart as you carry on the tradition of Assisted Living at Its Best!

OVERVIEW AND INTENT OF HANDBOOK

The intent of this handbook is to give you, the Administrator, some practical information to help in this challenging position. Please seek out those who have been identified as leaders in the area where you could use a little extra help. Remember there is no such thing as a dumb question. Questions left unanswered will not only slow your personal progress but also the progress of the company. A successful administrator doesn't withhold questions or resist asking for help just to avoid looking bad. You will be the most successful when you utilize the talents of those around you.

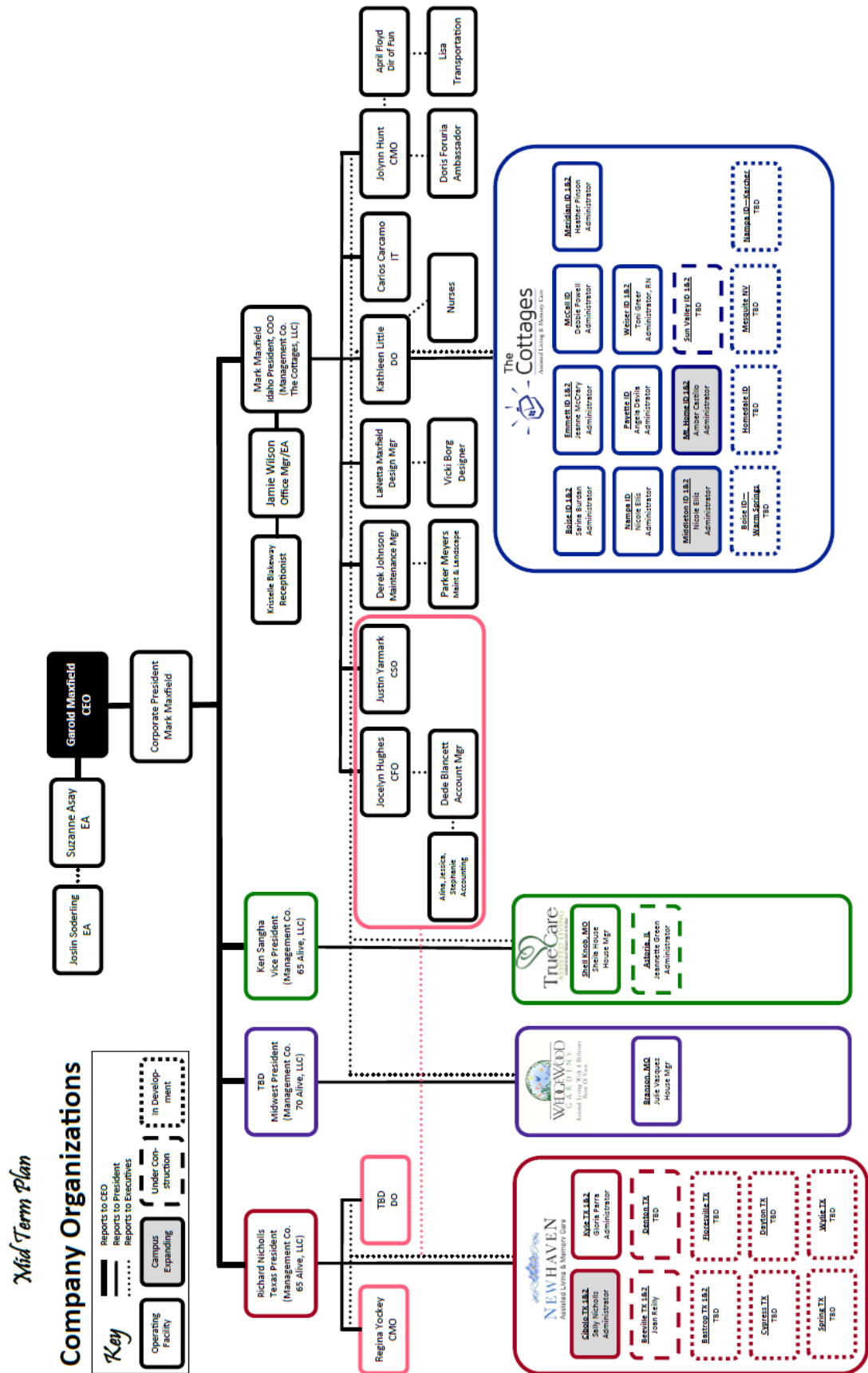
Remember to always look for ways to improve your skills both personally and professionally, and you will be sure to have a dynamic future.

Included is a list of who to go to if you should need help in any given area.

Email and Call Priority List

• Expenditure and purchase permission	Mark	cc Kathleen
• Medicaid admissions and questions	Mark/Kathleen	cc Dede
• Unique or significant operational issues (pets, resident fees)	Mark	cc Kathleen
• Resident/family concerns	Kathleen	cc Mark
• Staff discipline/concerns	Kathleen	cc Mark
• L.O.C.A. questions	Kathleen	
• General operational questions/issues	Kathleen	cc Mark
• Clinical Blue Step questions (service plan, assessments, etc.)	Kathleen	
• New admit paperwork (accounting@thecottages.biz)	Accounting	
• Invoices/bills/requests for payment	Accounting	
• Medicaid determinations and other info	Accounting	
• Receipts (FSA, CC, etc.)	Accounting	
• Weekly Census report	Jolynn	
• Community Relations Reports	Jolynn	
• Marketing questions/comments	Jolynn	
• Advertising questions/comments	Jolynn	
• Advertising purchases	Jolynn	cc Mark
• Decorating changes/questions/requests	LaNetta/Vicki	
• Furnishings, furniture, and appliance purchases	LaNetta/Vicki	cc Mark
• Changes or questions on cleaning products	LaNetta	cc Jamie
• Cleaning and Medical Supplies (Waxie, Addersons, etc.)	Jamie	
• Office supplies and equipment	Jamie	
• Something you need Mark to sign or look at	Jamie/Mark	
• Drug test kits/reordering	Jamie	
• Fire/safety inspections	Jamie	
• Employee loans	Jamie	
• Nonclinical Blue Step questions	Jamie	
• All non-emergency I.T. questions. (Printer, computer, phone, etc.)	Jamie	cc Carlos
• All emergency I.T. issues	Carlos	cc Jamie
• Significant building maintenance/repairs/concerns	Derek	cc Mark
• Routine maintenance and outside maintenance	Derek via Blue Step	
• Everything else	Use best judgment	
• Work Comp/Injury	Jamie	
• Unemployment	Jamie	

EMPLOYEE ORGANIZATION CHART



INTRODUCTION OF DEPARTMENTS AND LEADERS

CHIEF FINANCIAL OFFICER



Jocelyn Hughes

Welcome to the Cottages! I am delighted that you have joined our team. It's an exciting time for The Cottages. As we continue to grow, we strive to remain as adaptable, motivated, and responsive to our employees as we are to our residents.

I would like to introduce myself and explain my role at The Cottages. As the Chief Financial Officer, I am responsible for all financial management aspects of company operations. I provide leadership and coordination in the business planning, accounting, and budgeting efforts of the company. In addition, I prepare financial statements, financial reports, special analyses, and other information reports.

The accounting department is responsible for the management and administration of all aspects of payroll, including insurance programs for employees. We prepare all resident invoices and manage the receipt of funds. We pay all Company vendor invoices. At the end of the month, we prepare and present financial results to managers and investors. In addition, we analyze and manage cash flows, internal budgets, cost controls, and other expenses to make sound business decisions.

Our major function is to assist the Administrator of each location in their quest to run a successful, profitable building. We work closely with each Administrator to teach, train, and assist whenever there is a need for our assistance. The Cottages, LLC., is an exciting company to work for! The accounting department functions as a team within the larger Cottages team, and each one of us is dedicated to ensuring that our organization remains successful.

I would like you to know that you, as a part of our team, are our most important and greatest asset. We could not accomplish what we do every day without our talented employees. I am very pleased to welcome you to The Cottages where We Treat People Right.

DIRECTOR OF OPERATIONS



Kathleen Little

Welcome. If you are reading this handbook then please know you are among the few who have been chosen to be on an elite team of professionals. We are here to assist you in your growth and are excited to work alongside you in a great endeavor of service to others.

The Director of Operations is to provide support and oversight to the Administrators and Nurses and staff at large. This is done in a myriad of ways including, but not limited to, onsite training, one-to-one consultation, e-mails, phone calls, and mock surveys.

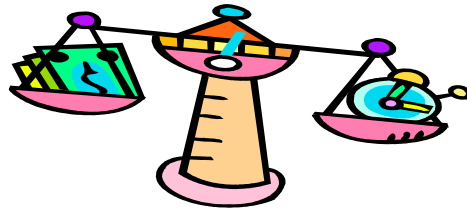
The Director of Operations concentrates on developing dynamic administrators and nurses who in turn manage their respective teams. This role provides a foundation by which the administrator and nurse can continue to develop their professional skills, as well as principles of leadership and management. Although seldom necessary, this position will also provide for disciplinary action and correction.

Becoming a leader takes time and practice, and it isn't automatic with a new badge and/or a title. You are encouraged to seek out knowledge that will help to grow you into your position. This can be done through reading, finding a mentor, attending various trainings, and asking lots and lots of questions. This organization is one that encourages both personal and professional growth. Staying stagnant allows us to keep our status quo; however, when we stretch ourselves beyond our comfort zone then we find that amazing things can happen.

Warmest Regards,

Kathleen Little L.S.W., M.ED.

Director of Operations



ROLE OF ADMINISTRATOR

The Administrator is the leader in the home and is responsible for all business operations—which ultimately affects revenue. This is accomplished by building relationships through trust with residents, their families, staff, vendors, and your local community. The diversity with which you approach driving the business to your home is vital. This ranges from participating in your local chamber of commerce to frequenting your local senior center. Other opportunities include following up with tours by sending thank you cards to responding to e-mails and phone calls with a sense of urgency. Quite often family members, Doctors, and Discharge Planners are in a time crunch, and the first person to respond will earn their business. Even if you are unable to assist someone, make sure to lead them to the appropriate person or business that can.

It is the role of the Administrator to maintain the overall physical quality of the property. If you should see the landscaping looking overgrown, you would contact the landscaping department and/or maintenance. If you see the carpets looking dirty, then request that your staff pay attention to them by using proper cleaning techniques. If this does not work, then notify maintenance through Blue Step so that the carpets can be professionally cleaned. Letting these issues go can prove costly. A small leak underneath a kitchen sink can lead to \$20,000 in repairs. That leak can lead to moisture seeping into the walls, mold growth, and then the necessity of ripping out cabinetry, carpets, sub flooring, etc. If the maintenance department had been notified, those costs would have likely been minimal.

Most Staff who will work for The Cottages will have little to no previous knowledge of how to conduct a great tour, and so the burden to teach rests with you. The recommendation is to teach people how we want them to relate on a professional basis; therefore, have staff watch you give a great tour. Be sure to teach the staff why we do and say what we do. Teach them to not make promises we can't keep such as, "Your rate will never go up" or "You will never have to leave." Additional teaching will be required to teach staff how to talk with people on the phone and what kind of information to gather, as well as what is appropriate information to give out. Although those in healthcare will have had some exposure to HIPAA, others may not. HIPAA stands for Health Information Portability Accountability Act. This refers to the way private information is transported. It is commonly referred to as a confidentiality act. Staff will need to be reassured that it is okay to not give out personal information about Residents unless they have a release or the person on the other end is on a need to know basis. For instance, a hospital or doctor is on a "need to know" basis as they provide critical medical care. Instances where we would not give out information would be random friends calling to check on someone, telemarketers, or long-lost family members. Unfortunately, sometimes their intentions are ill willed, and as we know, seniors

are at risk of being taken advantage of. It is our priority to do everything possible to keep our residents from harm. Harm not only includes physical harm; it also includes financial exploitation, emotional harm, and neglect.

Staff must be taught how to track leads and gather solid information. This will be an ongoing teaching process. It is suggested that at least once per quarter the correct filling out of tour/referral sheets is reviewed. A great method for teaching this is to bring a tour sheet to a monthly staff meeting, and then practice filling those out together. This includes: time, names, dates, and perhaps most important, how someone heard about us. This helps drive where we spend our energy and resources for future marketing purposes.

In addition, role-playing is a great method of teaching staff how to deal with a high strung, upset, overwhelmed, or happy potential customer. Our staff will learn from us how, We Treat People Right. As previously mentioned, this is our mission statement and needs to be at the top of your mind each and every day. If our staff sense that it is our number one priority, then the culture of each location will be that of truly treating people right.

Prioritization of issues is always a force to be reckoned with. Residents' needs come before anything else. However with that being said, it's important to realize that certain issues are time sensitive, such as payroll. So if you are aware that on a Monday morning you will have a couple of resident issues to deal with, then you will need to head to work a little early to make sure that you don't keep the payroll department waiting. Another example could be an upset family member who will want to be responded to quickly, so you may need to work through a lunch hour and take a late lunch or stay after 5:00 p.m. to meet with them. This is compensated with the salary position which recognizes that on certain occasions you may stay a little late or leave a little early. Our residents and families quickly identify our willingness (or lack of) to meet their needs. A constant look at your priorities and a willingness to shuffle will serve you well. It will also reinforce the priority we have of Treating People Right.

Employee discipline is an important role of the Administrator. Two forms of discipline are used which are Written and Verbal. It is recommended that there is always a second person present when offering discipline, and there always needs to be a second person present when an employee termination is to occur. Straightforward and concise documentation is needed with little to no emotional input in a write up. There needs to be dates, times, what the nature of the situation was, and who was involved. It is important to remember that the signatures of who was involved and what the expected improvement needs to be for the future are essential elements of the discipline process. Whenever possible have any witnesses write concise statements as to their involvement. Close coordination with The Cottages HR Department and/or Accounting Department is essential so that good communication flows and any unnecessary unemployment claims do not have to be paid out.

ADMINISTRATOR JOB DESCRIPTION

GENERAL RESPONSIBILITIES:

The Cottages Administrator shall direct the overall operation of their respective homes. The Administrator's first responsibility shall be to the physical, emotional, and spiritual needs of the residents of The Cottages; second, to the staff of The Cottages; third, to the actual physical building of The Cottages.

MAIN AREAS OF RESPONSIBILITY:

1. Operate in compliance with Division of Licensing and Certification and the Department of Health and Welfare to fulfill the mission of The Cottages.
2. Work to ensure a fun, safe, nurturing atmosphere among the residents and staff of The Cottages.
3. Screen prospective residents and, in conjunction with the appropriate professionals, determine whether or not to admit the prospective resident.
4. Ensure that the health needs of residents are addressed by utilizing outside medical professionals if necessary.
5. Ensure the safety of all residents.
6. Be responsible for interviewing, hiring, and if necessary, dismissing staff.
7. Make provisions for the training and development of staff.
8. Delegate areas of responsibility to the appropriate staff and/or contracted professionals.
9. Be responsible for establishing standards and guidelines for both residents and staff. Be fair, concise, and firm in the administration of these standards and guidelines.
10. Work with state and local authorities in licensing, fire, building, and health inspections, etc.
11. Represent The Cottages to the public at large in a positive and professional manner.
12. Ensure that all homes of The Cottages are properly maintained, clean, and free of debris and clutter.
13. Assist with medications for residents requiring prescription and non-prescription medications.
14. Be on call during evenings and weekends for emergencies.
15. Ensure that all documentation and paperwork for the residents, staff, and physical home is completed and submitted in a timely manner.
16. Implement community relations efforts and maintain a full census.
17. Manage and control home expenses and maximize the revenues.
18. Be prepared for anything, else deemed necessary for the effective operation of the home.

Chief Marketing Officer



Jolynn Hunt

Welcome! As the CMO I am pleased that you have decided to join our team. You were selected because we saw tremendous talent in you and an ability to communicate and interact with others. It is a privilege to be able to work with and serve the elderly population. We are confident that you will find great joy and satisfaction in being able to do so.

The main purpose of the marketing department is to help lead and develop marketing operations, partnership marketing, resident services, and resident retention.

The marketing department oversees and helps in the efforts of:

- Advertising
- Printed promotions
- Trade show exhibits
- Community outreach
- Communication techniques
- Market and client research
- Producing company marketing materials
- Developing community and industry relationships
- Electronic promotions, such as websites and social media
- Implementing innovative marketing techniques and tools
- Ensuring that the company's branding comes across in all media
- Collaborating with and training team members on how to increase resident satisfaction

We are here to help our administrators learn how to market to local businesses and individuals and ultimately build meaningful relationships. This is done through participating in activities, such as networking events, business expos, support groups, community events, building online networks, and marketing door to door.

Further, we assist our administrators by helping them train their staff on how to properly:

- Interact with individuals
- Conduct a tour
- Follow up on leads

The best way for us to work together is to have an open line of communication. If you need help in specific areas, please feel free to contact me. We are here to work as a team and provide superior care to our residents. This is an incredible company to work for which has high standards and offers the best in Assisted Living and Memory Care. Let's make sure that everyone knows this!

To Our Success,
Chief Marketing Officer
Jolynn Hunt, MSHCM

IT MANAGER



Carlos Carcamo

Welcome to The Cottages

As the IT Manager, I am glad to have you on our team. My responsibilities are to help you with the technology side of your job and to answer any technical questions.

First Days

Let me explain what to expect from the IT Manager on your first few days on the job. You will be set up with a domain account, which basically means you have access to The Cottages network and resources. You will also be set up with your own workstation or laptop with a username and password which you will use to log into your workstation, log into your email, log in remotely to your workstation, or access the VPN. I will give you a default password that you will need to change to something that you are familiar with or is easy to remember. Access to these resources can really save time and improve communication.

Email

We use email a lot to communicate in the office, so you will have Outlook configured with an email account, available 24/7, unless there is maintenance going on. We also have web mail which you can access from any computer with internet. Your email can be available via your smart phone mobile device which I can help you configure.

FTP

We have an FTP site where you can share files easier than through email. This is a great alternative for sending large or numerous files instead of sending through email. You will have your own personal folder on the FTP to store your files.

Backups

Backups of the email Exchange server are kept running up to 3 months back, in case you accidentally delete something. You will just need to let me know what you lost, by giving me information, such as who you sent the email to, what date you sent the email, what the subject was, etc. As soon as I find it, I will forward it to your inbox. I can also do a daily backup of a folder on your workstation. Just let me know the location of the folder you want to have backed up.

Everyday Needs

Everyday IT needs come up, and I work on resolving those as soon as possible. Please call the corporate office or submit a service ticket, and I will respond to your need as soon as I can.

Training

If you need training in any technology-related area involved in your job, I can provide individual training to make sure you know how to use the technology to do your job. I can also help residents setup their technology in their rooms or troubleshoot issues they may be having.

Remote Work

We have the ability to provide employees with access to their workstation remotely if left at work, such as from home or on the road or in a hotel. Also, as the IT Manager, many of your requests or tasks can be done remotely. I have the ability to remotely connect to your workstation or other device to work on an issue you may be having. This not only saves time, but money for The Cottages. Your issue is fixed quickly, and my time is not wasted driving. Sometimes a trip is needed, but most work can be done remotely.

Suggestions

If you have any suggestions for things you'd like to have changed or implemented, please let me know. I am very willing to take a look at different technology, methods, tools, or software that might make someone's life easier.

IT after Hours

When technology issues arise, they do not consider the day or time. IT emergency help is available after hours via cell phone, so please don't be afraid to call after hours. Please send an email for non-emergencies, and they will be addressed during off hours, if available, or the next business day.

In closing

As the IT Manager, I find my job unique, and I love being part of a team and getting satisfaction from making a difference for an employee or resident. I enjoy getting involved to help you or your staff. That is what I am here for!

Again, welcome to our team!

-IT Manager

DIRECTOR OF FUN



April Floyd

The Director of Fun (DOF) position at The Cottages involves coordinating and managing a variety of job duties. The DOF travels to all The Cottages locations and works with the Quality Of Life Coordinator (QLC) and Administrator to organize, plan, and implement an activity program that is tailored for that specific resident population. The DOF encourages and leads the QLC'S to design activities for all residents according to individual interests and needs through group and one-to-one type activities. The QLC also provides equipment and supplies for different activities and shares those supplies throughout the company as needed. The DOF works with The Cottages publisher to make any flyers and invitations to events and activities for each location and helps with planning and supplies for parties, barbeques, and community involved events. In addition to formatting and printing the monthly calendars for all the Cottages locations, the DOF also puts together the monthly newsletter, which features articles and pictures from all of the locations. The DOF also works closely with the Marketing Director to post pictures and activities on Face Book and other social media sites. In addition the DOF also works with the Marketing Director to promote events in the local communities and endorse the activity program as a valuable part of The Cottages marketing plan.

The value of this position to the administrators is that activities contribute to each resident's plan of care and quality of life. Having a successful activity program allows for longer resident retention at the assisted living rather than the hospital or nursing home. Activities can decrease depression, isolation, and decrease behaviors by involving residents in doing things that have interest to them. Activities can also keep residents active physically through exercises or bus trips and activities outside. Having regular activities also promotes a healthy and happy environment throughout the building and allows the floor staff to do provide personal cares without having to redirect and control negative behaviors. In addition, many resident families look for a robust activity program that offers a variety of leisure interests to their loved one. Families often want residents to be actively involved in activities that they used to enjoy, so it's important to have an activity program that is attractive to all personality types.

Activities are an integral part of services offered by The Cottages. It is one of the few positive aspects of living in an assisted living home. A good activity program attracts clients and has good community involvement to draw people in to see the good things that happen at our locations. Activities need to address the social, spiritual, and leisure needs of each person living at our homes. Without a great activity program, residents do not have good quality of life, and even if the medical and physical care is adequate, it isn't a complete service – the whole person's needs must be met.

Support Services Director/Office Manager



Jamie Wilson

Executive Assistant to President/COO, Support Services Director & Office Manager
Reports To: President/COO

Welcome to team!

My main responsibility as the office manager is to ensure that the corporate office runs as smoothly and efficiently as possible. I support company operations and coordinate work between various departments. I report to the President/COO and act as liaison between administrative support and senior management.

I am here to assist and support you in any way possible. Here are a few examples:

- I am your go-to person for non-clinical Blue Step questions, concerns, and requests.
- Medical and cleaning supplies are ordered quarterly, and I will coordinate with you and place orders.
- I act as liaison for all IT, phone, and printer issues. When you notify me of your IT issues, I will enter a trouble ticket for the IT Manager to address.
- I am constantly searching for the best prices from our current vendors as well as potential vendors. I ask that you give me feedback on product issues that you may come across, such as quality, etc.
- If you see ants, spiders, or any other kind of creepy crawly creatures, please contact me. I help coordinate and schedule pest control for all locations.
- I coordinate all office supply orders.
- I manage the internal website, which is also known as the E-Binder, and all of its contents. The E-Binder is where you will find the company's most current policies, procedures, training documents, and much more.
- If an employee is injured on the job, I handle the workmen's compensation claims.
- Processing of unemployment claims

My goal is to continuously search for ways to help you be successful and make your job easier. If you need anything or have questions, please don't hesitate to pick up the phone and give me a call. If I don't know the answer, I will find it! You are now a part of a wonderful family where....We Treat People Right!

Designers



LaNetta Maxfield

Vicki Borg

At The Cottages we strive to provide each of our residents with a living environment that above all “feels like home.” It is the job of the Design team to ensure that this goal is achieved. Whether in the planning stages of new construction or reconfiguring a remodeled building, the Design Manager and Designer study plans, make recommendations, are aware of codes and ADA requirements, and communicate with contractors to ensure the best possible finished product. Working together, the Design Manager and Designer are responsible for the design choices and for furnishing the buildings.

Once a home is completed and occupied, there is an ongoing need to keep it and the furnishings in good repair. Cleaning supplies are authorized and approved by the Project Manager. Cleaning checks are performed and necessary cleaning projects are scheduled.

Administrators can request assistance with individual projects that require planning, shopping, and executing by the Designers.

The Design team also plays a role in the success of marketing The Cottages. Staging empty rooms, keeping furnishings and accessories in good condition, and occasionally updating furnishings ensures that potential residents find The Cottages to be a place they love to come home to.

White glove Inspection

The White Glove Inspection will be carried out at the direction of the Design Team. The intended goal is to ensure a clean and tidy environment for our residents to reside, for our staff to work and for our guests to enjoy.

During that inspection you can expect the following to be evaluated: 1) equipment 2) resident rooms and bathrooms 3) public areas 4) cleanliness of carpet, misc. flooring and furniture 5) organization of cupboards in the kitchen, laundry room and linen closets 5) outside appearance including the patio, gazebo, parking lot and garage 6) a review of the MSDS book for completion and staff signatures.

To be adequately prepared ongoing cleaning checklists and training will be required. It is essential that your entire team share a sense of responsibility and that not just one person becomes liable. The White Glove award is not easily obtained but yet highly sought after at our annual awards dinner.

Another way to ensure readiness is to have an ongoing dialogue with the design team. If you have questions about products and or procedures please ask! If you see that something is in need of repair be sure to put it on the weekly Blue Step maintenance list. Be looking for paint chips around door jams, leaks and carpets that need to be shampooed. If you have put something on the maintenance list and you consider it to be urgent be sure to call the design team and or the maintenance department.

While it is fun and an honor to win this white glove award more importantly it is a way of honoring the space our residents call their home. It helps our furnishings last longer and in the end it makes marketing the building a lot easier.

Position Title: **Facility Nurse**

Reports to: Administrator

Position Summary: Assumes primary responsibility for coordinating all clinical services for The Cottages' residents on a 24/7 basis. Participates in the negotiated service planning process as well as renewal and maintenance of these plans. Recommends Health Care goals for the residents and assist the administrator in their implementation. Works with Administrator to oversee and delegate the medication assistance tasks to the caregivers and training of the Caregivers/Medication Assistants to meet resident needs.

Position Responsibilities:

1. Conducts comprehensive nursing evaluations of residents upon move in or shortly after. Completes appropriate documentation within The Cottages electronic medical record (EMR), Blue Step.
2. Completes quarterly nursing assessments on all residents and change of condition assessments as needed for residents who undergo change in their health status. Must document all assessments into the EMR.
3. Reviews the EMR frequently to review caregivers' documentation of residents' acute health care needs.
4. Reviews in the EMR the MAR at least 3 to 4 X weekly as a quality check and standard for the residents' medication assistance policy and procedures.
5. Works closely with administrator, residents, and caregivers in an effort to meet the individual residents' needs.
6. Evaluates health emergencies and determines emergency medical measure taken regarding resident care.
7. Acts as a resident advocate in medical-social situations involving resident and/or designated agents, physician, and/or agencies.
8. Administers or assists with medication administration based on state regulations and individual resident service plans. Observes and documents results.
9. Delegates general and specific resident services, (e.g. health care monitoring, nail care, medication, Caregiver delivered ADL's, etc.).
10. Examines and gives first aid to resident and staff within scope of practice.
11. Addresses physical, social, spiritual, and psychological needs of residents.
12. Assists Administrator as needed with Residents whose health condition has declined beyond our ability to meet their needs safely.
13. Notifies physician and/or designated agent(s) of resident's status/change as appropriate.
14. Supervises ordering of medication from pharmacy.
15. Verifies physician orders, move-in/move-out information, and initiates appropriate action/follow up.
16. Identifies resident and staff training needs.
17. Conducts training as assigned and mandated by regulatory requirements.
18. Must have ability to understand and follow the Rules mandated by the Bureau of Facility Standards.
19. Adheres to assisted living principles in providing services.
20. Performs all position responsibilities adequately.
21. Demonstrates effective training skills.
22. Recognizes and communicates problems effectively.
23. Relates to the public, residents, families, staff, and other health care professionals verbally and in writing.
24. Maintains accurate records.

25. Must possess adequate and clear English speaking and writing.
26. Is free of a non-treated communicable disease.
27. Has and will continue to maintain current CPR/First Aid certifications.
28. Works flexible hours and meets the physical requirements of the job; i.e. sitting, standing, lifting of 30 pounds regularly, fine motor skills.
29. Understands and is willing to uphold the Policies and Procedures of The Cottages, LLC.
30. Maintains car in good working order and has current auto insurance. Is willing to travel as needed for resident assessments, meetings etc.
31. Maintains a current/active, unencumbered nursing license with Idaho State Board of Nursing.
32. Performs other duties as assigned.

Phone Directory



Please give out cell phone numbers with discretion and utilize the proper chain of command.

Title	Name		Phone	Fax	Cell	Email
CEO	Garold	Maxfield	208-475-1805	208-475-1810	208-631-0996	garold@thecottages.biz
Executive Assistant	Suzanne	Asay	208-475-1805	208-475-1810	208-965-4721	suzanne@thecottages.biz
Assistant	Joslin	Soderling	208-475-1805	208-475-1810		joslin@thecottages.biz
President & COO	Mark	Maxfield	208-475-1805	208-475-1810	208-870-9878	mark@thecottages.biz
Support Services Dir & E.A.	Jamie	Wilson	208-475-1805	208-475-1810	208-863-1020	jamie@thecottages.biz
Chief Strategy Officer	Justin	Yarmark	415-895-2967		801-694-1967	justin@thecottages.biz
Chief Financial Officer	Jocelyn	Hughes	208-475-1805	208-475-1810	208-608-6889	jocelyn@thecottages.biz
Accounting Manager	Dede	Blancett	208-475-1805	208-475-1810	208-995-6882	dede@thecottages.biz
Accountant	Alina	Brokaw	208-475-1805	208-475-1810		alina@thecottages.biz
Accounting Clerk	Stephanie	Lloyd	208-475-1805	208-475-1810		stephanie@thecottages.biz
Accounting Clerk	Jessica	Walker	208-475-1805	208-475-1810		jessica@thecottages.biz
Chief Marketing Officer	Jolynn	Hunt	208-475-1805	208-475-1810	208-965-9106	jolynn@thecottages.biz
Ambassador	Doris	Foruria	208-475-1805	208-475-1810	208-859-7678	doris@thecottages.biz
Director of Fun	April	Floyd		208-475-1810	208-870-2194	april@thecottages.biz
Bus Driver	Lisa	Ney			208-250-5678	grammaneylisa@thecottages.biz
Design Manager	LaNetta	Maxfield	208-475-1805	208-475-1810	208-869-2620	lanetta@thecottages.biz
Design Manager	Vicki	Borg	208-475-1805	208-475-1810	208-867-4418	vickiborg@thecottages.biz
Maintenance Manager	Derek	Johnson	208-475-1805	208-475-1810	208-559-3496	derek@thecottages.biz
Maintenance	Parker	Meyers			208-440-4160	Meyers8@g.com
Director of Operations	Kathleen	Little	208-475-1805	208-475-1810	208-608-2884	kathleen@thecottages.biz
IT Manager	Carlos	Carcamo	208-475-1805	208-475-1810	208-685-9500	carlos@thecottages.com
MaxBuilt	Ben	Blaser	208-475-1805	208-475-1810	208-859-1916	ben@thecottages.biz
Receptionist	Kristelle	Blakeway	208-475-1805	208-475-1810		kristelle@thecottages.biz

Phone Directory (The Cottages cont.)



Please give out cell phone numbers with discretion and utilize the proper chain of command.

Title	Name		Phone	Fax	Cell	Email
Boise						
Administrator	Sarina	Burdan	208-853-1255	208-577-5789	208-608-2881	sarina@thecottages.biz
Contract RN	Nancy	Fischer			208-899-1252	nfischer44@gmail.com
Emmett						
Administrator	Jeanne	McCrary	208-365-9490	208-365-1178	208-275-9433	jeanne@thecottages.biz
Contract RN	Melanie	Baichtal			208-989-5786	mdbaichtal@gmail.com
McCall						
Administrator	Debbie	Powell	208-634-3883	208-634-8562	208-954-4868	debbie@thecottages.biz
Contract RN	Sandy	Cottrell			208-634-6589	sandylc@frontier.com
Meridian						
Administrator	Heather	Pinson	208-288-2220	208-955-1049	208-869-2974	heather@thecottages.biz
Contract RN	Nancy	Fischer			208-899-1252	nfischer44@gmail.com
Middleton						
Administrator	Nicole	Ellis	208-585-5959	208-585-5902	208-546-1409	nicole@thecottages.biz
Contract RN	Melanie	Baichtal			208-989-5786	mdbaichtal@gmail.com
Mtn. Home						
Administrator	Amber	Castillo	208-580-1121	208-587-8065	208-608-2883	amber@thecottages.biz
Contract RN	Nancy	Fischer			208-899-1252	nfischer44@gmail.com
Nampa						
Administrator	Nicole	Ellis	208-463-4941	208-475-1809	208-546-1409	nicole@thecottages.biz
Contract RN	Melanie	Baichtal			208-989-5786	mdbaichtal@gmail.com
Payette						
Administrator	Angela	Davila	208-642-6199	208-642-4827	208-740-0494	angela@thecottages.biz
Contract RN	Melanie	Baichtal			208-989-5786	mdbaichtal@gmail.com
Weiser						
Administrator, RN	Toni	Greer	208-414-4200	208-414-4203	208-859-9605	toni@thecottages.biz



NEW HAVEN

Assisted Living & Memory Care

Please give out cell phone numbers with discretion and utilize the proper chain of command.

Title	Name		Address	Phone	Cell	Email
Regional President	Richard	Nicholls			847-975-1609	rnicholls@newhavenassistedliving.com
Cibolo, TX						
Administrator	Sally	Nicholls	2300 FM 3009 Schertz, TX 78154	210-319-4965	208-431-4960	sally@newhavenassistedliving.com
Kyle, TX						
Administrator	Gloria	Parra	107 Creekside Trail Kyle, TX 78640		512-878-7252	gloria@newhavenassistedliving.com



Please give out cell phone numbers with discretion and utilize the proper chain of command.

Title	Name		Address	Phone	Fax	Cell	Email
Reeds Spring, MO							
Administrator							
AIT	Julie	Vasquez	17996 Business 13 Reeds Spring, MO 65737	417-272-6666	417-272-1822	417-230-8096	julie@wedgewoodliving.com

Resident Information Sheet & Example

The Resident Information Sheet is to be utilized for the purpose of tracking changes of address, changes in contact information, changes in resident rate and occupancy. If a resident moves in, moves out and or expires, you are required to send in a resident information sheet to the accounting department.

Be sure to fill in all of the blanks and check it over twice for accuracy. Make sure that the Individual Worksheet page in Blue Step reflects the information on the Resident Information Sheet.

Remember the accounting department doesn't have the optics to be able to keep up with all of the changes unless they are informed in a timely manner. This piece of paper is crucial to keeping them fully informed and ensuring accurate billing. If you are going to be away on vacation and or work travel be sure that your house manager or assistant manager is familiar with this process and can successfully see it through in your absence.

Resident Information Sheet		The Cottages Assisted Living at its best	
New Resident: <input checked="" type="checkbox"/>	Change to Existing: <input type="checkbox"/>	Effective Date of Change: <u>8/19/13</u>	
Resident Name: <u>Have Hope</u>	Facility: <u>Circle one</u>		
Telephone Number: <u>(208) 444-4444</u>	Boise #1	Boise #2	
Address (only if new resident): <u>633 S. Smith Rd.</u>	Emmett #1	Emmett #2	
<u>Meridian, ID 83665</u>	McCall		
Contact Person: <u>Bee Hope - Dtr.</u>	Meridian #1	<u>Meridian #2</u>	
Telephone Number: <u>(208) 555-6565</u>	Middleton	Mountain Home	
Address: <u>336 N. Cobblestone Way.</u>	Nampa	Payette	
<u>Boise, ID. 83333</u>	Weiser #1	Weiser #2	
Other Contact Person: <u>N/A</u>	Room Number:	<u>15</u>	
Telephone Number: _____	Move-in Date:	<u>8/19/13</u>	
Address: _____			
Automatic Payment Only			
Fax Online Banking Form To 208-475-1810			
Send Invoices to:			
Resident, _____	or	_____	or other contact _____
Explanation for changes: <u>Pro rated 13 days x 136.40 = 1773.20 + 952.00 = 2,723.20 Collected @ time of move in - Jma G.</u>			
Move Out Information:			
Reason for Move Out (circle one): <input type="radio"/> Move Out <input type="radio"/> Death <input type="radio"/> Emergency Transfer			
Last Date in Facility: _____			
Bill Through Date: _____			
Total Charges from The Cottages' Property & Inventory List: \$ _____			
*Send a copy of this form with a copy of The Cottages' Property & Inventory List to the corporate office 475-1810.			
Form Submitted by: <u>Jma G. Administrator</u> Date: <u>8/19/13</u>			

Level of Care Assessment (LOCA) Reviews & Example

The LOCA (Level Of Care Assessment) is the tool we utilize to determine a resident's care. It subsequently helps to determine the cost associated with that care. Every time the LOCA is submitted to the accounting department it needs to be double and triple checked for accuracy. Once it has been approved it will be scanned back to you the administrator. It is at that time it may be presented to the respective party and their signature may be obtained.

A couple of important items to pay attention to are: 1) Be sure that once the LOCA has been established and or updated it mirrors what's on the Service Plan and visa- versa. 2) Be sure that each time a LOCA is submitted to the Accounting. Department it is accompanied by a Resident Information Sheet. 3) It is not necessary to wait for the quarterly LOCA reviews that will be carried out under the direction of the Director Of Operations. If there's a change to be made to the LOCA be sure that's done in real time and don't wait. 4) Every time there is a change in a LOCA, that needs to be communicated to the respective party through either a face to face visit or via a phone call. Then the conversation needs to be documented on the Individual Worksheet page in Blue Step. This gives the Accounting Department an advantage to better understand what's been communicated, as they do not have access to the progress notes.

(See page 31 for LOCA Example)

LOCA Example:

LEVEL OF CARE ASSESSMENT FORM



Resident Name Jane Doe Date 7-28-14

Location Boise #2 Completed By Bill Buck

	Score		Score
Eating (check all that apply) (0) Independent (no assistance needed) (1) Verbal prompts (reminders to come to meals, chewing, etc.) (2) Extensive assist/special dietary needs (cut up, puree, thicken, etc.) (3) Meals to room (except for short term illness) (4) Total assistance (wouldn't eat without hands-on assistance) (5) Special diet purchases (gluten free, vegan, vegetarian, etc.)	3	Mobility (check all that apply) (0) Independent (no assistance needed) (1) Fall risk (see fall risk assessment) (2) Verbal prompts (safety/supervision) (3) Some assistance to steady, outside, & side-by-side walking (4) Requires bed or chair alarms for fall prevention (per device) (5) Total assist (not mobile without assistance)	2
Personal Hygiene (check one) (0) Independent (no assistance needed) (1) Verbal prompts (reminders only) (2) Stand-by/some hands-on assistance needed (3) Need physical assistance daily (4) Total assist (dentures, face washed, nails/hair, etc.)	2	Bath/Shower (check all that apply) (0) Independent (no assistance needed) (1) Verbal prompts (reminders only) (2) Stand-by/some hands-on assistance needed (3) 2 K's weekly (4) 3 or more showers weekly (includes additional for incontinence care) (5) 2 person assistance	2
Response to Emergency (check one) (0) Independent (recognized & responds to emergencies) (1) Need verbal assistance (2) Need some hands-on assistance (3) Total assist/physical/mental for safety in an emergency	1	Toileting (check all that apply) (0) Independent (no assistance needed) (1) Verbal prompts (occasional incontinence) (2) Some hands-on/occasional incontinence (Peri-care) (3) Extensive assist (total Peri-care) (4) Total incontinence (5) 2 person assist	4
Transferring (check one) (0) Independent (no assistance needed) (1) Verbal prompts for safety (reminders only) (2) Need some hands-on assistance (walker/wheel chair) (3) 1 person assistance to transfer (4) 2 person assistance to transfer	2	Medical Diagnosis (check all that apply) (1) Insulin dependent (2) Oxygen monitoring <u>2 COPD</u> (3) Misc. _____ per event (4) Special medications (nebulizers, complex creams, cpap, etc. per product) (5) Extensive team interventions (6) Foley catheter (7) Physical therapy/hospice/home health (8) Ostomy care	3
Medications (check all that apply) (1) Coordination w/outside pharmacy (2) Crushing Meds (3) Self-administration, but require facility/R.N. oversight (4) R.N. injections &/or blood draws (per event) (5) Blister packs/med-sets by R.N. (6) Staff assistance with all medications	8	Psycho/social status (check all that apply) (0) No behavioral concerns (1) Occasional verbal direction for appropriate social/personal wellness (2) Regular re-direction for learning and living skills (3) Frequent call/bell usage (4) Behavior plan/monitoring (5) Extensive intervention/behavior management required (6) High elopement risk (7) Excessive call bell (8) Constant redirection (9) 1 on 1 for activities (10) Excessive wandering (11) Severe agitation/sundowners (12) Physical aggression (13) Verbal inappropriate interaction requiring extensive redirection (14) Extensive psychotropic med intervention by R.N.	4
Transportation (check one) (0) Independent (arranges/attends own appointments w/ no assistance) (1) Staff assist with scheduling appointments (2) Staff assist with scheduling/transportation to few appointments (3) If bus is needed for transportation - lift use (4) Total assist and chaperone to all appointments	2	Housekeeping/Laundry (check all that apply) (1) Excessive housekeeping (2) Excessive laundry	0
Dressing (check all that apply) (0) Independent (no assistance needed) (1) Verbal prompts (reminders only) (2) Some hands-on assistance (buttons, shoes, etc.) (3) Daily assist with TED hose/braces, etc. (4) Extensive assistance for all dressing needs	2		
*The grand total point tally will be final upon approval from the corporate office. LOCA form may be subject to change 30 days after initial move-in and every 90 days thereafter or as needed.	Column Total: 20	Notes: Room = \$ <u>2400</u> Care = \$ <u>1715</u> Other = \$ _____ Total = \$ <u>4115</u> $35pts \times 49 = 4115$ $+ 650 \text{ move in} = 4765^{00}$	Column Total: 15

Resident/POA Signature _____ Date _____ Corp Office Signature _____ Date _____
 Administrator Signature Bill Buck Date 7/28/14 Rate Effective Date 7/29/14
 *GrandTotal:
 35

Revised 3-25-13

Example

THINK SMART WORK SAFE

The Cottages has developed this “Think Smart Work Safe” program to provide the necessary training and resources for all employees to work in an environment that is safe and free from harm. The Cottages’ stresses the importance of following safe practices and guidelines while at work.

The overriding philosophy of The Cottages in regards to safety and work related injuries, is to return the employee back to full duty as soon as possible. The practice of The Cottages is to continually strive to maintain a safe environment for all employees. It is proven that it is in the best interest of the employee and the employer if the injured worker is returned to work as soon as possible. Not only does this improve the ability to give raises, benefits, bonuses, and gifts, but also lessens the impact on the staff and other employees at the job site and enables the employee to rehabilitate quickly and still feel productive.

Everyone, including employees, and all levels of management, have a primary responsibility to practice safe work procedures and ensure safe working conditions. Any employee with safety concerns should immediately notify the supervisor. All employees should practice safe lifting procedures as instructed while on duty. All direct care staff should be mindful of the residents’ level of cares and lifting requirements before providing direct care to residents. All employees who provide direct care are required to use a gait belt while transferring residents. This is MANDATORY! Supervisors and all employees are expected to follow the work methods and procedures established by the company.

It is the policy of The Cottages employees to work safely and to further encourage your fellow workers and others to do the same. To promote this, The Cottages has various gifts and monetary prizes available to all staff members who work safely. All employees are eligible. The gifts are contingent upon the entire home maintaining an accident-free record on a month to month basis. The purpose of this program is to simply further encourage all Cottages employees to work safely and is in no way intended to discourage the reporting of all legitimate accidents and workplace injuries to the supervisor. There will be absolutely no reprisal on the behalf of the reporting employee for those who report a workplace injury.

These responsibilities can be met by striving continually to promote safe work practices among all employees and to maintain property and equipment in a safe operating condition. By working together, we can maintain a safe, efficient, and injury-free organization. Remember....THINK SMART, WORK SAFE.

Workers Compensation& Forms

Policy

All employees are covered by Workers' Compensation Insurance. Workers' Compensation provides protection for workers who suffer injuries or become ill on the job regardless of whether the employee or the employer was negligent. It pays medical bills, provides disability payments (income replacement) for loss time off, and loss of life or dismemberment arising out of or in the course of work. Workers' Compensation is an insurance program.

Goal

It is the policy of The Cottages to treat all injured employees with dignity and respect. During the time an employee is injured, every attempt will be made to ensure a speedy recovery and return to work. The Cottages' goal is the rapid and efficient return of employees to their original job if possible through modified/transitional duty.

Procedure

Reporting and Disability Management/ Early Return to Work Program

- **Step 1:** Every employee who is injured on the job must complete a **First Report of Injury** form and turn it in to the immediate supervisor. If the employee is unable to complete the report, the report must be completed by the immediate supervisor and in all cases faxed to the corporate office at 208-475-1810, attention Human Resource (HR) Department, within 24 hours of accident. The immediate supervisor will investigate every injury/accident. The supervisor will obtain statements from other employees/witnesses, complete the **Incident Witness Account**, and collect any evidence regarding the injury/accident.
 - **Blood Borne Pathogens**
Any employee who has been exposed to blood borne pathogens and/or needle stick, must immediately seek medical attention at the nearest clinic or emergency room for a base-line HIV/hepatitis test. This test must be repeated 90 days from the date of the incident.
- **Step 2:** If an employee is sent to the doctor, the employee must return to the facility with a doctor's note and Activity Status Report on the employees' diagnosis, next visit, actual days off work, etc. The Cottages has designated preferred providers in the area. This provider must treat employee, unless there is an emergency. If the employee wishes to see a different provider, (she) he must contact the HR department for approval prior to the appointment. Create a separate file with the injury report, investigation notes, and add doctors' notes from every visit. Please get the claim number from HR Department and place it in the folder under the employee's name and date of injury.
 - If the employee is able to return to work without restrictions, have the employee discuss the medical findings with the doctor and gather all required information. Also have the physician complete the **Return to Work Certificate**.
 - If the employee is able to return to work with restrictions, an accommodation is attempted with the help of the HR department, the physician, and the insurance company. Please review the disability matrix with HR department to determine what the restricted/light duty job shall be for the injured employee. All accommodations should be documented and placed in the workers comp file, and give a copy to the employee.

- i. If the employee has restrictions, please complete and send the **Physicians Letter**, and the **Modified/Transitional Duty Work Plan** and a copy of the **Return to Work Certificate** to the doctor via fax indicating that we are attempting to accommodate this employee, and we need their help in finding out what the employee is capable of doing.
 - ii. Send a new copy of the **Modified/Transitional Duty Work Plan** with the employee to each doctor's visit and have the doctor review it for changes.
- After each doctor visit, the employee must deliver in person all doctors notes, the **Modified/Transitional Duty Work Plan**, and instructions from the doctor. The supervisor/administrator should discuss and change the **Modified/Transitional Duty Work Plan** with the injured employee. At no time is the employee allowed to make changes to the work plan without the doctor's consent. If the employee insists that she/he can do more, have the employee contact the doctor and ask for a modification to the disability matrix. At no time should the supervisor/administrator encourage the employee to work outside the limitations (stated by the doctor).
- If an employee is unable to return to work, the immediate supervisor is responsible for the following procedures:
 - Instruct the employee to report to the facility after each doctor's appointment regarding the result of the visit
 - If the employee is unable to report directly to the facility, make arrangements to meet with the employee at his/her residence to review the written instructions received from the doctor's appointment.
 - At this time, the immediate supervisor should inform the employee of their responsibilities during the absence from work, as follows:
 - Employee must deliver all doctors' notes or instructions to the facility as soon as they are received.
 - Employee must follow up with the immediate supervisor on a weekly basis
 - Employee is required to follow the doctors' orders to expedite their recovery.
 - An employee may receive disciplinary action up to and including termination if the following occurs:
 - If employee does not comply with communication guideline as listed above.
 - If employee receives a Return to Work Release and does not comply as instruction by the doctor.

Early Return to Work Program

- Administrator must complete all of Step 2 in an attempt to get the employee back to work as soon as possible.
 - Once a Work Plan has been developed and approved by the physician and corporate HR, the administrator must call the employee and verbally offer (her) him a **Modified/Transitional Duty Work Plan**. Please document the date and time of the verbal notification on the Weekly WC Communications Log.
 - The **Modified /Transitional Duty Work Plan** and the **Job Offer of Temporary Modified Duty Letter** should be sent to the employee "Certified Mail/Return Receipt." Place a copy

of both in the Workers Comp file and copy to the corporate office. When receipt arrives, place it in the WC file as well.

- When the employee accepts the modified work plan an entrance interview should be held with the returning employee.
 - Discuss the **Modified/Transitional Duty Work Plan** with the employee and have the employee sign it.
 - Reiterate the importance of the employee working within the guidelines.
 - Reiterate the importance of the employee discussing any changes in the injury immediately and or the desire to do more work.
 - Discuss the need to visit the doctor before making any changes
 - Discuss their need to plan for time off for doctors' visits.
 - Discuss the need for them to continue to bring all doctor notes to you immediately after each doctor visit.
 - Reiterate our desire for them to return to full work duty as soon as possible, but we must follow doctor's orders for a good recovery.
- Communicate with all employees that this employee is on a modified work plan and what expectations are to accommodate the injured employee. This does not mean that the administrator needs to discuss how the employee is injured with the staff or any other information regarding the injury, only offer the information that relates to the tasks that the injured employee can and cannot perform.
- If the employee declines the **Modified/Transitional Work Duty Plan** or does not return to work on the designated date, notify Human Resources immediately. In some states, declining the offer of work could impact the employee's ability to receive workers comp benefits. HR will forward this information to the insurance carrier.

Important Information:

- Supervisor/administrator should meet with the employee every week to determine how the employee is doing. All employee comments should be documented on the **Weekly Employee WC Communication Log** and placed in the WC file.
- If at any time the administrator uncovers any fraud or false information, it should be reported to the HR department immediately in writing and followed up with a phone call. All questions should be directed to the HR department regarding workers compensation, the Early Return to Work Program, and this Disability Management Program.

Fraudulent behavior regarding workers' compensation will result in disciplinary action up to and including termination and, in some cases, prosecution.

Steps for Employee Injury & Forms:

1. Report all injuries & near misses to the Support Services Director (Jamie Wilson) immediately.
2. Fill out Injury Accident Report & send to the corporate office
3. Fill out Accident & Near Miss Investigation Form & send to the corporate office
3. Fill out Incident Witness Account (if there was a witness) & send to the corporate office
4. Employee visits the doctor & modified duty is required, fill out the Modified Transitional Duty Work Plan & send to the corporate office



Accident & Near Misses Investigation Form

Root Cause Analysis/Plan of Correction

Instructions: Obtain written and/or recorded statements from the injured employee to include what happened, what caused the accident, and what were the contributing factors. To do this, reconstruct the sequence of events that led to the injury. Attach additional sheets if necessary. Provide copies of the completed form to The Cottages corporate office within 3 days of the injury or avoided injury.

Injured Employee Data

Employee Name Jane Doe		Position Caregiver	Location Nampa
Date of Accident 10/14/14	9:00 <input checked="" type="checkbox"/> a.m. <input type="checkbox"/> p.m.	Claim Number (if known)	
Work Telephone 463-4941	Home Telephone 888-0000	Cell Number 888-2222	
Administrator's Name Nicole Smith			

Accident Description:

1. When describing the accident, address the 5 W's: Who, What, When, Where, Why, and How. Provide a full description of what happened. Address the **root** cause.

Jane tripped over the dishwasher door that was left open, upon returning from checking on a resident. She fell to the floor on her right knee and is now complaining of ongoing knee pain.

She was advised that she could leave her shift early to go home and rest her knee, however as of the time of the investigation, she says that it still hurts.

Plan of Correction:

What can be done to keep this accident from occurring again? What actions or steps should be taken?

There will be a mandatory in-service held on 10-15-14. We will discuss work place safety and will focus on hazards in the kitchen.

Investigator:

Date of Investigation 10/14/14	Copy sent to Mark Maxfield? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
--------------------------------	--

Administrator *Nicole Smith* Date 10/14/14

Comments:

Reviewed by Kathleen Little. Director of Operations on 10/14/14. Nicole also advised to ask staff to shut the dishwasher door every time they walk away.

Mark Maxfield *Mark Maxfield* Date 10/15/14

Unemployment Defined & Form

(*Print Actual Form From E-Binder)

Documentation we provide regarding an employee's work history and termination will be used as evidence by the unemployment office. The burden of proof that the employee was fired for cause is on the employer entirely, and we must prove the termination was justified in order to deny unemployment benefits.

Simply put – No documentation = No evidence. This is why upon ALL terminations, you must fill out the Termination Documentation Form (below) and send it into the corporate office (attention: Jamie)

Termination Documentation Form

Use the questions below to document verbal and written warning leading up to the termination of an employee. Attach this completed form to the Employee Status Form on all termed employees.

From

Administrator Name: Jane Smith	Date: 10/21/14
--------------------------------	----------------

Regarding

Employee Name: William Doe	Facility: Cottages of Boise	Position: Caregiver - Graveyard
----------------------------	-----------------------------	---------------------------------

1. What reasons were given to the employee for the discharge?

On 10/20/14, two staff members came to me stating that they believed William Doe came to work under the influence of alcohol. At 10pm on 10/20/14 William was swabbed for alcohol and given a drug test. The drug test was negative, but the alcohol was positive. Witness, Jane Williams was present during the test and results. William was terminated for being under the influence while at work. I offered him a ride home for his and other's safety. He refused and left. We called the authorities to notify them of the situation.

2. Was the claimant given warnings, related to the reason for discharge? If so provide specific dates of the warnings. If written warnings were given please provide copies.

n/a

3. If employee was discharged for violation of a company policy or rule, please indicate the specific policy/rule and provide documentation of acknowledgement by employee of receipt of the policy or rule.

In violation of The Cottages Drug and Alcohol Policy. (see attached company policy)

4. Please explain in detail the final incident that resulted in the termination of this employee.

There was suspicion of William being under the influence of alcohol while at work, so I performed an alcohol swab test. The result of the alcohol test was positive, with greater than a .09% alcohol level. (see attached alcohol swab results image)

5. If the employee was discharged due to absences, please provide the following information:

A.) Dates of absences in the last 90 days: n/a

B.) Was the proper procedure followed in notifying management of these absences? If, no, please explain below: n/a

C.) What reason did employee provide for absences? n/a

Signature: 	DATE: 10/21/14
--	----------------

The “Never Too Old to Dream” Program



We love serving our residents, and that is why we started the "Never Too Old to Dream" program. We find out what our residents' likes and dreams are, and then we help fulfill them. In the picture above, we honored a gentleman that had been a football coach for 25+ years at the collegiate level. We were honored to have some players from Boise State University honor our coach who subsequently preferred to be called “coach”. The players were generous enough to sign footballs and those proceeds were donated to the Alzheimer’s Association. We encourage our residents to always keep dreaming because we believe you are Never Too Old to Dream! We ask you and your staff to always be on the lookout for our next Never Too Old to Dream opportunity. To learn about the wishes we’ve been able to fulfill visit our website at www.TheCottages.biz.

The “Give Back” Program



The Cottages feel it is important to "Give Back" to the communities that many of our residents grew up in and supported throughout their lives. That is why we started the “Give Back” program. We look within our local communities and identify areas where The Cottages can "Give Back" to those in need. An example of one of our give back opportunities included providing toiletries and school supplies to a local, rural school that cares for disabled children. We always encourage our residents to participate in the give back programming. It provides a valuable way to integrate our residents into their respective communities to whom they given so much. Help us to identify opportunities in your community. To learn about the Give Back projects that we’ve contributed to, visit our website at www.TheCottages.biz.

Equipment & Software Resources

Software

BlueStep

Urgent: 1-800-477-1477

Non-urgent: clientcare@bluestep.net

BlueStep HQ is the first fully automated health and human services application. HQ automates and streamlines core business processes integrating resident management, facility operations, customer service, medication administration, human resources, and other core functions. Information is entered only once and automatically shared, depending on security levels, enterprise wide in real time. Data is secure and available 24/7.

Intranet Site

E-Binder

<https://thecottagesintranetresourcesite.bluestep.net>

The E-Binder (electronic binder) is a compilation of The Cottages, New Haven, and Wedgewood policies and procedures. This is where all of the current and up-to-date information is kept. You will also find helpful tools, training documents, and much more. If you have any questions or problems, please contact Jamie at the corporate office for assistance.

Alarm System

Simplex

Put system on test: 888-746-7539

All other issues: contact Maintenance Dept. first

There is an account number and passcode for each location that has to be used in order to put the alarm system in “test mode”. If you don’t have that and need it, please contact Jamie at the corporate office for assistance.

Phone/Fax

Freedom Voice

800-477-1477

Most locations utilize Freedom Voice for phones and faxing. Residents are able to purchase a line for a minimal fee of \$25.00. This fee has to be entered into Blue Step and put on the Resident Information Sheet and sent into the corporate office for billing purposes. If you have questions or problems with the building’s phone’s or faxes, contact Jamie at the corporate office. Jamie will submit a service ticket for Carlos or submit a ticket through FreedomVoice at www.weblink.freedomvoice.com

Other Miscellaneous & Important Things to Know

Maintenance-Shut Off Valves-

There are two types of shut off valves at each Cottage location they are the gas and water. Within your first week on site you will want to locate each of those. The water shut off will be in the mechanical room and the gas valve for the building will be outside and at the back of the house. It generally requires a wrench that should stay at the valve site for easy access. There are individual shut offs for each appliance if the entire house does not need to be shut off. Again please locate those. Be sure to have quarterly trainings and ensure that the new staff are aware of the locations. You will not always be present in case of an emergency and your staff need to know how to quickly turn these valves off. In the case of a water main bursting for instance time equals money and every minute counts.

Who Do I call?

You have been provided with an Email and Priority List. Within that document you will find who your go to person/people are. If after you review that you are still unsure you are always welcome to call the corporate office at 475-1805 and you will be directed to the correct person.

In case of a building emergency such as a fire call 911. Then notify the Director Of Operations. If you are having an urgent maintenance issue such as; the air conditioner or heating isn't working notify the Director Of Maintenance.

If you are experiencing, a critical IT issue such as; the computer, phone or Blue Step is down then notify the IT Director. If you have needs such as; the toner being low or the printer not working then notify the Director Of Support Services/Office Manager.

If you need assistance with clinical issues then notify the Director Of Operations. Clinical issues involve a wide range of topics from a difficult to manage resident to an unhappy customer.

Be sure to reach out and know that your corporate team is readily available, willing and ready to help you.

Mock Surveys

Mock Surveys have been designed to help ensure each location is ready for the state survey. They will be without notice and they generally occur, 2-3x's per year. They are conducted by the Director Of Operations. You will receive feedback and will be asked to prepare a response within a two week time period. Be sure to keep these surveys and periodically review them. They have been designed based on years of survey feedback and results. Also be sure to review the good and bad results with your staff. Having a great survey depends on your entire staff being invested in the process.

State Survey Process

If your location has two successful back to back surveys then your location will be put on a 3 year rotating schedule. That's a great place to be. The Cottage standard is to have 3 punches or less for every survey. If your location receives a core citation then you can expect surveyors to be back within 45 days, as we work together to bring your location back into compliance. Although receiving a core is a rare circumstance it is one that is taken very seriously and timing is crucial. Be sure to keep careful watch over time constraints, as the return results are time sensitive. Prior to turning in any results to the state, set an appointment to meet with the Director of Operations so that those results may be reviewed. Be sure to give ample time for the review process to take place.

Once surveyors are on site, immediately notify the Director Of Operations and the corporate office. We are here to help you and rest assured that we will pay quick attention to your requests and needs. The faster that we can comply with surveyors requests, the likelihood of a successful survey outcome rises.

Staff Meetings

Monthly staff meetings are the responsibility of you the administrator. You are encouraged to require the meetings to be mandatory and that children are not allowed. Children provide a sweet but nevertheless distraction to attendees. Giving at least a two week notice will help to ensure caregivers have adequate time to set appointments and find adequate child care.

Meeting content can range from ensuring the caregivers receive their 8 hours of ongoing education required each rolling calendar year to acknowledging employee birthdays and anniversaries. For these incentives you may utilize the employee incentive pot. This pot is replenished with \$75.00 every time you admit a resident and collect the move in fee. Please invite the Director Of Operations to your 1st staff meeting, so that they can adequately introduce you and welcome you to the team. Also feel free to invite the Director Of Ops anytime thereafter if you are experiencing difficult staffing issues or implementing new employee policies that will affect your staff. When you schedule your Christmas Staff Party be sure to notify the corporate office. When possible we like to send a representative to thank your staff and celebrate their year of accomplishments.

If your staff have not had any injury in the previous 30 days, you are asked to utilize the safety incentive drawing. Be sure to reiterate what it's for and take the opportunity to talk up the Think Smart Work Safe Program. You may purchase a gift card in the amount of \$50.00 for each respective home you oversee for that drawing.

Lastly you are encouraged to stay away from calling individuals out in a staff meeting unless it's to acknowledge something good. Discipline measures and or individual training needs can be brought up in a more private type setting. Be sure to utilize this time to teach, motivate and encourage exceptional work.

Weekly Reports

The **weekly community relations** report is a tool that is used to account and keep track of census, discharges, admissions, leads, and marketing efforts. The administrator updates this report every week and then emails it to the Chief Marketing Officer, Director of Operations, and President. It is due every Tuesday by 5:00pm. If you have questions concerning the report, the Chief Marketing Officer will be able to assist you.

WEEKLY COMMUNITY RELATIONS REPORT

Email report every Tuesday by noon to the following: to Mark Maxfield, Kathleen Little, Jolynn Hunt, Justin Yarmark)

Week-ending Date: 10-22-14		Preparer's Name: Elizabeth Hugh						
Facility Name: Boise I								
Licensed Beds 16	Current Census 15 (Private+ Med. + Respite)		Private 13	Medicaid 2	Respite 0	Daycare 1	Pd. Resv. 1	Hospice 1
Admits=1	Discharges=1		Reason for Discharge: Went to a SNF. Too high level of care.			Projected Next Week Census= 16		
Open beds=1	Single=1	Double=0	# of Tours=3		Comments on Census: Move-in scheduled 10-30			

Facility Name: Boise II								
Licensed Beds 16	Current Census 16 (Private+ Med. + Respite)		Private 15	Medicaid 1	Respite 0	Daycare 1	Pd. Resv. 1	Hospice 2
Admits=0	Discharges=0		Reason for Discharge:			Next Week Census 16		
Open beds=0	Single=0	Double=0	# of Tours=2		Comments on Census: Several inquiries this week			

Community Relations Activity

Date	Contact's Name/Activity	Potential Resident's Name	Phone Number
10-20-14	John Doe	Mary Doe	656-4444
NOTES	<p>Came in for a tour. Looking for his mom. Mom has dementia. Is 86 years old. Fairly good health. They need to find a place as soon as possible.</p> <p>10-21-14: I followed up with John to see how things went. He really enjoyed the tour. They want to come to The Cottages. John is going to bring in a deposit check this afternoon. They expect that Mary will be able to move in 10-31-14.</p> <p>10-22-14: John came in and gave a deposit to reserve a room.</p>		
Date	Contact's Name/Activity	Potential Resident's Name	Phone Number
10-19-14	Marketing to local businesses		
NOTES	I went and marketed to the following businesses: St. Al's hospital, St. Luke's hospital, Boise PT, Boise SNF, Boise Independent Living, Al's hearing aids,		

	Boise Small animal clinic, Regina's hair salon, Walgreen Pharmacy, Fab Home Health/Hospice		
Date	Contact's Name/Activity	Potential Resident's Name	Phone Number
10-18-14	Fax discharge planners		
NOTES	I faxed St. Al's and St. Luke's discharge planners and let them know that we have availability.		
Date	Contact's Name/Activity	Potential Resident's Name	Phone Number
10-19-14	Dr. Dear		
NOTES	I followed up with Dr. Dear concerning one of our residents. While speaking with him I let him know that we have an availability. He said that he has a referral for us and would be sending them our way. The referrals first name is Grace.		
Date	Contact's Name/Activity	Potential Resident's Name	Phone Number
8-8-14	Marilyn Ralph	Mary Mum	226-2525
NOTES	<p>Marilyn called looking for AL for her mom. They're in the beginning stages of looking. I invited her in for a tour. She is coming today at 2:00pm for a tour.</p> <p>8-9-14: Marilyn came in for a tour yesterday. She is very interested in The Cottages. I called her to see if she had any other questions. She doesn't at this time. She really enjoyed it. They are going to wait for a while to move her mom into AL because she's not quite ready. It's ok to call and follow up with her on a monthly basis.</p> <p>9-9-14: I followed up with Marilyn to see how Mary is doing. She said she is doing ok. She is starting to decline and getting closer to needing AL. She wants me to follow up with her in a month.</p> <p>10-8-14: I followed up with Marilyn to check and see how things are going. Both she and her mom feel it is time to move Mary into AL. Marilyn is going to come and bring a deposit check tomorrow.</p> <p>10-9-14: Marilyn brought a deposit check and we made the appropriate arrangement for Mary to move in on 10-18-14</p> <p>10-18-14: Mary moved in to The Cottages.</p>		
Date	Contact's Name/Activity	Potential Resident's Name	Phone Number
10-20-14	Marketing phone calls		
NOTES	I called the following businesses to see how things are going and let them know that I have an availability – Heart Hospice, Sunny Home Health, Tonya at St. Al's, Bridget at Local Senior Center.		
Date	Contact's Name/Activity	Potential Resident's Name	Phone Number
10-10-14	Dan Brown	Dottie Brown	123-1234
NOTES	<p>I left a message with this lead that we received from our website.</p> <p>10-11-14: I called and spoke with Dan. He is looking for his wife for MC. He gave me his address and I am mailing him some info.</p> <p>1234 address way, Boise ID 83607</p> <p>10-14-14: I followed up with Dan to ensure he received our info. packet. He did. He set up a tour for tomorrow at 4:00pm.</p> <p>10-15-14: Dan came in for a tour with his wife. He is very interested and put a deposit down. He will move her in on 10-28-14.</p> <p>10-20-14: I followed up with Dan to make sure things are still going ok and see if he has any questions. I reconfirmed the move-in date of 10-28-14.</p>		

The **census report** is a document that you will receive in your email every Wednesday. It reports the number of permanent residents and respite and daycare individuals that are at each location. It is important to review this document when you receive it. If you have any questions concerning the census report the Chief Marketing Officer will be able to assist you.

The Cottages Assisted Living & Memory Care		Full	Admits	Discharges	Reason For Discharge	Change prev week	Open Beds	Paid Resv.	Prev. Week Occ.	Total Occ	% Full	# on Hospice	Respite	Day Care	Private	Medicaid	Next Week Projection
Emmett II-AL	15	0	0			0.00	6	0	9	9	60%	1	0	0	6	3	
Emmett I-MC	15	0	1		went to and	-1.00	6	0	10	9	60%	5	0	0	9	0	
Meridian I- MC	15	0	0			0.00	-1	1	16	16	107%	5	0	0	14	2	
Meridian II-AL	15	0	0			0.00	-1	1	16	16	107%	0	0	0	16	0	
Middleton	15	0	0			1.00	0	0	14	15	100%	5	0	0	14	1	
Mountain Home	15	0	0			0.00	-1	7	16	16	107%	0	0	0	15	1	
Payette	15	1	1		respite went home	0.00	4	0	11	11	73%	1	0	1	9	2	
Weiser I-MC	15	0	0			1.00	-1	0	15	16	107%	3	0	0	13	3	
Weiser II-AL	15	0	0			-2.00	1	0	16	14	93%	1	0	0	11	3	
Total	135	1	2			-1	13	9	123	122	90%	21	0	1	107	15	
2013 Totals	135									113	84%						
2012 Totals	135									128	95%						
Compared to prev year										9	7%						
Boise I-AL	15	0	0			0.00	1	0	14	14	93%	0	0	0	12	2	move-in 10/9
Boise II-MC	15	0	0			0.00	0	1	15	15	100%	3	0	0	15	0	
Nampa	10	1	0			1.00	2	1	6	7	70%	1	0	0	6	1	move-in 10/15
McCall	12	1	1		went to rehab	0.00	1	0	11	11	92%	0	0	0	10	1	
Total	52	2	1			1	4	2	46	47	90%	4	0	0	43	4	
2013 Totals	52									38	73%						
2012 Totals	52									37	71%						
Compared to prev year										9	17%						
Final Numbers 2013	187									151	83%						
Final Numbers 2014	187	3	3		0	0	17	11	169	169	90%	25					
Compared to prev year										18	7%						

In closing, we hope you have found this handbook to be beneficial. Please know that we actively strive to promote an open door policy. If you need something reach out and ask believing that we care enough to listen to your concern. If you are not feeling heard or something has been overlooked please speak up. We cannot address your concerns if we are unaware of them.

Your time at the Cottages will be large in part to what you make of it. So go forth, believing that you have what it takes. You are surrounded by others who believe in you and thus you have been hired.

Again, welcome and congratulations on your new endeavor. May we have a long and successful relationship.

Warmest Regards,

The Cottages, LLC.