Kenyon
HOMECARE CONSULTING

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Better Outcomes.

Operations Manual

1425 Broadway #22
Seattle, WA 98122
www.kenyonhcc.com
gkenyon@kenyonhcc.com
Tel: 206 721 5091

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Ginny Kenyon RN, MN, Principal
Kenyon HomeCare Consulting
1425 Broadway, Suite 22
Seattle, WA 98122 USA
gkenyon@kenyonhcc.com

EDITING YOUR MANUAL

This document's formatting is controlled by the use of Word styles. It is a Microsoft Word document and should operate on systems using Office 2007 software or higher. Kenyon HomeCare Consulting has done it's best to ensure reformatting will be minimal for most agencies, but we do not assume liability for any formatting errors that may occur.

There are a number of text placeholders that will need to be replaced with your agency's information. Text placeholders are as follows:

[HOME CARE AGENCY NAME] — Your agency's business name

[BUSINESS TYPE] — Your agency's business type

[STATE] — The state your agency is licensed in

[OPENING TIME] — Your agency's opening operating time

[CLOSING TIME] — Your agency's closing operating time

[GEOGRAPHIC COVERAGE AREA] — Your agency's geographic coverage area, including cities, towns, and/or counties

[HOLIDAYS OBSERVED] — Your agency's observed holidays that you will be closed for

[DOLLAR LIMIT] —Your agency's dollar limit within document

[JOB TITLE] — Your agency's Administrator title

[STATUS] — Your agency's status: for-profit or non-profit

To Find and Replace Text Placeholders:

1. On the Edit menu, click Replace.
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3. In the Replace with box, enter the replacement text.
4. Click Find Next, Replace, or Replace All.
5. To cancel a search in progress, press ESC.

To Update Table of Contents:

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1. Hold down CONTROL key, click the table of contents, and then click Update Field.
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INTRODUCTION

How you start up and run your business is always a very personal thing. There is no one right way to set up your operations. Certain elements in your systems will be required by licensure if you are in a state that requires licensure. If you are not in a licensed state, you will still need to develop systems to run your agency. The purpose of this manual is to assist you, using best practices from across the country to set up the different systems you will need to run your business.

Each section contains best practices by process and is to be used as guidelines and not as the system. The sections are divided by Employment, Client Care and finally Internal Operations. Under each of these sections are the different systems you will need to create. As you will note in reviewing this manual at the end of each system there is a list of questions for you to address.

For each process, you will need to identify the staff position(s) that are responsible for the different process in each system. It is critical that you be as specific and detailed as you can be when describing the process and who will be responsible for each area. Failure to be specific means that you are leaving the decisions up to the staff and what they decide may not be what you want or what your licensure may require.

The questions in each section are intended to assist you in thinking through your system and who, what and how that system is run. Think carefully about the work flow and be sure to include everyone that will be affected by the system. E.g. if the administrative assistant is responsible for screening the applications so that the supervisor can interview them, what is the system to be for the selection, the testing, and interviewing. How will the supervisor know who and when he/she has interviews? How will the information regarding their application and the test results be transferred to the supervisor? What day of the week will she/he interview and at what times? Is the calendar on paper or in the computer? If on the computer, is it in the supervisor's calendar in Outlook or in a corporate calendar? Be very specific at each step of the process. Remember the more you leave unspecified the more you leave to someone else to decide for you.

OPERATIONS MANUAL

EMPLOYMENT AND STAFFING SYSTEMS

STAFF RECRUITMENT AND HIRING

Staff recruitment and hiring is probably the most important task of any company. Your staff is the company and how others will see you. Failure to hire the best staff and keep them puts you and your company at a disadvantage. The first step of hiring is the recruitment ad.

Ads are increasingly being placed on the internet with good results. The need for descriptive ads however, has not changed. The ad should direct the applicant as to the requirements and qualifications for the position and be written in a manner that will encourage appropriate individuals to apply.

RECRUITMENT PROCESS

1. Develop an ad appropriate to the position being posted, e.g.
   "***Growing home care company has positions open for Certified Nursing Assistants (CNAs) who want to make a difference in the lives of those they care for. Shifts available seven days a week, all hours. At least three years' experience with elder care required, experience with Alzheimer's and Dementia a plus. Must have own car and be able to drive."***
2. Place the ad in on-line sites like Monster.com, Craigslist, etc. College publications and bulletin boards often-net good hires. Placing ads in local newspapers should not be your only advertising avenue.
3. Ads should be on going but must have periodic breaks in publishing.
4. Place specific ads for specialty shifts e.g. live-in, Mom/Babe program, etc.
5. Develop on-line application process; who, what, when

HIRING PROCESS

1. Establish baseline requirements for the job
2. Develop intake form for phone and internet screen
3. Use screening tool to screen out applicants that do not meet minimum requirements
4. Send a notice to those who do not meet requirements with a thank you for applying indicating they do not meet your requirements
5. Call applicants who applied on line and meet requirements and set up an in-person interview. When phone screening, set up an interview time during the phone call for candidates meeting your requirements.
6. NOTE: SAME DAY OR NEXT DAY APPOINTMENTS ARE CRITICAL TO CAPTURE THESE APPLICANTS.
7. Inform applicants when setting the appointment that they will need to be prepared to take a written knowledge test and an online personality test before filling out any application. They will also need to bring their license or certification, driver's license, passport, green cared or social security card,

address and names of work references (stress that personal references are not used), any letters of reference.

8. On the day of the appointment, watch to see if they are on time.
9. First, ask applicants to complete the online personality test. Then review the personality test for areas of concern. Use provided interview questions to clarify areas of concern identified as problematic. While this is good information, it is not the only information you use to select or not select a potential employee. However, there are personality traits critical for great caregiver's and you should pay close attention to these areas.
10. Administer the written test after the applicant completes the personality test. To pass, they must achieve an 80% or better score. If they fail, review the test and their incorrect answers with them. Some people have difficulty taking written tests but can pass the test when they hear the information. If they still fail after a verbal test, advise the applicant that they can return in three months to reapply.
11. If the candidate passes the first two tests, have them complete an application packet that consists of the application, three reference check forms, one criminal background check, and a criminal disclosure statement. (All of these are in your forms manual). To keep the application together it is advised that the three pages of the application be printed on an 8½ x 17 sheet with the first page on the front and the second and third pages in the inside of the form. Fold in the middle. That leaves the back open and available for writing during the interview.
12. Clerical staff should review the application packet for completeness;
    - The application must be filled out completely, do not allow "see resume" in the work history part of the application as this is a document that is signed indicating all the information on the application is true.
    - Be sure they have filled in the name, phone number and address of persons to be called for reference checks and that the forms are all signed.
    - Be sure they fill out the criminal background check form completely and have signed and dated it
    - Be sure that the criminal disclosure statement is signed and dated.
13. Clerical/Schedule staff completes the first interview at that the time of application. A selected set of questions should be developed for the clerical/scheduler interview. Most of the information should be fact finding, e.g. times and days available. Types of clients and shifts they prefer, restrictions to distances to be traveled etc.
14. If the candidate passes the first interview, the clerical/scheduling staff sets the candidate up for a second interview with management. We suggest management make two days of the week open for interviews so that the interview can occur within a week of the initial application. This interview should include any questions raised in the personality test and other questions that are targeted towards determining the candidates fit with the organization.