	Title: Policy and Procedure	Page: 1 of 3
	Section: 5 Care and Record Management	Date: January 31, 2017
	Policy: 3Q Client Assessment & Admission Process	Replaces: July 2, 2015

Client Assessments & Admission Standard Procedure

Policy: An Initial Nursing assessment must be completed prior to any services being rendered by FFHC Nursing Staff to: Obtain medication orders, determine the clients' ability to provide Activity Daily Living (ADLs) and Individual Activity Daily Living (IADLs), and the level of social support. Every prospect will have a complete Fall Risk Assessment and Skin Assessment. Every new client will be assessed by a Licensed Registered Nurse or the assessment will be supervised by an RN and the delegation of task can be performed by an Licensed Practical Nurse (LPN), State Tested Nursing Assistant (STNA) or Certified Medical Assistant (CMA).

Procedure:

A. A new client or the client representative (case manager or family member) contacts FFHC. The initial call is completed by a Marketing Clerk or Sales Clerk in ClearCare or trained office personnel.

B. The prospect is assigned to an office staff member to complete the initial consultation with the client and the family member to explain FFHC services and to obtain signature on the client agreement form. Also to obtain signed release of information to obtain medical information and a doctor or if applicable. The office staff will also obtain all required documents need to verify proof of insurance and preauthorization. Registered Nurse and Care Manager (LPN/CMA/STNA).

C. The office staff member returns back to the office and updates ClearCare and Task the Medical Billing Department an upload all documents obtain from prospect into ClearCare for preauthorization process to begin.

D. The office staff members also task the Marketing Department staff to let them know that FFHC has a new potential prospect that has moved to preauthorization phase. The Marketing Department will send a welcome letter to the client and family members welcoming them to the FFHC, along with contact numbers to help assist with the Admission Process.

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Procedure:

L. Medical Billing Department upon completion of preauthorization from Case Manager (s) and obtaining a Physician Order with Diagnosis for Personal Care services and/or Home Care Services that includes the Physician's NPI#. The Medical Billing Department will contact the assigned Registered Nurses to have the RN contact client within 24 hours to schedule the Nurse assessment.

M. Registered Nurse and/or Care Manager (LPN/CMA) must complete the Initial Assessment prior to any staff being scheduled to a client.

N. The Nurse must complete a full body assessment in the client's home or resident, along with a fall risk assessment and also provide nursing education to the client and family to prevent any health or safety risks to the client such as the DNR policy.

O. The nurse must complete the ClearCare Assessment and Care plan and upload the Fall Risk Assessment Sheet, and Skin Assessment Sheet.

P. Once the RN makes a "Certified" note in ClearCare in the Assessment tab in the "Care Needs" box that the care plan is accurate and annotates the date and type the RN full name and title. The RN will click Submit.

Q. The RN will also make an "Activity Note" in the clients file stating that the care plan is complete and note when the next **60 days Assessment** is due.

R. The RN will create a "Task" in ClearCare to the assigned Scheduler to alert the office to assign staff to the client and to start services.

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S. The Scheduler will send out notification in ClearCare to all employees who match the "**Care Finder Match Criteria".** The Scheduler will assign the employee to the client and notify the RN of all employees assigned to the client.

T. The RN will contact each employee and review the client's care plan and send an email that the care plan review was conducted and the employee must reply prior to the RN clearing the employ to be finalized on the client's official schedule.

U. Once the Schedule receives notification from the RN that an employee has confirmed review of the Care Plan the Scheduler can confirm the hours in ClearCare.

V. Once the Schedule is updated the Schedule must contact the Client and the Case Manager and/or the family member(s) and provide and initial schedule.

W. The Scheduler will send a message to the CBO, COO, PAO and CEO that a new client has completed admission process and provide the official start date.

X. PAO will assigned a Marketing Sales Clerk to make a courtesy call no more than 7 days after the initial start of services to ensure that the client and family is satisfied with the employees and FFHC services.

L. The Marketing team staff member will annotate an Activity note and create a "Task" to the appropriate department if follow up issues need to be addressed.