

PRECEPTORS QUARTERLY REPORT FOR
ADMINISTRATOR IN TRAINING

Name of AIT _____

First Quarter Report: From _____ To _____

Circle the area of work-study the AIT has completed from the following domain of practice:

RESIDENT CARE AND QUALITY OF LIFE

Assure that nursing services are planned, implemented, and evaluated, to maximize resident quality of life.

Department/Focal Areas: Nursing
Rehabilitation
Medical/Patient Records
Activities
Social Services/Admissions
Dietary

Knowledge of:

- a. the aging process (psychological)
- b. the aging process (physiological)
- c. definition, concept, and basic principles of nursing
- d. basic principles of restorative nursing
- e. basic principles of rehabilitation
- f. basic principles of infection control
- g. basic principles of drug administration
- h. basic pharmacological terminology
- i. resident care needs
- j. Resident Assessment Instrument (RAI) and interdisciplinary care plan requirements and process
- k. professional ethics of licensed nursing personnel
- l. admissions, transfers, and discharges
- m. techniques of auditing care outcomes

Skill in:

- a. recognizing that resident needs are met
- b. auditing a care management program for each resident and communicating the results to appropriate individuals (e.g. quality assurance)

- c. auditing resident services with regard to resident care outcomes and communicating results to appropriate individuals (e.g. quality assurance)

Assure that medical services are planned, implemented, and evaluated to meet resident medical care needs, to maximize resident quality of life.

Knowledge of:

- a. basic medical terminology
- b. the provision of basic consultant specialty medical services (e.g. podiatry, psychiatry, psychology)
- c. role of physician in the family
- d. frequency of physician visits
- e. the provision of dental services
- f. provision of emergency medical services
- g. physician/resident relationship(s)
- h. quality assurance
- i. Resident Assessment Instrument (RAI) and interdisciplinary care plan requirements
- j. information needed from the facility by the physician

Skill in:

- a. developing and coordinating medical specialty service programs
- b. communicating state and federal regulations to medical directors and physicians
- c. auditing communication between physicians and staff and communicating results to physicians and staff, as appropriate
- d. auditing delivery of medical services and communicating results to appropriate individuals

Assure that pharmaceutical program is planned, implemented and evaluated to support medical care for residents, to maximize resident quality of life.

Knowledge of:

- a. basic drug administration terminology (e.g., b.e.d, p.r.n.)
- b. regulations for handling, administration, labeling of drugs and biologicals, record-keeping, and drug destruction
- c. systems of inventory controls
- d. role of pharmacist and/or consultant pharmacist

Skill in:

- a. auditing pharmaceutical program and communicating results to appropriate individuals

Assure that a rehabilitation program is planned, implemented, and evaluated to maximize resident's optimal level of functioning.

Knowledge of:

- a. basic resident rehabilitation needs
- b. roles of all rehabilitation service disciplines
- c. available rehabilitation resources (e.g., outpatient clinics)
- d. evaluation mechanisms for determining program success
- e. Resident Assessment Instrument (RAI) and interdisciplinary care plan requirements related to rehabilitation
- f. adaptive rehabilitation equipment
- g. audit procedures for evaluation of rehabilitation program outcomes

Skill in:

- a. auditing rehabilitation program and communicating results to appropriate individuals

Assure that a medical records program for resident care is planned, implemented, and evaluated to meet documentation requirements.

Knowledge of:

- a. basic medical record-keeping systems, including automation and retention
- b. the role of medical records managers
- c. clinical medical record content and format
- d. Federal documentation requirements including Resident Assessment Instrument (RAI)
- e. safeguarding clinical information (e.g., procedures, safety considerations)

Skill in:

- a. auditing medical record-keeping systems and communicating results to appropriate individuals

Assure that therapeutic recreational/activity programs are planned, implemented, and evaluated to meet the needs, wants, and interest of residents, to maximize resident quality of life.

Knowledge of:

- a. basic therapeutic recreational/activity needs of residents
- b. role of recreation/activity therapist
- c. types of adaptive therapeutic equipment
- d. volunteer resources
- e. available resources (e.g., community, volunteer)
- f. Resident Assessment Instrument (RAI) and interdisciplinary care plan requirements
- g. techniques of program evaluation for activities

Skill in:

- a. auditing resident satisfaction with therapeutic recreational and activity programs
- b. auditing the outcomes of therapeutic recreational and activity programs for residents
- c. communicating results of program audits to appropriate individuals

Assure that social service programs are planned, implemented, and evaluated to meet resident psychological needs, to maximize resident quality of life.

Knowledge of:

- a. resident and family council formation and function
- b. resident admissions, transfers, and discharges
- c. social, emotional, psychological, spiritual, and financial needs of residents and their families
- d. basic principles of family consultation
- e. dynamics of interpersonal relationships
- f. role of the social worker
- g. available resources
- h. the grieving process
- i. death and dying
- j. group dynamics
- k. Resident Assessment Instrument (RAI) and interdisciplinary care plan requirements
- l. resident rights
- m. advanced medical directives such as living wills, do not resuscitate (d.n.r.), do not intubate (d.n.i.)
- n. resident legal service needs
- o. personalization of environment

Skill in:

- a. using basic counseling methods
- b. using basic crisis-intervention techniques
- c. communicating with cognitively impaired residents
- d. communicating with individuals with a wide variety of social, economic, ethnic, educational, and religious backgrounds
- e. establishing and maintaining relationships with families or legal representatives of residents
- f. auditing social service programs with regard to outcomes and communicating results to appropriate individuals

Assure that food service program is planned, implemented, and evaluated to meet the nutritional needs of residents, to maximize resident quality of life.

Knowledge of:

- a. basic nutritional requirements
- b. basic principles of food preparation and presentation
- c. the effects of dining experience on residents
- d. frequency of meals
- e. types of therapeutic diets
- f. principles of dietary sanitation including dish washing technique and water temperature
- g. dietary audit techniques
- h. role of registered dietitian
- i. role of director of food service
- j. food service delivery
- k. food serving and storage (e.g. holding, serving, and storage temperatures)
- l. types of nutrition supplements
- m. types of adaptive feeding equipment
- n. Resident Assessment Instrument (RAI) and interdisciplinary care plan requirements

Skill in:

- a. auditing resident satisfaction with nutrition program
- b. auditing nutritional outcomes of residents
- c. auditing food service program and communicating results to appropriate individuals

Signature of Preceptor Completing Report

Signature of Administrator-In-Training

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Second Quarter Report: From _____ To _____

Circle the area of work-study the AIT has completed from the following domain of practice:

HUMAN RESOURCES

Facilitate the process of communication between management and all staff.

Department/Focal Area – Personnel

Skill in:

- a. effective and clear written and verbal communication to personnel
- b. conducting group meetings (e.g. departmental staff meetings)
- c. using basic negotiating techniques

Monitor the recruitment, evaluation, and retention of individuals to provide resident care and services.

Knowledge of:

- a. grievance procedures
- b. employee interview procedures
- c. facility staffing needs
- d. staff position qualifications
- e. job descriptions
- f. cultural diversity training
- g. basic confidentiality policies
- h. recruiting procedures
- i. employment history and verification procedures
- j. basic staff development procedures
- k. audit procedures to evaluate the effectiveness of training
- l. procedures to analyze absenteeism and turnover
- m. staff disciplinary procedures
- n. staff recognition and appreciation techniques
- o. performance-based employee evaluation procedures

- p. how to develop wage scales

Skill in:

- a. conducting employment and exit interviews
- b. using interview techniques
- c. using performance-based measurement techniques
- d. using basic employee counseling techniques
- e. using personnel recruiting techniques
- f. using team-building techniques
- g. negotiating wages, salaries, and benefits
- h. matching qualifications of candidates to job requirements
- i. auditing procedures to recruit, train, evaluate, and retain individuals to provide resident care and services, and communicating results to appropriate individuals

Assure that personnel policies are planned, implemented, and evaluated to comply with governmental entities, laws, and regulations.

Knowledge of:

- a. labor laws
- b. civil rights laws
- c. Federal rules and regulations including family medical leave act, military leave, etc.
- d. NLRB rules and regulations
- e. Federal and case law requirements for personnel files
- f. work rules (e.g., smoking policies, breaks, no tipping)
- g. employee benefits policies
- h. performance-based evaluation procedures
- i. staff grievance procedures
- j. unemployment compensation rules and procedures
- k. safety procedures
- l. basic management-union contracts

Skill in:

- a. developing clear and concise policies and procedures
- b. establishing facility's wages and benefits in light of industry standards
- c. predicting overall effect of personnel policies on the organization
- d. auditing personnel policies and communication to appropriate individuals

Assure that employee health and safety programs are planned and implemented.

Knowledge of:

- a. basic safety training programs
- b. Federal rules and regulations governing employee health and safety, including:
- c. employee benefits insurance programs
- d. workers' compensation rules and procedures
- e. injury prevention procedures
- f. incentives and discipline regarding safety rules and procedures
- g. relationship between employee health status and job performance

Skill In:

- a. implementing procedures for reporting injuries and follow-up
- b. auditing employee health and safety programs and communicating results to appropriate individuals

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Third Quarter Report: From _____ To _____

Circle the area of work-study the AIT has completed from the following domains of practice:

FINANCE

Manage or develop a budget for facility to allocate fiscal resources.

Department/Focal Area: Business Office

Knowledge of:

- a. programs and services offered by the facility
- b. budgeting methods and financial planning
- c. basic accounting and bookkeeping methods
- d. financial statements
- e. reimbursement mechanisms (e.g., Medicare, Medicaid, managed care) and revenue sources
- f. hours, wages, compensation, and fringe benefits
- g. industry trends (e.g., internal, external)
- h. facility's capital needs
- i. continuum of post-acute care services
- j. regulatory requirements for budgeting
- k. need for reserve/profit

Skill in:

- a. preparing an integrated budget
- b. interpreting financial regulations as they apply to reimbursement
- c. interpreting financial statements
- d. negotiating managed care contracts
- e. cost-based analysis for managed care patients
- f. evaluating budget requests

Develop systems to monitor financial performance.

Knowledge of:

- a. internal controls
- b. inventory controls
- c. purchasing procedures and controls
- d. staffing hours in relation to resident acuity level
- e. financial resources
- f. the existence of all local, state and federal codes, rules, and regulations affecting nursing home reimbursement (e.g., anti-kickback laws, demand billing)
- g. financial ratios
- h. financial analysis methods
- i. fixed versus variable costs

Skill in:

- a. evaluating inventory controls
- b. auditing financial performance of facility and communicating results to appropriate individuals

Manage or develop a financial audit and reporting system.

Knowledge of:

- a. cash flow projections, needs and trends
- b. financial reports
- c. payroll procedures and documentation
- d. regulatory accounting requirements
- e. collections procedures
- f. billing procedures
- g. resident banking procedures and account management
- h. ancillary and other revenue-producing sources
- i. account aging
- j. accounts payable control system
- k. CPA audit reports

Skill in:

- a. using audit reports
- b. evaluating the financial reporting system
- c. analyzing variance between budget and actual financial performance

PHYSICAL ENVIRONMENT AND ATMOSPHERE

Assure that a system for maintaining and improving buildings, grounds, and equipment is planned, implemented, and evaluated.

Department/Focal Areas: Housekeeping, Laundry and Maintenance

Knowledge of:

- a. preventive maintenance systems
- b. equipment and operating manuals
- c. retention of blueprints, approved “as built drawings,” and original building documents
- d. environmental design needs of nursing home residents
- e. physical plant needs
- f. implementing equipment replacement program
- g. existence of all local, state, and federal codes, rules, and regulations for buildings, grounds, equipment, and maintenance
- h. establishing maintenance procedures

Skill in:

- a. anticipating physical plant needs of facility
- b. evaluating environment’s impact on residents

Assure that an environmental safety program that will ensure the health, welfare, and safety of residents, staff, and visitors is planned, implemented, and evaluated.

Knowledge of:

- a. safe housekeeping and maintenance practices
- b. basic concepts regarding safety devices
- c. potential hazards
- d. required lighting
- e. security measures
- f. hazardous communication standard
- g. existence of local, state, and federal codes, rules, and regulations affecting environmental health, welfare and safety rules and regulations

Skill in:

- a. identifying and minimizing health risks
- b. interpreting and applying safety codes
- c. auditing safety program outcomes designed to ensure the health, welfare, and safety of residents, staff, and visitors and communicating results to appropriate individuals

Assure that an emergency program to protect the safety and welfare of residents, staff, and property is planned, implemented, and evaluated.

Knowledge of:

- a. existence of local, state, and federal rules and regulations affecting fire, disaster, and emergencies
- b. elements of fire and disaster programs
- c. National Fire Protection Association (NFPA) guidelines (life safety codes)
- d. community emergency resources
- e. in-house emergency equipment
- f. training resources
- g. evacuation resources
- h. emergency procedures
- i. natural disaster preparedness

Skill in:

- a. developing disaster and evacuation plans
- b. using in-house emergency equipment
- c. interpreting and implementing life safety codes
- d. assigning responsibility for specific fire and disaster program duties
- e. assuring coordinated implementation of disaster and evacuation plans
- f. evaluating availability of community resources
- g. auditing staff use of fire and disaster plan procedures and communicating results to appropriate individuals

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Fourth Quarter Report: From _____ To _____

Circle the area of work-study the AIT has completed from the following domain of practice:

LEADERSHIP AND MANAGEMENT

Assure that policies and procedures are planned, implemented, monitored, and evaluated in order to maintain compliance with directives of governing entities.

Department/Focal Area - Administration

Knowledge of:

- a. Government agencies such as Medicare, Medicaid, Occupational Safety and Health Administration (OSHA)
- b. strategic planning principles
- c. professional licensing and certification boards and applicable rules and regulations
- d. types of governing entities (e.g., ownership, boards)
- e. mission statement and philosophy
- f. bylaws
- g. responsibilities of and to the governing entity
- h. legal aspects of types of ownership
- i. legal liability of the facility
- j. legal liability of administration
- k. ethical policies of the governing entity
- l. professional ethics of the nursing home administrator

Skill in:

- a. interpreting rules and regulation
- b. implementing policies and procedures to achieve compliance with rules regulations, and plans of correction
- c. auditing facility's compliance to rules and regulations and communicating results to appropriate individuals
- d. recognizing the need for change
- e. reserved
- f. communicating policies and procedures from the governing entity
- g. assessing facility's implementation of the directives of the governing body

- h. auditing facility's implementation of the directives of the governing entity
- i. auditing facility's compliance with ethical policies of the governing entity

Observe, monitor, and evaluate outcomes of all facility programs, policies, and procedures, to ensure effectiveness.

Knowledge of:

- a. community, social, educational and consumer organizations
- b. the role of ethics committees
- c. functions of all departments and services provided
- d. management principles and philosophies
- e. information collection procedures
- f. operational audit procedures
- g. basic computer operations related to facility management

Skill in:

- a. recognizing the need for change
- b. recognizing significant problems
- c. collecting relevant information
- d. performing cost/benefit analysis for alternative solutions including new trends and services
- e. prioritizing alternative solutions
- f. organizing and directing all facility departments
- g. assessing the implication of change on each aspect of the operation
- h. implementing change

Monitor and evaluate resident satisfaction with quality of care and quality of life, through communications with resident, representatives, family, staff, volunteers, and governing entities, to maximize resident quality of life.

Knowledge of:

- a. methods for assuring and monitoring resident and responsible parties' satisfaction with quality of care and quality of life
- b. basic techniques of conflict resolution
- c. grievance procedures for residents and families
- d. resident rights
- e. the role of the resident ombudsman
- f. resident and responsible parties' participation in care planning process
- g. oral and written communications practices
- h. community, social, educational, and consumer organizations

Skill in:

- a. using basic counseling methods
- b. honoring and safeguarding resident rights
- c. reviewing each resident's total program of care
- d. reviewing each resident's satisfaction with quality of care and quality of life
- e. auditing procedures to enhance resident satisfaction with quality of care and quality of life and communicating results to appropriate individuals
- f. using interpersonal communication techniques

Implement, monitor, and ensure the integration of resident's rights with all aspects of the facility's operation.

Knowledge of:

- a. internal and external reporting procedures
- b. monitoring systems, procedures, and information

Skill in:

- a. collecting relevant information
- b. integrating resident rights and services provided

Plan, implement and evaluate a risk management program.

Knowledge of:

- a. risk management principles, including legal liability issues

Skill in:

- a. integrating all risk management programs to ensure effective outcomes

Plan, implement, and evaluate a program that informs residents and the community of the services offered.

Knowledge of:

- a. basic public relations and marketing techniques

Skill in:

- a. verbal and written communications

Plan, implement, and promote integration between the facility and other community resources (e.g., educational institutions, hospitals, vendors).

Knowledge of:

- a. basic contracts and agreements

Skill in:

- a. negotiating contracts and agreements

Signature of Preceptor Completing Report

Signature of Administrator-In-Training