

National Administrator-in-Training Program Manual

MODULE 2:

Knowledge & Skills

Sample Learning Activities



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Knowledge & Skills

Before you go “too” deep into the sample learning activities in the next tab, it is also recommended to review the information in this tab. The assumption here is that, in order to accomplish the “TASKS” one would have the prerequisite “SKILLS” and applicable “KNOWLEDGE” which are further detailed below in the “Knowledge and Skills” tab. Questions on the NAB exams are developed from these items. Maybe it would be insightful if you asked yourself how you would write questions to “test” each of these items if you were an exam item writer?

SKILLS (applicable to ALL Domains)

- S01** Creating and communicating a vision
- S02** Communicating effectively
- S03** Cultivating effective relationships
- S04** Inspiring and motivating
- S05** Demonstrating empathy
- S06** Group facilitation, consensus building, and team building
- S07** Delegating, leading, and empowering
- S08** Coaching, teaching, counseling, and mentoring
- S09** Negotiating, collaborating, and resolving disputes
- S10** Problem solving
- S11** Analyzing and interpreting information/data
- S12** Informed decision making/critical thinking
- S13** Recognizing and ensuring care recipients’ holistic needs are being met
- S14** Assessing and recognizing safety concerns and needs
- S15** Allocating and optimizing resources and programs
- S16** Writing and evaluating policies and procedures
- S17** Developing and evaluating systems
- S18** Protecting and promoting financial viability
- S19** Managing regulatory and accreditation surveys, inspections, and audits
- S20** Prioritizing and managing time
- S21** Utilizing technology
- S22** Utilizing social media

KNOWLEDGE - Domain 1 - Care, Services, and Supports

Knowledge of:

1A Quality of Care

- 1A1 Medical and Nursing Care Practices
- 1A2 Medication Management and Administration
- 1A3 Disease Management (e.g., acute vs. chronic conditions)
- 1A4 Nutrition and Hydration (e.g., specialized diets)
- 1A5 Activities of Daily Living (ADLs) and Independent Activities of Daily Living (IADLs)
- 1A6 Rehabilitation and Restorative Programs
- 1A7 Care Recipient Assessment and Interdisciplinary Care Planning
- 1A8 Resident Assessment Instrument (RAI) and Interdisciplinary Care Planning Requirements and Process
- 1A9 Outcome and Assessment Information Set (OASIS) and Interdisciplinary Care Planning Requirements and Process
- 1A10 Clinical and Medical Records and Documentation Requirements (e.g., storage, retention, destruction)
- 1A11 Medical Director
- 1A12 Emergency Medical Services (e.g., CPR, first aid, Heimlich maneuver, AED)
- 1A13 Transition of Care (e.g., admission, move-in, transfer, discharge, and move-out)
- 1A14 Basic Healthcare Terminology

1B Quality of Life

- 1B1 Psychosocial Needs (e.g., social, spiritual, community, cultural)
- 1B2 Person-Centered Care and Comprehensive Care Planning
- 1B3 Care Recipient Bill of Rights and Responsibilities
- 1B4 Care Recipient Safety (e.g., fall prevention, elopement prevention, adverse events)
- 1B5 Care Recipient (and Representative) Grievance, Conflict, and Dispute Resolution
- 1B6 Care Recipient Advocacy (e.g., Ombudsman, resident and family council)
- 1B7 Care Recipient Decision-Making (e.g., capacity, power of attorney, guardianship, conservatorship, code status, advance directives, ethical decision-making)
- 1B8 Care Recipient (and Representative) Satisfaction
- 1B9 Recognition of Maltreatment (e.g., abuse, neglect, exploitation)
- 1B10 Mental and Behavioral Health (e.g., cognitive impairment, depression, social support systems)
- 1B11 Trauma-Informed Care (e.g., PTSD)
- 1B12 Pain Management
- 1B13 Death, Dying, and Grief
- 1B14 Restraint Usage and Reduction
- 1B15 Foodservice (e.g., choice and menu planning, dietary management, food storage and handling, dining services)
- 1B16 Social Services Programs
- 1B17 Therapeutic Recreation and Activity Programs

1B18 Community Resources, Programs, and Agencies (e.g., meals on wheels, housing vouchers, Area Agencies on Aging, Veterans Affairs)

1C Ancillary Services

1C1 Hospice and Palliative Care

1C2 Specialized Medical Equipment (e.g., oxygen, durable medical equipment)

1C3 Transportation for Care Recipients

1C4 Telemedicine (e.g., e-health)

1C5 Diagnostic Services (e.g., radiology, lab services)

1C6 Dental and Oral Care Services

1C7 Healthcare Partners and Clinical Providers (e.g., MD/DO, Nurse Practitioner, Psychiatrist, Podiatrist, Dentist)

1C8 Volunteer Programs

KNOWLEDGE - Domain 2 - Operations

Knowledge of:

2A Human Resources

2A1 Federal Human Resources Laws, Rules, and Regulations (e.g., ADA, FMLA, Wage and Hour, FLSA)

2A2 Selection and Hiring Practices (e.g., EEOC, interviewing, adverse impact, protected classes, occupational qualifications)

2A3 Compensation and Benefits Programs (e.g., time off, healthcare insurance, employee pay and payroll)

2A4 Organizational Staffing Requirements and Reporting (e.g., PBJ)

2A5 Staff Certification and Licensure Requirements

2A6 Professional Development (e.g., maintenance of credentials, continuing education)

2A7 Employee Training and Orientation

2A8 Performance Evaluation

2A9 Human Resource Policies (e.g., drug-free workplace, discipline, job classification, photography and video, social media usage, mobile phone usage)

2A10 Employee Record-Keeping Requirements

2A11 Employee Grievance, Conflict, and Dispute Resolution

2A12 Employee Satisfaction, Engagement, and Retention

2A13 Cultural Competence and Diversity Awareness

2A14 Labor Relations (e.g., union, collective bargaining [CBA], contract/pool staff)

2B Financial Management

2B1 Budgeting and Forecasting

2B2 Financial Analysis (e.g., ratios, profitability, debt, revenue mix, depreciation, operating margin, cash flow)

2B3 Revenue Cycle Management (e.g., billing, accounts receivable, accounts payable, collections)

- 2B4** Financial Statements (e.g., income/revenue statement, balance sheet, statement of cash flows, cost reporting)
- 2B5** Revenue and Reimbursement (e.g., PDPM, PDGM, ACOs, HMOs, Medicaid, private payors)
- 2B6** Financial Reporting Requirements (e.g., requirements for not-for-profit, for-profit, and governmental providers)
- 2B7** Integration of Clinical and Financial Systems (e.g., EMR/EHR, MDS)
- 2B8** Internal Financial Management Controls (e.g., segregation of duties, access)
- 2B9** Supply-Chain Management (e.g., inventory control)
- 2B10** Resident Trust Accounts for Personal Funds

2C Risk Management and Compliance

- 2C1** OSHA Rules and Regulations
- 2C2** Workers Compensation
- 2C3** Ethical Conduct and Standards of Practice
- 2C4** Compliance Programs
- 2C5** Risk Management Process and Programs
- 2C6** Quality Improvement Processes (e.g., root cause analysis, PDCA/PDSA)
- 2C7** Scope of Practice and Legal Liability
- 2C8** Internal Investigation Protocols and Techniques (e.g., incidents, adverse events)
- 2C9** Mandatory Reporting Requirements (e.g., incidents, adverse events, abuse, neglect, financial exploitation, fraud)
- 2C10** Insurance Coverage (e.g., liability, property)
- 2C11** Healthcare Record Requirements (e.g., confidentiality, disclosure, safeguarding, HIPAA, HITECH)
- 2C12** Security (e.g., cameras, monitoring systems, locks, staff location reporting)
- 2C13** Contracted Services (e.g., roles, responsibilities, oversight, background checks)

KNOWLEDGE - Domain 3 - Leadership and Strategy

Knowledge of:

3A Leadership

- 3A1** Organizational Structures (e.g., departments, functions, systemic processes)
- 3A2** Organizational Change Management
- 3A3** Organizational Behavior (e.g., organizational culture, team building, group dynamics)
- 3A4** Leadership Principles (e.g., communication, styles, mentoring, coaching, personal professional development)
- 3A5** Governance (e.g., board of directors, governing bodies, corporate entities, advisory boards)
- 3A6** Professional Advocacy and Governmental Relations

3B Billing, accounts receivable, and collections

- 3B1** Mission, Vision, and Value Statements
- 3B2** Strategic Business Planning (e.g., new lines of service, succession management, staffing pipeline)

- 3B3** Business Analytics (e.g., evidence-based practice, data analytics)
- 3B4** Business Development (e.g., sales, marketing, partnerships, ACOs, contracts and agreements, negotiations)
- 3B5** Public Relations and External Stakeholders (e.g., hospitals, referrals sources, local community, donors)

KNOWLEDGE - Domain 4 - Environment and Quality

Knowledge of:

4A Care Environment

- 4A1** Federal Codes and Regulations for Building, Equipment, Maintenance, and Grounds
- 4A2** Person-Centered Environment (e.g., home-like environment)
- 4A3** Safety and Accessibility (e.g., ADA, safety data sheets)
- 4A4** Facility Management and Environmental Services
- 4A5** Information Systems Infrastructure (e.g., configurations, data security, technical controls)
- 4A6** Preventative and Routine Maintenance Programs (e.g., pest control, equipment, mechanical systems)
- 4A7** Infection Control and Sanitation (e.g., linens, kitchen, hand washing, healthcare-acquired infections, hazardous materials)
- 4A8** Disaster and Emergency Planning, Preparedness, Response, and Recovery (e.g., Appendix Z)

4B Regulatory Compliance

- 4B1** Federal Healthcare Laws, Rules, and Regulations
- 4B2** Certification and Licensure Requirements for the Organization
- 4B3** Government Programs and Entities (e.g., Medicare, Medicaid, waivers)
- 4B4** Centers for Medicare and Medicaid Services (CMS) Quality Measures
- 4B5** Quality Assurance and Performance Improvement (QAPI)
- 4B6** Regulatory Survey and Inspection Process
- 4B7** Procedures for Informal Dispute Resolution (IDR)
- 4B8** Bed-Hold Requirements
- 4B9** Pre-Admission Screening Annual Review (PASSR)
- 4B10** Facility Assessment

Learning Activities Key

- 1 Establish and maintain care recipient service policies and procedures that comply with applicable requirements and regulations.
- 2 Implement and evaluate care recipient service practices to promote quality of care and quality of life, and ensure compliance with policies and procedures.
- 3 Ensure plans of care are established, implemented, updated, and monitored according to evidence-based practice, care recipient (and representative) preferences, and assessed needs.
- 4 Ensure transitions of care are executed according to requirements, regulations, and standards of quality.
- 5 Ensure care recipients' psychosocial needs and preferences are assessed and addressed at each level of care.
- 6 Ensure health information management programs meet applicable documentation requirements, regulations, and standards of quality.
- 7 Ensure the medication management process supports the needs of the care recipient and meets standards of quality.
- 8 Ensure the rehabilitation and restorative programs maximize level of functioning and independence for care recipients.
- 9 Coordinate and oversee contracted care and services.
- 10 Ensure effective environmental services, including housekeeping and laundry services, are provided.
- 11 Ensure nutritional needs and dining preferences of care recipients are met.
- 12 Advocate for care recipients' rights, self-determination, and preferences within all aspects of care.
- 13 Ensure care recipient representatives are considered and included to maximize care recipient quality of life.
- 14 Ensure ancillary services are available to meet care recipients needs and preferences.
- 15 Establish and maintain human resources policies and procedures that comply with applicable requirements and regulations.
- 16 Implement and evaluate human resources practices to ensure compliance with policies, procedures, and standards for effectiveness.
- 17 Establish and lead an organizational culture that fosters professional development, employee engagement, ethical practice, and sensitivity to diverse backgrounds.
- 18 Ensure a safe and secure work environment is established and maintained.
- 19 Establish a process for effective interdisciplinary and interdepartmental communication and coordination.

- 20** Develop, implement, and evaluate risk management programs and interventions to ensure regulatory compliance.
- 21** Develop, implement, and evaluate business development and public relations practices.
- 22** Develop, implement, and evaluate the organization's quality assurance and performance improvement programs.
- 23** Develop, lead, and evaluate organizational change initiatives.
- 24** Develop, implement, and evaluate practices to ensure compliance with directives of governing body and strategic plan.
- 25** Promote satisfaction and engagement of care recipients and their representatives, and resolve any grievances.
- 26** Establish and maintain financial management policies and procedures that comply with applicable requirements and regulations.
- 27** Implement and evaluate financial management practices to promote financial viability and ensure compliance with policies, procedures, and standards for effectiveness.
- 28** Plan, implement, and evaluate financial management systems and practices that improve financial outcomes and comply with Generally Accepted Accounting Principles (GAAP).
- 29** Negotiate, interpret, and implement contractual agreements to ensure compliance and optimize organizational performance and outcomes.
- 30** Establish care environment policies and procedures that comply with applicable requirements and regulations.
- 31** Implement care environment policies and procedures that comply with applicable requirements and regulations.
- 32** Maintain care environment policies and procedures that comply with applicable requirements and regulations.
- 33** Ensure a safe and secure care environment that includes consideration of infection control, sanitation, and disaster preparedness.
- 34** Ensure facility management and maintenance activities are performed according to applicable requirements, regulations, and standards of quality.
- 35** Establish and evaluate information systems and technology infrastructure to ensure data privacy and protection, and to comply with applicable requirements and regulations.
- 36** Educate stakeholders on services provided, regulatory requirements, and standards of care.
- 37** Manage the survey and inspection process.
- 38** Establish, implement, and evaluate internal investigation and mandatory reporting processes.

Sample Learning Activities

Below are examples of Sample Learning Activities that you may wish to consider using in your Plan of Study. This is NOT a complete or exhaustive list and stands to be improved through YOUR creativity it is a good starting point for things to think about as possible learning activities for each sub-domain task. You may wish to copy and paste, edit, add to, or delete from this list and tailor it to your own style when creating your "Plan of Study" for your AIT.

Before you review these sample learning activities, it is recommended that you review the information in the "Knowledge and Skills" tab. The assumption here is that, in order to accomplish these "TASKS", one would have the prerequisite "SKILLS" and applicable "KNOWLEDGE", which are further detailed in the "Knowledge and Skills" tab. Questions from the NAB exams are developed from these items. Ask yourself how you would write questions to "test" each of these items if you were an exam item writer.

Domain	Sample Learning Activity	Task Numbers from key on pages 8 & 9
SA01	Review applicable rules, laws, regulations.	1, 2, 4, 6, 7, 15, 16, 20, 26, 30, 31, 32, 34, 35, 36
SA02	Review existing policies in the host facility.	1, 2, 3, 4, 6, 7, 10, 11, 14, 15, 16, 18, 19, 24, 27, 30, 31, 32, 34, 35, 36
SA03	Propose changes to update existing policies.	1, 2, 3, 4, 6, 7, 10, 11, 14, 15, 16, 18, 19, 24, 26, 27, 30, 31, 32, 34, 35, 36
SA04	Create a list of existing rules, laws, regulations and policies.	1, 2, 3, 4, 6, 7, 10, 11, 14, 15, 16, 18, 19, 20, 24, 26, 27, 30, 31, 32, 34, 35, 36
SA05	Review care related survey tags.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 22, 24, 25, 29, 30, 31, 32, 33, 35, 36, 37, 38
SA06	Review nursing job descriptions and policy/procedure manuals.	1, 2, 3, 4, 5, 6, 7, 8, 9, 11, 12, 13, 14, 18, 19, 22, 25, 29, 30, 31, 32, 33, 35, 36, 37
SA07	Learn scheduling techniques/staffing patterns.	1, 2, 15, 16, 17, 23
SA08	Review the nursing in-service training session - attend a session.	1, 2, 3, 4, 5, 6, 7, 8, 9, 11, 12, 13, 14, 18, 19, 22, 25, 29, 30, 31, 32, 33, 35, 36, 37, 38
SA09	Observe quality of interactions between nursing staff and residents.	1, 2, 4, 5, 6, 7, 8, 9, 11, 12, 13, 14, 18, 25, 30, 31, 32, 33
SA10	Review infection control procedures.	1, 2, 9, 10, 18, 19, 20, 22, 24, 33, 34, 37
SA11	Identify major standards and regulations required for the facility.	1, 2, 4, 5, 6, 7, 15, 16, 20, 26, 30, 31, 32, 34, 35, 36

SA12	Determine how compliance is tracked and evaluated.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 19, 22, 24, 25, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA13	Observe an admission process; assist and/or conduct an admission.	1, 2, 3, 4, 5, 6, 7, 8, 11, 12, 13, 14, 19, 24, 25, 35, 36
SA14	Research and list document requirements at the facility.	1, 4, 6, 7, 10, 11, 14, 15, 16, 18, 19, 24, 26, 27, 28, 30, 31, 32, 34, 35, 36
SA15	Review the contents and organization of a standard medical record.	1, 2, 3, 4, 5, 6, 7, 8, 9, 11, 13, 14, 19, 35
SA16	Using a checklist, analyze a sample of 4-5 medical records for completeness and currency of information (audit records).	1, 2, 3, 4, 5, 6, 7, 8, 9, 11, 13, 14, 19, 35
SA17	Attend a meeting of the committee assigned to monitor quality of care.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 22, 24, 25, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA18	Become familiar with resident assessments and care plans.	1, 2, 3, 4, 5, 6, 7, 8, 9, 11, 12, 13, 14, 19, 25
SA19	Identify quality measures used by the facility.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 14, 19, 22, 23, 24, 25, 29, 30, 36, 37
SA20	Review the Social Worker's Job Description and job duties.	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 13, 14, 19, 24, 25, 30, 31, 35
SA21	Determine facility's philosophy regarding social services for residents and their families.	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 13, 14, 19, 24, 25, 30, 31, 35
SA22	Participate in a resident care planning meeting.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 22, 24, 25, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA23	Assist Social Services Director with a special project as needed (e.g., record review, resident satisfaction survey, etc.).	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 13, 14, 19, 24, 25, 30, 31, 35
SA24	Conduct admission audit of current in-house resident population, analyze data and report (assist with recommendations as needed).	1, 2, 3, 5, 6, 7, 8, 11, 12, 13, 14, 22, 24, 25, 35
SA25	Audit Admissions documents.	1, 2, 3, 5, 6, 7, 8, 11, 12, 13, 14, 22, 24, 25, 35
SA26	Complete audit of resident preferences, such as time to eat, rise and retire, bathe, time of therapy, etc. (make recommendations).	1, 2, 3, 4, 5, 6, 8, 9, 10, 11, 12, 13, 14, 19, 20, 22, 24, 25, 29, 30, 31, 32, 33, 35
SA27	Develop and implement an outreach program that communicates regularly with residents and or families, post discharge.	4, 5, 6, 7, 8, 12, 13, 17, 21, 22, 36
SA28	Observe a discharge.	1, 2, 4, 5, 6, 7, 8, 12, 13, 17, 21, 22, 36
SA29	Observe an interdisciplinary team meeting discussing a possible discharge.	1, 2, 4, 5, 6, 7, 8, 12, 13, 17, 19, 21, 22, 36
SA30	Assist with a discharge.	1, 2, 4, 5, 6, 7, 8, 12, 13, 17, 19, 21, 22, 36
SA31	Attend CNA training (become a CNA) (highly recommended and will cover several items...).	1, 2, 3, 4, 5, 6, 7, 8, 9, 11, 12, 13, 19, 20, 22, 23, 24, 25, 30, 31, 32, 33, 35
SA32	Develop a "rounds" checklist with the Administrator and DON that is resident-centered; initiate implementation.	1, 2, 3, 4, 5, 6, 7, 8, 9, 11, 12, 13, 19, 20, 22, 23, 24, 25, 30, 31, 32, 33, 35
SA33	Develop resident satisfaction surveys and make recommendations for implementation as necessary.	1, 2, 3, 4, 5, 7, 8, 9, 10, 11, 12, 13, 14, 19, 22, 23, 24, 25, 33, 34
SA34	Interview residents to learn what they are interested in doing.	1, 2, 3, 4, 5, 8, 11, 12, 13, 14, 19, 25

SA35	Assist to plan activities/events/programs; review related survey tags.	1, 2, 3, 4, 5, 8, 11, 12, 13, 14, 19, 25, 37
SA36	Explore the Activities Director's philosophy of service.	1, 2, 3, 4, 5, 8, 11, 12, 13, 14, 19, 25, 37
SA37	Review and evaluation the activity calendar for variety and appropriateness.	1, 2, 3, 4, 5, 8, 11, 12, 13, 14, 19, 25
SA38	Participate in a variety of activities with residents.	1, 2, 3, 4, 5, 8, 11, 12, 13, 14, 19, 25
SA39	Work one-on-one with a resident in an activity (e.g., BINGO Buddy).	1, 2, 3, 4, 5, 8, 11, 12, 13, 14, 19, 25
SA40	Review HIPAA requirements.	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 13, 14, 19, 24, 25, 30, 31, 32, 33, 35, 36, 37, 38
SA41	Review and observe HIPAA related policies and practices.	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 13, 14, 19, 24, 25, 30, 31, 32, 33, 35, 36, 37, 38
SA42	Suggest changes to HIPAA related policies and practices; review related survey tags.	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 13, 14, 19, 24, 25, 30, 31, 32, 33, 35, 36, 37, 38
SA43	Conduct audit of flu vaccination response variables, analyze data and report (assist with recommendations as needed).	1, 2, 4, 5, 6, 7, 9, 12, 14, 18, 24, 33, 35, 36
SA44	Conduct audit of admission and annual required vaccines, analyze data and report (assist with recommendations as needed).	1, 2, 4, 5, 6, 7, 9, 12, 14, 18, 24, 33, 35, 36
SA45	Observe med passes/documentation.	1, 2, 3, 4, 5, 6, 7, 9, 12, 14, 18, 19, 20, 22, 24, 30, 31, 32, 33, 35, 37
SA46	Observe expired med destruction.	1, 2, 3, 4, 5, 6, 7, 9, 12, 14, 18, 19, 20, 22, 24, 30, 31, 32, 33, 35, 37
SA47	Review med storage policies/practices; review related survey tags.	1, 2, 3, 4, 5, 6, 7, 9, 12, 14, 18, 19, 20, 22, 24, 30, 31, 32, 33, 35, 37
SA48	Learn the policies covering drug orders, receiving drugs, drug storage, disbursement of medication and drug destruction.	1, 2, 3, 4, 5, 6, 7, 9, 12, 14, 18, 19, 20, 22, 24, 30, 31, 32, 33, 35, 37
SA49	Observe the procedures and techniques used in the administration of medications.	1, 2, 3, 4, 5, 6, 7, 9, 12, 14, 18, 19, 20, 22, 24, 30, 31, 32, 33, 35, 37
SA50	Observe nurse peer review on administration of medications.	1, 2, 3, 4, 5, 6, 7, 9, 12, 14, 18, 19, 20, 22, 24, 30, 31, 32, 33, 35, 37
SA51	With DON, ensure medications are not expired.	1, 2, 3, 4, 5, 6, 7, 9, 12, 14, 18, 19, 20, 22, 24, 30, 31, 32, 33, 35, 37
SA52	Observe rehabilitation; observe range of motion measurements; observe assessments for rehabilitation.	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 14, 18, 19, 22, 24, 29, 30, 31, 32, 33, 34, 35, 37
SA53	Determine how the facility provides rehabilitation services to residents (direct staff, contract, etc.).	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 14, 18, 19, 22, 24, 29, 30, 31, 32, 33, 34, 35, 37
SA54	What types of rehabilitation specialists are used by the facility (PT, OT, Speech, etc.)? Visit with one of the rehabilitation specialists about his/her services.	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 14, 18, 19, 22, 24, 29, 30, 31, 32, 33, 34, 35, 37
SA55	Observe, if possible, rehabilitation treatments.	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 14, 18, 19, 22, 24, 29, 30, 31, 32, 33, 34, 35, 37
SA56	Organize and implement a follow-up program for discharged residents to the community.	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 14, 18, 19, 22, 24, 29, 30, 31, 32, 33, 34, 35, 37
SA57	Develop audit for equipment inventory and complete audit report.	1, 2, 3, 4, 5, 6, 7, 8, 9, 12, 14, 18, 19, 22, 24, 29, 30, 31, 32, 33, 34, 35, 37

SA58	Review existing contracts.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 18, 19, 20, 25, 29, 30, 31, 32, 33, 34, 35, 37, 38
SA59	Assist to establish a new contract or renew an existing one.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 18, 19, 20, 25, 29, 30, 31, 32, 33, 34, 35, 37, 38
SA60	Review the (contract) requirements for services required to be offered.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 18, 19, 20, 25, 29, 30, 31, 32, 33, 34, 35, 37, 38
SA61	Assist to prepare incident report(s); discuss/recommend interventions.	1, 2, 3, 4, 5, 6, 12, 13, 19, 20, 24, 25, 31, 32, 33, 35, 37, 38
SA62	Observe/conduct/assist with an investigation; participate in post-incident counseling.	1, 2, 3, 4, 5, 6, 12, 13, 15, 16, 17, 19, 20, 24, 25, 31, 32, 33, 35, 37, 38
SA63	Review infection control, housekeeping and laundry related survey tags.	1, 2, 9, 10, 12, 13, 14, 18, 20, 24, 25, 29, 30, 31, 32, 33, 34, 37
SA64	Assist with housekeeping daily chores.	1, 2, 9, 10, 12, 13, 14, 15, 16, 18, 20, 24, 25, 29, 30, 31, 32, 33, 34, 37
SA65	Assist with laundry procedures.	1, 2, 9, 10, 12, 13, 14, 18, 20, 24, 25, 29, 30, 31, 32, 33, 34, 37
SA66	Review housekeeping and laundry policies.	1, 2, 9, 10, 12, 13, 14, 15, 16, 18, 20, 24, 25, 29, 30, 31, 32, 33, 34, 37
SA67	Identify several possible professional development activities and ask the preceptor to sponsor you for one or more events (e.g., local seminars, meetings, professional groups, etc.)	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA68	Become certified to assist with resident dining.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA69	Assist in dining.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA70	Assist with weigh-in procedures.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA71	Assist with preparation and storage of food.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA72	Assist with delivery of meals to residents.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA73	Review physician prescribed dietary requirements for various residents.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA74	Review job description of the Food Service Director, cooks and other staff.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA75	Learn how the dietary department is organized and how staff is scheduled.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA76	Review policies and procedures regarding key issues in food service, e.g., hand washing, temperatures, waste management, etc.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA77	Review and discuss menu preparation with Food Service Director and/or Dietician.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37

SA78	Visit another facility that delivers/serves meals in a different way (perhaps from a menu or ala carte?).	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA79	Review culture change.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA80	Interview residents to learn what they miss/desire (variables such as taste, temperature, timeliness, presentation, etc.).	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA81	Visit another facility that delivers/serves meals in a different way (perhaps from a menu or ala carte?).	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA82	Audt to confirm residents are receiving correct diets, drinks and adaptive devices.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA83	Understand nutritionally compromised concerns and how weights are monitored.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA84	Audit purchasing and storage process.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA85	Audit food temperatures.	1, 2, 5, 6, 9, 11, 12, 13, 18, 19, 24, 25, 30, 31, 32, 33, 37
SA86	Study Resident Rights; present an in-service regarding aspect(s) of resident rights.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 17, 19, 22, 24, 25, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA87	Present an in-service regarding abuse, neglect, misappropriation of resident property and/or mistreatment of residents.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 17, 19, 22, 24, 25, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA88	Review the residents, rights statements used by the facility - evaluate them for completeness, accuracy, timeliness.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 17, 19, 22, 24, 25, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA89	Review methods of disseminating resident rights information to residents and families.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 17, 19, 22, 24, 25, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA90	Evaluate the extent to which resident rights are being addressed by staff.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 17, 19, 22, 24, 25, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA91	Review Quality Improvement Measures; interview residents/responsible parties and employees to see how the facility is progressing.	1, 2, 3, 4, 5, 7, 12, 13, 19, 20, 21, 22, 23, 24, 25, 30, 31, 32, 33, 35, 36, 37
SA92	Develop and implement a Volunteer Program.	1, 2, 5, 6, 8, 10, 11, 12, 13, 15, 16, 17, 18, 19, 20, 21, 23, 24, 25, 30, 31, 32, 33, 35, 36, 37
SA93	Develop/Enhance Life Enrichment/Person Centered Care Program - interview residents and families to ensure desired activities are planned and implemented.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 19, 20, 21, 22, 23, 24, 25, 30, 31, 32, 33, 34, 37, 38
SA94	Develop in-service alongside Activities Director for Life Enrichment/Person Centered Care; assist to present in-services.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 19, 20, 21, 22, 23, 24, 25, 30, 31, 32, 33, 34, 37, 38
SA95	Explore additional transportation options not currently used.	1, 2, 9, 12, 13, 14, 18, 19, 20, 21, 22, 24, 25, 33, 36

SA96	Review existing transportation policies.	1, 2, 3, 4, 9, 10, 12, 13, 19, 20, 21, 24, 25, 30, 31, 32, 33, 36
SA97	Interview residents to learn their choices/preferences.	1, 2, 3, 4, 5, 7, 8, 9, 10, 11, 12, 13, 14, 19, 22, 23, 24, 25, 33, 34
SA98	Study "customer service" in another setting (restaurant, hotel?) and compare it to how this facility defines customer service.	2, 10, 12, 13, 16, 17, 18, 19, 20, 21, 22, 23, 25, 26, 27, 28, 29, 33, 35
SA99	Conduct an in-service on the importance of customer service.	2, 10, 12, 13, 16, 17, 18, 19, 20, 21, 22, 23, 25, 26, 27, 28, 29, 33, 35
SA100	Recognize employees who are good examples of customer service.	2, 10, 12, 13, 16, 17, 18, 19, 20, 21, 22, 23, 25, 26, 27, 28, 29, 33, 35
SA101	Determine how resident care policies and procedures are developed and disseminated in the facility.	1, 2, 4, 6, 7, 15, 16, 20, 26, 30, 31, 32, 34, 35, 36
SA102	Determine the extent to which staff knows relevant resident care policies.	1, 2, 4, 6, 7, 15, 16, 20, 26, 30, 31, 32, 34, 35, 36
SA103	Audit/do rounds for dust, clean floors, toilets, showers, etc.	1, 2, 9, 10, 12, 13, 14, 15, 16, 18, 20, 24, 25, 29, 30, 31, 32, 33, 34, 37
SA104	Audit laundry.	1, 2, 9, 10, 12, 13, 14, 15, 16, 18, 20, 24, 25, 29, 30, 31, 32, 33, 34, 37
SA105	Audit infection control, safety and cross-contamination procedures.	1, 2, 9, 10, 18, 19, 20, 22, 24, 30, 31, 32, 33, 34, 37
SA106	Follow the linen distribution system from soiled to clean.	1, 2, 9, 10, 18, 19, 20, 22, 24, 30, 31, 32, 33, 34, 37
SA107	Review federal and state HR requirements.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA108	Review/update facility HR policies.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA109	Review facility policy on cultural diversity and cultural competence; determine how staff is being trained in these areas.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA110	Conduct employee file audit per regulations and organizational policy.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA111	Review/Understand employee handbook - look for accuracy and compliance; make recommendations.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA112	Participate in job interviews.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA113	Interview employees to find out why they stay.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA114	Conduct exit interviews to understand why employees are leaving.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA115	Review the process of interviewing prospective staff (who does it? What techniques are used, etc.?).	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA116	Collect annual turnover rate for last few years and develop strategic plan with activities, timeframes, etc., for identified changes.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA117	Participate in a complete employee hiring and orientation process, i.e., interview, background check, etc.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA118	Review policies and procedures to train managers/leaders regarding evaluation of employees... Conduct an in-service for managers/leaders.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA119	Conduct a staff meeting and/or an in-service training program.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38

SA120	Review performance evaluation requirements.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA121	Review status of performance evaluations.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA122	Study correlation of turnover with evaluation reports.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA123	Develop employee satisfaction questionnaire; administer it and analyze data = develop plan.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA124	Brief new employees at a new employee orientation regarding their benefits.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA125	Review facility recognition programs and procedures.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA126	Examine how performance reviews are conducted and by whom.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA127	Conduct an assessment of turnover rates and identify major factors that contribute to staff turnover.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA128	Review employee benefit policies and plans (Employee Manual).	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA129	Determine how compensation and benefits policies and programs are developed and implemented.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA130	Conduct a compensation analysis using state, regional or national comparative data.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA131	Study and analyze recruiting plans and staffing patterns - offer ideas to improve.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA132	Review and evaluate payroll plans, compensation plans, and benefits packages.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA133	Review facility safety policies and programs.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA134	Attend a safety committee meeting.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA135	Study OSHA regulations that pertain to the facility.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA136	Review workers compensation policies and procedures.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA137	Track absentee information by shift, days of week reasons, frequency...analyze and report.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA138	Review policies and procedures relating to measurement of employee satisfaction.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA139	Review organization chart.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA140	Review employee disciplinary policies and procedures.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA141	Participate in counseling.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA142	Participate in incident investigations.	1, 2, 9, 15, 16, 17, 18, 20, 21, 22, 24, 33, 34, 38
SA143	Participate in interview of employee regarding performance or behavior issue.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA144	Review and evaluate the unemployment compensation record of the facility and attend an unemployment compensation hearing as necessary.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA145	Participate in grievance procedures.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA146	Conduct in-service for employees focusing on leadership.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA147	Study a new leadership principle.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA148	Learn about "empowerment" and teach a department head.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA149	Learn about delegation and teach it.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38

SA150	Review and report on ways to encourage and support professional development of team members.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA151	Conduct and evaluate an emergency/disaster drill.	9, 10, 18, 20, 24, 30, 31, 32, 33, 34, 37
SA152	Review emergency/disaster plans.	9, 10, 18, 20, 24, 30, 31, 32, 33, 34, 37
SA153	Create a "cheat sheet" for the facility to show where all important shut-off valves/ switches are located.	9, 10, 18, 20, 24, 30, 31, 32, 33, 34, 37
SA154	Participate in the testing of emergency generators.	9, 10, 18, 20, 24, 30, 31, 32, 33, 34, 37
SA155	Conduct an in-service; brief new employees on the details and importance of emergency procedures.	9, 10, 15, 16, 18, 20, 24, 30, 31, 32, 33, 34, 35, 37
SA156	Audit external health care providers to determine current license, liability insurance, etc.	1, 2, 6, 7, 8, 9, 11, 14, 15, 16, 18, 19, 20, 24, 29, 30, 31, 32, 33, 37
SA157	Participate in conflict resolution (test theories, methods).	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA158	Study conflict resolution techniques.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA159	Attend diversity sensitivity training.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA160	Propose ideas to recognize staff performance.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA161	Spontaneously recognize (informally) staff performance.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA162	Review communication policies and procedures.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA163	Review performance evaluations.	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA164	Examine the methods administrators use to communicate with employees (e.g., newsletters, bulletin boards, social media, etc.).	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA165	Review laws, rules, regulations relating; review facility policies relating; observe the practice of protecting employee records (conduct an exercise to attempt to violate a faux record?).	9, 15, 16, 17, 18, 20, 21, 22, 24, 38
SA166	Conduct an inservice involving Residents Rights; conduct an orientation briefing that covers Residents Rights for new employees/volunteers; review existing policies and procedures.	1, 2, 5, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 24, 25, 30, 31, 32, 33, 34, 35, 37, 38
SA167	Review laws, rules, regulations relating; review facility policies relating (financial management).	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA168	Review budget documents; analyze status of various departments in meeting their budget.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA169	Review and understand budget structure for the facility.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA170	Determine how budgets are developed and approved.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA171	Assist administrator with the development and submission of a budget.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA172	Review regularly produced financial reports and make recommendations if necessary.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA173	Assist with billing; assist with collection; study billing charges (accounts payable).	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA174	Review bad-debt and/or write-off policy- determine avenues for improvement.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37

SA175	Participate in establishing a new contract or renewing an existing one.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA176	Review existing contracts; discuss details of existing contracts with attorney (if possible).	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA177	Participate in process to dissolve an agreement (if the opportunity presents itself); discuss how/why you would dissolve an agreement.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA178	Review the facility's union contracts (if applicable).	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA179	Study a sample consultant contract and reimbursement paperwork.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA180	Study GAAP; study internal controls; review established internal policies and procedures.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA181	Assist in trust account execution (disbursement, documentation, etc.); review accounting documents.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA182	Review and understand Facility financial statements.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA183	Determine how financial statements are monitored and how variances are addressed.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA184	Discuss the latest facility audit with relevant staff.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA185	Study the internal controls used; review policies; establish the back-up plan for passwords in case of emergency or plan to validate access when someone is not available.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA186	Determine the facility's revenue sources and how they are managed.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA187	Review billing and accounts receivable procedures.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA188	Review Medicaid and/or Medicare billing process, if applicable.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA189	Review insurance policies.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA190	Review risk management policies and procedures.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA191	Proactively identify an issue in the facility that could be addressed more strongly.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA192	Study other risk management procedures, e.g., security systems.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA193	Review financial documents; identify opportunities and strengths.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA194	Perform calculations for the administrator to assess performance.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA195	Review systems that adjust labor requirements, supplies and resources based on census/occupancy rates.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37

SA196	Determine the extent to which the facility provides inservice training to staff on financial issues.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA197	Develop a training module on some aspect of financial management for staff; provide the training and evaluate its effectiveness.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA198	Study pay sources and rates; study how these sources change.	1, 2, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 20, 21, 22, 26, 27, 28, 29, 33, 34, 35, 36, 37
SA199	Participate in a mock survey (focus on Life Safety Code tags/Maintenance/Equipment issues).	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA200	Make rounds to find physical plant issues in the facility (maintenance focused).	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA201	Study applicable physical environment-related federal, state, local and facility rules, laws, regulations, policies and procedures.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA202	Review job descriptions of maintenance staff.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA203	Determine the facility's policies and procedures to monitor compliance with environmental regulations and standards.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA204	Compile a list of all federal, state and local standards and regulations that govern the facility's physical environment; review the content of these items and determine how they are managed within the facility.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA205	Review policies and procedures for a safe working environment; determine how these are developed and updated; determine how they are monitored and evaluated.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA206	Make rounds; participate/conduct and evaluate drills.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA207	Learn the facility's system for repair orders.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA208	Study the preventive maintenance system.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA209	Accompany a staff member on a preventive maintenance assignment.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA210	Audit preventative maintenance logs per regulations and company policy - track and trend related variables such as time of day, season, staff members, etc.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA211	Audit resident rooms to evaluate such items as electrical safety, call lights operating properly, water temperatures, beds properly functioning, etc.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA212	Review emergency generator and life safety code requirements.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA213	Audit and analyze previous year's maintenance logs with Maintenance Supervisor.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA214	Develop a "rounds" sheet with Administrator and Maintenance Supervisor that is environmental and safety centered - initiate implementation.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA215	Review Infection control policies and procedures from Maintenance perspective; make rounds.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA216	Conduct and analyze exercises/drills; review the various disaster plans and test various aspects of them randomly.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37

SA217	Study the fire and evacuation plans (any regional specific plans such as tornado or hurricane...) and participate in a fire drill if possible.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA218	Review the facility's emergency management plan; Help update the plan/validate agreements if needed.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA219	Review housekeeping and laundry policies and procedures; take random temperatures (water and air); create a temperature log; determine which systems need preventative maintenance and schedule the maintenance; participate in mock survey or partial mock survey.	1, 2, 9, 10, 12, 13, 14, 18, 20, 24, 25, 29, 30, 31, 32, 33, 34, 37
SA220	Review job descriptions for housekeeping and laundry.	1, 2, 9, 10, 12, 13, 14, 15, 16, 18, 20, 24, 25, 29, 30, 31, 32, 33, 34, 37
SA221	Review the staffing patterns and determine how staff is scheduled in laundry and housekeeping.	1, 2, 9, 10, 12, 13, 14, 18, 20, 24, 25, 29, 30, 31, 32, 33, 34, 37
SA222	Review how resident laundry is managed.	1, 2, 9, 10, 12, 13, 14, 18, 20, 24, 25, 29, 30, 31, 32, 33, 34, 37
SA223	Determine resident satisfaction with the laundry services.	1, 2, 9, 10, 12, 13, 14, 18, 20, 24, 25, 29, 30, 31, 32, 33, 34, 37
SA224	Review plant and equipment related federal, state and local requirements, policies and procedures.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA225	Audit log out/tag out procedures for compliance.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA226	Review HIPAA requirements; review technology safeguards in place; study other options available (Maintenance perspective).	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA227	Review policies and procedures related to a homelike environment (Maintenance implications).	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA228	Conduct rounds to find homelike environment issues; interview residents to discover their desires and needs.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA229	Review the facility's safety program and procedures.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA230	Attend a safety committee meeting.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA231	Survey age of furnishings and project life expectancy of these items; project major replacement schedule for furniture items.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA232	Study furnishing innovations in the industry; conduct rounds and inspect furniture.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA233	Interview care recipients to discover their desires and needs; interview family members (plant/maintenance focus).	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA234	Make rounds and survey/inspect rooms; participate in mock survey; study OSHA regulations that pertain to the facility; attend a safety meeting.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA235	Examine the extent to which resident rights are assured by the facility's environmental policies and practices.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA236	Study applicable rules, laws and regulations. Determine the KEY federal, state and local rules and regulations governing the facility; examine the procedures and practices for maintaining compliance with these factors (Maintenance focus).	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA237	Present an in-service related to ethics; make an orientation briefing related to ethics; attend an ethics committee meeting; review existing ethics policies and procedures.	1, 2, 12, 13, 15, 16, 17, 18, 24, 25, 30, 31, 32, 34, 35, 36, 38

SA238	Determine what outcomes are routinely measured by the facility (e.g., turnover rates, financial gains...). Determine how variances are addressed and followed up on.	1, 2, 5, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 24, 25, 30, 31, 32, 33, 34, 35, 37, 38
SA239	Review policies and procedures influenced by governing body, attend a governing body meeting.	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA240	Study the bylaws and minutes of the governing body	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA241	Determine the type of ownership of the facility (e.g., for profit, not for profit, governmental, etc.).	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA242	Identify stakeholders; discuss the mission, vision and/or values at an orientation and/or in-service.	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA243	Review mission, vision and values.	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA244	Attempt to write a cogent mission statement, vision statement and define values.	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA245	Participate in a strategic planning process; review the existing values, mission, vision and policies (suggest improvements).	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA246	Determine how the facility educates the governing body on compliance and regulatory requirements.	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA247	Develop a briefing on new regulations or rule change for the preceptor to share with the governing body.	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA248	Review the facility's strategic planning process.	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA249	Evaluate the facility's governing ideas (vision, mission, values) for clarity and effectiveness.	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA250	Conduct rounds; conduct interviews with residents and/or staff regarding resident satisfaction.	1, 2, 3, 4, 5, 7, 8, 9, 10, 11, 12, 13, 14, 19, 22, 23, 24, 25, 33, 34
SA251	Conduct and/or participate in mock surveys focusing on resident satisfaction.	1, 2, 3, 4, 5, 7, 8, 9, 10, 11, 12, 13, 14, 19, 22, 23, 24, 25, 33, 34, 37
SA252	Participate in stand up meeting(s) and participate in care plan meetings with family members, etc.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA253	Review results of past resident/family satisfaction surveys.	1, 2, 3, 4, 5, 7, 8, 9, 10, 11, 12, 13, 14, 19, 22, 23, 24, 25, 33, 34, 37
SA254	Assist preceptor in developing, administering and analyzing a new survey.	1, 2, 3, 4, 5, 7, 8, 9, 10, 11, 12, 13, 14, 19, 22, 23, 24, 25, 33, 34, 37

SA255	Review Policy and Procedure manuals to determine if appropriate and current per regulations and organization policy - make recommendations as necessary.	1, 2, 12, 13, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA256	Discuss various key stakeholders and their needs/competing needs; discuss the relationship issues with each.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA257	Participate in an educational opportunity for a stakeholder.	36
SA258	Discuss decision making; participate in decision-making.	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38
SA259	Determine how the facility ensures that resources are available as needed.	2, 4, 5, 7, 9, 10, 11, 12, 14, 18, 19, 20, 25, 26, 27, 28, 29, 30, 34, 35,
SA260	Review resource budgeting process.	24, 26, 27, 28, 29, 32, 33, 34, 36
SA261	Participate in a survey/mock survey; review survey protocol policies/procedures.	1, 2, 3, 4
SA262	Conduct an in-service regarding survey/inspection; review/update survey preparation materials.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA263	Determine the process for providing administrative oversight for the survey process.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA264	Review the last 2-3 licensing or certification surveys; Study how the facility addressed any issues noted in the surveys.	1, 2, 8, 10, 12, 13, 18, 19, 20, 24, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA265	Review/Update existing risk management policies/procedures; review insurance policies; conduct relevant in-service briefings.	15, 16, 17, 18, 19, 20, 21, 22, 24, 26, 27, 28, 30, 31, 32, 33, 34, 35, 36
SA266	Review the facility's training plan for disseminating compliance and regulatory information to key parties; Participate in a training session.	1, 2, 6, 7, 8, 10, 11, 12, 14, 15, 16, 17, 18, 19, 20, 24, 31, 32, 33, 34, 35, 36
SA267	Discuss legal liability issues; conduct in-service regarding relevant issue(s); develop a system to analyze current practices and improve on them.	1, 2, 6, 7, 8, 10, 11, 12, 14, 15, 16, 17, 18, 19, 20, 24, 31, 32, 33, 34, 35, 36
SA268	Discuss an issue with the preceptor and identify areas of potential legal liability with the facility.	1, 2, 6, 7, 8, 10, 11, 12, 14, 15, 16, 17, 18, 19, 20, 24, 31, 32, 33, 34, 35, 36, 37, 38
SA269	Observe how the preceptor manages various areas of risk.	1, 2, 6, 7, 8, 10, 11, 12, 14, 15, 16, 17, 18, 19, 20, 24, 31, 32, 33, 34, 35, 36, 37, 38
SA270	Review information management processes; recommend improvements to the current processes; analyze strengths/weaknesses of current processes.	1, 2, 6, 7, 8, 10, 11, 12, 14, 15, 16, 17, 18, 19, 20, 24, 31, 32, 33, 34, 35, 36
SA271	Study the facility's information management system; suggest improvements to the system from a user's perspective.	1, 2, 6, 7, 8, 10, 11, 12, 14, 15, 16, 17, 18, 19, 20, 24, 31, 32, 33, 34, 35, 36
SA272	Review policies, procedures, brochures; draft changes to update policies, procedures, brochures; meet with stakeholders; draft a "mock" press release following a disaster exercise.	1, 2, 6, 7, 8, 10, 11, 12, 14, 15, 16, 17, 18, 19, 20, 24, 31, 32, 33, 34, 35, 36, 37, 38
SA273	Study the facility's marketing plan; Evaluate the effectiveness of various aspects of the plan in marketing the facility to the public.	12, 21, 24, 25, 26, 27, 28, 29, 36
SA274	Determine facility practices in media relations.	12, 21, 24, 25, 26, 27, 28, 29, 36
SA275	Review the facility's public relations and marketing budget.	12, 21, 24, 25, 26, 27, 28, 29, 36

SA276	Explore the types and degree of interaction between the facility and various community resources.	5, 12, 13, 15, 16, 18, 20, 24, 25, 30, 35, 36
SA277	Attend a community meeting with your preceptor.	5, 12, 13, 15, 16, 18, 20, 24, 25, 30, 35, 36
SA278	Make a list of local, state and federal political representatives for the facility.	5, 12, 13, 15, 16, 18, 20, 24, 25, 30, 35, 36
SA279	With approval from your preceptor, compose a letter to a local or state representative regarding some aspect of legislation or regulation affecting the facility.	5, 12, 13, 15, 16, 18, 20, 24, 25, 30, 35, 36
SA280	Review and update written agreements; review federal and state guidelines; review provider/vendor agreements.	1, 2, 6, 7, 8, 9, 10, 11, 12, 14, 15, 16, 18, 19, 20, 21, 24, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37
SA281	Participate in QA meetings; design a program to meet a current need of the facility (implement with the aid of the preceptor/staff).	2, 4, 5, 6, 7, 8, 9, 10, 11, 12, 14, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 30, 31, 32, 33, 34, 35, 36
SA282	Identify a program that needs to be advanced and lead the initiative to make those changes (this is a blend of management AND leadership...managing a program, leading the people to make the change(s) that are necessary and to get their buy-in to make those changes, etc.).	2, 4, 5, 6, 7, 8, 9, 10, 11, 12, 14, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 30, 31, 32, 33, 34, 35, 36
SA283	Develop and assist with annual strategic planning meeting.	23, 24, 25, 26, 27, 28
SA284	Review the organizational chart; participate in resolving issues; participate in various internal media.	23, 24, 25, 26, 27, 28
SA285	Discuss key management and leadership skill necessary for effectiveness.	23, 24, 25, 26, 27, 28
SA286	Evaluate the leadership and management styles of key management staff.	15, 16, 18, 23, 24, 25, 26, 27, 28
SA287	Review current internal and external contracts/agreements for accuracy, efficiency and timeliness - make recommendations as necessary.	5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 18, 19, 20, 25, 26, 27, 28, 29
SA288	Participate in counseling; assist the administrator to write a performance evaluation.	1, 2, 3, 4, 5, 6, 12, 13, 15, 16, 17, 19, 20, 24, 25, 31, 32, 33, 35, 37, 38
	Preceptors/Mentors, State Jurisdictions and local ACHCA Chapters, anyone involved in the AIT process, CAN add to these AND they can make certain activities "mandatory" in their local programs. This is a TOOL as has been stated before. This list is not complete nor exhaustive (as thorough as it is) and we earnestly solicit your ideas to make it better for others.	