

Disclosure of Rights and Services 2017/2018

for Heritage at Framingham's
Homestead, Harmony,
Classic Assisted and Independent Program



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HARMONY AT HERITAGE MISSION STATEMENT

Harmony at Heritage is a specialized assisted living program for residents with mental health needs.

Harmony has a layout that fosters social interaction in pleasant common areas and spacious activity rooms.

Our environment, activities and staff assistance are focused on maintaining an individual's physical and cognitive abilities in a homelike and secure living environment. Our goal is to enhance the quality of each resident's life.

HOMESTEAD AT HERITAGE MISSION STATEMENT

Homestead is a specialized assisted living residence that provides a caring and comfortable environment for individuals with memory impairments. Our mission is to provide the assistance, support and structure that our individual residents require and thus enhance cognitive and physical well-being.

NUMBER /TYPES OF UNITS AND STAFFING LEVELS

Heritage at Framingham features a total of 98 units. In the Classic building, there are 58 units: 24 studios, 22 one-bedroom units, 8 one-bedroom units with a den, 2 two-bedroom units and 2 two-bedroom deluxe units. In both the Homestead and Harmony programs, there are 20 units in each program: 16 studios and 4 suites.

The layout fosters social interaction in pleasant common areas and spacious activity rooms. Our environment, activities and staff assistance are focused on maintaining individuals' physical and cognitive abilities in a homelike and secured living environment. Our goal is to enhance the quality of each resident's life.

Each neighborhood's entrance has a sitting area. Outside each cluster of 5 apartments is a sitting area as well. Each neighborhood has a kitchen with stove, microwave, refrigerator, dishwasher and storage closets in the common area kitchen/dining space. Each neighborhood also has a laundry room, spa/tub room with handicap bathroom, public bathroom and a dining area.

Homestead is located on the first floor of building B at Heritage at Framingham. There is a large activity room as well as a public bathroom. The fence surrounding the Homestead outdoor back yard has an access gate which is locked. The first floor has five exits leading to garden/sitting patios. The outside grounds have paved walking areas with benches or chairs available for resting.

At least quarterly, the Quality Improvement Committee reviews staffing, including an assessment. The appropriateness of staffing is based upon actual required care needs of the residents. At all times on Homestead and Harmony, we have a minimum of 2 awake staff.

Currently, Heritage at Framingham employs the following minimum number of Resident care staff (this includes Classic, Homestead and Harmony buildings):

Times	Homestead care aides	Harmony Program care aides	Classic care aides	Licensed Nurses	Licensed Nurse on call
7AM–3PM	2	2	2	1–5*	1
3PM–11PM	2	2	2	1 M–F	1
11PM–7AM	2	2	1	0	1

*Dependent on day of the week

Heritage employs awake staff (RCAs and/or nurses) in the building 24 hours per day to respond to emergencies and meet the Residents’ needs. Staffing levels are assessed on an ongoing basis and are adjusted by the care needs of the residents.

HOMESTEAD PROGRAM PERSONAL CARE

As many minutes per day as appropriate, in increments up to 15 minutes, included in monthly fee up to two hours per day. Cost included in monthly rent. Beyond two hours per day, Resident/family member is responsible for bringing in additional care.

HARMONY PROGRAM PERSONAL CARE

As many minutes per day as appropriate, in increments up to 15 minutes, included in monthly fee up to two hours per day. Cost included in monthly rent. Beyond two

hours per day, Resident/family member is responsible for bringing in additional care.

CLASSIC PROGRAM PERSONAL CARE

As many minutes per day, as appropriate, included up to one hour per day, in increments of up to fifteen minutes each. Cost included in monthly rent. Beyond one hour and no more than two hours per day, such services cost \$35/hour. Beyond two hours per day, the Resident/family member is responsible for bringing in additional care.

INDEPENDENT PROGRAM

No personal care assistance or bed making provided. Includes three meals per day, activities, van trips and weekly Housekeeping (including linens). Cost is \$500 less than Classic costs per month.

ADDITIONAL FEE/ CHARGE SCHEDULE

Our fees for apartments range from \$3,800 to \$9,525 a month. Heritage does not participate in any subsidy programs.

Community fee	\$3,400.00
Guest meals	
Breakfast	\$3.75 per meal
Lunch.....	\$7.50 per meal
Dinner.....	\$10 per meal
Meal credits.....	\$7.50 per day
(given on the 15th day of medical or personal leave)	
Additional maintenance	\$40 per hour
(i.e. moving furniture, installing bath rails, etc.)	
Additional housekeeping	\$35 per hour
Personal laundry if Homestead	included in monthly fee
If Independent/Classic	\$10 per load
Beauty/barber salon	see listing in salon
Escorting or additional personal care	\$35 per hour
Apartment change fee	\$600
Lifeline emergency pendant	
lost or not returned upon move-out.....	\$140
Replacement keys	\$5
Replacement or additional proximity/access card	\$15
Car fee (October thru March)	\$25 per month

Apartment Painting: In the event that an apartment is painted a non-standard color, Heritage will charge for the painting as indicated below. The apartment will also need to be painted back to the neutral color at the end of the Residency. The total cost will be paid at the time of move-in. Or, if a Resident is already living at Heritage, the full cost for painting would need to occur before the painting would be done. In either case, the families are responsible for the selection and purchase of sufficient paint.

Apt. Size	Initial painting	Restoration painting	Total Cost
Studio	\$500	\$500	\$1,000
1BR/Homestead Suite	\$750	\$750	\$1,500
1BR with Den or 2BR	\$1,000	\$1,000	\$2,000

COMMUNITY FEE & REFUND POLICY

A one-time Community Fee is charged at move-in. No Community Fee shall be charged upon any renewal of the Lease Agreement. The Community Fee is intended to cover upfront staff administrative costs, the Resident's initial service coordination plan and move-in assistance, and establish a replacement reserve for building improvements and activity costs.

Refunding of the Community Fee is described below.

PROCEDURE

If resident leaves within 3 months of move-in, refund is 75% of the Community Fee.

If resident leaves within 4 to 6 months of move-in, refund is 50% of the Community Fee.

If resident leaves after 6 months of move-in, there is NO refund.

GRIEVANCE PROCEDURE

Upon move-in, Residents will be informed and encouraged to make use of the grievance procedure for the purpose of resolving complaints or conflicts.

PROCEDURE

- Resident or Advocate informs the appropriate Department Director of a complaint situation requiring attention.
- The Department Director will work with the Resident to attain a mutually agreeable resolution of the issue.
- If the situation is not resolved to the Resident's satisfaction, the Resident or the Advocate is encouraged to report the complaint to the Executive Director who will respond to the Resident.
- Any unresolved situation will be directed to the CEO/President of Mary Ann Morse Healthcare Corp. who will work with the Resident/Advocate on resolution of the issue.
- At any time, the Resident may contact the Ombudsman for Assisted Living Facilities.

THE ASSISTED LIVING OMBUDSMAN PROGRAM

The Ombudsman representative is an Advocate for Residents of assisted living communities. Ombudsmen work for the Executive Office of Elder Affairs. The role of the Ombudsman is to act as a Mediator and Advocate for Residents in assisted living communities.

You may wish to contact the Ombudsman at any time if you wish to ask a question, express a concern, or make a complaint. All calls will be kept confidential.

To reach an Ombudsman contact:

1-800-AGE-INFO (1-800-243-4636) or 617-727-7750

TDD/tty: 1-800-872-0166

The Elder Abuse Hotline Number is: 1-800-922-2275 Available outside normal business hours, 24 hours a day, 7 days a week

The Assisted Living Ombudsman Program

Executive Office of Elder Affairs

1 Ashburton Place, 5th Floor

Boston, MA 02108

**REASONABLE RULES OF CONDUCT & BEHAVIOR FOR RESIDENTS,
MANAGEMENT AND STAFF**

- Entrance doors, hallways, walks, lawns, elevators and other public areas shall not be obstructed. No personal belongings may be placed in the hallways, stairwells, or about the building.
- No nails, screws, or adhesive hangers, except standard picture hooks, shade brackets and curtain rod brackets may be placed in walls, woodwork, or any part of the apartment. No alterations or improvements shall be made by the Resident without the consent of the Executive Director.
- All drapes and shades/blinds installed by the Resident must be lined in white to present a uniform appearance.
- Insurance coverage maintained by the Community does not protect Residents from loss of personal property by theft, fire, water damage, etc. Each Resident is strongly advised to obtain renter's insurance protecting his or her personal property.
- The Resident and/or family is prohibited from adding, changing or in any way altering locks in the apartment without written permission of the Executive Director.
- All musical instruments, television sets, stereos, radios, etc. are to be played at a volume which will not disturb other persons. The Resident shall not make or allow any disturbing noises in the apartment by the Resident, family or guests.
- Management and staff are to comply at all times with the standards of conduct contained in the current Heritage at Framingham employee handbook. With respect to management and staff interaction with Residents, management and staff shall:

- strive to assure that each Resident is provided a dignified existence that promotes freedom of choice, self-determination and reasonable accommodation of individual needs;
- respect a Resident’s dignity and treat him/her with consideration, courtesy and respect;
- assure that each Resident is protected from verbal, mental or physical abuse, corporal punishment and involuntary seclusion;
- assure that Residents have personal privacy and access to their personal records, for example, by knocking before entering Apartments;
- not accept or provide benefits that could be seen as creating a conflict of interest; and
- not use a Resident’s resources for personal or improper purposes, or permit others to do so.

SERVICES AND AMENITIES

- Three meals per day
- Scheduled daily activities
- Wellness program
- Recreational trips
- 24-hour awake on-site staffing
- Self-administered medication management
- Beauty and barber shop
- Religious services
- Weekly housekeeping
- Linen service
- Library areas

- Personal care assistance (normally, each provision of personal care services can last up to 15 minutes)
 - Homestead:** Intermittent help; including help with bathing, dressing, medication management, escorting and grooming, up to a total of two hours per day. Hourly visual checks occur 24 hours a day.
 - Harmony:** Intermittent help; including help with bathing, dressing, medication management, escorting and grooming, up to a total of two hours per day. Residents will utilize Lifeline services.
 - Classic Program:** Intermittent help; including help with bathing, dressing, bed making, medication management, escorts, and grooming, up to a total of one hour per day (after one hour per day additional fees apply).
 - Independent Living:** The same as Classic with the exception of no personal care assistance provided.
- Medical transportation within a 15-mile radius on Tuesdays and Thursdays. This is a drop-off, pick-up service and is subject to availability (with accompanying family or, for an additional fee, staff escort; see Additional Fees/Charge Schedule on page 3). If Heritage is unable to provide transportation for any reason, it is the responsibility of the Resident/family to make other arrangements at their own cost.

OCCASIONAL PUBLIC EVENTS

Heritage at Framingham permits some public events to be held in community space. Such events occur approximately two times a month. Such events include meetings or events in which the public is invited. Heritage residents are included in some of these events. During these events, staff is assigned to assure that attendees do not access other parts of Heritage, that our residents are not disturbed, and that our residents will have the same amount of activities and care as any other day.

HARMONY ADMISSION CRITERIA

The Harmony Program at Heritage at Framingham is geared towards meeting the mental health needs of individuals. In addition, a Medical History and a Recent Physical Examination are required for admission to the program. Residents must meet all of the following admission criteria:

- Able to ambulate safely with or without assistive device.
- If resident requires use of a wheelchair, the resident must have the ability to transfer with the assistance of no more than one staff member.
- Accepting of assistance of one with personal care as needed.
- Requires minimal assistance with meals, which may include cueing, giving verbal instruction, or cutting up food. The resident must be able to physically feed him/herself.
- Able to participate in Self-Administered Medication Management (SAMM), which includes the ability to take medications with cueing, prompts, and instruction.
- Able to respond to staff redirection or supervision to control behaviors; does not exhibit physically aggressive, abusive or sexually inappropriate behaviors.
- Incontinence care can be managed with assist of one, and resident accepts assistance.

HARMONY DISCHARGE CRITERIA

Residents exhibiting one of more of the following will be considered for discharge from Harmony:

- Immobility and/or inability to transfer independently or with a one person assist.
- Resident needs assistance of more than one staff for any ADLs (bathing, dressing, transfer, toileting, ambulation, grooming/hygiene) on an ongoing basis.
- Incontinence or urine and/or stool that is unmanageable.
- Exhibits behavior that is physically aggressive, abusive or sexually inappropriate, compromises the integrity and safety of other residents or staff, or is disruptive to other residents.
- Requires ongoing nursing and medical monitoring not available in this setting.
- Resident is unable to fee him/herself.

In the case of physically aggressive, abusive or sexually inappropriate behavior, an immediate plan for discharge will be developed. Heritage at Framingham will attempt to assist the family and the resident in the transition to the appropriate care facility, when possible. In this case, it is the responsibility of the family to provide at its cost additional one on one care until an alternate placement is found.

LIMITATION OF SERVICES

Heritage at Framingham does not provide the following services:

- Management of any communicable disease. Heritage at Framingham will not admit any Resident who has a communicable disease.
- A two person assist with any ADL (Activity of Daily Living, e.g. bathing, dressing, toileting, transferring, etc.).
- Management of unsafe Resident behaviors, such as wandering, abusive or physically aggressive behavior, including coercive or inappropriate sexual behavior.
- If you begin to wander or exhibit other behaviors so that we are unable to assure your safety, or the safety of others, we will assist you to move to a more appropriate setting.
- Incontinence care is available as part of a Resident's individual service plan as long as it is manageable. You and/or your family are responsible for supplying incontinence supplies. If your particular needs mean that your incontinence cannot be managed with incontinence products and assistance of one, we will assist you to move to a more appropriate setting.

ROLE OF NURSES

Heritage at Framingham is a non-medical, social model of senior living. The nurses cannot provide skilled nursing assessments or care. The Resident Care Director and nurses act as advocates for the Residents. The nurses will assist the Residents to coordinate necessary services to meet the Resident's care needs.

ASSESSMENT PROCESS AND RESIDENCY AGREEMENT TERMINATION

The Resident undergoes at his/her own expense a health evaluation review completed by a physician and/or a qualified human services agency acceptable to the Community. The Resident also submits certain medical information on a form provided by the Community (the "Medical Evaluation Form") signed by a licensed physician or a nurse practitioner that confirms the Resident does not have any communicable disease. A Heritage at Framingham nurse will conduct a functional assessment to ensure the resident meets admission criteria.

The Residency Agreement may be terminated by the Resident at the end of the Initial Term or at the end of any month, by giving 60 days' prior written notice to the Owner. The Owner may terminate the Residency Agreement on 14 days' notice if the Resident fails to pay the rent when due; or on 30 days' notice if: the Resident's physical or mental needs can no longer be adequately met; if the Resident or his/her guests are habitually disruptive, create unsafe conditions, disrupt other Resident's rights, interfere with management of the Community or otherwise endanger the health or welfare of him/herself or other Residents, staff or guests; or if the Resident fails to comply with material provisions of the Residency Agreement or makes any material misrepresentation or omission on the application information.

BED RAILS

Bed rails have been found in some cases to increase the incidence of falls or head trauma due to falls and other accidents such as strangulation and entrapment. Per the Executive Office of Elder Affairs, any Resident wishing to implement bed rails must have an assessment done by a physical therapist or an occupational therapist to be sure that the Resident is capable of getting in and out of bed unobstructed. There will be a bed rail assessment as needed every six months with service plan review or with any significant change at no cost to the Resident.

Please see Attachment 1 (page 22) for alternatives to "bed rails".

CPR POLICY

Heritage at Framingham is an Assisted Living non-medical model. Cardiopulmonary Resuscitation (CPR) is not performed by any staff. In the event of cardiac or respiratory arrest, 911 will be called immediately.

PHYSICAL DESIGN FEATURES OF HERITAGE AT FRAMINGHAM

Heritage at Framingham has three programs—The Classic program has three floors. Harmony and Homestead are housed in two separate floors. The entire building, and each apartment, has sprinklers and heat and smoke detectors. Heating and cooling is controlled from each apartment. Please note that in winter only heat is available. We switch the entire system over to air conditioning in the spring once the weather is consistently warm. In the fall we switch back to heating at an appropriate time.

SERVICE PLAN

See the attached Service Plan examples (pages 13 and 17). The service plan is a tool to coordinate all services needed for a Resident. The Service Plan is created prior to move-in and then reviewed within 30 days of move-in, and is again reviewed every six months thereafter or upon any change of status. The Resident or the Resident Representative must sign the Service Plan. The Service Plan will be filled out by one of our nurses.

DIETS

Per EOEIA regulations, Heritage at Framingham provides the following therapeutic diets: no added salt, low fat and no concentrated sweets.

ENRICHMENT ACTIVITIES

Homestead setting provides daily activities which include gross motor, self-care, social and sensory activities that are specifically designed memory enhancement activities. Homestead has on-site cultural, social, recreational and spiritual programs. In addition, off-site trips are regularly scheduled. Homestead furnishes a minimum of 8 hours of activities daily.

Harmony setting provides daily activities which include gross motor, self-care, social and sensory activities that are specifically designed for individuals with mental health needs. Harmony has on-site cultural, social, recreational and spiritual programs. In addition, off-site trips are regularly scheduled. Harmony furnishes a minimum of 8 hours of activities daily.

Classic and Independent settings provide daily activities which include on-site cultural, social, recreational and spiritual programs. In addition, there are off-site trips including regular trips to grocery store and pharmacy. Classic furnishes a minimum of 8 hours of activities daily.

GUESTS: SECURITY POLICY

All exit doors in the entire building are locked and alarmed from 8PM until 7AM. From 7AM until 8PM, the alarms are off but doors remain locked from the outside, except for the Classic lobby, Homestead lobby and Classic back patio.

We ask all guests to sign in and out in these two lobby areas.

- If you are entering the building between 8PM and 7AM, please use the phone in the lobby to alert the on-duty staff of your presence even though you are using your swipe card to enter without waiting for them.
- **Classic and Harmony Only—Lifeline System:** If a Resident will be out of the building for more than 24 hours, you must leave the Lifeline pendant or bracelet behind, otherwise an alarm will go off hourly until the pendant is returned.
- In **Homestead**, there is a visual check made on every Resident every hour.

EMERGENCY INSTRUCTIONS

Please see Attachment 2 (page 23) for a copy of instructions given to Classic Residents regarding instructions in an emergency situation.

FAMILY PARTICIPATION

- **Homestead:** It is a Heritage at Framingham policy that a family member/representative participate in all service planning and any necessary meetings regarding Resident status.
- **Classic and Harmony:** Families are invited and encouraged to attend service planning and meeting regarding the Resident's status.

RESIDENT CARE DIRECTOR AND PROGRAM DIRECTOR

Heritage at Framingham employs a Resident Care Director who is a nurse, currently licensed by the Commonwealth of Massachusetts. The Executive Director supervises the Resident Care Director.

The Resident Care Director is responsible for the oversight of the Resident care staff which includes Resident Care Assistants (RCAs) and the R.N./L.P.N. supervisors. The Resident Care Director ensures that the Resident care staff is following the regulations of the Executive Office of Elder Affairs, as pertains to Assisted Living. The Resident Care Director oversees that the Resident care staff is meeting the needs of each Resident via a Service Plan, which is updated as needed or every six months.

Assisted Living is a non-medical, social model of senior living. Nurses in this setting cannot provide skilled nursing care or assessments.

Heritage at Framingham has a Homestead Program Director who is a nurse overseeing the Homestead Program, a program designed to meet the needs of

individuals with Alzheimer's Disease and memory impairment. The Homestead Program Director works in conjunction with the Resident Care Director to ensure the Resident's needs are met while also overseeing the Homestead recreational program.

The Program Director is responsible for the oversight of the Harmony Program, a program designed to meet the needs of individuals with mental illness. The Program Director works in conjunction with the Resident Care Director to ensure the needs of the residents are met.

MEDICATION MANAGEMENT POLICY

SELF ADMINISTERED MEDICATION MANAGEMENT (SAMM)

Policy

The Residents of Heritage at Framingham may receive the services of Self-Administered Medication Management (SAMM) if requested by the Resident or the Resident's responsible party.

Purpose

To provide assistance to Residents who have the need for SAMM in accordance with EOEA regulations.

Process

1. The Resident requiring SAMM must comply with the medication procedure of Heritage at Framingham as set forth by EOEA.
2. The Resident and/or the responsible party will be instructed to notify the primary physician and request the physician to telephone order all prescriptions to the pharmacy.
3. The Resident's medication will be prepared in the appropriate medication container provided by Heritage at Framingham and clearly labeled with the Resident's name and/or date/days.
4. At the appropriate time, the Resident Care Attendant (RCA) will go to the Resident's apartment and observe the Resident take his/her medication.
5. The RCA may open the medication container for the Resident if he/she is unable to do so.

6. The RCA will read Resident's name, date and time medication is to be given.
7. The RCA is to remain with the Resident while the Resident takes his/her medication.
8. The RCA will document his/her initials in the medication reminder log to indicate the taking of medication was observed.
9. If the Resident refuses to take his/her medication, the RCA will document the refusal and will notify the Resident Care Director (RCD) or nurse.
10. If the Resident is unable to take his/her medication, the RCA will document the inability and notify the RCD or nurse.
11. If the Resident is out of the Community, the RCA will document "out".
12. The Resident service plan will reflect participation in SAMM.
13. At each service plan meeting, the list of medications will be reviewed. It is the responsibility of the Resident or the Responsible Party to notify the nurse or RCD of the medication changes at the time of the change.
14. It is the Responsible Party's or Resident's responsibility to destroy discontinued and/or expired medication. The Resident will be reminded to review all stored medications during each service plan meeting.

When medications are delivered from the pharmacy, the pharmacy staff member delivering the meds will be escorted by a Heritage staff member to the apartment with or without the Resident present and the meds will be put into the locked box.

Heritage at Framingham does not offer Limited Medication Assistance.

OXYGEN MANAGEMENT

Policy

Residents who require oxygen as part of their service plan may need and request cueing and reminders for safe and efficient administration.

Purpose

To provide assistance with oxygen in accordance with EOEA regulations.

Process

The Resident and/or his/her family will be responsible for the ordering, set-up and ongoing maintenance of oxygen supplies.

MEDICATION PROTOCOLS

Medication Patches

The only assistance we may provide is to assist applying a patch with hand-over-hand technique.

Eye Drops/Eye Ointments

The only assistance we may provide is to place a hand on the Resident's hand to steady and guide the placement of the bottle or tube.

Inhalers

The only assistance we may provide is to place a hand on the Resident's hand to steady and guide the placement of the inhaler.

Nasal Spray

The only assistance we may provide is to place a hand on the Resident's hand to steady and guide the placement of the nasal spray.

PRN Medication

If PRN procedures are requested, the required steps will be reviewed with the family by the Resident Care Director. The Resident must request his/her specific PRN medication, which must be identified on the PRN medication documentation sheet in the Resident's apartment. A separate medication box labeled PRN and the Resident's name will be provided. A Resident Care Associate will check documentation of the date/time of the last dose of the PRN medication and, when appropriate, assist the Resident to self-administer the PRN medication and document that assistance. The RCA will not assess the Resident for a need for PRN medication.

Families are required to communicate any PRN medication assistance they provide to their family member to avoid possible overdoes.

**THE SERVICE PLAN WILL BE FILLED-OUT BY A
NURSE AND REVIEWED WITH THE FAMILY.**

THIS IS A SAMPLE

HERITAGE AT FRAMINGHAM:
HOMESTEAD SERVICE PLAN

Reason for Service Plan:

Date:

Initial move in	
30 days after move in	
6 month review	
Change in status	
Move from classic	

Resident name:		Apt.	H
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DNR: Yes No

Legal Guardian: Yes No

POA: Yes No

Health Care Proxy: Yes No

HCP activated: Yes No

- A bed rail may only be used if it is not functioning as a restraint and the Resident is able to navigate around the bar and get in and out of bed safely.

Assessment update:

Emergency system:	Hourly visual checks
Need for assistance	

Use of bed rail/transfer bar: Yes No

Heritage at Framingham has 24-hour on-site, awake staff. Homestead apartments have no stove capabilities.

Management, Nurses, RCA's, housekeeping and maintenance have keys to each apartment in the building. Staff is trained to knock before entering an apartment.

GOALS

Resident or Resident Representative states goal(s) to be:

BEHAVIOR CONCERNS

If applicable see attached Behavior Management Plan.

Newspaper delivery: <input type="checkbox"/> Yes <input type="checkbox"/> No	Name:
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RESIDENT SERVICES

Ambulation status:	
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	Frequency	Comments
Bathing shower/spa:		
Dressing:		
Hygiene/grooming:		
Continent (products)		
Laundry:	HAF staff weekly	
Bed making:	HAF staff daily	
Housekeeping:	HAF staff weekly	

Family to wash blankets and comforters

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Diet:	
Any problems eating?	

Homestead Activities include gross motor activities, self-care activities, social activities and sensory and memory enhancement activities.

Activities:

Comments:

See attached sheet for Diagnoses and Medication List.

If applicable, medications kept in locked box in apartment and delivered directly to locked box by pharmacy staff with HAF staff escort with or without Resident present.

SAMM Yes No

Pharmacy:

Family prefill:

If applicable, Managed Risk Agreement signed for

Family: Yes No

Filled Cassettes: Yes No

OUTSIDE SERVICE PROVIDERS

Outside provider	Payor source	Type of service	Start date	Frequency	End date
Dr. John	Insurance/private	Podiatry		Q 8-10 WKS	
Hairdresser	Private	Haircut		Q 4-6 WKS	
Manicure	Private	Manicure/care – by professional manicurist		Offered every other week	
Manicure by Heritage staff	No charge	Manicure/care		Approx. every other week by Heritage staff	
Dr. Atkins	Insurance/private	Dentistry		As requested	

Signature of Resident/Resident Representative:

Date

Signature of Nurse Completing Service Plan:

Judith Sabol, BSN Date

Other attendees:

END OF SERVICE PLAN

HOMESTEAD PROGRAM SERVICE PLAN

SAMPLE

THE SERVICE PLAN WILL BE FILLED OUT BY A
NURSE AND RE VIEWED WITH THE FAMILY.

THIS IS A SAMPLE

THIS IS A SAMPLE
HERITAGE AT FRAMINGHAM:
CLASSIC SERVICE PLAN

Reason for Service Plan:

Date:

Initial move in	
30 days after move in	
6 month review	
Change in status	

Resident name:		Apt. #:	
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DNR: Yes No Legal Guardian: Yes No
POA: Yes No Health Care Proxy: Yes No

Emergency call system:	Lifeline
------------------------	----------

Lifeline system reviewed w/Resident:
Heritage at Framingham has on-site, awake staff 24 hours a day.

Fire safety reviewed: Yes No
No stove in apartment: Yes No
Use of bed rail/transfer bar: Yes No

Management, Nurses, RCAs, housekeeping and maintenance have keys to each apartment in the building. Staff is trained to knock before entering an apartment.

GOALS

Resident or Resident representative states goal(s) to be:

To be in a safe environment that provides good nutrition and social events.

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RESIDENT SERVICES

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	Frequency	Comments
Bathing:		
Dressing:	AM: PM:	
Hygiene/grooming:		
Escort:		
Continent (products)		
Laundry:		
Bed making:		
Housekeeping:		

Classic service package includes 1 hour of care per day.

Is Resident using more than 1 hour of care per day? Yes /No

Other:

Diet:

Breakfast

1st seating

2nd seating

7:30 to 9AM

11:30AM & 4:30PM

12:45PM & 5:45PM

Dining room:		
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Activities

See attached sheet for Diagnoses and Medication List.

If applicable, medications kept in locked box in apartment and delivered directly to locked box by pharmacy staff with HAF staff escort with or without Resident present.

SAMM: Yes No

Pharmacy:

Family Prefill:

If applicable, Managed Risk Agreement signed for Medications exempt from SAMM policy: Yes No

If applicable, Managed Risk Agreement signed for Family Filled Cassettes: Yes No

Behavior Concerns:

Behavior Management: If applicable see attached Behavior Management Plan.

Outside provider	Payor source	Type of service	Start date	Frequency	End date
Dr. John	Insurance/private	Podiatry		Q 8–10 WKS	ongoing
Dr. Atkins	Insurance /private	Dentistry		As needed	ongoing
Hair Salon	Private	Hair cut		Offered 1x per week	ongoing
Manicure	Private	Manicure/care		Offered every other week	ongoing

Signature of Resident/Resident Representative:

_____ Date: _____

Signature of Nurse Completing Service Plan:

_____ Date: _____

END OF SERVICE PLAN S - A - M - P - L - E

RESIDENT RIGHTS

The law and regulations provide residents of Assisted Living with specific rights. Every resident of an Assisted Living Residence has the right to:

- (A) Live in a decent, safe, and habitable residential environment;
- (B) Be treated with consideration and respect and with due recognition of personal dignity, individuality, and the need for privacy;
- (C) Privacy within the Resident's Unit subject to rules of the Assisted Living Residence reasonably designed to promote the health, safety, and welfare of Residents;
- (D) Retain and use his or her own personal property, space permitting, in the Resident's living area so as to maintain individuality and personal dignity;
- (E) Private communications, including receiving and sending unopened correspondence, access to a telephone, and visiting with any person of her or his choice;
- (F) Freedom to participate in and benefit from community services and activities and to achieve the highest level of independence, autonomy, and interaction within the community;
- (G) Directly engage or contract with licensed or certified health care providers to obtain necessary health care services in the Resident's Unit or in such other space in the Assisted Living Residence as may be made available to Residents to the same extent available to persons residing in their own homes: and with other necessary care and service providers, including, but not limited to, the pharmacy of the Resident's choice subject to reasonable requirements of the Residence. The Resident may select a medication packaging system within reasonable limits set up by the Assisted Living Residence. Any Assisted Living Residence policy statement that sets limits on medication packaging systems must first be approved by Elder Affairs;
- (H) Manage his or her own financial affairs, unless the Resident has a Legal Guardian or other court-appointed representative with the authority to manage the Resident's financial affairs;
- (I) Exercise civil and religious liberties;

(J) Present grievances and recommended changes in policies, procedures, and services to the Sponsor, Manager or staff of the Assisted Living Residence, government officials, or any other person without restraint, interference, coercion, discrimination, or reprisal. This right includes access to representatives of the Assisted Living Ombudsman program established under M.G.L. c. 19D, s. 7, the Elder Protective Services program established under M.G.L. c. 19A, ss. 14 through 26, and the Disabled Persons Protection Commission (DPPC) established under M.G.L. c. 19C et seq.;

(K) Upon request, obtain from the Assisted Living Residence in charge of his or her care the name of the Service Coordinator or any other persons responsible for his or her care or the coordination of his or her care;

(L) Confidentiality of all records and communications to the extent provided by law;

(M) Have all reasonable requests responded to promptly and adequately within the capacity of the Assisted Living Residence;

(N) Upon request, obtain an explanation as to the relationship, if any, of the Residence to any health care facility or educational institution to the extent the relationship relates to his or her care or treatment;

(O) Obtain from a person designated by the Residence a copy of any rules or regulations of the Residence which apply to his or her conduct as a Resident;

(P) Privacy during medical treatment or other rendering of services within the capacity of the Assisted Living Residence;

(Q) Informed consent to the extent provided by law;

(R) Not to be evicted from the Assisted Living Residence except in accordance with the provisions of landlord/tenant law as established by M.G.L. c. 186 or M.G.L. c. 239 including, but not limited to, an eviction notice and utilization of such court proceeding as required by law;

(S) Be free from Restraints;

(T) Receive an itemized bill for fees, charges, expenses and other assessments for the provision of Resident services, Personal Care Services, and optional services;

(U) Have a written notice of Residents' Rights published in typeface no smaller than 14 point type posted in a prominent place or places in the Assisted Living Residence where it can be easily seen by all Residents. This notice shall include the address and telephone number of the Elder Affairs Assisted Living Ombudsman Program and the telephone number of the Elder Abuse Hotline; and

(V) Be informed in writing by the Sponsor of the Assisted Living Residence of the community resources available to assist the Resident in the event of an eviction procedure against him or her. Such information shall include, but not be limited to, the name, address and telephone number of the Assisted Living Ombudsman Program.

ATTACHMENT 1



This is an alternative to a bed rail. It is also known as a U-bar and is never to be used as a restraint.

ATTACHMENT 2

EMERGENCY INSTRUCTIONS FOR RESIDENTS

(Classic Residents under the independent and assisted programs)

- If you are in immediate danger, remove yourself from the danger.
- If the fire alarms are activated and you are not in harm's way, stay where you are until staff or fire department instructs otherwise. If you are in your apartment, keep your door closed, unlocked and remain until staff or fire department instructs otherwise
- Electronic panels in the front entrances tell us where the issue is originating. The firemen can see this and investigate right away.
- The buildings have fire doors and fire rated walls. There are sprinklers and smoke detectors in all apartments and common areas. There are also several fire extinguishers and fire alarm pulls in common areas on all floors.

DISCLOSURE STATEMENT SIGNATURES

Resident/Legal Representative Signature

Date

Management Agent

Date

Prospective Resident's name(s) printed