

SUMMIT INDEPENDENT LIVING JOB DESCRIPTION

JOB TITLE: Self Directed Personal Assistant
WAGE RANGE: \$18.00 per hr. for personal care
\$18.00 for Waiver social, homemaker, and respite hrs
LOCATION: Member's home
IMMEDIATE SUPERVISOR: Member or Personal Representative

SUMMARY: Works in private residence to provide personal care that is medically necessary in order for members who are functionally limited in performing activities of daily living to remain independent in their home and community.

RESPONSIBILITIES AND JOB DUTIES:

1. Provide direct care to individuals, following a plan of care that has been authorized by the Mountain Pacific Quality Health that may include:
 - a) Activities of daily living such as bathing, dressing, hygiene, toileting, transfers, mobility, and exercising.
 - b) Meal preparation that includes meal planning, shopping, storing, preparing and serving food.
 - c) Household tasks related to maintaining the member's health and safety in the home.
 - d) Escort services for members who require personal assistance during trips to obtain Medicaid reimbursed medical care or shop for items essential to the member's health care and nutritional needs.
 - e) Assist with health maintenance tasks as authorized by the member's Health Care Professional.
2. Maintain required documentation
 - a) Time cards – Hours are broken down into 15 minute increments
EX: 15 minutes= .25 hours, 30 minutes= .50 hours, 45 minutes= .75 hours
 - b) Current address, phone number, or contact information

EMPLOYMENT PAPERWORK REQUIREMENTS

These documents will be filed in the Missoula Summit office as the permanent record of employees:

- Personal data information sheet- falsifying information is cause for immediate termination.
- Form W-4 Employee's Withholding Allowance Certificate (bottom portion filled out and signed)
- I-9 Employment Eligibility Verification form. Employers are required to have all employees fill out an I-9 form within three (3) days of hire. Employees fill out Section 1. Send copy of driver's license, Social Security card, or other listed documentation so Summit can complete the other sections.
- Summit's Drug Free Workplace Statement.
- Statement acknowledging you have received and reviewed the Summit Safety Policy and PCA manual.

- Direct Deposit form (optional) with attached voided check. Prepaid cards must have print out of account number, no hand written ones will accepted.
- Original timecards (completed in full and signed by employee and member)
- An attendant cannot be paid if they are on the Inspector General of Investigation Exclusions Database and the member will be responsible in paying privately if attendant is on there.

EMPLOYMENT PROVISIONS

- Both Summit and the member share responsibility as your employer. Summit is the employer of record and serves as the fiscal agent on behalf of the member. The member does the day to day supervision of services.
- Hours are not guaranteed. By nature of the personal assistance program, the condition and needs of your member may result in varying hours.
- No overtime will be paid unless prior authorized by Summit.
- Original timecards are required, NO faxes will be accepted. Timecards are due by Wednesday following the pay period by 2 pm. Late timecards will be processed the following pay period.
- Checks are mailed on Thursday and direct deposit is done Friday mornings. Any checks that are mailed and not received will not be replaced until the following pay period.
- The employee is responsible for letting Summit know your correct mailing address and Summit is not responsible for delivery errors made by the U.S. Postal Service.
- In the event that an employee is laid off, or fired, final wages will be paid during the next regularly scheduled pay period after receipt of a properly completed timecard.
- All information is to be kept confidential. Confidential information is not to be discussed by anyone other than authorized personnel.
- Safety policy and procedures must be followed at all times.
- Employees must follow the policies and procedures outlined in the Personal Assistant Manual.
- Health Insurance: Health insurance is available on the first of the month following a three-month measurement period for attendants consistently working 30-or-more hours per week. Employee cost is just \$40 per month (more for adding family members to the plan). The Montana Department of Health and Human Services pays the rest of the premium. Health insurance is provided through Associated Employers and includes medical coverage. It is a 70/30 plan with a \$2000 yearly deductible and \$30 office visit co-pay.



SUMMIT INDEPENDENT LIVING

POLICY AND PROCEDURES

SELF-DIRECTED COMMUNITY FIRST CHOICE & PERSONAL ASSISTANCE SERVICES (SD-CFC/PAS)

Personal Care Attendant Manual

Summit Independent Living is a private, nonprofit organization founded in 1981. Summit is a nonresidential program headquartered in Missoula, Montana that provides advocacy and assistance with independent living resources for persons with disabilities.

Our Mission

Summit's mission is to advance the independence and civil rights of people with disabilities. In pursuit of this mission, we offer a range of services designed to help people with disabilities improve their self-confidence, knowledge, skills and access to community resources. We also work at the community level to reduce attitudinal, architectural and communication barriers, to combat discrimination, and promote development of needed resources. Our ultimate goal is increased independence, economic opportunity, and enhanced quality of life for all persons with disabilities.

Summit Board of Directors

Executive Director – Tami Hoar

SD-CFC/PAS Program Manager – Carrie Dyrud

SD-CFC/PAS Coordinator – Patti Montgomery-Stewart

SD-CFC/PAS Coordinator – Devon Harris

SD-CFC/PAS Specialist – Aleyna Raymond

SD-CFC/PAS Administrative Assistant – Jessica Workman

Fiscal Manager – Scott Fels

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Glossary

ACTIVITIES OF DAILY LIVING (ADL) - - Bathing, dressing, hygiene, toileting, transfers, positioning, mobility, meal preparation, eating, exercise, and medication assistance.

DEPARTMENT (DPHHS) - - The Montana Department of Public Health and Human Services.

HEALTH CARE PROFESSIONAL (HCP) - - A health care professional is a physician, physician assistant, nurse practitioner, registered nurse, occupational therapist, or a medical social worker working as a member of a case management team for Home and Community Based Services

MEMBER - - A person who is eligible for Medicaid and receives self-directed personal assistance services.

MPQH - - Mountain Pacific Quality Health is a quality improvement organization that contracts with the Department to perform the authorization functions of the Personal Assistance Services Program.

PERSONAL CARE ATTENDANT (PCA) - - The individual, who is paid, to deliver personal assistance services.

PERSONAL REPRESENTATIVE (PR) - - An unpaid individual who is directly involved in the day to day care of the member and assumes the role of managing personal assistance services for a member.

PROVIDER AGENCY - - An approved agency, such as Summit, which enrolls with the Department to provide oversight of self-directed services.

STATE PLAN PERSONAL ASSISTANCE - - Medically necessary in-home services provided to members whose chronic health problems cause them to be functionally limited in performing activities of daily living.

SERVICE DELIVERY RECORD - - Timecard/timesheet submitted for pay.

1. INTRODUCTION

The policies and information in this volume specifically apply to the position of Personal Care Attendant (PCA) in the Self-Directed Community First Choice/Personal Assistance Services (SD-CFC/PCAS) Department of Summit, and not to any other Summit employee. A copy of this volume will be given to each newly hired PCA. Any specific accommodations necessary to implement these policies should be discussed with a Summit SD-CFC/PAS coordinator. This policy and procedure manual is available in large print, computer disk, audiotape, or other alternative formats upon request.

The policies and information in this volume also apply to members enrolled in Summit's SD-CFC/PAS program. A copy of this volume will be given to each newly enrolled member or personal representative who will act as the PCA's supervisor.

Any questions regarding these policies and procedures should be discussed with the SD-CFC/PAS coordinator.

DPHHS Manual: As a provider agency, Summit must follow rules and procedures set forth in the Self-Directed Community First Choice/Personal Assistance Services manual issued by the Montana Department of Public Health and Human Services (DPHHS). Members/PRs and PCAs, as participants in this Medicaid program, are also subject to these rules and procedures. This DPHHS manual is available at Summit's Missoula office or the State of Montana DPHHS website.

Health Maintenance Activities: Members may be authorized to receive assistance with Health Maintenance Activities, which are skilled nursing tasks that can be performed by PCAs if the member's health care professional agrees. They include:

- Administering medications
- Urinary systems management
- Wound care
- Bowel care

2. SD-CFC/PAS PROGRAM OVERVIEW

The SD-CFC/PAS program is a Medicaid program which allows persons with disabilities (members) or their Personal Representative to recruit, hire, train, and manage Personal Care Attendants of their choice. Members/PRs train the Personal Care Attendants to meet their specific personal care needs and maintain a schedule convenient and flexible for both member and PCA(s).

The member must need assistance with activities of daily living, be eligible for full Montana Medicaid coverage and have the skills and abilities to direct their in-home personal assistance services.

Shared Employment Responsibility: In the SD-CFC/PAS program members /PRs and provider agencies share the responsibility for employment of Personal Care Attendants who work in members' homes. The provider agency is considered the "employer of record" and serves as a fiscal agent on behalf of members, while members/PR's have the responsibility for day-to-day supervision of their PCAs. Both these roles are spelled out in more detail below.

Summit's Role: Summit is the employer of record and is legally responsible for ensuring that all state and federal labor laws are followed. The member/PR is the employer in every other way: making decisions about direct provision of his or her care, including control in selecting, training, managing, and dismissing the PCAs. Summit provides paychecks to PCAs and performs other payroll, human resources, record keeping and billing procedures, including verification of eligibility for employment, handling of workers compensation and unemployment claims, and other duties as the employer of record.

Member/Personal Representative Role: The member or personal representative acts as the employer of PCAs for the day-to-day aspects of service delivery, including selecting, scheduling, training and supervising PCAs. The member/PR has responsibility for ensuring that services provided by PCAs are done in accordance with the approved plan of care and that timecards accurately reflect services provided.

3. EMPLOYMENT CONSIDERATIONS

The first step toward employment through Summit's SD-CFC/PAS program is selection by the member/PR. The selection process used is customized by each member.

Defining the Position: The member/PR is responsible for determining the duties and responsibilities for the PCA, following the authorized plan of care.

Orientation: All newly hired PCAs must meet with the member/PR, or Summit's SD-CFC/PAS staff to fill out employment paperwork and complete orientation to the SD-CFC/PAS program. A copy of the PCA's social security card and driver's license or state ID must accompany the application. PCAs must review the Summit Safety Manual which accompanies this application

packet and sign and return the acknowledgement form. ***Failure to promptly submit orientation paperwork to the Missoula office may result in a delay in the issuance of paychecks.***

Summit reserves the right to terminate employment if the PCA falsifies any information on the employee application.

Criminal Background Checks: Summit will conduct criminal background checks of all individuals selected for employment by members or PRs. If the background check reveals prior felony or misdemeanor convictions, Summit reserves the right to decline or terminate employment, at the discretion of the Executive Director. Persons on the Exclusion List of the federal Office of Inspector General; or with convictions for public assistance fraud, abuse, neglect or exploitation of persons with disabilities, children or older adults are not eligible for employment with Summit. Hiring decisions on individuals with other criminal convictions will typically be made jointly by Summit and members/PRs taking into consideration the nature and gravity of the conviction, length of time since the conviction, and other factors. If the background check reveals criminal convictions, the results will be shared with member/PR so a joint hiring decision can be made; or to inform the member/PR that the type of conviction automatically disqualifies the individual from employment with Summit.

Employment Status: As described above, Summit is the official employer of record for all PCAs employed in the SD-CFC/PAS program. Given the intimate nature of personal assistance services, it is vital that members have flexibility and control over their in-home services and the ability to select the PCAs that best meet their needs. A member/PR may dismiss a PCA from service in his or her household for virtually any reason, such as incompatible schedules, personality conflicts, a PCA's inability to perform required job duties, etc. Dismissal by a member does not automatically mean termination of employment with Summit. Unless the dismissal was "for cause" as defined in Section 8 Dismissal/Termination of Employment, PCAs remain eligible for referral to other members in Summit's SD-CFC/PAS program. Such PCAs are considered "laid off" versus "terminated" and their names are placed in a temporary pool if they desire to seek employment with other Summit SD-CFC/PAS members.

Temporary Pool: Summit's SD-CFC/PAS staff will maintain regional lists of PCAs who are available for employment, either for ongoing hours, temporary fill-in hours, or emergency hours. Being included on the list is at the PCA's discretion and does not obligate the PCA to accept offered hours. The list will be distributed to any SD-CFC/PAS member/PR upon request. Contact the SD-CFC/PAS coordinator for further information.

Supervision: It is expected that members/PRs will inform their PCAs of job specifics including training requirements, job duties, scheduled hours, procedure for planned and emergency leaves, and procedure for late arrivals.

Training: The member/PR is responsible for on-the-job training of their PCAs, giving instruction in specific skills and techniques and providing any assistance to the PCA in resolving problems. The member/PR may document in notes each PCA's ability to function competently and safely, although this is not required by Summit or DPHHS. Temporary additional PCA hours may be available for training purposes. Summit can provide training on matters in this manual, and other training materials upon request. Contact Summit SD-CFC/PAS staff for information.

Probationary Period: All newly hired PCAs are subject to a 6-month probationary period. During this period the member or PR monitors the PCA's job performance to determine his or her capacity to perform the duties and responsibilities of the job. Summit also monitors compliance with SD-CFC/PAS program policies and procedures.

- During the probationary period, the PCA can be dismissed for any reason.
- Completion of the first 6 months marks the end of the probationary period but does not guarantee continued employment. Ongoing employment will be contingent upon continued satisfactory job performance.
- Summit reserves the right to extend the probationary period if necessary.

Equal Employment Opportunity: Summit provides equal opportunity for all qualified job applicants and employees and does not discriminate in compensation or in the terms, conditions or privileges of employment because of race, creed, religion, color or national origin or because of age, physical or mental disability, sexual orientation, marital status, or sex. In accordance with the Americans with Disabilities Act, Summit will provide reasonable accommodation for any known disabilities of employees to enable them to complete the essential functions of their jobs so long as it is not an undue hardship. Every member/PR is expected to be aware of our commitment to equal employment opportunity and non-discrimination. Because members/PRs act as though they are the employer for selecting, managing and dismissing workers, they share in Summit's obligation to abide by Equal Employment Opportunity policies and refrain from discrimination in hiring and employment of Personal Care Attendants.

4. EMPLOYEE BENEFITS

Health Insurance is available to PCAs who work at least 30 hours per week on a consistent basis providing personal care or waiver services. Coverage for newly enrolled employees begins on the 1st of the month following a 3-month measurement period and a one-month administrative period. There is a \$40.00 monthly cost to PCAs. Coverage for employees' spouses and children is also available, but at the employee's cost. The PCA's portion of the premium will be paid via payroll deduction.

AFLAC supplemental insurance is available, on a pre-tax basis, to all Summit employees. Premiums are paid by the employee and are withheld from wages. Some limitations apply. Contact Summit SD-CFC/PAS staff for more information.

5. SERVICE DELIVERY RECORDS and PAYROLL PROCESS

Work Week and Pay Periods: Summit's official work week for the SD-CFC/PAS program begins on Sunday and ends on Saturday. Summit's SD-CFC/PAS Department processes payroll every two weeks (bi-weekly).

- Summit will provide a paycheck to PCAs every two weeks (see payroll schedule for specific dates).

Service Delivery Records: Service delivery records (timecards) are to remain at the home of the member during the work week. It is the responsibility of the member or PR to review and sign each timecard for each PCA at the end of the pay period. The PCA or member/PR delivers the timecard to Summit.

- Timecards are legal documents and should be completed in blue or black ink. Do not use white out if you make a mistake – cross out the mistake and initial next to it. First and last names of PCAs should be written on the timecards using the same name listed on their W-4 employment form. Do not use a nickname.
- Timecards must be completed in full with all required information.
- Timecards are due to the Summit Missoula office by **2p.m. on Wednesday** following the pay period end.

- Late timecards will be processed the following pay period. Timecards will be considered late if they are not filled out completely with all required information, or if information conflicts with the member's plan of care. SD-CFC/PAS staff will make a reasonable effort to contact the member/PR to obtain an acceptable timecard or clarify timecard information.
- **Original** timecards are required as Summit uses originals to bill Medicaid. **No faxes or electronic copies will be accepted; we only accept original timecards.**
- Misrepresentation of hours worked or tasks performed is considered **Medicaid fraud** and is grounds for termination of employment and termination of member eligibility for Summit SD-CFC/PAS services.
- Violation of policies regarding timecards will result in disciplinary action up to and including termination of employment as outlined in Section 8 below.
- No PCA can work over 40 hours per week (including state plan, waiver, and Medical Escort Service Delivery Records). It is the responsibility of the PCA to keep track of hours between all members through Summit.

Community Integration and Shopping: For detailed guidelines, see Handout.

Community Integration/Shopping Mileage: If community integration and/or shopping have been authorized on your MPQH plan of care, mileage reimbursement is available when PCAs use their car to take a member on an authorized CFC/PAS shopping trip or community integration activity. Mileage may only be billed when the time it takes the member to get to, from and during the activity can be covered under the hours authorized in the member's Service Plan for shopping and community integration.

Enter the specific trip information in the designated area on the service delivery record; amount of time, specific location, and last three digits of beginning/ending odometer readings. Be sure there are enough hours in the work day for caregiving tasks AND shopping/community integration.

Payroll: Summit will process payroll and provide a paycheck to PCAs every two weeks. This includes withholding Social Security, Medicare, and federal and state income taxes from employee's gross wages; paying employer Social Security, Medicare, and unemployment insurance taxes; and providing workers' compensation coverage. Employee benefits include:

- **Social Security/Medicare:** Summit pays 6.2% Social Security and 1.45% Medicare tax on all employee wages; this payroll tax matches the contributions withheld from employee earnings. These taxes are paid into each employee's Social Security account and provide Medicare coverage and retirement, disability, and survivors benefits to eligible persons. It is important to verify that Summit is using the correct Social Security number to report your wages to the Social Security Administration.
- **Unemployment:** Summit pays payroll taxes to the State unemployment program which provides temporary, partial reimbursement for lost wages due to layoff, reduction in work hours and other situations. Summit, rather than the member/PR, is the employer of record for receiving unemployment benefits. This all depends on hours worked according to Unemployment.
- **Worker's Compensation:** Summit pays premiums for this insurance program which provides coverage for medical treatment and lost wages due to job-related injuries. Report any work-related injuries to the Missoula Summit SD-CFC/PAS staff immediately, by at least the following business day.

Paychecks and Payment of Wages: Summit's payroll is processed by an outside payroll company. Checks that are not direct deposited are mailed on Thursday prior to payday. Therefore, no pay checks can be issued outside of regularly scheduled pay periods.

- ***Any checks that are mailed and are not received by employees will not be replaced until the following pay period.*** Employees are responsible for letting Summit know their correct address and Summit is not responsible for delivery errors made by the U.S. Postal Service. Summit encourages employees to utilize direct deposit to avoid problems that occur from time to time with processing or delivery of mail.
- In the event that an employee is laid off or terminated, final wages will be paid during the next regularly scheduled pay period after receipt of a properly completed timecard or within 15 days of separation, whichever occurs first.

Employment Verification: Summit will only provide information on wages paid and will not speculate on employees' future wages and/or schedule. Summit usually requests a release of information, signed by the employee, before providing employment information. Exceptions are Social Security,

Office of Public Assistance, workers compensation, and State unemployment. Employees who receive public assistance should keep copies of their pay stubs. Providing a record of wages paid may take up to 2 weeks depending on the office schedule. There is a fee for this service. Contact the Summit bookkeeping department for further details.

Paystubs: It is the responsibility of the PCA to keep all paystubs that are given to them by our payroll department.

Garnishment of Wages: Employees will be charged up to \$5.00 for each garnishment, each payroll. This applies to both voluntary and court ordered garnishments.

Allowable Hours: If a PCA works for more than one member, a separate timecard must be used for each member. Summit's work week begins Sunday and ends Saturday. ***PCAs must not work more than 40 hours per week total as a Summit employee unless previously authorized by Summit in writing.*** This includes state plan, waiver, and medical escort timesheets. Failure to get prior authorization can lead to disciplinary action and/or termination for cause.

6. MEMBER PLAN OF CARE

Following the Profile (plan of care): It is the member's/PR's responsibility to follow the profile authorized by Mountain Pacific Quality Health (MPQH) including staying within the authorized hours and authorized tasks, and to communicate this information to PCAs. Unless prior authorized, Summit will not pay for any time above and beyond the authorized hours.

Guidelines for Change in Frequency: For plans that are authorized 1-4 days per week, the frequency of tasks may be changed by 1 day per week. Example: If the MPQH profile authorizes services over 3 days, the frequency of tasks may be decreased to 2 days/week OR increased to 4 days/week.

For plans that are authorized for 5-7 days per week, the frequency of tasks may be changed by 2 days per week. Example: If the MPQH profile authorizes services over 5 days, the frequency of tasks may be decreased down to 3 days/week OR increased to 7 days/week.

Approved Activities: The SD-CFC/PAS program can assist a member with Activities of Daily Living, as approved on member's MPQH plan of care, such as bathing, dressing, grooming, toileting, transfers, positioning, mobility, meal preparation, eating, exercise, and medication assistance. Light

housekeeping, laundry, shopping, community integration activities, and medical escort can also be authorized in addition to personal assistance services. Certain Health Maintenance Activities are allowed as exceptions to the Nurse Practice Act if authorized. These are bowel programs, urinary management, wound care, and medication administration. Members/PRs are responsible for training PCAs specifically to their needs.

Here is a list of some of the household duties that a Personal Care Attendant is **not allowed** to perform with State Plan hours:

- Cleaning floor and furniture in areas not used by the member.
- Doing laundry or bedding that the member does not use; for example, doing the laundry for the entire family.
- Shopping for items that the member does not need for health and nutrition (unless approved as community integration)
- Running errands or paying bills (unless approved as community integration)
- Supervision, babysitting, or friendly visiting.
- Taking care of pets, unless it is a state certified service animal.
- Taking care of the lawn (unless approved on profile as yard hazard removal) window washing, and cutting wood.

This program is not a housekeeping program.

Summit relies on PCAs to report if services are being used inappropriately. If you have questions on tasks that can be provided, please contact the Summit SD-CFC/PAS coordinator.

Hospitalization/Nursing Home Stay: The SD-CFC/PAS program cannot pay for personal assistance services provided in a hospital, nursing home or other institution. SD-CFC/PAS services can be resumed once the member returns home.

7. HEALTH AND SAFETY

Mandatory Reporter: As a Medicaid provider Summit is a "mandatory reporter" and is required to notify the proper authorities if we have knowledge that a member is being abused or neglected. Both Summit SD-CFC/PAS staff and PCAs have this obligation and must report suspected abuse or neglect. A serious occurrence may be one of the following, but can also be anything that puts the member's health, safety or welfare in jeopardy:

- Physical and/or verbal abuse;
- Neglect, including self-neglect;
- Sexual harassment or sexual abuse;

- Exploitation
- Injuries requiring medical help; and
- Anything that is reported to Adult Protective Services or law enforcement.

Safety Program: Summit has established a safety program in the interest of reducing workplace accidents and potential injury to PCAs and/or members. The Summit Safety Policy is attached to the application packet. It is the responsibility of the PCA to read and sign the policy statement. If you need additional information on the safety policy our staff can assist you.

Members/PRs and PCAs have a responsibility to maintain a safe working environment and report to SD-CFC/PAS staff any environmental hazards or other situations in the member's home that may lead to an accident or injury. Members/PRs are also responsible for ensuring that PCAs follow generally accepted safety procedures while performing personal assistance tasks.

Workplace accidents not only lead to personal injuries and lost time at work, they also drive up the cost of Workers Compensation insurance, which ultimately limits Summit's ability to increase wages and benefits to PCAs.

Accidents/Injury at Work: All members and PCAs are responsible to report all work-related incidents that result in or may result in injury **immediately, but no later than by the next working day**. An incident report must be done within 3 days of an accident. Accidents must be reported to the SD-CFC/PAS coordinator or safety officer in the Missoula office. Summit staff will follow up with both the PCA and the member and will report any incidents to the insurance company, the Montana State Fund.

Early Return to Work Program: Summit has established an Early Return to Work program that is designed to help SD-CFC/PAS PCAs who have been injured on the job return to work as soon as possible. If the injured employee's physician releases the employee to work limited duties prior to full recovery, Summit's safety officer and SD-CFC/PAS coordinator will work actively with the physician, the employee, and the member or PR to explore temporary, transitional employment duties that are medically appropriate to the employee's capacities while on limited duty status. Early return to work may not be possible in every case given the employee's medical condition and the organization's ability to arrange appropriate duties, but Summit will make a good faith effort to evaluate each on the job injury and explore possibilities for early return to work.

Early Return to Work is subject to the following:

- The member or PR must approve any placement of an injured worker in the member's home under Early Return to Work in keeping with member direction under the SD-CFC/PAS program. The member/PR will work closely with the SD-CFC/PAS coordinator and Summit safety officer to arrange and manage the injured employee's limited duties.
- If placement with a SD-CFC/PAS member is not possible, Summit will explore options for light duty work for injured employees at one of Summit's four offices.
- Employees will be paid at their normal rate of pay during limited duty status.
- Employees may work up to the number of hours authorized by their physician while on limited duty status, not to exceed the maximum number of hours they were working each week prior to injury.

Discrimination, Harassment, and Retaliation: Summit makes every effort to maintain an environment free of any form of discrimination or harassment on the basis of race, color, religion, sex, age, national origin, disability, genetic information, sexual orientation, protected activity, or any other classification protected under law.

Sexual harassment may include, but is not limited to unwelcome sexual advances, requests for sexual favors, or other verbal, nonverbal, or physical conduct of a sexual nature. All such conduct is strictly prohibited.

Summit will not tolerate retaliation of any kind against an individual who, in good faith, makes a complaint or participates in an investigation under this policy, even if no violation is ultimately found. Any individual who believes he or she has experienced or witnessed any discrimination, harassment, or retaliation in violation of this policy should immediately report it to Summit staff. Members who violate this policy risk having their services terminated. Employees who violate this policy will be subject to disciplinary action, up to and including termination of employment.

Any member or PCA who believes he or she has experienced or witnessed any discrimination, harassment, or retaliation in violation of this policy should report it to a Summit SD-CFC/PAS coordinator. The complaint will be investigated where appropriate. Complaints will be handled confidentially to the extent practicable.

Confidentiality: Given the nature of SD-CFC/PAS services, PCAs may come into contact with personal information and records regarding the member, and be party to personal conversations and/or professional discussions between the member/PR and others. All such information is strictly confidential. Confidential information is not to be discussed by anyone other

than authorized personnel. PCAs are required to observe confidentiality with respect to member information and not share such information without the member's written authorization. Violation of this policy will result in disciplinary action up to and including termination of employment.

Drug Free Workplace: As a recipient of federal funding, Summit and its employees are subject to the Drug Free Workplace requirements established by the federal government. This means that at Summit's office or during any Summit activity employees are strictly prohibited from engaging in the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance. In addition, use of alcoholic beverages is not permitted while employees are on duty, and employees are prohibited from reporting to work under the influence of alcohol or any controlled substance, or impaired by the use of a prescription drug. A member's home is considered the workplace for all in-home services received through the SD-CFC/PAS program. Because of the shared employment responsibility between Summit and the member/PR, the member/PR is responsible for maintaining a drug free workplace for their PCAs. All PCAs are given a copy of Summit's Drug Free Workplace policy, and must sign a statement verifying that they have read and understand its contents.

8. False Claims Act Policy and Procedures

POLICY STATEMENT:

Summit Independent Living (Summit) is committed to complying with all federal and state laws, particularly those that are designed to prevent and detect Medicaid waste, fraud, and abuse. As a Center for Independent Living that receives Medicaid funding and other federal funds, Summit is responsible for establishing and disseminating detailed information regarding the federal and Montana False Claims Acts and related whistleblower protection laws to all employees, associates, agents, and contractors.

OVERVIEW

Federal False Claims Act

The False Claims Act is a federal law designed to prevent and detect Medicaid fraud, waste and abuse. The False Claims Act prohibits, among other things:

- knowingly presenting, or causing to be presented, a false or fraudulent claim for payment or approval;

- knowingly making, use or causing to be made or used, a false record or statement material to a false or fraudulent claim;
- conspiring to defraud the government by getting a false or fraudulent claim allowed or paid; and
- knowingly making, using or causing to be made or used, a false record or statement material to an obligation to pay or transmit money or property to the Government, or
- knowingly concealing or knowingly and improperly avoiding or decreasing an obligation to pay or transmit money or property to the Government.

Additionally, there is a Montana False Claims Act that is substantially similar to the federal False Claims Act. Violators of either Act may be subject to penalties imposed by state and federal entities as described below.

Penalties

Violations of the Federal False Claims and Montana False Claim Act can result in significant fines, civil liability, criminal penalties, and/or exclusion from federally funded programs.

Whistleblower Protection Under the False Claims Act

The False Claims Act protects employees who report a violation under the False Claims Act from discrimination, harassment, suspension, termination of employment or any other retaliation as a result of reporting possible fraud. Employees who report fraud and consequently suffer discrimination may be awarded (1) two times their back pay plus interest, (2) reinstatement of their position without loss of seniority, and (3) compensation for any costs or damages they incurred, (4) any other relief necessary to make the employee whole. The Montana False Claims Act also includes protections for whistleblowers.

Individual (Qui Tam) Plaintiff

An individual (called a qui tam plaintiff or relator) who is an original source of information, can sue for violations of the False Claims Act. Under both the federal False Claims Act and the Montana False Claims Act, a qui tam plaintiff can receive between 15-25% of the total amount recovered if the Government prosecutes and 25-30% if litigated by the qui tam plaintiff.

SUMMIT POLICIES AND PROCEDURES

Summit has established the following policies and procedures to prevent fraudulent activities in the delivery of Medicaid and other government-funded services:

- Employees who provide such services must exercise due diligence in calculating charges for services provided so that invoices, claims and other billings accurately reflect actual services delivered and amounts due.
- If an employee discovers that a mistake was made in calculating charges due, or that services or claims already billed are inaccurate or cannot legitimately be charged to Medicaid or other funding source, the employee will immediately notify his or her supervisor so the error can be corrected and repayment made.
- Employees who suspect Medicaid fraud, abuse or waste, or other fraudulent activity, must immediately report their concerns following Summit's established whistleblower policy.
- Employees who violate these policies and procedures will be subject to disciplinary action, up to and including termination of employment.

Summit has established a general policy prohibiting discrimination, harassment, and retaliation. Refer to the Health and Safety Section, section D of the Summit Personal Care Attendant Manual for details.

9. DISMISSAL/TERMINATION OF EMPLOYMENT

The following definitions are utilized in Summit's SD-CFC/PAS program:

Dismissal: PCA is dismissed from service in a member's household by the member/PR as described above in Section 3 Employment Status. Members/PRs must notify SD-CFC/PAS staff if they plan to dismiss a PCA from employment in their household and to communicate the reason for dismissal and discuss next steps.

Resignation: PCA voluntarily resigns from service in a member's household. Member/PR must notify SD-CFC/PAS staff that the PCA has resigned and last day worked.

Mutual Agreement: Member/PR and PCA mutually agree that service in the member's household will not continue. Member/PR must notify SD-CFC/PAS staff that the employment relationship will not continue and identify last day worked.

Termination for Cause: PCA's service to member and employment with Summit is terminated for reasons including, but not limited to, the following:

- Verbal or physical abuse of members or Summit staff
- Sexual harassment of members or Summit staff
- Theft, misuse, or destruction of member property
- Violation of SD-CFC/PAS program policies and procedures
- Breach of confidentiality
- Use of drugs or alcohol while on duty
- Repeated absences/tardiness
- Job abandonment
- Unsatisfactory job performance
- Failure to follow orders or defiance of orders
- Failing to accurately and promptly report on-the-job injuries
- Falsifying timecards or committing other Medicaid fraud
- Any other reason that Summit believes that the employee's actions would reflect poorly against the organization.

Members/PRs should immediately contact Summit SD-CFC/PAS staff if they experience any of the situations listed above under "termination for cause" to ensure continued member safety and well-being and make arrangements to initiate appropriate disciplinary action, up to and including termination of the PCA's employment. Only Summit can legally terminate a PCA as Summit is the official employer of record.

Disciplinary Action: Summit may take disciplinary action as needed against PCAs for poor job performance, violations of Summit policies and procedures, instances of unacceptable behavior or misconduct, or conduct not in keeping with accepted standards of behavior associated with employment.

Summit will address all policy violations and other infractions with appropriate discipline. Such discipline may, but will not necessarily, involve corrective interviews, written reprimands, disciplinary probation, suspension with or without pay, or termination. PCAs should have no expectation of progressive discipline. Summit will determine appropriate consequences based on the nature and severity of a given offense. A PCA may be terminated without prior warning if Summit deems the policy violation as sufficiently serious.

10. COMPLAINTS AND GRIEVANCE PROCEDURE

Conflict resolution between member/PR and PCAs is the responsibility of the individuals involved. If a PCA is dismissed from service by a member/PR,

and it is determined that the dismissal was "for cause", continued employment at Summit and participation in the temporary pool is at the discretion of Summit's Executive Director.

In regard to a PCA's relationship with the provider agency, it is a Summit policy that PCAs have the right to express suggestions and complaints, and to contest disciplinary actions or other employment conditions that they believe are unjust or inequitable. PCAs are encouraged to bring problems to the SD-CFC/PAS coordinator and/or Summit's Executive Director, who will act as a mediator. If the problem persists, a formal grievance can be filed as described below.

Formal Grievance: In situations in which informal methods of conflict resolution have been unsuccessful, or in which a PCA is contesting disciplinary action or other conditions of employment that he or she feels is unfair, the following steps should be taken:

Step One: The PCA must submit to the Executive Director a written statement which describes the complaint or grievance, and what redress is sought. The written statement must be filed within five (5) working days of the event giving rise to the grievance, or such grievance will be deemed to have been waived by the PCA. In cases which have moved from informal complaint to formal grievance, the written notice of grievance must be filed as soon as practical of the informal conference with the Executive Director. The Executive Director will provide a written response to the PCA as soon as practical of the receipt of the grievance.

Step Two: If the aggrieved PCA is not satisfied with the decision of the Executive Director, or if the grievance relates to the Executive Director, he or she can file a written appeal with Summit's Board of Directors. The appeal must be filed within five (5) working days of receipt of the Executive Director's decision or the grievance will be deemed to have been waived by the aggrieved PCA. The Board, or Executive Committee thereof, will convene as soon as practical thereafter, of receipt of the appeal and make a final determination on the grievance, which will be submitted in writing to the PCA. The PCA must sign the determination, a copy of which will be placed in his or her personnel file.

Additional Grievance Rules:

- 1) PCAs are expected to carry out their job duties and responsibilities (unless the PCA has been terminated) until the grievance is resolved.

- 2) A grievance may be canceled when the aggrieved PCA requests to do so in writing.
- 3) Time limits on each grievance step described above may be extended by mutual written consent of both the aggrieved PCA and the Executive Director or Board of Directors.
- 4) No PCA will be subject to any form of punishment or harassment as a result of filing a grievance in good faith.
- 5) Summit will not be responsible for any expense of any kind incurred by a PCA in pursuing a grievance.
- 6) Filing of a false grievance may lead to disciplinary action leading up to termination.



Self-Directed Community First Choice & Personal Assistance Services

Safety Policy and Procedures

Summit Independent Living:

Recognizes that an effective health and safety program is an important component of our company's best business practices.

Works diligently in an ongoing effort to assure Personal Care Assistants, Consumers and Summit employees enjoy a safe and healthy work environment.

Believes health and safety are shared values: Summit works to obtain the lowest-cost premiums for worker's compensation coverage. Employees benefit through Summit's ability to offer the highest possible rate of pay.

Involves Summit Members, Personal Representatives and Employees in taking responsibility for understanding and complying with Summit safety policies.

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Workplace Safety Policy and Procedures

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To ensure a safe working environment is maintained, all Members, caregivers and employees must actively promote safety and accident prevention as an integral part of their normal job functions. Each Member, caregiver and employee is responsible for implementing this policy by continually observing safety practices, guidelines, and standards throughout the workday.

Full cooperation of all SD-CFC/PAS Members, caregivers and employees is essential for Summit to achieve the goals of this safety policy.

PURPOSE

It is the intent of Summit Independent Living to ensure a safe environment for Consumers and Personal Care Attendants. It is also our intent to properly manage any incidents that occur so as to minimize injury and other forms of loss. A well-managed workplace safety program can benefit our organization and its people in countless ways. In order for Summit to achieve its goals, we have developed a workplace safety program outlining the policies and procedures regarding the health and safety of employees, home care aides and volunteers. Each and every individual must become familiar with the program, follow and enforce the procedures, and become an active participant in this workplace safety program.

While Summit management will be responsible for developing and organizing this program, its success will depend on the involvement of each Member and Personal Care Attendant. We look forward to your cooperation and participation.

SCOPE

It is our policy:

- To conduct business in a manner that promotes occupational health, and Member, caregiver and employee safety.
- To provide the latest health and safety information and training as needed to protect our Members, caregivers and employees.
- To comply with all federal and state Health and Safety regulations and exceed compliance as appropriate.
- To involve Summit Members in taking responsibility for understanding and complying with Summit ILC safety policies.
- To provide programs to protect and enhance the health and safety of our Members, caregivers and employees.

ACCIDENT PREVENTION PROGRAM

- All Members, caregivers and employees are required to participate in our accident prevention program which emphasizes the integration of safety and health measures into each job.
- It is mandatory for all Members to have a safety orientation at the Members residence within two weeks of beginning services with Summit Independent Living's SD-CFC/PAS program.
- Caregivers are expected to attend the Member safety orientation at the Member's home.

ENVIRONMENTAL AND SAFETY PRACTICES

- Immediately report unsafe conditions or practices to the SD-CFC/PAS Coordinator. Take all necessary temporary measures to make conditions safe.
- Know the proper use and location of firefighting equipment and building exits. Keep access to fire extinguishers free from obstruction.

- Keep all exits, stairways and walkways free from obstructions.
- Make a prompt report of each injury regardless of the degree of severity (Initial Incident Report).
- No alcoholic beverages or illegal drugs are allowed during or after work at any Summit job site.
- It is the employee or Member's responsibility to report equipment malfunction to SD-CFC/PAS staff.
- Follow correct techniques to prevent injuries. i.e. Lift Properly – use your legs, not your back.
- Follow Universal Precautions guidelines regarding blood-borne pathogens and other infectious agents.

REPORTING ACCIDENTS/INJURIES ON THE JOB

It is the Personal Assistant/Caregiver's responsibility to comply with Montana State Fund regulations:

Montana State Fund

Do you know what to do in case of an accident?

Immediately reporting on-the-job accidents and filing an Initial Incident Report form ensures you get the medical care you need. **It is required by state law.** Here are some first steps:

- ➔ Get proper medical attention.
- ➔ Report your injury right away to the assigned person (if you don't know who to report to, ask your supervisor).
- ➔ With the help of your supervisor or assigned person, fill out a Initial Incident Report form within 24 hours of your accident.

- All work related incidents must be reported to Summit Independent Living staff immediately (no later than the next business day.)
- An Initial Incident Report form (see page 21 of this manual) must be filled out and forwarded to the Missoula Summit office.
- Fill out the Initial Incident Report completely and to the best of your knowledge. You will receive a copy of the report in your employee folder. If you need more copies, please call the Summit SD-CFC/PAS Coordinator.
- Summit will report all injuries to Montana State Fund, our Worker's Compensation provider.
- All reports will be followed up by Summit and Montana State Fund.

BLOOD-BORNE AND OTHER PATHOGENS EXPOSURE PREVENTION

Universal Precautions

Universal Precautions are actions that you take to place a barrier between yourself and potentially infected body fluids.

Biological hazards expose workers and clients to infectious disease risks. Blood and other body fluids (i.e., semen, vaginal fluids, saliva, urine, feces & vomit) may contain viruses and bacteria that can be passed on to another person through direct contact. Hepatitis B & C and HIV are diseases that can be transferred from one person to another through contact with infected blood and/or body fluids. Since there is no way to know without testing if a person has hepatitis B or C or HIV, **it is recommended that you treat all body fluids as though they were infected.**

Exposure Prevention

Exposure prevention means following the Universal Precautions guidelines.

Proper infection control practices will protect caregivers and Members from acquiring healthcare associated infections.

Anytime there is blood-to-blood contact with infected blood or body fluids, there is a potential for transmission.

Unbroken skin forms an impervious barrier against blood-borne pathogens. However, infected blood can enter your system through: Open sores, cuts, abrasions, acne, dermatitis, or blisters.

Health care workers with open lesions (injury or wound) or dermatitis (skin rash) should avoid direct contact with patients and their supplies and equipment until healed.

Universal Precautions Guidelines

The following is a summary of the Centers for Disease Control's universal precautions and guidelines for control of AIDS, hepatitis B, and other infectious diseases:

- a) Consider all blood and body fluids to be contaminated.
- b) Always wash hands before and after (patient) contact.
- c) Always wash hands if contaminated with blood or body fluids
- d) Wear gloves when handling or touching blood, body fluids, body tissue, mucous membranes, non-intact skin, or contaminated equipment and supplies.
- e) Wear gloves when performing venipuncture and other blood access treatments or procedures.
- f) Change gloves after each patient contact.
- g) Wash hands after glove removal. **Gloves do not replace handwashing.**
- h) Wear gloves, gown, mask, goggles/face shield if splashing of blood or body fluids can occur or if exposure to droplets of blood or body fluids is a possibility. Examples of this are wound care and endoscopy.
- i) Use extreme caution when handling needles, scalpels, and other sharp instruments (sharps) during procedures and when handling them after procedures are completed. Dispose of sharps in an approved puncture-proof container that should be located as close as practical to the work area.
- j) Use a mouthpiece if performing cardiopulmonary resuscitation although saliva has not been implicated in transmission of human immunodeficiency virus (HIV), the virus that causes AIDS.
- k) Clean blood and body fluid spills with disinfectant or a 10 percent solution of sodium hypochlorite (household bleach).
- l) Report needle-sticks, splashes, and contamination by wounds or body fluids. Follow up with employee health services, physician, and other appropriate personnel.
- m) Pregnant health care providers should be especially careful to adhere to the guidelines so as to protect themselves and the unborn child.

Occupational Exposure can be caused by:

- Accidental puncture from contaminated needles, broken glass, or other sharps
- Contact between broken or damaged skin and infected body fluids.
- Contact between mucous membranes and infected body fluids.

Post Exposure Actions

- Document the route of exposure and exposure event circumstances, following the Summit ILC reporting procedure.
- Identify and document the source individual.
- Test the source individual's blood for HBV and HIV as soon as possible.
- Have your blood tested.
- Have post exposure prophylaxes administered.

Preventing Back Injuries

Preventing a back injury is much easier than repairing one. Because your back is critically important to your ability to walk, sit, stand, and run, it's important to take care of it. Most back pain arises from using your back improperly, so learning a few basic rules about lifting, posture and proper exercise can help keep your back in good shape.

Lifting and Back Injury Prevention

- Never pick up a load without first determining how heavy it is.
- Always use lifting aides when possible.
- If you must lift, bend at the knees, hold the load close to your body, and use your legs to lift.
- Never try to lift heavy items above your head.
- Be sure to set items down correctly.
- Never twist when lifting an item. If you must turn, do so by turning your feet, not twisting your back.

EXERCISE TO STRENGTHEN YOUR BACK AND REDUCE STRESS

Having a strong back and stomach muscles is important in order to ease the work your back is put through each day. By doing simple back-toning exercises, you not only strengthen your back but also reduce stress and improve your appearance too. Check with your doctor as to the best exercise for you.

LOSE EXCESS WEIGHT

Excess weight exerts extra force on back and stomach muscles. Your back tries to support the weight out in front by swaying backwards, causing excess strain on the lower back muscles. By losing weight, you can reduce strain and pain in your back. Check with your doctor for the most sensible diet plan for you.

MAINTAIN GOOD POSTURE

You can prevent back pains by learning to sit, stand and lift items correctly. When you sit down, don't slouch. Slouching makes the back ligaments, not the muscles, stretch and hurt, thus putting pressure on the vertebrae. The best way to sit is straight, with your back against the back of the chair with your feet flat on the floor and your knees slightly higher than your hips. Lean to stand tall with your head up and shoulders back.

MAINTAIN GOOD POSTURE WHILE YOU SLEEP

Sleep on a firm mattress or place plywood between your box springs and mattress for good back support. If your mattress is too soft it could result in back sprain or sway back. Sleep on your side with your knees bent on your back with a pillow under your knees for support.

MAINTAIN GOOD POSTURE WHILE YOU DRIVE

Drive with your back straight against the seat and close enough to the wheel so your knees are bent and are slightly higher than your hips.

PLAN YOUR LIFT

In order to lift correctly and reduce strain on your back, it's important to plan your lift in advance. This means to think about the weight of the object you will be moving and the distance you will be moving it. Is it bulky? Will you need help? Do you see any hazards that can be eliminated? Think about this whenever you do any lifting.

POSITION YOURSELF CORRECTLY IN FRONT OF THE LOAD

Once you have planned your lift, the next important step is to align yourself correctly in front of the load with your feet straddling the load, one foot slightly in front of the other for balance. Slowly squat down by bending your knees, not your back and stomach. Using both hands, firmly grab the load and bring it as close to your body as you can. This will help distribute the weight of the load over your feet and make the move easier.

LIFT WITH YOUR LEGS, NOT YOUR BACK

Once the load is close to your body, slowly straighten out your legs until you are standing upright. Make sure the load isn't blocking your vision as you begin to walk slowly to your destination. If you need to turn the side, turn by moving your feet around and not by twisting your stomach.

SET THE LOAD DOWN CORRECTLY

Once you have reached your destination, it's equally important that the load is set down correctly. By reversing the above lifting procedures you can reduce the strain on your back and stomach muscles. If you set your load on the ground, squat down by bending your knees and position the load out in front of you. If the load is set down at table height, set the load down slowly and maintain your contact with it until you are sure the load is secure and will not fall when you leave.

GET HELP, IF NEEDED

If the load is too heavy, bulky or awkward for you to lift alone find a friend to help you carry it. If no one is available is it possible to break the load into two smaller loads? Or, can you locate a cart or dolly to help you move it? Look for simple solutions to help make the move easier on you.

Activities of Daily Living

Bathing & Dressing safety

Bathing is one of the most physically challenging care-giving tasks.

- Ensure the bathroom is set up to accommodate the type of assistance required for the needs of the Member. This will require an assessment of the room, as well as an assessment of the client's mobility.
- Use the appropriate tools, such as grab-bars and shower seats. These should be permanently installed, not only to make the bath safe and comfortable for the Member, but also safe for the care-giver.
- When bathing an individual, try not to reach too far, as this can cause shoulder and back strain.
- Make sure all the supplies you will need are within close reach.
- Make sure there are appropriate floor coverings in the bathroom. Use non-skid rugs that will not slide or roll up. Use indoor carpet tape to fasten the rug to the floor (available at hardware and home supply stores).
- Make sure any water on the floor is cleaned up immediately, before you or the client walk on the surface. Falls in the bathroom account for a large number of in-home injuries.
- If you must kneel when bathing a Member, kneel on one knee, and then alternate to the other. Always use a pad of some sort under your knee.
- Never bend at the waist when providing assistance. If the client is at a lower point than you are, either kneel or squat to offer assistance.
- When assisting the client out of the tub/shower, use mechanical lift aids whenever possible. If mechanical aids are not available, remember to lift properly. Always use arms and legs to perform the lifting task, not your back.
- As with bathing, it is important to avoid putting undue stress on your body when performing this task. Allow the client to complete as much of their dressing as possible. If you need to offer support, such as stabilization, be sure that you are not using your back as the primary support.
- Dress the client in the bedroom, not in the bathroom. Generally, there are fewer obstacles in a bedroom and you don't have to worry about water on the floor.
- If you must perform a task such as tying shoes, kneel or squat, never bend at the waist.
- Wear appropriate shoes when assisting in the bath. Slip-resistant, close-toed shoes are best.

Light Housekeeping & Homemaking Safety Tips

Some Members with Summit Independent Living are given homemaking hours. These hours cover some activities that are not covered under the State Plan hours. Below is a list of some of the activities included under the homemaking portion of a contract. Please be sure to check with the program coordinator if you have questions about homemaking. If

there are no homemaking hours scheduled for the Member, please do not perform these duties.

Bathrooms

Blood and other body fluids may contain viruses and bacteria that can be passed on through direct contact. It is very important to follow Universal Precautions When cleaning a bathroom. (Refer to page 6 of this manual for more information)

- Wear disposable gloves.
- Make certain your disposable gloves are recommended for use with the cleaning product you are using.
- After properly disposing of your gloves, wash your hands with hot, soapy water.
- To avoid slips, trips, and falls when cleaning the bathroom: Always wear appropriate slip resistant, closed-toe shoes when cleaning the bathroom. Shoes that are soft plastic or rubber are generally the best type of shoe.
- Work your way toward the door, so you don't have to walk on previously cleaned surfaces. Always maintain 3 points of contact when scrubbing the shower: both feet firmly planted on the floor, one secure handhold and using your other hand to scrub.
- Ergonomic issues – consider the reaching, bending, twisting, stooping, kneeling, and other movements needed to complete the task. Try to minimize or eliminate these motions.
- When cleaning the tub or toilet, kneel on one knee at a time and use a pad under the knee.
- When leaning over the tub to scrub the bottom and lower sides, squat or kneel on one knee, don't bend straight at the back.
- Don't overreach. If the shower is abnormally deep, try standing in the shower on a non-slip surface to reduce your reach. Use a stepstool for high places.

Flipping the mattress

- Mattresses queen sized or larger should never be flipped by one person. Always request assistance in completing this task.
- Strip the bed of all linen. This includes mattress pads.
- To make the flip easier, slide a plastic bag between the mattress and the box spring on the side you will be pulling the mattress toward.
- Pull the mattress toward you (away from the side with the plastic bag) until it is standing on end. Have your helper steady the mattress while you move to the other side to be the "catcher" when the mattress is lowered.

Cleaning out the refrigerator/freezer

- Have several small boxes in which to place items to keep.
- If items are to be disposed of, have a trash can near the work area.
- Never overload boxes or trash cans. Remember, frozen foods can be heavier than normal items in a box, so be sure to check the weight of the box frequently.
- Remember, reaching into chest freezers can be dangerous. If you must reach to the bottom of a chest freezer, get a step stool and place it as close to the freezer as

possible. Additionally, remember to limit the amount of weight you are lifting from the bottom. The freezer will challenge your use of good lifting techniques.

Yard maintenance

- When mowing, always use proper personal protective equipment.
- Hearing protection is of utmost importance as lawn maintenance equipment produces noise loud enough to cause hearing loss.
- Eye protection should always be worn when trimming.
- Long pants and closed-toe shoes should be worn for protection. Never mow or trim in shorts and sandals.
- Watch for trip hazards.
- Avoid sticks, rocks, and other hard objects. These objects could become projectiles and hit you or bystanders.
- Make sure all the appropriate guards are in place on the mower or trimmer. Never remove guards.
- Always fuel the machine when the engine is off and cool. Hot engines are a source of heat and will ignite gasoline vapors.
- Never use riding mowers on steep slopes. They can tip and cause serious injury or death. When using a walk-behind mower, always go across the slope.
- Never tamper with or disable the grab bar shut off device.
- Never use a mower or trimmer for a purpose other than intended. Never trim hedges or trees with trimmers or mowers, and never reach under the mower when the power is on.
- Never mow in reverse. If you have to back up, disengage the blade on the mower.
- Make sure pets and children are inside and away from danger when mowing.

Vacuumping, sweeping, and mopping

- Cleaning floors consists of repetitive motions which can result in repetitive motion strain injuries. Always spread out this type of activity over an extended period of time to reduce the chances of developing a cumulative trauma disorder.
- Use adjustable or telescoping tools whenever possible. Make sure that the vacuum, broom and mop are all used at the appropriate height. Don't try to carry vacuums. They are awkward and heavy and can cause back or shoulder injuries.
- Dusting and window washing can require work in high locations. Never reach above shoulder height as this can cause shoulder, neck, and back pain.

Floors

- Loose boards, slippery throw rugs, frayed carpet and loose kitchen tiles should be removed or repaired. Inform your Member of any potential safety hazards.
- Use throw rugs heavy enough to lie flat. Use rugs with nonskid backing. Use indoor carpet tape to fasten the rug to the floor (available at hardware and home supply stores).
- Wipe up spills immediately.
- Don't stretch electrical cords across rooms, and never run extension cords underneath a rug or carpet. Besides being a tripping risk, they can overheat or fray and catch fire.

- Arrange furniture so everyone can move through the house easily.
- Keep floors clear of toys, magazines, or other objects.
- Always use cleaning supplies according to their directions. Pay close attention to the directions for use: too much of the product in solution may cause the floors to be slippery.
- Make certain you are using the correct product for the job. The use of an incorrect chemical may cause the floor surface to become dangerous.

Safe use of household cleaners/chemicals

- Always work in a well-ventilated area.
- Never use chemicals unless you have been trained in their proper use, disposal, and safety precautions.
- Never mix chemicals.
- Never sniff or taste chemicals.
- Always keep chemicals in labeled containers.
- Always place chemicals back where they belong when done and out of the reach of children.
- Never set chemicals near heat or other sources of ignition.
- Never allow chemicals to contact food or drinks.
- Always wear the appropriate Personal Protective Equipment when working with chemicals
- Always read the Material Safety Data Sheet (available from the product manufacturer) for each chemical prior to using it.

Preventing Slips, Trips and Falls.....

In the KITCHEN

- Walk slowly and carefully on slippery surfaces.
- Wear shoes with good traction and/or traction devices.
- Keep floors clean and uncluttered and, if possible, treat floors with a slip-resistant coating.
- When spills occur, clean them up immediately.
- Never carry large loads that obstruct your vision.

On STAIRWAYS and STEPS

- Keep stairs and steps well lit and free of objects.
- Fasten any stair coverings securely. Do not put throw-rugs on stairs or steps.
- Provide sturdy handrails.
- Carry loads that are small enough to not block your vision and allow you a free hand.
- Take your time when going up or down stairs.
- Don't use stairways to store boxes, tools, equipment or odds and ends, even temporarily.
- Use extra care going up or down stairs when wearing high heels, house slippers, long dresses or robes.

- Never use small rugs at the top or bottom of stairways.
- For extra caution, paint the top and bottom steps white. Or, put white stripes on the front edges of steps.
- Mix sand with paint for a rough, non-slip surface on basement or outdoor steps.
- Keep a flashlight handy when using poorly lit stairways.
- Always fix broken stair treads.
- Take care on older stairs. They may be steeper, with narrower treads than newer stairs.

In the BATHROOM

- Be cautious around the wet, slippery surfaces, which are often seen in bathrooms. Keep rubber-backed or taped-down rugs on the floor.
- Use a nonskid mat or self-adhesive nonskid appliqués in the bathtub or shower.
- Install grab bars in and out of the bathtub or shower. Have a grab bar system installed around the toilet for household members with disabilities.
- When hanging wet clothes, be sure they drip into the tub or shower and not onto the floor where they could create puddles.
- Install night lights in the bathroom for nighttime visitors.

In the BEDROOM

- Never stand on the bed to perform tasks. Always use a step stool or a ladder.
- Never use dresser drawers as a step.
- Never stand on boxes or other stacked items.

OUTDOORS

- Watch for broken or uneven sidewalks or walkways.
- Watch for ice. If you must walk across ice, use the 'penguin walk' described on page 10 of this manual.
- Wear appropriate footwear. When working in the garden, wear shoes that have been designed for use in and around water. In winter conditions, avoid cowboy boots, hard soled shoes, and high-heeled shoes.
- Watch for tree roots, pets, and other obstacles that could be hiding in the grass.
- When getting in and out of your vehicle, use three points of contact at all times and be sure to watch where you are stepping (Three points of contact is defined as having one hand and both feet or both hands and one foot in contact with something at all times).

Assisting the Member with Bathing & Dressing

- Always keep your reaching to a minimum.
- Kneel or squat when performing tasks such as tying shoes. Never bend at the waist.
- Remember to keep your body in neutral posture when assisting the client. It is important that reaching above your head, bending, twisting, pushing, and pulling are done so as to not cause you pain or strain.

OTHER THINGS YOU CAN DO

- Reduce chances of falling by wearing shoes with pliable soles and low heels.
- Short garments or pants are safer to wear around the house than long dresses or robes.
- Install night lights throughout the house. Some plug into a socket, but all are cheap to buy and operate.
- Arrange furniture so traffic patterns within rooms are as straight and wide as possible. Keep furniture out of normal traffic areas.
- Close any open drawers, cabinets, doors or closets after use and before going to bed.
- Use a stepladder or step stool to reach high places. However, do not stand on the top step of a stepladder.

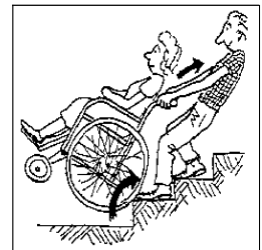
Wheelchair safety

- The Member should have the safety strap/seat belt
- When folding or unfolding the wheelchair, keep fingers and hands clear of any moving parts.
- Pushing and pulling wheelchairs up and down ramps can be dangerous. Always plan the move, and on ramps that are steep, proceed with caution. Always watch where the wheelchair is located on the ramp, and know where you are in relation to the sides of the ramp. Try to avoid ramps without hand-rails.
- Always read the manufactures instructions and receive proper training prior to using any mechanical lifts. These lifts have pinch points, and other operating parts that can cause serious injuries.
- When possible, push the wheelchair. Pulling puts extra strain on your back and shoulders, and can cause injury.

How to Maneuver a Wheelchair in Different Situations

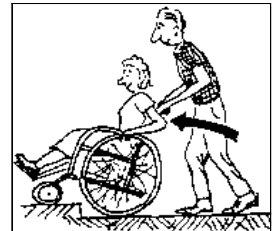
UP STEPS BACKWARDS

- Reverse chair with back to steps.
- Tip chair back and balance weight on back wheels.
- Pull steadily upwards.
- Move back until sufficient room to put down all wheels this method can be used to go up multiple steps.



UP STEPS FORWARDS

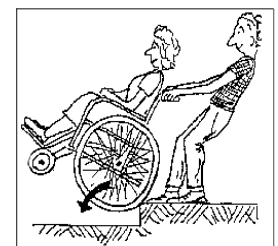
- Tip chair back so front wheels clear step.
- Put front wheels on top of step.
- Push steadily and firmly (large wheels will ride up).
- Ensure chair is safely on flat surface.



DOWN STEPS

When going down multiple steps or a steep slope, the wheelchair should generally be maneuvered down backwards to prevent the passenger from being tipped forwards.

- Reverse to edge of step
- Lower rear wheels down step
- Lower front wheels



If there are only one or two steps, it may be easier to tilt the wheelchair backwards and gently lower as shown.

THROUGH DOORWAYS

Approach the doorway backwards. The assistant should use their body and hold door open and pull wheelchair through.

TO PUSH A WHEELCHAIR DOWN HILL

If the gradient is very steep it may be advisable to go down backwards to prevent the person in the chair from tipping out.

FOLDING A WHEELCHAIR

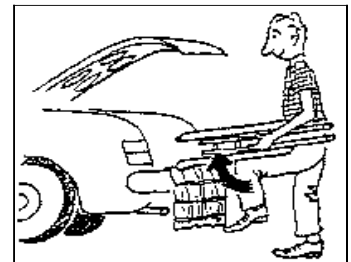
When folding or unfolding the wheelchair, keep fingers and hands clear of any moving parts. Remove cushion and lift foot plates. Stand to one side of the chair, place hands at the center of the front and back of the seat and pull upwards.

UNFOLDING A WHEELCHAIR

Lean the wheelchair to one side against your body. Locate each seat frame and place flat hands at the front and along the inside edge then push down. Keep fingers clear of the edges of the seat frame so they do not get trapped.

FOUR EASY STEPS TO PUT A WHEELCHAIR IN A CAR

- Remove footplates, armrests and wheels (if quick release wheels are fitted).
- Fold the chair and engage brakes.
- Hold the wheelchair frame and tilt the chair back towards you.
- Use your knees to lift and raise it to the trunk of the car.



Remember: Use each of these techniques with great care! Use proper lifting procedures, and don't place your body into unsafe situations.

Animal/Pet Safety for the Home Care Worker

Many of the Members who contract with Summit Independent Living have pets at their home. Additionally, many Members live in apartment complexes or other types of housing that have a common yard. In many of these housing units, there may also be pets and other animals that could pose a risk of harm.

As part of your assessment for hazards inside and outside the home, consider household pets and other animals. Sources of injury from animals, especially pets, may include bites, tripping, and allergic reactions.

Make sure all pets are current on their vaccinations, including rabies. Unless it is absolutely necessary or you know the animal well, avoid contact with pets. An animal bite is painful and can cause a bad infection.

Cats often let you know when they have had enough attention by biting or scratching.

Dogs may appear friendly but can also be very protective of their territory and owners.

If aggressive action by the animal occurs, request that it be secured in a safe place prior to your visits.

You may encounter other animals outside of the Member's home. Remember, any animal can become aggressive if it feels its territory is being infringed upon.

When you are assisting the client, pets can get underfoot causing a safety hazard. It is advisable to work out an arrangement for containing the animal prior to the start of the session.

Some pets, including turtles, frogs, lizards, snakes, and other caged animals could pose a threat to your health. They may harbor infectious organisms which can cause serious illness. If you handle these pets, be sure to wash your hands with hot soapy water immediately after handling them.

Pet rodents can also pose health hazards to humans. It is advised that you not handle the Member's pet rodents; however, if you do come into contact with them, wash your hands with hot soapy water immediately after contact.

Sometimes pets can chew through electrical cords. If you notice this has occurred, turn off the power to that appliance and unplug it. Notify the Member and remove the appliance.

If you have allergies to certain animals, it may be necessary to limit your clientele to Members without a pet. However, you may consult your health care provider for guidance. You may be able to protect yourself by taking an appropriate allergy medication prior to your home visits.



Electrical Safety in the Home

Working Safely

- Never allow electrical outlets to become overloaded. During the holidays, many outlets are stressed past their capacity due to the extra electrical components plugged into them.
- Never place electrical cords under rugs.
- Never plug extension cords into other extension cords, or into power strips. This can cause an overload on the plug. Additionally, the cord could heat and cause a fire.
- Never plug a power strip into another power strip. One power strip per outlet! **DO NOT OVERLOAD POWER STRIPS!**
- Always be aware of the overhead power lines. Never use a ladder in the vicinity of overhead lines, and always watch when moving items that extend above your head.
- Always use the correct amperage fuses and circuit breakers for the main circuit panel. If you have never been trained in the proper use of a fuses and circuit breakers, hire a professional to assist you with the task.
- Do not use appliances with frayed wires or broken cords. Always replace or fix frayed wires or broken cords, or replace the electrical item with a new one.
- Extension cords are to be used on a temporary basis. Never use extension cords for permanent wiring. A good rule of thumb when using extension cords is limit it to 30 days or less.
- Never store combustibles such as paper near electrical appliances. Always allow appliances room to breathe, to allow proper air circulation around the entire unit.
- Never staple, nail, or tack cords to hold them in place. This can cause damage to the wires.
- Never allow electrical appliances or tools to be used near water. If items, such as curling irons and hair dryers are to be used in the bathroom, always make sure there is no water near them. Close the lid on the toilet and empty the sink and tub. Always unplug the item when done using it. Never allow appliances, including cordless telephones, to be used while in the tub.
- If you see a downed power line, alert the electric company. Stay away from it.
- If digging, especially when planting trees or shrubs, always call for a utility locate. It is free, takes very little time, and could save your life.
- Never pull a tool or appliance by its plug. Always unplug items by firmly grasping the plug end and pulling straight out.
- Never alter a plug end. Always plug three pronged cords into three pronged outlets, and never alter polarized plugs to fit into non-polarized outlets.

Burn & Fire Prevention

- Install a smoke alarm and carbon monoxide monitor in every bedroom, outside every sleeping area, and on every floor of your home.
- Keep space heaters away from flammable materials.
- Don't wear loose-fitting clothing with long sleeves near ranges or ovens.
- Store combustibles away from all heat-producing appliances.
- Keep a fire extinguisher handy in the kitchen.
- Keep potholders easily accessible.
- Provide adequate room for safe handling of pots on the range top.
- Reduce the temperature on your hot water heaters to reduce the potential for scalding when using hot water in sinks.
- Never allow chemicals to touch your skin. If contact is made, immediately wash it off with water and soap. If you have undiluted chemicals on your skin, run the affected body part under water for 20 minutes.
- If you have sustained a burn, seek medical treatment. Never put burn cream over a chemical burn, it may make it worse.
- Never leave dish rags or aprons near a hot surface.
- Never leave stoves or other equipment unattended when in use.
- Clean range hoods and stoves on schedule to help reduce build-up.
- Don't overload electrical outlets.
- Don't force three-pronged cords into two-prong outlets.
- Don't use equipment with a frayed cord or bent prongs.
- Don't use equipment that smokes, sparks or is otherwise damaged.
- Make sure your hands are dry and free of lotions and other products that may make them slippery. A good grip is essential to preventing burns.
- Unplug all electrical devices when done, wait for them to cool, and store them correctly, with their cords wrapped up. Never wrap a cord around a hot curling iron.
- Never leave hot curling irons unattended. Curling irons can cause fires if allowed to get too hot.
- Never overload the clothes washing machines. This can cause damage to the machines which could result in electrical overloads and fires.
- If you have to use a public or shared laundry facility, do so during daylight hours. Only use well lit facilities, and let someone know where you are and when you will be back.
- Clean the dryer lint trap after every load.
- Make sure the machine has proper air flow around it. Also, clean the lint trap with warm soapy water at least monthly.
- **Develop and practice an emergency fire escape plan.**

Fire Extinguisher Safety Handout

P-A-S-S

Pull the pin

Aim at base of fire

Squeeze the handle

Sweep from side to side



Extinguishers are classed by the type fire they can put out. Some extinguishers are **Combination** types that can be used on several different types of fires

Types of Fires

Class A

Combustible material such as paper and wood

Class B

Fires involving flammable liquids such as gasoline, paint, diesel fuel or solvents

Class C

Fires started in electrical equipment by arcing or overheating

Class D

Fires involving combustible metal powders, flakes or shavings

Smart Safety Rules

Stand 6 to 8 feet away from the fire.

Use an extinguisher **ONLY** if you have been trained to use it.

Fire Extinguishers are for small fires in the early stages.

Know where fire extinguishers are located.

Never place a pressurized fire extinguisher upright unless you are holding it - if it falls over the nozzle can break off.

All fire extinguishers should have an inspection tag and a trigger seal and a pin.

After use, do not put a fire extinguisher back on its mounting – it must be refilled before being returned to its location.

Emergency/Disaster Planning

Disasters can happen at any moment. By planning ahead you can avoid waiting in long lines for critical supplies, such as food, water and medicine and you will also have essential items if you need to evacuate. For your safety and comfort, have a disaster supplies kit packed and ready in one place before a disaster hits.

- Assemble enough supplies to last for at least three days.
- Store your supplies in one or more easy-to-carry containers, such as a backpack or duffel bag.
- You may want to consider storing supplies in a container that has wheels.
- Be sure your bag has an ID tag.
- Label any equipment, such as wheelchairs, canes or walkers, that you would need with your name, address and phone numbers.
- Keeping your kit up-to-date is also important. Review the contents at least every six months or as your needs change.
- Check expiration dates and shift your stored supplies into everyday use before they expire. Replace food, water and batteries, and refresh medications and other perishable items with “first in, first out” practices.

Community Disaster Plans

Ask about the emergency plans and procedures that exist in your community.

Know about your community’s response and evacuation plans (e.g., hurricane, nuclear emergency, severe weather). If you do not own a vehicle or drive, find out in advance what your community’s plans are for evacuating those without private transportation or make arrangements with a neighbor who would drive you.

If you receive home care, speak with your case manager to see what their plan is in times of emergency and how they can assist with your plan.

When a disaster strikes, you may not have much time to act. Planning ahead reduces anxiety. Prepare now for a sudden emergency and remember to review your plan regularly.

Meet With Your Family and Friends

Explain your concerns to your family and others in your support network and work with them as a team to prepare. Arrange for someone to check on you at the time of a disaster. Be sure to include any caregivers in your meeting and planning efforts.

Assess yourself and your household. What personal abilities and limitations may affect your response to a disaster? Think about how you can resolve these or other questions and discuss them with your family and friends. Details are important to ensure your plan fits your needs. Then, practice the planned actions to make sure everything “works.”

Carry family/friends contact information in your wallet. Choose an out-of-town contact person. After a disaster, it is often easier to make a long-distance call than a local call from a disaster area.

Develop a plan

- Plan the best and quickest escape routes out of your home and evacuation routes out of your neighborhood.

- Decide on a meeting place outside your neighborhood in case you cannot return home.
- If you or someone in your household uses a wheelchair, make sure all escape routes from your home are wheelchair accessible.
- Know the safe places within your home in case you need to shelter during extreme weather events (e.g., *tornado*).
- Practice your escape drill every six months.
- Plan for transportation if you need to evacuate to a shelter.

Utilities

Talk to your utility company about emergency procedures and know how and when to turn off water, gas and electricity at the main switches or valves. Share this information with your family. Keep any tools you will need nearby. Turn off the utilities only if you suspect the lines are damaged, you suspect a leak or if local officials instruct you to do so (*Note: If gas is turned off for any reason, only a qualified professional can turn it back on. It could take several weeks for a professional to respond. Heating and cooking would need alternative sources*).

Smoke Alarms and Carbon Monoxide Alarms

Test your smoke alarms and carbon monoxide alarms regularly. Consider strobe or vibrating alert systems that might meet your needs. Change the batteries in all alarms at least once a year or according to the manufacturer's instructions.

Post emergency numbers near all of your phones

Include the numbers of those in your support network. Remember that in some emergencies telephone lines might not be working. Consider having alternative plans for contacting those in your network.

Keep support items like wheelchairs and walkers in a designated place so they can be found quickly. This step is essential for those who have home-health caregivers, particularly for those who are bed bound.

Plan for Your Pets or Service Animals

Take your pets with you if you evacuate. However, be aware that pets (except service animals) are not permitted in emergency public shelters for health reasons.

Prepare a list of family, friends, boarding facilities, veterinarians and 'pet-friendly' hotels that could shelter your pets in an emergency.

Vital Records and Documents

Keep copies of vital family records and other important documents such as birth and marriage certificates, social security cards, passports, wills, deeds, and financial, insurance and immunizations records in a safe location, like a fire safe or safe-deposit box.

Every Six Months Maintain Your Kit and Practice Your Plan

- Review your plan with all of your friends and family.
- Check your disaster supplies kit and refresh all expiring items (e.g., food, water, medications and batteries).
- Conduct fire and emergency evacuation drills on a regular basis with your family. Make sure all your plans "work."

If an employee is injured or an accident occurs:

- If an accident occurs to an employee while on the job but **no** injury has occurred and no medical treatment has been necessary;

(1) Call the Summit SD-CFC/PAS staff and leave a brief message regarding a non-injury accident with your contact information,

(2) Fill out an Initial Incident Report and mail to Summit. If follow up is necessary, you will be contacted by Summit staff.

- If an injury occurs that requires medical treatment;

(1) Have the injured employee seek medical attention. When medical evaluation/treatment is given, the employee informs the provider this is covered under Summit's workers compensation insurance. The medical provider will contact Summit or Montana State Fund for a claim number.

(2) Call Summit SD-CFC/PAS staff and leave a brief message regarding an injury accident with your contact information within 24 hours of the incident.

(3) Fill out an Initial Incident Report and mail to Summit. You will be contacted by Summit staff.

(4) Provide the injured employee with a Grab and Go packet included in the Member manual. The employee needs to take this to their medical provider to see if they can participate in the Return-To-Work program and any work restrictions they may have.

(5) Summit staff will contact the Member or Personal Representative and the employee regarding the incident. A First Report of Injury will be filled out by Summit and mailed to the employee for their review and signature. This report is then mailed to Montana State Fund. Summit staff contacts Montana State Fund as well to let them know of the incident.

SUMMIT INDEPENDENT LIVING
INITIAL INCIDENT REPORT

Today's Date: _____

Date of accident or injury: _____

Time of accident or injury: _____

Name of injured employee and any involved person(s):

WHO witnessed the incident? _____

WHAT was the employee doing when the injury or the accident occurred?

WHAT part of the body received the injury? _____

WHERE did the incident take place? (for example: in the bathroom, bedroom, etc.)

WAS there any emergency care provided for this incident? Yes No

If yes, list name of hospital or urgent care facility where treated:

Date of emergency care visit: _____

I hereby acknowledge that the information given above is accurate to the best of my knowledge.

Signature of Employee

Signature of Supervisor

Provide original copy to Summit Safety Officer in the Missoula office.
When received it will be placed in the employees personnel file.

Early Return to Work Program

An Employee Benefit

The goal of the Return to Work Program is to help our employees who have been injured on the job return to work as soon as possible. The program promotes active management of incidents, open communication between all parties, and options such as appropriate transitional work duties for an injured worker upon their return to the workplace.

Worker's Compensation payments cover only two-thirds of an injured employee's pay. By returning to work as soon as possible, injured employees receive their normal compensation sooner, minimizing lost wages and time.

Studies show Return to Work Programs help injured employees heal more quickly and completely.

Return to Work Programs have been proven to reduce depression and alleviate emotional stress common among injured employees.

As an employee, you play a key role in the success of our Return to Work Program. If you are injured on the job, report the injury to your employer immediately. All injuries must be reported to Summit on the same day the injury occurred. Tell your health care provider of your coverage under the Return to Work Program. Ask him/her to complete a Medical Status Form (contained in the Grab and Go kit). Communicate regularly with your employer.

Grab and Go kit

The Grab and Go kit is to assist with communications between the injured employee, medical provider(s), Summit and Montana State Fund. The employee should take the kit with them to the treating medical provider if possible. If not on the first treatment, on the next visit, and return the completed forms to Summit ILC. The Grab and Go kit contains:

- A letter to the medical provider describing the Return-To-Work policy and Summit's commitment to getting the employee back to work as soon as medically appropriate.
- A Medical Status form. This form outlines the physical activities the employee is able to do and should be completed by the treating medical provider at the initial appointment and each follow-up visit as necessary. The employee should provide Summit with an updated form following each appointment.

RE: Company Return to Work Program

Dear Medical Provider:

Our employees are the most important assets of our company.

When one of those employees is injured, we are committed to helping him or her return to work as soon as it's medically appropriate, both for the well-being of the employee and our company.

That is why we have implemented a Return to Work program. Through this program, we work with medical providers and injured employees to facilitate recovery and a return to the workplace. Our program includes options such as temporary modifications of work schedules and duties. We can also create temporary positions to accommodate an injured employee's physical capabilities. If an injury results in permanent restrictions, we strive to accommodate the employee's needs in compliance with the Americans with Disabilities Act.

If you have any questions about our Return to Work Program or you would like to learn more about our workplace safety programs, please contact me directly.

Thank you for your assistance on this matter.

Sincerely,

Contact Information:

Name: Tami Hoar

Phone: (406) 728-1630 ext. 120

MEDICAL STATUS FORM

Employer Contact Information (Optional)

Employee Info

Employee's Name (Last, First) _____ Date of Birth (mm/dd/yyyy) _____ Provider Timestamp _____

Claim Number _____ Date of Injury (mm/dd/yyyy) _____ Provider Contact Information _____

Released for Work?

Employee Released to Full Duty Date _____ To _____

Employee Released to Modified Duty (See Work Abilities) Date _____ To _____

Employee May Work Limited Hours: _____ hours per day Date _____ To _____

Employee May Work Part-time: _____ Date _____ To _____

Employee Not Released to Work Date _____ To _____

Capacity Duration (estimate days): 1-10 11-20 21-30 30+ permanent

	Blank Space = Not Restricted (NR)			Continuous	Frequent	Occasional	Never
	L	R	B				
Hand/Wrist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grasping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pushing/Pulling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fine Manipulation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting 01-10 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting 11-20 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting 21-25 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting 26-50 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting 51-70 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of Hours Employee May: Sit <input type="checkbox"/> Stand <input type="checkbox"/> Walk <input type="checkbox"/>							
List Other Restrictions:							

Signatures

Employee Signature _____ Date _____

Provider Signature _____ Date _____

Copy of Medical Status Form to employee Date of Next Visit _____

Medical Status Form Instructions

The purpose of the Medical Status Form is to:

- 1) facilitate communication between a worker with a work-related injury or occupational disease, the employer, and the health care provider for Stay at Work/Return to Work; and
- 2) provide necessary medical status to the insurer.

The Medical Status Form is a statutory requirement. MCA 39-71-1036 says, "The department shall create a medical status form to be provided to a health care provider providing treatment for a compensable injury or occupational disease." An insurer may request additional information not contained in the form from the health care provider. The treating physician (or a designee) is now required to complete the form following every office visit with the worker.

This three-part form is designed to transmit the correct and essential information to the appropriate parties, easily and accurately.

Employer Contact Information: Enter the name, address, phone number and facsimile number of the Employer. (Optional)

Employee Info: Enter Patient/Employee Name, Date of Birth, Claim Number and Date of Injury.

Provider Time Stamp: Health Care Provider may enter timestamp if necessary.

Provider Contact Information: Enter the name, address, phone number and facsimile number for the Provider.

Released for Work? The Medical Status Form will allow for more than one option to be selected. Check all the applicable boxes and enter the effective date, which in most cases is the date of current office visit. The "To ___" box in most cases is the follow-up visit date and can be considered the "Anticipated MMI date" by the payer. See below for steps for each option.

Patient/Employee Released to Full Duty: If selected, enter the effective date, and skip to Signature and Treatment Plan.

Patient/Employee Released to Modified Duty: If selected, enter the effective date, answer the Capacity Duration (estimate days) and continue to the next section (Modified Work Abilities).

Patient/Employee Released to Limited Hours: If selected, enter the number of hours per day, enter the effective date, answer the Capacity Duration (estimate days) and skip to the questions at the bottom of the next section (Modified Work Abilities).

Patient/Employee Released to Work Part-time: If selected, enter days of the week, enter the effective date, answer the Capacity Duration (estimate days) and skip to the questions at the bottom of the next section (Modified Work Abilities).

Patient/Employee Not Released to Work: If selected, enter the effective date, answer the Capacity Duration (estimate days) and "To ___" date. Skip to Signature and Treatment Plan.

Capacity Duration (estimate days) is the provider's estimation of how long the current work restrictions will last. Are the work restrictions permanent? The capacity duration can also be used to estimate "Anticipated MMI Date" by the payer.

Modified Work Abilities: This section must be completed if Patient/Employee Released to Modified Duty was checked in the previous section. All categories should be completed if there are restrictions. If there is no restriction; BLANK SPACE means this area is normal and not restricted.

Work Abilities (Continuous/ Frequent/ Occasional/ Never): Check the appropriate box for each activity. If there is limitation to use just one side or hand check the appropriate "L" for left, "R" for right or "B" for bilateral box.

Number of Hours (Sit/Stand/Walk): Enter the maximum number of hours for each activity the patient/employee is limited to per day if these hours of limitations exceed normal break and lunch periods and are not accommodated by normal breaks and lunch periods in an 8 hour day.

List Other Restrictions: Is the patient/employee involved in treatment and/or medication related to the work-related injury/occupational disease that might affect their ability to work safely in any capacity? --A response is required. Enter in free text area of List Other Restrictions. Will the patient/employee be required to use any devices or braces? --A response is required. Enter in free text area of List Other Restrictions. Additional comments specific to patient/employee's work abilities --A response is required. Use the List Other Restrictions area to indicate any unaddressed limitations, such as driving restrictions.

Signatures: The signature of the patient/employee is for the sole purpose of acknowledging receipt of the information on the form.

Provider Signature to complete and date as indicated. Check box if copy of form is given to employee. Date of Next (scheduled) Visit.

The information above is automatically transferred to the Page Two (yellow copy of triplicate form) and Page Three (pink copy triplicate form) of the form. Page Three (pink copy) is for employer ONLY. The bottom section on Page One (white copy) and Page Two (yellow copy) contains confidential information for the medical provider, insurer, and patient/employee only and is NOT given to the employer without the patient/employee's authorization.

Employee Progress: When slower than expected is checked this communicates to payer that more intervention or assistance may need to be undertaken to improve employee's progress.

Current Rehab: select appropriate category if applies.

Surgery: select one.

Comments: free text area to communicate further information regarding treatment plan or special circumstances or need for aggressive interventions to the payer; or Stay At Work/Return to Work.

Treatment concluded by this provider: select if this provider has no further treatments or interventions to offer the Employee. Enter effective date.

Max Medical Improvement (MMI): select if the Employee has reached MMI. Enter effective date.

Care Transferred to: complete if transferred indicating name of provider and specialty.

Consultation needed with: complete if necessary and indicate specialty and/or name of provider.

Study Pending: complete if there are diagnostic studies ordered and awaiting results.

Medications: complete for all medications whether OTC or prescribed for the work injury.

Opioids Prescribed for: indicate if Employee is receiving opioids and whether they are for acute (less than 30 days) pain or for chronic (greater than 30 days) pain.

Diagnosis: Enter the work injury/work disease diagnosed condition(s).



**Community First Choice &
Self-Directed Personal Assistance Services**

Safety Policy Statement

The Member or personal representative is responsible for assuring all employees have read, understand the Summit Safety Policy and Procedures manual. After which the Personal Care Attendant will sign and date the Safety Policy Statement, thereby agreeing to practice safety in the work environment. Additional copies of the Safety Policy and Procedures manual may be requested by calling the Summit SD-CFC/PAS staff at (406) 728-1630.

It is the intent of Summit Independent Living Center, Inc. to assure a safe and healthy work environment for Members and caregivers in the SD-CFC/PAS program. Summit expects each Member and caregiver(s) to recognize their obligations in the effort to maintain a safe work environment.

Members, caregivers and Summit employees must actively promote safety and accident prevention as an integral part of their normal job functions. Each Member, caregiver and Summit employee is responsible for implementing this policy by continually observing safety practices, guidelines, and standards throughout the workday. Full cooperation of all SD-CFC/PAS Members, caregivers and Summit employees is expected.

If an injury does occur, seek medical attention if necessary. Summit ILC has Workers Compensation Insurance for on the job injuries.

All injuries must be reported to Summit ILC, including emergency room visits. Summit ILC must receive prompt notification of all on-the-job injuries. An Initial Incident Report must be completed and sent to Summit ILC without delay. Summit ILC has a short time frame to report on the job injuries to our Workers Compensation carrier. The Member or their Personal Representative will provide a "Grab and Go" packet to the employee. This contains forms and information for a treating physician to fill out.

By my signature below, I certify that I have reviewed and understand the Safety Policy and Procedures. I understand that I have the opportunity to discuss any questions or concerns with Summit SD-CFC/PAS staff.

Employee Signature

Date

2025

Payroll Calendar

SUMMIT INDEPENDENT LIVING

Self-Directed Community First Choice/Personal Assistance Services

- Timesheets documenting any changes or clarification of shifts in MobileCaregiver +, as well as timesheets for services not logged in the application, are due in the Missoula office by Wednesday at 2pm after the pay period ends.
- Timesheets received after 2pm on the due date will be processed with the following pay period.
- Signed, original timesheets must be received.
- SD-CFC/PAS pay periods run every two weeks (begin Sunday, end Saturday)

Start of Pay Period (always on a Sunday)	End of Pay Period (always on a Saturday)	Time Cards Due (1 st Wed. after pay period ends)	Pay Day (2 nd Fri. after pay period end)
12/15/2024	12/28/2024	01/01/2025	01/10/2025
12/29/2024	01/11/2025	01/15/2025	01/24/2025
01/12/2025	01/25/2025	01/29/2025	02/07/2025
01/26/2025	02/08/2025	02/12/2025	02/21/2025
02/09/2025	02/22/2025	02/26/2025	03/07/2025
02/23/2025	03/08/2025	03/12/2025	03/21/2025
03/09/2025	03/22/2025	03/26/2025	04/04/2025
03/23/2025	04/05/2025	04/09/2025	04/18/2025
04/06/2025	04/19/2025	04/23/2025	05/02/2025
04/20/2025	05/03/2025	05/07/2025	05/16/2025
05/04/2025	05/17/2025	05/21/2025	05/30/2025
05/18/2025	05/31/2025	06/04/2025	06/13/2025
06/01/2025	06/14/2025	06/18/2025	06/27/2025
06/15/2025	06/28/2025	07/02/2025	07/11/2025
06/29/2025	07/12/2025	07/16/2025	07/25/2025
07/13/2025	07/26/2025	07/30/2025	08/08/2025
07/27/2025	08/09/2025	08/13/2025	08/22/2025
08/10/2025	08/23/2025	08/27/2025	09/05/2025
08/24/2025	09/06/2025	09/10/2025	09/19/2025
09/07/2025	09/20/2025	09/24/2025	10/03/2025
09/21/2025	10/04/2025	10/08/2025	10/17/2025
10/05/2025	10/18/2025	10/22/2025	10/31/2025
10/19/2025	11/01/2025	11/05/2025	11/14/2025
11/02/2025	11/15/2025	11/19/2025	11/28/2025
11/16/2025	11/29/2025	12/03/2025	12/12/2025
11/30/2025	12/13/2025	12/17/2025	12/26/2025
12/14/2025	12/27/2025	12/31/2025	01/09/2026
12/28/2025	01/10/2026	01/14/2026	01/23/2026
01/11/2026	01/24/2026	01/28/2026	02/06/2026



CHANGE OF ADDRESS FORM

Name (Please Print): _____

OLD ADDRESS:

Street Address: _____ Apt #: _____

City: _____ State: _____ Zip Code: _____

Phone Number: _____

NEW ADDRESS:

Street Address: _____ Apt #: _____

City: _____ State: _____ Zip Code: _____

Phone Number: _____

Employee Signature

Date