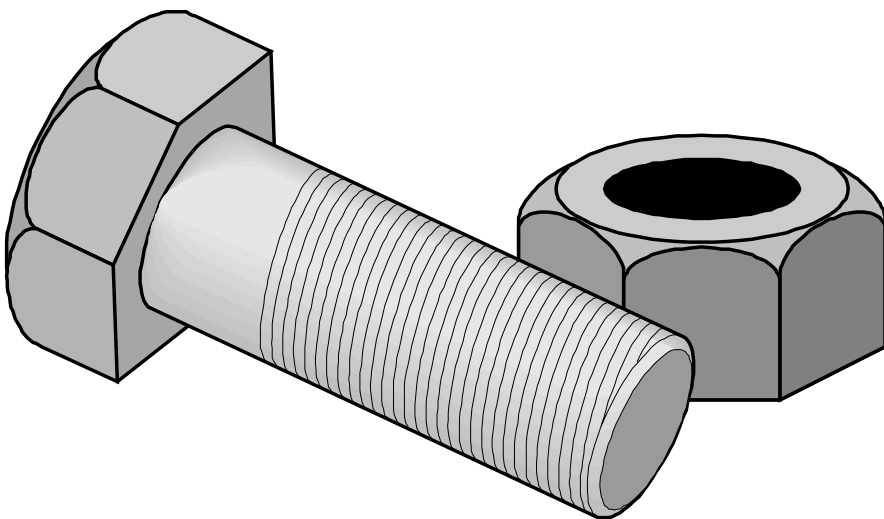


---

*DDSD's Residential Training presents...*

# NUTS AND BOLTS

## **Participant Manual**



State of Oklahoma Department of Human Services  
Developmental Disabilities Services Division

---

---

# NUTS AND BOLTS

## RESIDENTIAL TRAINING

### LEARNING OBJECTIVES

#### *Primary Objective:*

*Upon completion of this training and given the appropriate materials, the participant will be able to summarize and implement those projects around a home that make it into a pleasant and livable environment.*

#### *Secondary Objectives:*

- *Identify and be able to implement five methods that apply to home maintenance.*
  - *Discuss basic exterior home maintenance and how it relates to inclusion in the community.*
  - *Identify and be able to implement four methods of cleaning the home.*
  - *Define the quality assurance process and list four examples.*
-

---

# Nuts and Bolts

## TABLE OF CONTENTS

### Participant Manual

Introduction .....	1
Issues .....	3
I.    Accountability .....	3
II.   The Chain of Command.....	4
III.  Policy and Procedures.....	5
IV.  Work Schedules .....	5
V.    Injuries.....	6
Other Important Issues .....	6
I.    Pets .....	6
II.   Mail .....	7
III.  Personal Funds .....	8
IV.  Visitors .....	9
V.    Liability .....	10
VI.  Documentation .....	10
Oklahoma’s Quality Assurance System.....	12
I.    Quality Assurance Surveys.....	13

---

---

# NUTS AND BOLTS

***Primary Objective:***

***Summarize and be able to implement those projects around a home that make it into a pleasant and livable environment***

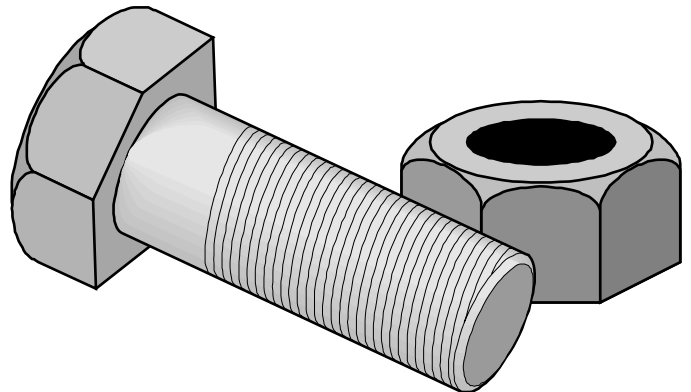
## INTRODUCTION

The Nuts and Bolts of any home or organization are those things that hold it together: the things that allow it to stand the test of time -- the skill or craftsmanship that allows it to stand strong. These nuts and bolts can refer to the actual carpentry, plumbing, and structure of the house, or to the spirit of teamwork and cooperation that operates in a home or an agency that assures everyone knows (and does) their jobs in order to keep services running smoothly. We're going to explore all varieties of Nuts and Bolts. We're going to look at ways to keep the appearance (both interior and exterior) of the home in good condition as well as other issues that affect the way a home runs.

We're also going to look at how you can become the Nuts and Bolts (the firm foundation) of the agency you work for, if you work for one, instead of the weak link in a chain.

In an organization where many people are working toward a common goal it is easy for one person not to know what another is doing. It is difficult to work with a group to accomplish a task without communication. Communication is the foundation for building any productive relationship. Therefore, make sure you take the time to communicate to people about the things you think might be significant.

It is important to pay attention to the small details as it will make life run more smoothly for the person you work for and for the staff you work with. An added bonus is that all employers and bosses like having employees



---

who see things that need to be done AND DO THEM WITHOUT BEING TOLD.

If the toilet develops a slow leak, leave a note or call your supervisor. Don't assume they already know! If you see a light bulb out on the porch, put a new one in. If there aren't any bulbs, make a shopping list and put light bulbs on it.

Right or wrong, good or bad, it's a fact of life that people develop first impressions from appearance. That means the way a home looks and the way a person looks is the basis many use for creating a social image. In order to promote positive images, we must be aware that appearances are important.

# AGENCY ISSUES

## Accountability

When you accept the job of a residential support staff member, you become accountable for

1. Helping the person achieve the goals and objectives in the person's Plan;
2. Assisting the individual to lead a healthy and safe life;
3. Helping the person enjoy the resources in their neighborhood;
4. Assisting in developing and building relationships;
5. Assisting the individual in exercising individual rights, and safeguarding belongings and money;

Being accountable for all these things means that you will be held responsible for proving that you completed these activities. The agency you work for will undoubtedly have forms or data collection methods for documenting what actions you have taken. This documentation is very important and should be taken very seriously. Filling out documentation accurately and completely is an important method for proving that you are a valuable employee.

---

# The Chain of Command

Each agency has an administrative department that handles such things as agency budget, billing, payroll, contracts, and personnel.

And, each agency has a Chain of Command. A common example of this begins with the board of directors, followed by the executive director, program coordinators, supervisors and staff. Following the chain of command in your agency expedites problem-solving, reduces conflict and promotes teamwork.

*Example: Direct contact staff would report to an immediate supervisor; supervisors report to program coordinators, program coordinators report to the Executive Director who, should it be necessary, reports to the Board of Directors. The layers of supervision depend upon the agency.*

## Policy and Procedures

Each agency will have a Policy and Procedure manual that explains the guidelines and practices that the agency follows. If there isn't a manual at your worksite, check in the Administrative office. Becoming familiar with the policies and procedures of the agency will allow you to become a more productive and effective employee. It will also minimize your confusion about certain procedures and help stop disagreements by clarifying objectives. The policies and procedures include personnel information.

## Work Schedules

Your work schedule is set by the agency to ensure the most interaction in the best time frame for the person(s) you serve. It is important that you

arrive at your work site on time;  
carry out any supervisor assignments;  
help the person learn using implementation strategies;  
document results of this learning on the forms provided by your agency.

---

In the event you are unable to work at your appointed time, you should give ample notice to the person in charge of scheduling so they can a replacement. It is not always an easy matter to find replacements at the last minute.

It will be your responsibility to provide your employer with an accurate record of the time you have worked. If you want to be paid in the correct and accurate amount and on the day you expect, DO YOUR PART! The agency you work for will have some method for communicating administrative issues. This may be a spiral notebook, a communication log or a staff log. Sometimes this is used between agencies serving the same person. Using this type of communication may be the only way you will have of exchanging ideas, information and problems with coworkers and other agencies serving the person whom you seldom see.

# Injuries

It is important that everyone practice good safety awareness. This means that you and your supervisor are constantly looking for potentially hazardous conditions that could cause injury for you and/or the person you work with.

Hopefully, you'll be on the lookout for such hazardous situations and act immediately to remedy them. However, should you become injured on the job, your immediate obligation is to notify your supervisor. The agency will probably ask you to complete a written account of the accident/injury. If you need medical treatment, make sure you follow the procedure established by the agency.

---

# MAINTENANCE

## Home Maintenance

Maintaining a home is an awesome responsibility. "If it ain't broke, don't fix it." is often the philosophy we've been taught and we tend to ignore fixing those small things that don't seem critical. But with a home, we need to be aware that if there is a small problem, we should take care of it before it develops into something much larger and more expensive. Therefore, teamwork is essential. It begins with each staff person becoming aware of the importance of preventive maintenance and early intervention in problem recognition. **Once you encounter a problem, it is essential that it be reported to a supervisor, program coordinator, etc. Follow the chain of command!**

*In case of an emergency, deal with it in the most effective way until help arrives.*

### ● Checklists

A checklist of things to do and why they are important is a helpful way of making sure a residence is well maintained. It also helps you organize your daily routine to make sure things get done.



---

# Exterior Maintenance

Where people live says a lot about who they are and how they feel about themselves and their community. This is true for everyone. It affects how the community perceives the individual living in the home and is a large factor in initiating inclusion into the community. So, looks *ARE* important. THIS IS SOMEONE'S HOME!

Here are some things you can do to help the home become just like any other home in the neighborhood. And remember, involving the person you work with in home maintenance can help develop a sense of pride and ownership.

*The outside appearance of a home can be enhanced by planting flowers and shrubs and keeping the yard clean and mowed. Here are a few tips:*

## ● Outside Appearance and Maintenance

Make sure that the outside of windows and doors are cleaned at least twice a year. Hose spray the outside brick and/or paint/siding at the same time. Scrape peeling paint, prime and repaint as needed. Make sure that no trash gathers in the yard and debris from dead plants and trees is removed.

### **Gutters and Downspouts**

In spring and fall, gutters should be cleaned and flushed of leaves, twigs, and other debris.

### **Weather Stripping, Caulking, and Insulation**

Weather stripping seals air leaks around doors and windows. Tubular or foam-filled vinyl stripping is usually self-adhesive and should be applied to the outside of doors and windows. Cracks around window frames and other areas of the house can be caulked with a latex sealant to stop heat and air-conditioning loss. Areas such as the space between the slab foundation and cracked or warped floor boards can be sealed with an expanding foam

---

insulation. Larger areas such as attics and outside walls may need to have insulation added to conserve heat and air conditioning. Driveway cracks can be filled with a butyl rubber caulk and the cement cleaned of oil stains with a special cement cleaner.

### **Painting**

Painting can be the single most important thing you do to improve the appearance, both inside and outside, of your home. If you notice peeling or flaking paint, you should scrape it off then apply a primer. One or two coats of a good quality paint can then be painted using either brush, spray applicators, or rollers. Latex paint easily washes out of brushes and clothes and is much easier to work with than oil based paints. However, oil-based paints and stains are excellent depending upon the type of job you are considering. Check with your local paint supply to get more information.

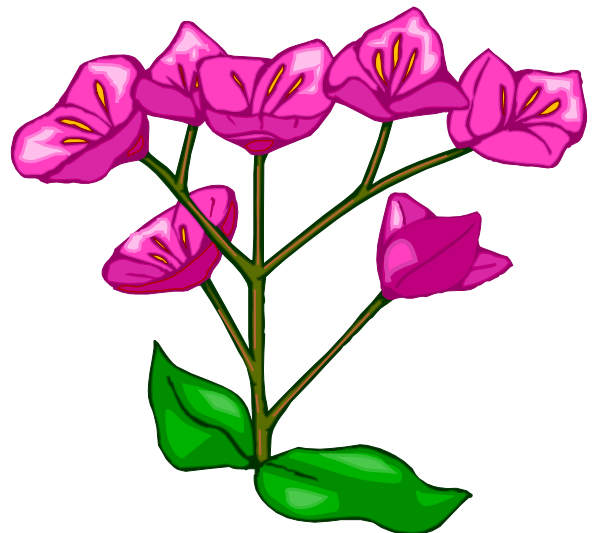
## **Flower Beds**

Planting flowers and shrubbery is one of the easiest and most rewarding ways to "spruce" up a home. Nothing adds more cheer and color than a bright bed of begonias or impatiens. And, working in a flower bed is a great way to spend some stress-free leisure time. Encourage the person you work with to arrange and plant the flowers, water them, and even weed them. ***Be sure to check with your landlord and/or agency before making any landscaping changes.***

### **Designing and planting the bed**

Choose an area with good drainage that gets at least six hours of sun a day for those plants that love sun. (Shady areas can also be made into lovely flower beds.) Sketch out roughly where you are going to plant and make sure that you have considered the amount of sun, water, and type of soil that each plant requires.

Start with the perennials; they're the plants that bloom year after year without replanting. Next, place bulbous plants such as daffodils, irises, tulips, gladiolus, and day lilies. Leave space for annuals that you will plant by seed or from bedding plants. Leave space for interspersing herbs and such vegetables as lettuce and broccoli (their leaves are very ornamental and blend



---

beautifully into flower beds). Next, mark off your space with stakes and string and dig or rototill the soil until at least nine inches deep (this is also a good time to add compost or manure to naturally fertilize your soil). The local county extension office will test your soil (for free or for a small fee) and let you know if it needs lime or other additives.

Following your sketch, plant your perennials first and then your bulbs and annuals. Outline your bed with railroad ties, bricks, flat stones or other border materials. Water as needed and pull weeds when they are young and have not established good root systems. Fertilize at least twice during the growing season according to the needs of your specific plants.

## A Quick Guide to Bedding Plants

You can enjoy continuous blooming plants from spring until frost by interspersing spring bedding plants among your bulbs, perennials and shrubs. As their blooms die, they can be replaced with other plants through the summer and fall.

### Spring bedding plants:

Some favorite spring bedding plants are: Pansies, primroses, forget-me-nots, sweet williams and english daisies. Don't forget to consider wildflowers. Most are carefree, do not attract pests, and are abundant bloomers.

### Summer bedding plants:

As spring plants die or fade, they can be replaced with summer favorites such as: Sweet alyssum, petunias, marigolds, zinnias, dahlias, geraniums, impatiens, begonias, coreopsis and snapdragons. Also, remember your grandmother's favorite -- the morning glory.

### Fall bedding plants:

Fall in Oklahoma often extends well into November and even at times through December. A favorite bloomer is the mum family including all the chrysanthemums from button to giant.

### Bulbs and perennials

For year-after-year blooms with minimum care, consider planting some favorite bulbs and perennials. These may include:

**Bulbs:** Cannas are care-free, low maintenance and produce blooms from early-summer through late fall. Dahlias come in a variety of sizes and colors and are also favorite all season producers. Other bulbs include: tulips, iris, fairy bells, hyacinths, coleus and elephant ears (for drama).

---

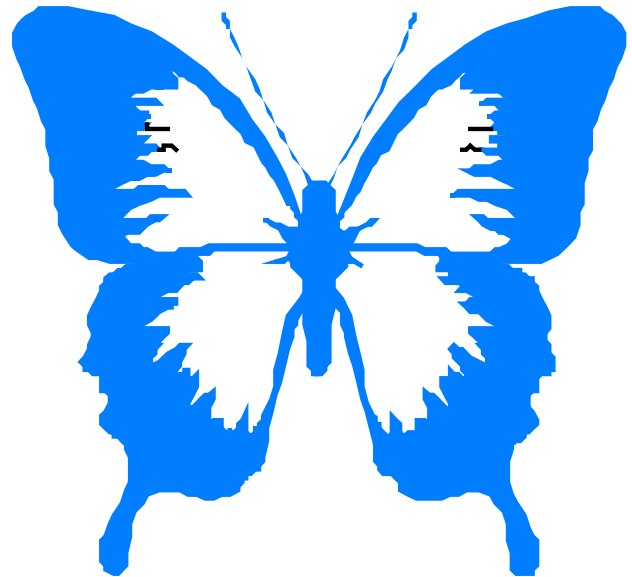
**Perennials:** The rose family is probably one of the most well known and loved of the perennials. They do require a fair amount of care but reward you with some of the most beautiful blooms in the plant kingdom. Shasta daisies are spectacular all season.

**Shrubs**

Shrubs can shield your house from winter winds and shade it from summer sun. Shrubs can enclose a private area, define a path, or mark boundary lines. For year-round privacy or a winter windscreen, look for evergreens. For fragrant blossoms near your patio or bedroom windows use lilac, trumpet vine (needs to be kept in check but will attract hummingbirds to your garden), and crepe myrtle. For show blossoms in full sun, choose forsythia, flowering quince, nutlet plum or oleander. In shady areas try andromeda, hydrangea, rhododendron, or witch hazel.

## Vegetable Gardens

Vegetable gardens can be fun as well yield a bountiful array of food for the dinner table. Many vegetables are easy to grow (green beans, watermelon, carrots, okra, lettuce, etc.) and taste much better than store-bought produce. Your county extension office has pamphlets on how to plan, plant, and care for vegetables as well as food preparation and storage. Even a few vegetables tucked into a flower bed yield delights beyond their visual appeal. Vegetable gardens also offer many opportunities for teaching functional skills as well as leisure opportunities. It can be very relaxing to "dig in the dirt" and grow things.



## Lawn Care

A green, well-trimmed lawn gives the message that the home is cared for and maintained. Here are some tips on lawn care:

A lawn needs several hours of sunlight a day and at least one inch of water a week. An inexpensive rain gauge can tell you how much water your lawn is getting. To keep your lawn green in dry spells, give it a thorough weekly soaking, preferably in the morning. Fertilize with a high-nitrogen fertilizer (10-6-4) once in the spring and again at mid-summer using 3-4 pounds per 1,000 square feet.

---

## Mowing

Don't mow a lawn too short. Grass needs sufficient leaf area to produce a thick root system and dense mat. Bermuda grass needs to be 2 1/2 to 3 inches from the roots in hot weather (1/2 inch shorter in cool weather). Clippings under 1 inch long may be left on the ground but longer clippings should be raked and added to the compost pile.

If you have an electric lawn mower, be careful not to drive over the cord. In one agency, staff weren't careful of this safety feature and ended up buying new cords every week.

## Lawn Mower Maintenance

Make sure that your lawnmower is well-maintained. Have the engine, pull-rope, blades, etc., inspected at the beginning of the mowing season. At the end of the season, drain the gas tank and run the mower out of gas.

# Interior Maintenance

## Interior decor

The interior of your home reflects the personality and attitudes of the people who live there. A well-maintained, neat interior combined with such homey touches as pictures on the walls, flowers and green plants, and knick knacks suggests warmth and an interesting home. However, not all people like such decorations. It is okay to have simple living areas if this is truly a matter of the individual's choice.

The attractiveness of a room often shapes the type of communication that occurs in it and influences the energy and happiness of the people living there. Curtains, carpeting and comfortable furniture communicate feelings of comfort, importance and enjoyment.

Beautiful rooms decorated with pleasant colors stimulate alertness and creativity. Research has shown that "un-living rooms" with furniture coverings, plastic lamp coverings, and spotless floors send nonverbal messages of: do not get me dirty, do not touch, do not put your feet up, etc. We are uncomfortable in such homes and are unable to relax.

---

*A well-maintained home is more comfortable and safe than one that is kept poorly. Here are some suggestions for maintaining the home:*

## **Plumbing**

### **Unclogging Drains**

Keep drains clear by treating them monthly with boiling water and two tablespoons of baking soda. If you use a chemical cleaner, follow the directions and rinse the drain afterwards.

**CAUTION: Chemical drain cleaners are dangerous. If you splash any on your skin, wash it off immediately in cold water. If a drain is clogged and the cleaner remains in the sink, call a plumber. Don't try unclogging the drain by other methods (plunger or snake) as the leftover chemicals may splash on you.**

### **How to unclog a sink using a plunger**

1. Remove the sink stopper or strainer. If the sink has an overflow opening, block it with a wet cloth.
2. Run enough water in the sink to cover the rubber force cup of the plunger. Fit the rubber force cup over the drain, tilting the cup to get rid of trapped air.
3. Vigorously pump the plunger up and down 10 times to create a vacuum surge. On the last upstroke, lift plunger abruptly from the water.
4. If the water is still standing or drains slowly, try plunging again as it may take several tries.

### **How to unclog a toilet**

The best way to avoid a clogged toilet is to make sure you don't try and flush things that are not supposed to be flushed. Washcloths, paper towels, and hand wipes should go in trash cans or laundry baskets. However, if a clog does form here are some things you can try.

1. If a toilet is clogged near the upper bend, follow the same directions as unclogging a sink with a plunger.

- 
2. If the clog is deeper in the plumbing lines, you may need to use a snake. These can either be purchased or rented. They feed into the sewer lines and have a small rotating tip that removes the clog. If you aren't sure how to use a snake, call a plumber.

### **Water leaks from toilet**

A toilet sweats when the cold water inside reacts with warm, humid air on the outside causing condensation to form. To tell whether moisture dripping from a tank is due to a leak or to sweating:

1. Put a few drops of food coloring in the tank water.
2. An hour later, touch white tissue to the bolt tips under the tank. If the tissue colors, a leak is present. If it is just wet, moisture is from condensation.
3. If a leak is present, turn off the water supply to the tank if possible. If not, place a bowl under the leak. Call a plumber.

### **Toilet water runs constantly**

1. If the toilet runs continuously, remove the tank lid and watch what happens during and after a flush.
2. Check to make sure the chain to the flush valve isn't kinked. If it is, jiggle it until it straightens out.
3. If water in the tank fills but keeps spilling into the overflow tube, lift the float arm. If this stops it, the float mechanism is at fault. Check for cracked or water-filled bulb and replace as needed.
4. If the bulb is okay, bend the float arm down slightly until the bulb is at the right level and water shuts off.

### **Pipe leaks or breaks**

Locate the main water shutoff to the house. If the water leak is severe, or if a major line has broken, shut off the water and call a plumber. If you have a small pin-sized leak, a temporary repair can be made by sticking a toothpick in the hole and breaking it off so that it fills it solidly then wrapping the section with duck tape. Call a plumber as this is only a temporary measure.

**Frozen pipes** should be thawed (check to make sure they are not broken before thawing - if they are, do not thaw and call a plumber). To thaw plastic and metal pipes, wrap them with rags and pour very hot water over the pipe. Open

---

the nearest faucet and, using a heat lamp or hair dryer, work back from the faucet toward the frozen area. During a winter cold snap, open all faucets just a little so that they drip slowly. This may be enough to keep the lines from freezing; even if it does freeze, this will keep the line from bursting. Metal pipes (not plastic) may be wrapped with an electric heating cable and insulation.

## Water heaters

To keep sediment from building up in the heater tank, open the drain valve and drain water into a bucket until it runs clear. Do this monthly if your water is hard and every 3-4 months if it is not.

To save energy, set heater thermostats at 120 degrees Fahrenheit.

# Electrical Maintenance and Problems

## Circuit Breakers

A circuit is an overload switch for your electrical system. Fuses perform the same function in older homes. They both keep the electrical lines from carrying too much electricity and possibly overheating and catching on fire. If too many appliances are plugged into a circuit, the breaker reacts by tripping (switching off) the circuit. Each breaker turns off a specific portion of the house.

The "main" breaker will switch off electricity to all the house at once.

Most modern breakers have three positions:

1. "ON" - power is flowing through the circuit
2. "OFF"- power is shut off and not flowing
3. "TRIPPED" - a midway position after the circuit is overloaded and is off.

To restore power to a tripped circuit, remove the overload by unplugging or switching off extra appliances, lights, etc. Then move the breaker handle to "OFF" and then firmly back to "ON."

**IF A BREAKER KEEPS TRIPPING IT MEANS SOMETHING IS WRONG! GET AN ELECTRICIAN!**

---

## Power Failures

Check with your supervisor for proper procedures. If the power goes out in your area, turn off or disconnect all appliances and fixtures. Leave a lamp and/or radio on to let you know when the power is restored. Open the refrigerator as seldom as possible. Food will stay frozen up to 48 hours in a fully loaded freezer that is kept closed. If a black out occurs during the winter, close off colder rooms and confine activities to a few warmer, insulated rooms. To prevent pipes from freezing, turn on all faucets to a trickle and flush toilets periodically.

Keep emergency supplies handy. Store candles, matches, fresh batteries, flashlights, and a transistor radio in an accessible area known to all occupants. In cases of prolonged power failures, notify your supervisor and discuss whether or not an interim emergency housing plan should be implemented.

## Natural Gas

Natural gas is an efficient way to cook and heat your home and water. However, you should be sure that all gas appliances are well maintained and checked periodically by service people. If you smell gas fumes at any time, you should **LEAVE THE RESIDENCE IMMEDIATELY!** Call your natural gas company to check out the cause of the odor. **ALWAYS CHECK WITH YOUR SUPERVISOR IF YOU SUSPECT PROBLEMS.**

## Lighting gas pilots

To re-light the pilot of a gas range surface burner, lift the cook top and hold a match to the pilot. To reach an oven pilot, you may have to remove the oven bottom. Be sure to turn off the oven and air it out before lighting the pilot.

The burner control for a hot water heater or furnace usually has a gas cock with "OFF," "ON," and pilot settings. If the pilot goes out, remove the access panel, turn the gas cock off, and air out the burner chamber. Set the gas cock on "PILOT," hold a match to the pilot, and depress the cock for thirty seconds. Release the cock and the pilot should remain lit. If the pilot lights, turn the gas cock to "ON." If it doesn't light, report it and don't try again.



---

**CAUTION: Check with your agency before attempting to light a pilot. Many local gas companies will provide this service. If you light the pilot, follow manufacturer's instructions exactly. Don't light the pilot if there is a strong gas odor. Close the main gas shut off valve and call the gas company to report it IMMEDIATELY!**

## Air Conditioning

Because an air conditioner uses large amounts of electricity, the cool air that it delivers can be costly. One way to control these costs is to make sure it is well maintained. Change filters frequently. Clean or replace them if they are clogged by dust. Wash reusable filters in detergent and water then rinse and reinstall. Have your air conditioner inspected at the beginning of the season to make sure it is working efficiently. Be sure to keep doors and windows closed to also increase efficiency and lower bills.

## Major Appliances

### Washing Machines

If the washer vibrates excessively, adjust the leveling legs so that the cabinet is level from side to side and from back to front. Use a level to check. If water doesn't enter the tub or enters slowly, pull the washer away from the wall; use pliers to disconnect the inlet hoses from the water-inlet valves (catch runoff water in a pan). Straighten out any kinks in the hoses. Use needle nose pliers to remove the dome screens from the valves and from the faucet ends of the hoses. Clean the screens with a small brush and running water; replace and re-attach hoses, making sure to tighten to prevent leaks.

**CAUTION: Before servicing, unplug the washer and turn off the faucets.**

### Refrigerators and Freezers

If the refrigerator or freezer is not cooling properly, move it away from the wall and vacuum the coils at the back of the appliance. Place a piece of notebook paper between the door and the inside of the freezer and shut the door. If the paper slides freely, the rubber seals need to be replaced. Clean the drain pan and, using a thin piece of wire, check to see if the drain hose is clogged. Call a repair person if the appliance still does not cool properly.

**CAUTION: Make sure the refrigerator or freezer is unplugged before cleaning or checking coils.**

---

## Vacuum Cleaners

If the vacuum cleaner fails to pick up dirt or lint, first check to see if the dust bag is full. If the bag needs replaced, follow your manufacturer's directions and make sure that the filter is clean. Replace vacuum filters and inside bags as needed, at least once a year.

In a canister vacuum, check for obstructions of the hose and attachments if suction is poor. If an obstruction is found, use a broom handle to push the obstruction free. To replace the belt of an upright sweeper, turn the vacuum on its side, remove the metal plate, and release the old belt. Lift out the beater bar and insert a new belt. Reset the bar. Some belts need to be twisted when inserted. There should be an arrow on the sweeper that indicates the way to twist the belt. If not, turn on the vacuum briefly. The beater bar should rotate from back to front. If it doesn't, reverse the twist in the belt.

# CLEANING TIPS

- **Methods and Materials**
- **Cleaners and Polishers**



There are a number of very good household cleaners on the market today. Choose one that is all purpose; cleans, disinfects, and deodorizes. Also, don't forget cleaning solutions that are available from your own kitchen:

- |          |  |
|----------|--|
| Ammonia- | Mix 2 tablespoons in 1 quart of water - (for some stronger solutions use one cup of ammonia/quart of water)                                  |
| Vinegar- | Mix 2 tablespoons in 1 quart warm water - (for a stronger solution use 1/2 cup vinegar and 1/4 cup baking soda per one gallon of warm water) |

---

Baking Soda - Baking soda is very versatile, it can be used to scour cabinets, ovens, etc., it also cuts grease and is an effective deodorizer.

**CAUTION: DO NOT MIX CLEANING AGENTS. MIXING AMMONIA AND BLEACH WILL PRODUCE CHLORINE GAS THAT WILL KILL OR INJURE IF BREATHED IN LARGE AMOUNTS.**

## ● Blinds

Washing Venetian blinds is messy; postpone this operation by dusting regularly. Use a vacuum cleaner or wipe the slats by hand using a cloth.

To wash plastic or metal blinds at the window, first dust them. Have two pails of water on hand; one with ammonia in it, the other clear water. Extend the blinds fully, with slats horizontal. Starting at the top, wipe each slat with a sudsy sponge; rinse immediately with clear water.

Blinds can also be taken down and washed in the bathtub or taken outside and hosed down. Scrub one slat at a time and rinse.

## ● Carpet Cleaning

Because dirt wears carpet fibers, it is a good idea to clean carpets regularly. When selecting a cleaning product, read the label carefully to make certain it is suitable for your carpet. Before you apply the cleaner, test it on a small inconspicuous area. Try and work on a clear, dry day. Open windows for ventilation. Remove furniture.

Start by vacuuming thoroughly. Pre-treat heavily soiled spots with the cleaning agent. If your carpet is only lightly soiled, you may be able to clean it with a canned spray foam. Apply foam evenly, allow it to dry, then vacuum well. For more soiled carpets, use a home-type carpet shampooer or rent a shampooer at hardware or grocery stores. Follow manufacturers' instructions.

It is a good idea to pour a small amount of vinegar (or baking soda) in your water as this will deodorize as well. Also, while your carpet is still damp, rake it with a grass rake, this will fluff the fibers and keep them from drying matted.

## ● Oven Cleaning

If the oven has a self-cleaning feature, refer to the owner's manual and follow instructions. The easiest way to keep an oven clean is to wipe spills when they occur and to regularly wash the surface. To clean burnt-on grease from an

---

electric oven, pour one cup ammonia into a glass or ceramic bowl and leave in the cool oven overnight. In the morning, use rubber gloves and wipe the oven clean with a solution of one cup ammonia in a pail of water.

Always wear rubber gloves and follow other safety precautions recommended on the bottle label.

## ● **Stain Removal**

Always follow all fabric-care directions and test any cleaning agent on a hidden part of the fabric before applying. Enzyme pre-wash products are effective on washable fabrics for treating protein stains such as milk, blood, egg, meat juices, grass. Chlorine bleach can be used to remove the last traces of a stain on white and colorfast washable fabrics.

Tackle any stain quickly; flood a non-greasy stain with water to keep it from setting; sprinkle a greasy stain with an absorbent such as cornstarch or talc, and let it set 10 minutes. Brush away and use stain removal methods listed below.

### **Mildew**

To tackle persistent mildew on ceramic tile or concrete, scrub with a mixture of one cup chlorine bleach to 1 gallon water; rinse and allow to dry. Scrub painted surfaces with one cup ammonia, 1/2 cup vinegar, and 1/4 cup baking soda per gallon of water. Ventilate the area and wear rubber gloves when using either solution.

### **Coffee, Tea, Alcoholic Beverages, Soft Drinks, and Fruit Juices**

Don't use soap on a fruit stain. If the fabric is washable, soak it in a solution of 1/2 teaspoon liquid dishwashing detergent, one tablespoon vinegar, and 1 quart water. Rinse well. If the fabric is non-washable, sponge stain with water, apply a few drops of wet spotter and vinegar. Blot with a cloth dampened with the wet spotter plus vinegar and flush with water.

### **Blood and Vomit**

If fabric is washable, soak the stain for 30 minutes in a solution of 1 quart warm water, 1/2 teaspoon liquid dishwashing detergent, and one tablespoon ammonia. Rinse well. If fabric is non-washable, sponge the stain with water; apply a few drops each of wet spotter and ammonia and flush with water.

### **Grass**

Sponge with non-oily nail polish remover: flush with cleaning solvent and let dry naturally. Sponge with water, apply a few drops each of wet spotter and vinegar; flush with water and allow to dry.

---

**Ink (except red)**

Spray stain with alcohol-based hair spray. Scrub lightly with a solution of dishwashing detergent, one tablespoon ammonia, and 1 quart of warm water. Rinse. Repeat spraying and washing until stain is removed. Allow to dry naturally.

**Red Ink, Perspiration, and Urine**

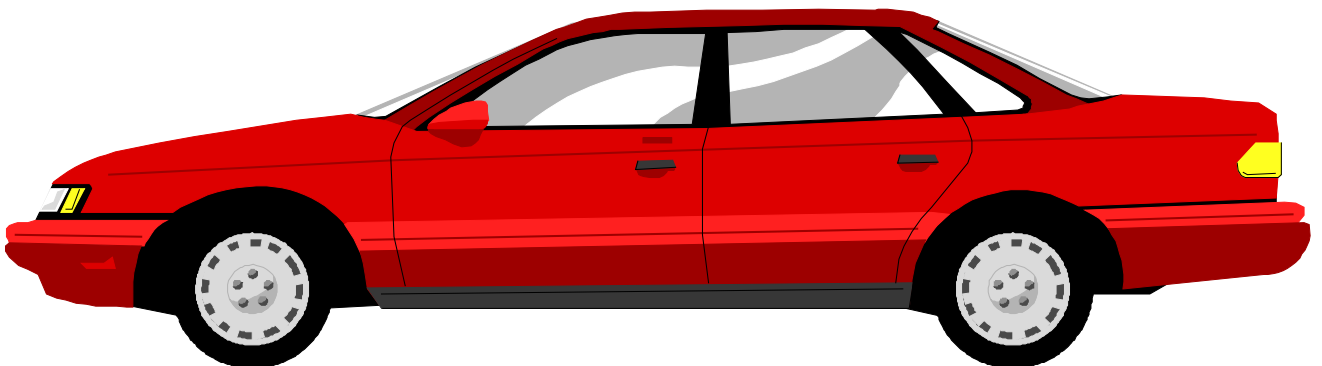
Soak in a solution of 1/2 teaspoon liquid dishwashing detergent, one tablespoon ammonia, and 1 quart warm water. Rinse. Sponge with alcohol and rinse second time. Allow to dry naturally.

## • Odors

The best way to keep a home smelling fresh is to keep it clean. However, baking soda, vinegar and lemon juice will help rid your house of most unpleasant odors. Use disinfectants such as chlorine bleach to prevent mildew and garbage smells. To get rid of strong cooking odors, place a pan of white vinegar on the stove and simmer. Remove fish, garlic, and onion odors by washing utensils, pans, cutting boards and even hands in lemon juice. Use a solution of baking soda and water to freshen inside of refrigerator. Grind lemon or orange peels in the garbage disposal to clean and deodorize. A mixture of potpourri simmering on stove or in simmer pot will add a pleasant smell to your home.

## • Car Maintenance and Repair

Car problems and expensive repairs can often be avoided by following these simple maintenance tips. Be sure and check with your supervisor or program supervisor before authorizing repairs and follow agency procedures for routine maintenance.



---

## ● Fluids

Fluids should be checked periodically (once a week). Make sure you know where the following reservoirs are located and keep them filled according to manufacturer's specifications.

- Oil
- Water
- Transmission fluid
- Braking fluid
- Power steering fluid (if applicable)
- Radiator water
- Battery water
- Windshield cleaner

## ● Antifreeze

Have the car's cooling system checked every six months. Antifreeze added to the radiator water not only lowers the freezing point of water in the system but also raises its boiling point; so, it should be used both winter and summer. Remember that **ANTIFREEZE IS POISON!** If it gets on cement or floors clean it up immediately as it will kill pets and people!

## ● Batteries

Most drivers don't think about their car battery until it is too late. Most batteries today are sealed, however, if yours is not, remove the cap and check the water level every two months. If the level is low, add tap water until it comes up to the bottom of the cap hole. If the tap water in your area is hard, use distilled water.

**CAUTION:** Car batteries contain acid. When working on a battery, remove jewelry and wear goggles, gloves and heavy clothing. If acid gets on your skin or in your eyes, rinse for 15 minutes with cold running water. Then, go to a doctor. Batteries also emit explosive gas. never light a match, cause a spark, or smoke around one.

## ● Oil

**Changing the oil regularly is perhaps the single most important thing you can do to prolong the life of your vehicle.** Oil changes should be performed every 3000 miles using a new oil filter and a good 10W40 or 10W30 oil.

---

# Tires and brakes

Your life depends upon your tires and braking system. Tires should be checked regularly to see if tread is worn or damaged. If tread is less than 1/4 inch deep, have the tire replaced. Keep the recommended amount of air in the tires. A well-filled tire (according to manufacturer's specifications) will not ride as comfortably as one that is low but will last much, much longer.

Brakes should be checked periodically. Keep braking fluid filled. If you notice any grinding, squealing or other sounds from the brake system take the vehicle to a mechanic immediately. If a car "pulls" in one direction or the other when braking then a wheel alignment is probably needed and you should take the vehicle to a mechanic.

## PREVENTITIVE MAINTENANCE RECORD

**YEAR** \_\_\_\_\_

**HOME:** \_\_\_\_\_

This form is to be completed by the Program Coordinator or designee at the time of the monthly program review. Any work or repairs that need to be made will be referred to a maintenance man for completion

Inspection of each item will be verified by entering the date and reviewer's initials in the appropriate monthly column.

Items inspected	Freq of inspection	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Remarks
1. Check wall paper for spots and where paper has come loose at edge or blistered	Quarterly													
2. Pain Condition Checked	Quarterly													
3. Light Fixtures Inspected	Quarterly													
4. Floor Coverings Inspected	Quarterly													
5. All Doors Checked	Quarterly													
6. Kitchen Cabinets Checked (Drawer tracks, hinges, knobs and pulls)	Quarterly													
7. Storm / Screen (as appropriate for weather conditions)	Twice yearly													
8. Floor Drains Checked for Proper Drainage	Twice Yearly													
9. Attic: Checked for moisture that indicates leaky room	Quarterly													

**PREVENTITIVE MAINTENANCE RECORD**

**YEAR** \_\_\_\_\_

**HOME:** \_\_\_\_\_

Items inspected	Freq of inspection	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Remarks
<b>FURNITURE</b>														
1. Checked for weakness, cleanliness, cracks, rips	Monthly													
<b>FIRE DETECTION / PREVENTION SYSTEM</b>														
1. Fire extinguishers inspected for proper charge	Quarterly													
<b>APPLIANCES – STOVE, RANGE HOOD</b>														
1. Oven checked	Monthly													
2. Filter unit in hood checked	Monthly													
3. Heating element checked	Quarterly													
4. Lights Checked	Quarterly													
5. Inspect Drip Catchers	Quarterly													
6. Stove Moved and Cleaned	Quarterly													
<b>REFRIGERATOR / FREEZER</b>														
1. Temperature checked in both parts	Weekly													
2. Check drip pan	Monthly													
3. Door seals checked for leaks	Quarterly													
4. Move and Clean	Quarterly													Re-level if necess

**PREVENTITIVE MAINTENANCE RECORD**

**YEAR** \_\_\_\_\_

**HOME:** \_\_\_\_\_

Items inspected	Freq of inspection	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Remarks
<b>DISHWASHER</b>														
1. Checked for Leaks	Monthly													
2. Controls Checked	Monthly													
<b>CLOTHES WASHER</b>														
1. Checked for Leaks	Monthly													
2. Controls Checked	Monthly													
3. Functional Check on Mechanical System	Monthly													
4. Washer moved and cleaned	Quarterly													Re-level if necess
5. Lint Trap inspected	Monthly													
<b>CLOTHES DRYER</b>														
1. Lint Filter Checked	Daily													
2. Exterior Dryer Vent Outlet	Monthly													
3. Functional Check of Controls and Mechanical Operation	Monthly													
4. Dryer Moved and Cleaned	Quarterly													Re-level if necess
<b>OTHER APPLIANCES</b>														
1. Conduct functional check of operation	Quarterly													

**PREVENTITIVE MAINTENANCE RECORD**

**YEAR** \_\_\_\_\_

**HOME:** \_\_\_\_\_

Items inspected	Freq of inspection	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Remarks
<b>PLUMBING – GENERAL</b>														
1. Check Faucets for Leaks	Monthly													
2. Check Drains for Leaks	Monthly													
3. Water supply and flush controls on Toilet(s) inspected	Monthly													
4. Grouting Checked on Ceramic Tile	Monthly													
5. Inspect Caulking around tub and shower fixtures.	Monthly													
6. Check for leaks at the base of toilet(s)	Monthly													
7. Exhaust fan(s) checked	Quarterly													
<b>ELECTRICAL SYSTEM</b>														
1. Cord and plugs on appliances checked	Annually													
<b>HEATING / COOLING SYSTEMS</b>														
1. Furnace room inspected and clear of combustible items.	Monthly													
2. Filters changes	Twice yearly													
<b>HOUSE EXTERIOR</b>														

**PREVENTITIVE MAINTENANCE RECORD**

**YEAR** \_\_\_\_\_

**HOME:** \_\_\_\_\_

Items inspected	Freq of inspection	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Remarks
HOUSE EXTERIOR														
1. Cracks and joints checked for need of caulk around windows and doors.	Annually													
2. Weather stripping checked on doors, windows, and garage door	Annually													Before heating season
3. Visual check for infestation of insect and rodents	Twice yearly													
4. Visual check of exterior light fixtures	Twice yearly													
5. Check brickwork / blockwork for cracks	Annually													
6. Exterior siding checked for damage or painting needs	Annually													
7. Hoses disconnected and water shut off to exterior spigots	Annually in November													In the fall
8. Gutters and downspouts checked	Twice yearly													

## VEHICLE MAINTENANCE

Beginning Odometer Reading \_\_\_\_\_

Date: \_\_\_\_\_

After Driving	The odometer reading is:	Have the following don	Completion done
3,500 miles		Change oil, filter, and lube	
7000 miles		Change oil, filter, and lube	
10,500 miles		Change oil, filter, and lube, balance and rotate tires	
14,000 miles		Change oil, filter, and lube, replace fuel, and air filters	
17,500 miles		Change oil, filter, and lube, check alignment	
20,500 miles		Change oil, filter, and lube, rotate and balance tires, align front end, check wipers	
24,000 miles		Change oil, filter, and lube, service transmission filter	
27,500 miles		Change oil, filter, and lube, check all belts and hoses	
30,500 miles		Change oil, filter, and lube, check / flush anti-freeze	
34,000 miles		Change oil, filter, and lube replace fuel/ air filter, tune-up	
37,500 miles		Change oil, filter, and lube, check tires for alignment	
40,500 miles		Change oil, filter, and lube, lube, replace tires, align front end, have front rear brake job	

---

After Driving	The odometer reading is:	Have the following don	Completion done
44,000 miles		Change oil, filter, and lube	
47,500 miles		Change oil, filter, and lube	
50,500 miles		Change oil, filter, and lube, rotate and balance tires	
54,000 miles		Change oil, filter, and lube, replace fuel filter	
57,500 miles		Change oil, filter, and lube, check tires for alignment	
60,500 miles		Change oil, filter, and lube, rotate and balance tires, align front end, check wipers	
64,000 miles		Change oil, filter, and lube, service transmission / filter	
67,500 miles		Change oil, filter, and lube, check all belts and hoses	
70,500 miles		Change oil, filter, and lube, check / flush anti-freeze	

---

## Other Important Issues

You know from your own experiences that life is a seldom predictable. There are always things that come up which you didn't plan for or weren't sure how to handle. The same will be true in your work environment. Once again, we want to remind you that when unusual situations arise or when you need a "second opinion," you should use your agency's organizational chart and follow the chain of command.

There are however, some situations that occur frequently enough for us to talk about. Here are a few:

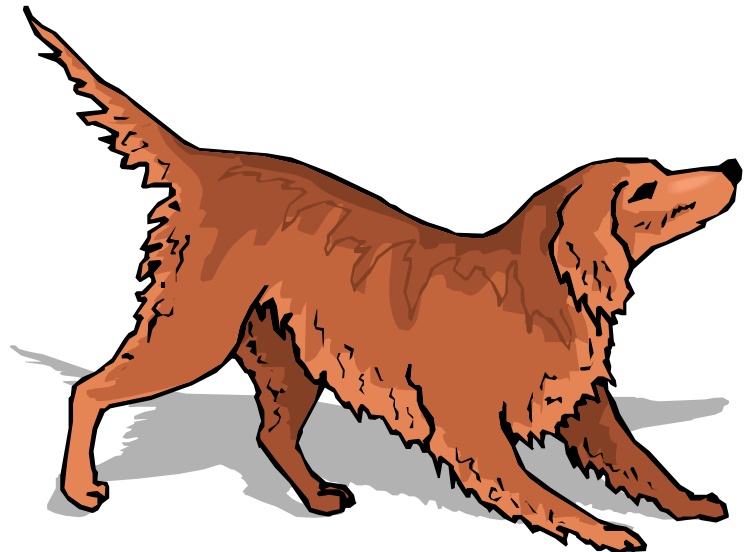
### PETS

The people you work with might be interested in having a pet. No one can deny the benefits and joys of keeping an animal but sometimes financial obligations, responsibilities for care, and medical conditions are overlooked. You may want to "pet sit" for someone before you actually get one. Also, before encouraging or suggesting that a pet be brought into the home, get answer to the following questions.

- Will the landlord allow pets?
- Will a pet deposit need to be paid?
- Is the home large enough for a pet?
- Do any home members have pet allergies?
- Does the person have enough money to pay for food and medical care for the pet?
- Who will be responsible for the daily care of that pet?
- Who will be responsible for cleaning up after the pet in the house or yard?

Remember that state funds do not pay for any pet or pet-related expenses.

Finally, please remember that if the person you work for can't or doesn't take care of the pet, someone else must!



---

# MAIL

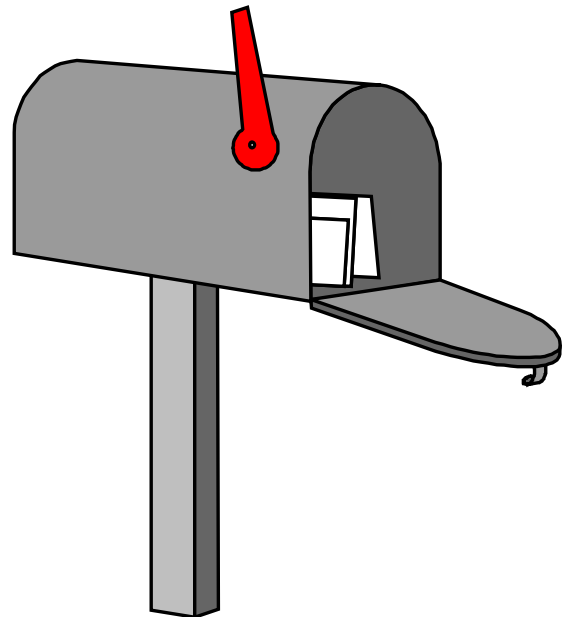
Neglect or abuse of any animal **cannot be allowed**. If the person you work with does not care for the pet, or does not seem to enjoy the animal, M& to your supervisor to see if a new home should be found for the animal.

*It is extremely important that people open their own mail, have privacy to do so, and that you maintain confidentiality when you are needed to assist the person. Specific training regarding this issue is covered in Ethical and Legal Issues. There are times, however, when all of us get mail that we would rather ignore -- i.e., BILLS!*

**Ignoring a bill won't get it paid!** If utility bills or doctor/medical bills come to the home, use the opportunity to discuss financial responsibilities with the person. Some of the bills that come to the residence will be the person's responsibility and some will be the responsibility of the agency. If you're not sure who is responsible for paying, contact your supervisor.

Ignoring the bill could result in collection agencies becoming involved and/or utilities being disconnected.

Sometimes, the person's Medicaid (medical card, D-card, Title 'KIX card, etc.) and disability check will come to the home. You should check with your supervisor to determine what to do with these items.



## PERSONAL FUNDS

The person you work with has a monthly income. These monies may come from earnings at a job, from Supplemental Security Income (SSI), from Social Security, Veteran's Benefits, Railroad Retirement, and/or Aid to the Disabled (AD). Sometimes the individual receives these checks directly. Sometimes the agency is the representative payee, or if the person you work with has a legal guardian, that individual may receive the checks.

Each agency handles receipt of these monies and payments of monthly bills in a different manner. Therefore, it is your responsibility to discuss with your supervisor the procedures to follow.

---

Some of you will work with individuals who budget and manage their own funds. Some of you will work with people who require considerable support in making financial decisions and transactions. In either case, there are a few rules that apply to everyone:

- Never loan or borrow money from a person
- Never buy or sell anything from a person

If the person you work with has a bank account -- either checking or savings - it will be important that you assist them in balancing and reconciling their account. Talk to your supervisor or program coordinator to see if there are special considerations you need to take when assisting with bank transactions.

Some of you will work for people who need considerable assistance in money management. When you are closely involved in managing the consumer's personal money, you must keep detailed and accurate records of the following:

- Date, amount, and purpose of any check written or cash usage (must also keep a receipt).
- Date, amount, and purpose of any bank deposit.
- Date, amount, and purpose of any bank withdrawal

The agency you work for should have procedures in place that will help you protect the person's funds from any unauthorized uses. Follow these procedures carefully to prevent you from being the subject of an investigation regarding misappropriation.

## VISITORS

Just as in **any** home, there may be visitors occasionally. However, it is important that you know how to handle certain situations that may arise. A wide variety of people may come and go throughout the day that might not be present in a typical household. Specialists such as therapists and team members, quality assurance surveyors, family members, and administrative staff may all visit at various times.

There are several issues here. One is that we should always respect the individual we serve and do the best we can to protect his or her privacy from unnecessary intrusion. After all, you wouldn't want some stranger traipsing through your house unannounced. A second issue is legality. Are policies being followed for visitors? Are people trying to buy, sell, take pictures, etc.? There are also safety issues to consider:

---

Do you know who all the people coming and going are, as well as the purpose of their visit? Do they have appropriate identification? Use common sense - if a visitor does not have a good reason for visiting and an appropriate ID, don't let him or her in.

One group of regular visitors will be quality assurance staff whose job it is to be sure that the person has the best services and supports possible. When such staff visit, act as normally as possible, follow your regular routines. They aren't police so don't panic

## “VISITORS” SCENARIOS

### **Scenario #1**

A stranger comes to your door and wants to visit the person you serve. He has no ID and says he "Heard you have people with mental retardation living here and Just wanted to see them." *What should you do?*

### **Scenario #2:**

A neighbor you've not met comes to your door to say hello. *What should you do?*

### **Scenario #3:**

Your agency administrator calls you up and tells you that he has scheduled a tour group to come visit the next morning. *What should you do?*

### **Scenario #4:**

A high-pressure salesman comes to your door and engages Bill, the person you serve, **in** conversation. You walk into the room in time to hear that he has sold a water-filtration system to Bill who has already made out his check and handed it over to the salesman. *What should you do?*

### **Scenario #5:**

John's stepfather comes to visit and wants John to show him his bank account statement. However, John's step father is not his legal guardian. *What should you do?*

### **Scenario #6:**

A surveyor with proper identification comes for his pre-arranged visit. However, he has five people with him that you don't know. *What should you do?*

---

## • **LIABILITY**

## • **Transportation**

If you transport an individual receiving services in your own car, rather than in a car provided by your employer, you bear an additional liability for that person's safety. This liability is based on your professional relationship with that person. As such, it is more extensive and requires more attention to detail than when you transport a friend or a member of your family. For this reason, your car should always be well maintained and in good condition. The agency you work for should discuss insurance requirements with you if you use your personal vehicle to transport people for whom you are responsible. Some agencies have specific requirements concerning insurance coverage. Foster parents and others who contract directly with DHS to provide services also have specific insurance requirements in their contracts. You should discuss your insurance needs with your insurance agent.

## • **DOCUMENTATION**

Use the proper form when reporting, i.e. seizure report forms, medication sheets, time sheets, attendance sheets (group homes and workshops), transportation logs, maintenance logs, daily documentation sheets, monthly progress reports (DHS and Waiver Services), and telephone logs. Give brief, accurate, factual, objective information on incident reports.

Always include:

NAME	(person served and yours written in proper place)
DATE	of incident or service rendered
TIME	start / finish time of incident or service rendered
PLACE	where incident or service was rendered
TYPE	of incident or service rendered if appropriate

Give brief, accurate, factual, objective information that pertains to the incident that occurred. When reporting on skills training, you should include your personal opinions about progress/lack of progress. Focus your documentation on the people you serve, not on co-workers or the organization.

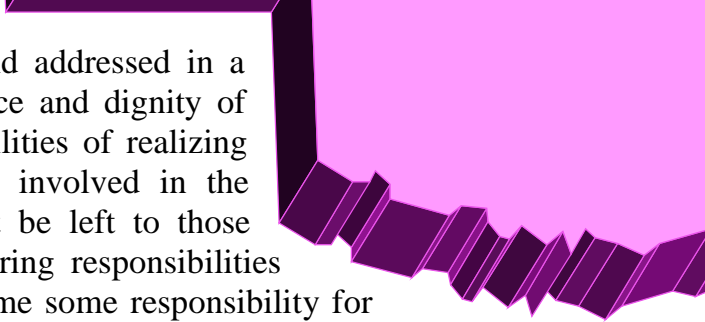
Timely documentation is a **MUST**. Keep notes when something happens for reference at the end of your shift. Your signature and initials are an important part of documentation.

---

REMEMBER: These documents may become legal records.

# OKLAHOMA'S QUALITY ASSURANCE SYSTEM

Quality assurance systems exist to ensure that needs are identified and addressed in a way that promotes the independence and dignity of each person served. The responsibilities of realizing these outcomes are shared by all involved in the delivery of services. It should not be left to those individuals who have only monitoring responsibilities outside the system. You must assume some responsibility for assessing the service system and making sure that it has successfully addressed the person's needs.



Many people served by the Developmental Disabilities Services Division have case managers who are employed through the Department of Human Services. The case manager should be looked upon as a resource in assuring that the individual being served has the services he or she needs. The case manager regularly makes direct contact with the person to determine if he or she is satisfied with the services and if the person has any un-addressed areas of need or concern (i.e., health, leisure, work, etc.). The case manager will also determine if past services have been successful in meeting those needs.

The case manager has two levels of responsibility:

- Address the individual's needs
- Develop and promote an awareness of what the individual desires.

Agencies serving people with developmental disabilities and contracting with DDS must comply with standards issued by the Accreditation Council sometimes referred to as ACDD or AC during surveys by DDS Quality Assurance staff. They must also comply with the standards of their contract with DDS. The results of these surveys are used by DDS to insure the compliance of contracting agencies.

---

SELECTED ACDD STANDARDS AND INTERPRETATION GUIDELINES  
1990 EDITION

160 (127) The behavior of staff reflects sensitivity to the needs of the individuals served for privacy and dignity. For example, confidentiality and normal sensibility are exercised when speaking about an individual. Undignified displays, exhibitions, or exposure of individuals served, whether deliberate or unintentional, do not occur.

Probes: Are individuals talked about in the presence of other individuals?  
Is staff respectful of individual privacy?  
Does staff intercede when individuals are not mindful of their own privacy or dignity?

Guidelines: The behavior of staff should reflect concern by actions such as knocking on bedroom doors and waiting for response, closing bathroom doors and keeping them closed when in use, assisting individuals to go to the bedrooms to dress/undress, turning on lights only when bedrooms are unoccupied or individuals are awake.

162 (128) Individuals choose and wear their own clothing.

Probes: Are personnel hired or used to purchase clothing thus excluding individuals from choosing?  
Are clothing selections made without individual input?  
Are individuals wearing “street” or “dress” clothes as opposed to “bed” clothes?  
Are shoes worn? If not, are there medical contraindications?  
Are there items of clothing such as pajamas, underwear, and socks that are “stock” items as opposed to belonging to individuals?

Guidelines: Individuals choose, are encouraged to choose or are assisted in choosing what to wear on a daily basis and in making clothing purchases.

This does not apply when individuals live in their own homes (with their families or alone) or when an agency does not have responsibility for the day-to-day activities of individuals. It is expected that if problems exist and are not dealt with otherwise, any team member who becomes aware of them would bring this to the attention of the entire team.

---

163 (130) Individuals have access to their personal possessions including clothing, money, and toilet hygiene items.

Probes: Do individuals have personal possessions?

Do individuals have independent access to their possessions?  
Are closets or other storage areas designed to allow access by individuals who use wheelchairs?

Guidelines: “Personal possessions” include clothing, money, and toilet and hygiene items. Basic hygiene items are shampoo, deodorant, toothpaste, comb/brush. Individuals may have others depending on personal preference or need. Possessions are not locked due to the behavior of others unless individuals have and use their own keys.

168 (135) Each individual opens his or her own mail and packages generally without direct surveillance and mail is not read by staff unless requested by individual, except as contraindicated by documentation of the individual’s inability to open and read mail and packages safely and responsibly.

Probes: Is mail unopened when individuals receive it?

Guidelines: Mail is delivered to individuals. Staff open mail only when requested to do so or when individuals need assistance and only in the presence of the individual.

181 (154) When referring to individuals, staff use terms that recognize individuals as people first and then, if necessary, as people with disabilities, that enhance dignity and self-worth that are non-stigmatizing, and that are appropriate to age and sex.

Probes: Are individuals referred to in any of the following ways:

By disability- “the developmentally disabled,” by diagnosis- “the severe,” “the Downs,” by limitation or needs- “the wheelchairs,” the diets,” “the low functioning.”

Are adults referred to as “kids,” “boys,” “girls.”?

Guidelines: Individuals are seen first as people and then as people with disabilities.

---

191 (157) Each individual has an adequate amount of neat, clean, fashionable, and age-appropriate clothing.

Probes: Do many individuals wear the same style of clothing giving an appearance of living in an institutional setting?

Are pants too long or too short?

Are cords/pins used to keep pants up instead of belts?

Guidelines: “Adequate amount” means enough complete changes of clothing for at least four days.

“Neat, clean, fashionable, and age-appropriate” means that clothes fit, are not dirty and are what is typically worn by age peers who do not have disabilities. Persons seeing an individual or a group of individuals should not be likely to assume that they have a developmental disability because of the style(s) of the clothing or how it fits.

193 Individuals have the right to obtain, retain, and protect personal possessions of a private nature.

Probes: None

Guidelines: “Possessions of a private nature” refers to items such as personal letters, photographs of family members and friends, diaries, performance reports, contraceptives. Individuals do not have to obtain such possessions, but if they desire to do so, that right is respected.

At all times staff should display respect for individual’s wishes regarding the use and safekeeping of his or her personal possessions and should intervene when it is suspected that the individual’s rights to such have been abridged.

---

194 (159) Individuals have personal possessions such as toys (for children), games, books, pictures, audio and video equipment, arts, and crafts materials, religious materials, and jewelry.

Probes: None

Guidelines: Agency policies and practices should not dictate how individuals obtain, retain, and protect personal belongings. For example, an individual who purchases certain articles such as a television or stereo should not be required to store them in areas the agency as designated as “safe” unless the individuals chooses to do so. The agency should make other arrangements or assist the individual to maintain items according to his or her preference and convenience so that individuals can access them independently.

The agency should not dictate what types of personal property are unacceptable for an individual to own or retain unless it would be unacceptable in the general community. (illegal articles).

Individuals should be viewed as any other consumer and be trained and assisted in purchasing significance (also see Standard 138). This would include not only clothing and furnishing, but based on the individuals particular capabilities and needs, also places of residence and vehicles for personal transportation.

---

197 (164) Individuals are free to decorate their bedrooms with items of personal significance.

Probes: Have individuals been encouraged and assisted to decorate their rooms?  
Have individuals selected or been involved in the selection of decorations in so far as possible?

Guidelines: “Equitable” means responsibilities are shared and rotated on a regular basis (weekly, bi-weekly, monthly) determined by the interest and needs of the individuals living in the residence. Such tasks include meal planning and preparations, house cleaning, laundry, and shopping.

203 (170) Mealtimes are pleasant, leisurely, and afford opportunities for socialization.

Probes: Are there time limits for meals that cause staff to rush individuals?  
Does staff talk with individuals during meals?  
Are seating arrangements such that they encourage small group conversation?

Guidelines: Individuals should not be rushed through their meals. Staff should model appropriate mealtime behaviors and conversation and, if and when possible, eat meals with individuals instead of standing over them “supervising”.

---

713(591) The interior design of each residence if functionally arranged as a home.

Probes: Does the configuration of the room look like a house or apartment? comparable to those found in homes.

Guidelines: Room size should be

714 (592) Furniture and furnishings are safe, comfortable, and in good repair and resemble those in homes in the local community, to the extent compatible with the physical needs of individuals.

Probe: Does furniture look like that typically seen in homes?  
Are furniture and furnishings repaired or replaced when broken or unsafe?

Guidelines: Furniture should not be commercial or “institutional” in appearance, for example, plastic covered or molded plastic that is designed for ease of cleaning and resistance to abuse.

723 (601) Each bedroom contains sufficient storage space to accommodate all in-season clothing of each resident;  
724 (602) Storage space for personal items; and

Probes: None

Guidelines: Individuals should have closets or wardrobes, dressers, or chests of drawers.

725 (603) Sufficient seating and flat surfaces to allow each residents to perform tasks or to pursue leisure interests

Probes: None

Guidelines: Individuals should have furniture items such as easy chairs, desks, or tables and chairs. Selections should be based on preference or need.

---

729 (607) Bathrooms, including toilet and bathing facilities, are located and equipped so that they facilitate maximum independence and self-help skills.

Probes: None

Guidelines: Individuals should be able to get the bathrooms without having to walk some distance from their bedrooms or living rooms.

776 (676) All medications administered by agency staff are properly stored.

Probes: None

Guidelines: Standards related to drug storage are applied to drugs administered by agency staff.

Individuals who administer their own medications can be responsible for their storage or taught to assume that responsibility.

805 (657) If meals are served, perishable foods are stored at the proper temperature to prevent spoilage.

Probes: None

Guidelines: Food items should be kept at the appropriate temperature until they are to be cooked and should be refrigerated after cooking, if not served immediately.

- 
- |     |   |
|-----|---|
| 808 | Individuals are offered opportunities for choices in food selections;   |
| 809 | Teaching and training in food preparations and alternative cooking method such as microwaves are provided;                  |
| 810 | Individuals are actively involved in menu planning and food preparation and services as part of the daily mealtime routine. |

Probes: Are individuals involved in the preparation of menus?

Are individuals' likes and dislikes solicited and/or considered in preparation of menus and selections of snacks to be made available?

Are microwave ovens available if they would be helpful to individuals?

Are illustrated cookbooks and menu cards provided for individuals who cannot read?

Guidelines: Individuals should have the opportunity to plan menus, select and prepare food.

---

SELECTED REGULATIONS AND INTERPRETIVE GUIDELINES  
INTERMEDIATE CARE FACILITIES FOR THE MENTALLY RETARDED

W129	(7) Provide each client with the opportunity for personal privacy and
W130	ensure privacy during treatment and care of personal needs;

**Probes:** Do individuals actually see out and utilize opportunities for privacy? Do individuals actually have places to go to be alone and are they allowed to do so? For example, allowed to go to their room alone? Allowed to go to a quiet private area, or do staff routinely "herd" individuals preventing opportunities for privacy?

Are these rights afforded to less disabled individuals only? Are they taught "private area": behavior and responsibilities? What do you see staff do when individuals are not mindful of their or other's privacy?

To what extent are individuals talked about in the presence of other individuals?

To what extent have accommodations been made so that individuals with physical disabilities, who otherwise would be independent, can perform basic personal hygiene activities without staff present?

How does staff preserve personal privacy of individuals when visitors are present?

**Guidelines:** The facility must examine and treat individuals in a manner that maintains the privacy of their bodies. Only authorized employees directly involved in the treatment are present when treatments are given. Some method or mechanism which ensures privacy (such as a closed door, a drawn curtain or systematically implemented training for an individual to use their own methods) must be employed to shield the individual from passers-by. People not involved in the care of the individual should not be present without their consent while they are being examined or treated.

And individual must be granted privacy during toileting, bathing, and other activities of personal hygiene. If an individual requires assistance because of developmental or physical deficit, authorized staff should assist giving utmost attention to the individual's need for privacy.

The facility must have a method of arranging for privacy of visits between individuals with significant relationships, if they do not both reside at the facility.

Exercise special attention to ensure that your behavior, during onsite observations in the individual's home, does not violate an individual's right to privacy during treatment and care of personal needs.

---

W133 (9) Ensure clients the opportunity to communicate, associate and meet privately with individuals of their choice,

Probes: Does the facility provide individuals with the opportunity to form individual relationships with others including opportunities to experience personal relationships both within and outside the facility?

Guidelines: Space must be provided for individuals to receive visitors in reasonable comfort and privacy. Assistance must be provided to individuals who require help in reading or sending mail

How do individual's send and receive mail? Does staff assist individuals who are unable to open and read mail themselves? Is writing assistance provided? Do individuals contact personal friends and family members by telephone?

Refer to W145.

What pattern of freedom of movement do you see at the facility? Do most individuals move freely? Few?

On what basis is freedom of movement restricted? Is this dealt with programmatically in the individual program plan for each individual? How often is this restriction re-evaluated?

W135 (10) Ensure that clients have access to telephones with privacy for incoming and outgoing local and long distance calls except as contraindicated by factors identified within their individual program plans;

---

W136	(11) Ensure clients the opportunity to participate in social, religious, and community group activities;
------	--

Probes: Are all activities agency centered or sponsored?

Guidelines: Outdoor and out of home activities are planned for all individuals on a regular basis.

Are religious preferences known and honored?

What is the level of individuals participation (relevant to level of individual functioning):

- fully independent?
- Staff assisted/individual participation?
- Total staff assist?

Are the individuals allowed to participate independently in activities commensurate with their level of functioning and interest? What is the facility's system to facilitate an individual's participation?

What does the facility do to draw out non-participating individuals to the point that the individual makes his/her own active choice to participate or not?

Does the facility arrange for individuals to participate in community integrative activities individually or in small groups (3 or less) at least part of the time?

Does the facility arrange age and interest appropriate outside activities for individuals with the community (e.g., recreation centers, churches, social clubs)?

W137 (12) Ensure that clients have the right to retain and use appropriate personal possessions and clothing, and

W138 ensure that each client is dressed in his or her own clothing each day;

**Probes:** Are individuals dressed in their own clean, neat and attractive clothing? Is it of the correct size and in good condition? Is clothing appropriate for the weather and the type of activity?

To what extent is there a pattern of slacks that are too long or too short? Are cords and pins used to keep pants up instead of belts?

To what extent does the facility provide items of lesser quality or provide only one type of a particular item?

Is there clothing for a variety of activities (e.g. clothing for church, casual social functions, sports events)? Do colors, styles, and designs match and conform with community standards (i.e., staff's clothing)?

To what extent are items of clothing such as pajamas, underwear, and socks, considered "stock" items as opposed to belonging to individuals? Are individuals allowed to make personal purchases as independently as possible?

Are individuals assisted in clothes selection, room decoration and other forms of self-expression?

**Guidelines:** All individual possessions regardless of their apparent value to others must be treated with respect, for what they are and for what they may represent to the individual. The facility should encourage individuals to use or display possessions of his or her choice in a culturally normative manner. Appropriate personal possessions include personal care and hygiene items. Individuals should not be without personal possessions because of the behavior of others with whom they live. If a method for identifying personal effects is used, it should be inconspicuous and in a manner that will assist the individual to identify them.

"Appropriate" clothing means a supply of clothing that is sufficient, in good repair, accounts for a variety of occasions and seasons, and appropriate to age, size, gender, and level of activity. Modifications or adaptations of clothing fasteners should be considered based on the needs of an individual with a physical disability to be independent.

As appropriate, each individual's active treatment program maximizes opportunities for choice and self-direction with regard to choosing and shopping for clothing which enhances his or her appearance, and selecting

---

daily clothing in accordance with age, sex and cultural norms.

Are individuals satisfied with the access to and choice of the kinds and numbers of personal possessions they have? How frequently during the course of the day do you observe individuals using their personal possessions?

Are individuals' personal decorative possessions displayed? To what extent is there a pattern of individual loss, due to theft or destruction by others? What does the facility do to prevent loss? Is it successful?

W145 (3) Promote visits by individuals with a relationship to the client (such as family, close friends, legal guardians and advocates) at any reasonable hour, without prior notice, consistent with the right of that client's and other clients' privacy, unless the interdisciplinary team determines that the visit would not be appropriate;
--

**Probes:** Is there a systematic pattern of unreasonable restrictions on visitors in terms of when they can come, where they can go on the facility's property and to whom they can speak?

**Guidelines:** Any limitations of visitors are recorded by the interdisciplinary team with reason and time limits given. Decisions to restrict a visitor must be reviewed and re-evaluated each time the IPP is reviewed or at the individual's request. If you find broad restrictions, review general facility access policies.

W194 (4) Staff must be able to demonstrate the skills and techniques necessary to implement the individual program plans for each client for whom they are responsible.

Probes: Is there consistent implementation of specialized techniques of training and interacting with individuals served among staff and across shifts and program sites?

Can staff completely explain and demonstrate training and data collecting procedures?

Guidelines: Observe whether or not staff are competent and knowledgeable about the needs, programs and progress of each individual with whom they are assigned to work. Staff should be able to demonstrate in practice the results of training for the individuals for whom they are responsible to work.

W196 (a) Standard: Active Treatment

- (1) Each client must receive a continuous active treatment program, which includes aggressive, consistent implementation of a program of specialized and generic training, treatment, health services and related services described in this subpart, that is directed toward –
- (2) The acquisition of the behaviors necessary for the client to function with as much self determination and independence as possible; and
- (3) The prevention or deceleration of regression or loss of current optimal functional status.

Probes: How does the facility address the active treatment needs of individuals along their full life span?

As you conduct each observation, determine:

- Is the activity scheduled or planned?
- Are materials present to implement the activity?
- Are they used?
- Are all individuals present involved or engaged in the activity?
- Are the activity and materials age-appropriate, adaptive and functional?

Guidelines: “Continuos” is defined to mean the competent interaction of staff with individuals served at all time, in formal and informal settings, in the service of effective relationships in general

between staff and individuals served, and the implementation of specific IPP objectives, in particular.

Verify that active treatment is identifiable during formal and informal interactions between staff and individuals served. The performance of the individual should reflect the success, if any, of interventions being applied or the need to alter the intervention procedures.

- Are new skills and behaviors being taught or reinforced?
- Are all individuals reinforced and prompted frequently?
- Are all staff verbally and physically involved?
- Are there sufficient staff for the activity? Sufficient materials for the

- 
- activity?
- Are interactions characterized by a “mentor/friend/teacher”? Does the activity relate directly to specific objective and needs? Do staff demonstrate the skills necessary to train or reinforce training on the IPP objectives?
  - Are individuals observed to engage in aggression or self-injurious behavior? If so, do staff intervene immediately as per the IPP? Are individuals observed to engage in self-stimulatory behavior (e.g., finger flicking), if so, do staff intervene as per the IPP?

Although the active treatment process must be identifiable in documentation, it must be observable in daily practice. Determine how the ICF/MR accomplishes (or fails to accomplish) and environment of competence that enables active treatment to occur.

The ICF/MR ensures that each individual receives active treatment daily regardless of whether or not an outside resource(s) is used for programming (e.g., public school, day habilitation center, senior day services program, sheltered workshop, supported employment).

Those “active” interventions necessary to prevent or decelerate regression are considered to be part of the overall active treatment program. For example, if the application of a specific stimulation technique to the area of the mouth of an individual with severe physical and medical disabilities, decelerates the individual’s rate of reliance on tube feedings, and helps the individual retain ability to take food by mouth, then this intervention is considered to be a competent of active treatment for the individual.

Additionally, active treatment for elderly individuals may increasingly need to focus on interventions and activities which promote physical wellness and fitness, socialization and tasks that stress maintaining coordination skills and reducing the rate of loss of skills that accompanies the physical aspects of the aging process. Be sensitive to the total life span context when reviewing elderly individual’s unique needs.

Survey Procedure: Record each observation of individuals served by the facility. The optional Client Observation

---

Worksheet (HCFA-30701) is the mechanism by which answers to identified data probes may be recorded. The worksheet is applicable to any observation, regardless of whether or not the individual is part of the representative random sample. See Task 3 for instructions in completing observations.

---

**MANAGEMENT SITE AUDIT****DATE:**

Home Management	Meets standards	Needs Improvement	N/A	Auditor Comments	Home Supervisor Comments
1. Preventive Maintenance Checklist					
2. Evacuation Drills					
3. Emergency Equipment Checks					
4. Posted Work Schedule					
5. Posted Menu					
6. Groceries Available (Match menu)					
7. Overall Cleanliness					
8. Laundry Supplies					
9. Soap and Paper towels by basins					
10. Adequate personal needs					
11. Evacuation Plans & Emergency Nmbrs Posted					

**MANAGEMENT SITE AUDIT**

**DATE:**

Home Management	Meets standards	Needs Improvement	N/A	Auditor Comments	Home Supervisor Comments
12. Current admin relief posted					
13. Staff log in use & initialed entries by all employees					
14. Shift duties / flow sheets					
15. Correspondence / Memos/ IT min filed					
16. Timesheets					
17. Petty Cash Sign In					
18. Activity Calendar					
19. Needed Home Repairs					
20. Vehicle Maintenance					
21. Lawn Care					

**MANAGEMENT SITE AUDIT**

**DATE:**

Individual Records	Meets standards	Needs Improvement	N/A	Auditor Comments	Home Supervisor Comments
1. Basic Care Checklist					
2. Fluid Intake Record					
3. Food Acceptance Record					
4. Sleep Record					
5. Height & Weight Record					
6. Seizure Record					
7. Health Visit Grid					
8. Med. Documentation and Med Error Reports					
9. Medication stored properly					
10. Meds – 2 week supply of Meds on hand					
11. Med labels consistent with Admin Record					

**MANAGEMENT SITE AUDIT**

**DATE:**

Individual Records	Meets standards	Needs Improvement	N/A	Auditor Comments	Home Supervisor Comments
12. Habilitation programs					
13. Service objectives					
14. Incidental Learning					
15. Program Notes					
16. OBMS / ABC/ Behavior Baselines					
17. Personal Funds and Inventories					
18. Clothing					
19. Recreation / Leisure Grid					
20. Incident Reports					
21. Other					

Audit Completed By: \_\_\_\_\_

Home Supervisor must make comments and return to Auditor within 7 days.

---

TORNADO DRILL RECORD

At approximately \_\_\_\_\_ on \_\_\_\_\_, 19\_\_ a tornado drill was conducted. All persons that were participating assembled in the \_\_\_\_\_. Assembly time was \_\_\_\_\_ minutes. The all clear was given and participants returned to normal activity. The following persons participated in this Tornado Drill.

HOME MEMBERS                      VISITORS AND STAFF

---

---

---

---

Comments \_\_\_\_\_

---

---

---

---

Use the above space for additional comments about this tornado drill.

TORNADO DRILL RECORD

At approximately \_\_\_\_\_ on \_\_\_\_\_, 19\_\_ a tornado drill was conducted. All persons that were participating assembled in the \_\_\_\_\_. Assembly time was \_\_\_\_\_ minutes. The all clear was given and participants returned to normal activity. The following persons participated in this Tornado Drill.

HOME MEMBERS                      VISITORS AND STAFF

---

---

---

---

Comments \_\_\_\_\_

---

---

---

---

Use the above space for additional comments about this tornado drill.

---

Year \_\_\_\_\_

Home \_\_\_\_\_

FIRE DRILL CHART

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1 <sup>st</sup> shift		Date	1 <sup>st</sup> shift		Date	1 <sup>st</sup> shift		Date	1 <sup>st</sup> shift		Date
2 <sup>nd</sup> shift		Date	2 <sup>nd</sup> shift		Date	2 <sup>nd</sup> shift		Date	2 <sup>nd</sup> shift		Date
3 <sup>rd</sup> shift		Date	3 <sup>rd</sup> shift		Date	3 <sup>rd</sup> shift		Date	3 <sup>rd</sup> shift		Date

---

# Quality Assurance Surveys

Quality Assurance staff will come and look at what you are doing and how you are doing it. This performance survey is conducted by selecting a sample of individuals receiving services. These people are then visited at various hours throughout the day, usually during the morning or evening when people are typically home. Visits at work sites are designed to be as un-intrusive as possible.

Surveys usually take two to four days and, depending on the size of the agency, involve two to eight surveyors. Findings from the survey are given to the agency at the end of the visit. An exit conference allows the agency to participate in the explanation of concerns as well as hear recommendations on ways to improve services.

Renewal of agency contracts **through** DHS/DDSD are based on the results of performance surveys. If deficiencies are found in an agency's compliance with either ACDD or DHS standards, arrangements are made to visit with that agency until standards have been met.

## OKLAHOMA STATE UNIVERSITY

Annual on-site visits are another assessment process implemented by the State of Oklahoma. These visits determine if services to individuals have met their objectives. Oklahoma State University (OSU) makes pre-arranged visits to assess changes in individual adaptive skills, health, access to services, opportunities for inclusion, work related income, and satisfaction. Comparisons on a yearly basis of individual progress determines to what extent supports have been successful. OSU representatives provide an individual profile that summarizes achievements over the year. The OSU database also allows a comparison between individuals within group homes and individuals receiving in-home supports or institutional supports as to the progress they have made over the year.

---

## **OK-AIM**

OK-AIM (Oklahoma Advocates Involved in Monitoring) volunteers visit individuals on at least an annual basis. Volunteers do not look at records but focus on the experiences described by the people being served and their support staff. Volunteers offer suggestions on ways that services or environments might be improved. Following each visit, the volunteers evaluate the quality of supports. This information is shared with area managers who are responsible for following up on issues of significant concern or on areas that may lead to enhancement of supports.

## **HCFA**

The Health Care Financing Administration (HCFA), a federal agency, also uses the OSU information to determine the success and cost effectiveness of community versus institutional services expenditures. In addition, these surveys fulfill the Nursing Home Reform Act requirements in which visits are made to individuals with mental retardation in nursing facilities to ensure their health and programmatic needs are met.

The monitoring project has been very successful. It provides not only a source of information to providers and DHS staff but also a method for consumers to become familiar and involved in shaping services for themselves or other family members.

---

Monitoring Visit  
May 13, 1993  
Type of Living Arrangement: Group Home

Residence at:

### **General Observations**

The team gave a high rating in the area of Staff.

### **Specific Strengths**

The team liked the staff. They were cooperative and provided good role models for the individuals. The individuals and staff seemed to have a friendly relationship. The staff were very receptive to the team and willing to share their experiences. The staff was very positive and supportive with the individuals and had a good attitude. They were well trained and seemed knowledgeable about each of the individuals and their needs.

The house was attractively decorated and well kept on the outside and inside. The team thought there was enough room for the individuals and for their personal items. Each individual's bedroom reflected their hobbies and interests. The individuals were very comfortable in their home and with the staff. The individuals all seemed to be healthy, happy, and content.

### **Concerns**

The team thought the location of the house was semi-isolated therefore making community access more difficult and restricted. Also there were not many neighbors for the individual to develop friendships.

### **Agency Response**

The agency stated that they realized the house was somewhat in an isolated area but that they provided transportation for the individuals wherever they wanted to go. Also they do not have many neighbors but the few they have the individuals know and visit regularly.

---

Monitoring Visit  
May 21, 1992  
Type of Living Arrangement: Supported Living

Residence at:

### **General Observations**

The team gave a high rating in the area of Physical Setting, Staff, regard for the individual and personal growth.

### **Specific Strengths**

The team felt this was a good neighborhood. The house was clean and made a special note about shelf paper and the freshly shampooed carpet. They felt this home had a lot of extra room and liked the individual had his own private bathroom.

The team was impressed with the individual relationship with his neighbors. An example given was the neighbors visited the fire station in the are and the individual went too. The team also thought the interaction between staff and the individual was great. The individual mentioned going on trips out of town with the staff, and the team felt they really liked one another, and were good friends. The staff was trying to teach him to read and write and also was going to the literacy lab. Staff were honest with the individual and explained natural consequences of life and assisted him to make better choices.

The team was also impressed with the awareness the staff had about medical needs. The staff respected the individual's privacy, didn't interfere and closed the door so the individual could talk with the team.

Finally the team felt this individual makes his own choices and advocates well for himself. He had a lot of friends, activities, and hobbies such as wood craft, music, and baseball card collection. They really enjoyed their visit and would like to go back.

### **Concerns**

The team thought some light maintenance could be done. The garage door, some of the windows, and especially the bathroom were not as secure as they could have been. Also the team thought the individual could use more clothes and towels..

---

Monitoring Visit  
May 21, 1992

Agency:  
Residence at

**Agency Response**

1. The agency contacted the landlord to repair the garage door and stated they would check the windows.
2. In an effort to instill a work ethic, the individual's I.D.T. wanted him to realize the effects of not working therefore they were trying not to buy new personal items unless they are a necessity.

---

# SUMMARY

The Nuts and Bolts of a home are what hold it together, give it life, and create a caring and secure atmosphere. Both physical maintenance (interior and exterior) and quality monitoring and administration are essential for assuring that a home is safe and well-tended. They are also responsible for assuring that a home reflects the values of the community and provides that important image necessary to promote community inclusion.

