

ASSISTED LIVING CLINICAL PROTOCOL QUARTERLY TENANT ASSESSMENT & SERVICE UPDATE PROTOCOL

Principle

In order to ensure ongoing delivery of safe quality care that meets the needs of the tenant, quarterly reviews are completed by the FH AL Clinician, the tenant and the AL Service Provider.

Quarterly Review with AL HCP

Under both the FH Assisted Living Operating Agreement and the Personal Assistance Guidelines, ongoing regular communication/consultation about each tenant is required between the AL Service Provider and AL Clinician. The AL Provider will provide a Quarterly Review schedule to the AL Clinician which will include dates, times, and a list of tenants to be reviewed at each meeting. The Quarterly Review is usually attended by the Clinical Lead and FH AL Clinician. However, it may be appropriate in some cases for the AL Service Provider Manager, Pharmacist, or other health care providers to attend as well.

The content for the tenant review meetings will include:

1) Changes in tenant's care needs

- Functional abilities; e.g. increased assistance with dressing and use of a walker
- Health; e.g. medical appointments and medication changes
- Cognition; e.g. staff providing reminders and escort to attend meals
- Behaviours; e.g. refuses medication and physical aggression
- Other changes; e.g. falls, activity attendance, family/friend involvement

2) Changes made to the AL Service Plan

- Changes made *within* the same acuity level (low, moderate or high) can be made without authorization by the FH AL Clinician.
- Changes in tenant's acuity level (low, moderate or high) resulting in a change in funding must be authorized by the FH AL Clinician and will require an updated RAI-HC.
- 3) Requested changes to the AL Service Plan by the tenant; this may or may not be approved by the FH AL Clinician.

3) Communication with and/or referrals to other health care services (e.g. Mental Health and Physiotherapy), social services (e.g. The Bloom Group and Ministry of Social Development), and other relevant services (e.g. private-pay home support).

The purpose of the quarterly review of the tenant's Services Plan are completed to ensure:

- the tenant is receiving the services authorized on the AL Services Plan in addition to any private pay services (e.g. additional shower, meal tray delivery, and personal laundry), and they are satisfied with these services
- changes in care needs are identified and the care plan is adjusted to meet the needs of the tenant
- changes in tenant's acuity level (low, moderate or high) are identified
- the tenant's continued suitability for Assisted Living

Process

The Clinical Lead or designate will review all tenant support plans quarterly. The Quarterly date for review is determined by SeniorCare based on the initial entry of the AL Services Plan into SeniorCare.

The review will include a meeting with the tenant as well as gathering feedback from the team involved with the tenant. *The Quarterly Review Template* will guide the review process.

A review of the tenant's service requirements may be conducted at any time between the scheduled quarterly reviews at the request of the tenant, family, care staff, health professional, or when a concern arises.

The following will be reviewed quarterly:

- Functional status and all requirements for personal care and medication management
- Scheduling of personal care and medication management
- Cognition

Every possible effort will be made to accommodate tenant's requested changes to scheduling and supportive service.