# Seniors’ Facilities Documentation Checklist

The following is intended to assist you in collecting documentation in preparation for an accreditation site visit. This will augment the Seniors’ Facilities Self-Assessment Tool. It may be helpful in identifying the source of policies/procedures/minutes or related documentation.

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| **A. Mission Statement** | **Location/Source** |
| Copy of mission statement |  |
| Board minutes indicating when the mission statement was last reviewed |  |
| **B. Theological Values and Standards** |  |
| Annual report, organization chart, policy, reference in bylaws |  |
| Organization chart of United Church court structures |  |
| **C. Accountability** |  |
| Refer to *Section 429 Guidelines for Incorporated Ministries:* www.united-church.ca/handbooks |  |
| **D. Governance** |  |
| Corporate bylaws |  |
| Copies of annual reports, financial statements, board member lists, insurance statements from previous 2–3 years |  |
| Example of evaluation of administrator |  |
| Policies regarding business practices |  |
| **E. Leadership and Partnerships** |  |
| Policy regarding signing contracts |  |
| Review process of external providers |  |
| **F. Insurance** |  |
| Insurance policy |  |
| Actual vehicle(s) |  |
| Physical inspection of vehicles, documented process |  |
| **G. Information Management** |  |
| Copy of privacy policy and related procedures |  |
| Policy re health record audit |  |
| Policy/procedure re accessing resident files |  |
| Policy/procedure re accessing personnel files |  |
| Policy/procedure re disposal of electronic devices |  |
| **H. Resident Quality of Life** |  |
| Brochure, programming, handbooks, website information |  |
| Admission policies, application |  |
| Resident/family council, complaint process, hotline |  |
| Policy/procedure regarding aggressive/violent behaviour |  |
| Policy regarding uses of restraints |  |
| **I. Food Service** |  |
| Actual public health inspection reports and follow-up as required |  |
| Current menu |  |
| Documentation of recorded fridge temperatures |  |
| **J. Human Resources** |  |
| Samples of managerial, nursing, and service-related job descriptions |  |
| Orientation manual, agenda, sign-off form |  |
| Policy/process/events re employee recognition and performance evaluation |  |
| Organization chart |  |
| **K. Physical Building, Environment, and Equipment** |  |
| Annual inspection schedule, completed safety inspections, maintenance schedules/checks—actual documents |  |
| Evidence of WHMIS training |  |
| WHMIS manuals |  |
| **L. Emergency Preparedness** |  |
| Copies of emergency manuals/plans |  |
| Fire inspection/fire marshal reports |  |
| Documentation of drills and follow-up |  |
| Minutes of health and safety meeting |  |
| Annual testing records of fire systems: alarm, suppression, etc. |  |
| **M. Infection Control** |  |
| Policy and procedures related to: |  |
| Isolation/precaution techniques |  |
| Cleaning/disinfecting/sterilizing |  |
| Hazardous and infectious material |  |
| Personal hygiene |  |
| Building maintenance logs for HVAC |  |
| Policy/procedure regarding handling of laundry/linen |  |
| Policy/procedure re outbreaks |  |