Residential Disability Support Agency in Iowa

POLICIES & PROCEDURES MANUAL

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1. Incident Details ..... **Error! Bookmark not defined.**

2. Individuals Involved ..... **Error! Bookmark not defined.**

3. Description of Incident..... **Error! Bookmark not defined.**

4. Immediate Action Taken..... **Error! Bookmark not defined.**

5. Classification of Incident **Major Incidents (check all that apply): . Error! Bookmark not defined.**

6. Follow-Up Actions & Prevention Plan ..... **Error! Bookmark not defined.**

7. Reporting & Approval ..... **Error! Bookmark not defined.**

8. Office Use Only (If Additional Review is Needed) ..... **Error! Bookmark not defined.**

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5. Freedom and Autonomy ..... **Error! Bookmark not defined.**
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3. Rent & Payment Terms ..... **Error! Bookmark not defined.**
4. Security Deposit (If Applicable) ..... **Error! Bookmark not defined.**
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1.0 Purpose & Mission Statement

Policy Number: [COMPANY NAME]-001
Effective Dates: July 1,2024
Reviewed and Revised Dates: July 1, 2024

1.1 Purpose & Mission Statement

1.1.1 Purpose Statement:

To provide comprehensive, compassionate, and individualized residential supported living services for adults with disabilities, empowering them to lead fulfilling lives with dignity, independence, and inclusion.

1.1.2 Mission Statement:

Our mission is to build [redacted]

1.2 Rate Development

1.2.1 Policy Statement

The objective of this policy is to establish a structured approach for the development of rates for services provided by [COMPANY NAME] (herein referred to as [COMPANY NAME]). This policy aims to ensure [redacted]

1.3 Policy

1.2.2 Process for Establishing a Rate for Each Service

1. **Service Cost Analysis**:
    - **Objective**: To determine the full cost associated with delivering each service.
    - **Procedure**:
        [redacted]

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2. **Market Comparison**:
   - **Objective**: To ensure that service rates are competitive within the market while maintaining financial sustainability.
   - **Procedure**:

3. **Compliance and Regulatory Review**:
   - **Objective**: To ensure that rates adhere to relevant regulations and reimbursement guidelines.
   - **Procedure**:

4. **Revenue Goals and Strategic Objectives**:
   - **Objective**: To align service rates with [COMPANY NAME]'s financial goals and long-term strategic objectives.
   - **Procedure**:

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[redacted]

5. **Approval and Documentation**:
    - **Objective**: To secure formal approval of the rates and maintain a clear record for auditing and review purposes.
    - **Procedure**:
        - [redacted]

Policy Review and Approval

This policy shall be reviewed and approved by the Executive Committee. Any amendments to this policy shall be documented and approved by the same authority.

Approval Signatures

Data Protection Officer: _____ Date: _____

Policy Distribution

Copies of this policy shall be distributed to all employees and relevant personnel. An electronic copy shall be available on the [COMPANY NAME]'s intranet.

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2.0 Fiscal Accountability

Policy Number: [COMPANY NAME] - 002
Effective Date: [redacted]
Reviewed and Revised Date: [redacted]
Policy Title: Fiscal Accountability and Rate Development

2.1 Purpose

The purpose of this policy is to provide a structured and comprehensive framework for ensuring fiscal accountability at [COMPANY NAME]. This includes the development, maintenance, and regular review of budgets, as well as independent fiscal reviews. The aim is to guarantee [COMPANY NAME]'s ability to sustain its services while adhering to all regulatory requirements and ensuring financial sustainability.

2.2 Additional Authority

i. Iowa Administrative Code (IAC) Chapter 79.3(249A)
ii. Provider Agreement Requirements
iii. Relevant federal and state healthcare reimbursement guidelines

2.3 Scope

This policy applies to all departments and personnel involved in financial management, budgeting, and rate determination within [COMPANY NAME].

2.4 Responsible Party

Chief Financial Officer (CFO)
Contact: 515-783-2614

2.5 Definitions

i. **Fiscal Accountability**: The duty of managing the organization's financial resources efficiently, ensuring budget maintenance, and the conduct of independent fiscal reviews.
ii. **Rate Development**: The process of determining service rates based on a detailed analysis of costs, market conditions, regulatory requirements, patient needs, and revenue goals.

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2.6 Policy Statement

[COMPANY NAME] is committed to maintaining fiscal accountability by developing and maintaining budgets, conducting independent fiscal reviews, and establishing a structured rate development process. This policy aligns with [COMPANY NAME]'s core mission of providing high-quality healthcare services sustainably and compliantly.

2.7 Policy

1. **Fiscal Capacity**: [COMPANY NAME] has and aims to continue having a fiscal capacity to initiate and sustain services continuously. Evidence of fiscal capacity includes:

    a. Bank statements showing the [COMPANY NAME]' account balance
    b. Statements from banks indicating willingness to approve loans
    c. Business plans
    d. Financial statements showing fiscal capacity
    e. Projected budgets
    f. Adequate finance personnel and service plans

2. **External Review of Fiscal Systems**: [COMPANY NAME] has a process for the external review of its fiscal systems. Evidence shall include:
[redacted]
3. **Rate Development Process**: [COMPANY NAME] has a documented process for establishing rates for each service provided. Evidence of this include:
[redacted]
4. **Maintenance of Fiscal and Clinical Records**: [COMPANY NAME] has a documented process for maintaining fiscal and corresponding clinical records as seen in Policy 3 on Maintenance of Records.
5. **Coordination of Service Design**: [COMPANY NAME]' executive committee coordinates service design, development, and application with the applicable local county central point of coordination.

2.8 Procedure

2.8.1 Rate Development Policy

Objective: [COMPANY NAME] aims to establish a structured approach for developing rates for services provided.

Scope: Applies to all departments and personnel involved in rate determination.

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Rate Development Process:

1. **Analysis of Costs**: The [COMPANY NAME] CFO shall [redacted]
2. **Market Analysis**: The finance team shall research and analyze [redacted]
3. **Regulatory Compliance**: The finance team shall ensure compliance with [redacted]
4. **Patient Needs Assessment**: Consideration shall be given to the specific needs and requirements of patients and their families when determining rates, ensuring that services remain accessible and affordable.
5. **Revenue Goals**: The CFO shall establish [redacted]
6. **Rate Calculation**: A standardized methodology shall be utilized for calculating rates, incorporating findings from cost analysis, market research, regulatory compliance, patient needs assessment, and revenue goals.
7. **Public Disclosure**: To ensure transparency and compliance with the Iowa Department of Human Services (DHS) guidelines, [COMPANY NAME] will make established rates publicly accessible or available upon request to relevant regulatory bodies, consistent with reimbursement requirements. The CFO will ensure compliance with all disclosure mandates regarding rate structures.
8. **Established Rates**: [COMPANY NAME] will utilize the following rate structure, in compliance with Iowa's DHS tiered rate system for Home- and Community-Based Services (HCBS).

   Provider category: Federally Qualified Health Centers
   Basis of reimbursement: Retrospective cost-related
   See 441—88.14(249A)

   Upper limit:

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Except as noted, limits apply to all waivers that cover the named provider.

For AIDS/HIV, brain injury, elderly, and ill and handicapped waivers: [redacted]

For mental retardation waiver: [redacted]

HCBS waiver service providers, including:

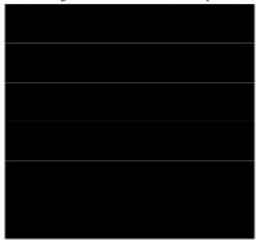
1. Adult day care – Fee schedule

Additional Fees

7. **Public Disclosure**: To ensure transparency and compliance with Iowa Department of Human Services (DHS) guidelines, [COMPANY NAME] will make established rates publicly accessible or available upon request to relevant regulatory bodies, consistent with reimbursement requirements. The CFO will ensure compliance with all disclosure mandates regarding rate structures.
8. **Established Rates**: [COMPANY NAME] will utilize the following rate structure, in compliance with Iowa's DHS tiered rate system for Home- and Community-Based Services (HCBS), effective for services rendered on or after December 1, 2017:

- **Daily Supported Community Living (SCL)**:
  - *Without day services (less than 39 hours outside the home)*:

  - *With day services (40+ hours outside the home)*:



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- [redacted]
- **Day Habilitation**:
  [redacted]
- **Adult Day Care**:
  [redacted]

9. **Documentation and Review**: The rationale and calculations behind rate determinations for each service offered shall be documented. Periodic reviews of rates shall be conducted to ensure continued relevance and effectiveness in meeting organizational objectives.

2.8.2 Approval Process

All rate development proposals shall undergo a rigorous review and approval process by the CFO. The approval process includes:

1. **Initial Review**: The finance team shall perform an initial review of the rate development proposal in April of every year.
2. **Submission to CFO**: The rate development proposal shall be submitted to the CFO for evaluation.
3. **CFO Evaluation**: The CFO shall evaluate the proposal against organizational objectives and financial sustainability.
4. **Final Approval**: Upon satisfaction, the CFO shall provide final approval and documentation of the approved rates by [redacted]

2.8.3 Communication

Approved rates and related policies shall be communicated to all relevant personnel. This includes:

1. **Notification to Department Heads**: Department heads shall be notified of the approved rates.

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2. **Distribution of Documentation**: Financial and administrative staff shall receive the necessary documentation.
3. **Updating Internal Systems**: The [COMPANY NAME]' internal systems and records shall be updated accordingly.
4. **Public Availability**: In alignment with transparency requirements, all rate schedules for services will be made accessible to the public, regulatory agencies, and stakeholders through [COMPANY NAME]'s intranet and other designated channels, as required by applicable laws and policies.

2.8.4 Budget: Monthly Operating Cost Budget for [COMPANY NAME]

Category	Description	Estimated Monthly Cost
1. Salaries and Wages	[redacted]	
- Administrative Staff		
- Healthcare Staff		
- Management		
- Payroll Taxes		
Total Salaries and Wages		
2. Rent/Lease		
3. Utilities		
- Electricity		
- Water and Sewage		
- Heating and Cooling		
- Internet and Phone Services		
Total Utilities		
4. Office Supplies and Equipment		
- General Supplies		
- Computer and Tech Equipment		
- Medical Supplies		
Total Office Supplies and Equipment		
5. Transportation		
- Vehicle Lease/Maintenance		
- Mileage Reimbursement		

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Total Transportation	[redacted]
6. Insurance	
- Liability Insurance	
- Workers' Compensation	
Total Insurance	
7. Marketing and Outreach	
- Advertising	
- Community Events	
Total Marketing and Outreach	
8. Training and Development	
- Staff Training Programs	
- Continuing Education	
Total Training and Development	
9. Miscellaneous	
- Legal and Accounting Fees	
- Contingency Fund	
Total Miscellaneous	
Grand Total Monthly Operating Cost	

2.8.5 Training and Awareness

All personnel involved in rate determination and fiscal management shall receive comprehensive refresher training on the policies and procedures on dates approved by the CFO. Training sessions shall cover:

1. **Overview of Policy**: An overview of the fiscal accountability and rate development policy.
2. **Detailed Instructions**: Detailed instructions on the rate development process.
3. **Compliance Requirements**: Best practices and compliance requirements.

2.8.6 Monitoring and Evaluation

The finance team shall be responsible for monitoring the implementation of the fiscal accountability and rate development policy. This includes:

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1. **Regular Audits**: Conducting regular audits of financial records.
2. **Periodic Reviews**: Performing periodic reviews of rates and fiscal capacity.
3. **Regulatory Compliance**: Evaluating compliance with regulatory requirements.

2.8.7 Policy Review

This policy shall be reviewed and revised annually, or as necessary, to ensure compliance with data protection regulations and to reflect changes in organizational practices. The CFO shall be responsible for initiating the review and revision process.

2.8.8 Implementation

The implementation of this policy involves:

1. **Reviewing of Procedures**: The development, reviewing, and approval of detailed procedures.
2. **Resource Allocation**: Allocating resources for training and communication by the CFO, the Finance Committee, and the Executive Committee.
3. **Ongoing Support**: Providing ongoing support and oversight by the finance team.

2.8.9 Responsibility

The CFO shall be responsible for [redacted]

Review and Revision

This policy shall be reviewed and revised annually, or as necessary, to ensure compliance with data protection regulations and to reflect changes in organizational practices. The CFO shall be responsible for initiating the review and revision process.

References

- Iowa Administrative Code (IAC) Chapter 79.3(249A)
- Provider Agreement Requirements
- Relevant federal and state healthcare reimbursement guidelines

Policy Review and Approval

- This policy shall be reviewed and approved by the CFO.

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- Any amendments to this policy shall be documented and approved by the same authority.

Approval Signatures

CFO: _____ Date: _____

Policy Distribution

- Copies of this policy shall be distributed to all employees and relevant personnel.
- An electronic copy shall be available on the [COMPANY NAME] intranet.

Notes on Compliance with Data Protection Regulations

- All financial and clinical records shall be maintained in compliance with data protection regulations.
- Regular audits and reviews shall be conducted to ensure ongoing compliance.

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3.0. Maintenance of Records Policy

Policy Number: [COMPANY NAME] - 003
Effective Date: July 1, 2024
Reviewed and Revised Date: July 1, 2024
Policy Title: Maintenance of Records

3.1 Purpose

The purpose of this policy is to establish comprehensive guidelines for maintaining records at [COMPANY NAME] in compliance with the Iowa Administrative Code (IAC) Chapter 79.3(249A) and other pertinent regulations. Proper record maintenance ensures the accuracy, accessibility, and confidentiality of client information, thereby facilitating high-quality care delivery and regulatory compliance.

3.2 Additional Authority

i. Iowa Administrative Code (IAC) Chapter 79.3(249A)
ii. Health Insurance Portability and Accountability Act of 1996 (HIPAA)
iii. Provider Agreement Requirements

3.3 Scope

This policy applies to all employees and contractors of [COMPANY NAME] involved in the creation, management, storage, and disposal of records.

3.4 Responsible Party

Chief Compliance Officer (CCO)
Contact: 515-783-2614

3.5 Definitions

i. **Record**: Any information, regardless of format, created or received in the course of operations and maintained as evidence of activities, decisions, or services. Confidentiality of dependent adult information shall be maintained, except as specifically authorized.
ii. **Confidentiality**: The principle of keeping sensitive information secure and protected from unauthorized access. Iowa Code section 235B.6 provides that confidentiality of dependent adult information shall be maintained, except as specifically authorized.

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iii. **Retention**: The period during which records shall be kept before they are disposed of.

[redacted]

iv. **Disposal**: The process of destroying or deleting records that are no longer required to be retained. [redacted]

3.6 Policy Statement

[COMPANY NAME] is committed to maintaining accurate, complete, and secure records in compliance with all relevant regulations. This policy outlines the responsibilities and procedures for creating, maintaining, retaining, and disposing of records to ensure operational efficiency, regulatory compliance, and the protection of sensitive information.

3.7 Policy

1. **Record Creation and Documentation**:

    a. All client records shall be accurately and comprehensively documented to reflect the care and services provided.
    b. Documentation shall include but not be limited to:

    [redacted]

    c. Documentation shall be completed in a timely manner, adhering to the specified timelines outlined in regulatory requirements.

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2. **Confidentiality and Security**:

    a. All records shall be stored securely to prevent unauthorized access.
    b. Access to records shall be limited to authorized personnel only.

3. **Retention and Disposal**:

    a. Records shall be retained for a minimum of five years after the date of the last claim.
    b. Disposal of records shall be conducted securely and in accordance with legal requirements.

4. **Quality Assurance and Audits**:

    a. Regular audits shall be conducted to ensure compliance with documentation standards and the quality of care provided.
    b. Quality assurance processes shall be in place to monitor and improve record-keeping practices.

5. **Training and Education**:

    a. All personnel involved in record management shall receive training on this policy and related procedures.
    b. Ongoing education and updates shall be provided to ensure compliance with any changes in regulations.

6. **Review and Revision**:

    a. This policy shall be reviewed and revised annually, or as necessary, to ensure ongoing compliance with regulations and to reflect changes in organizational practices.

3.8 Procedure

3.8.1 Record Creation and Documentation

Objective: The aim is to ensure accurate and prompt creation of records that reflect true and complete information.

Procedure:

- All personnel shall create records immediately after the occurrence of the event or transaction being documented.

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- Records shall include all relevant details, such as [redacted]
- Standardized forms and templates shall be used to ensure consistency in documentation.

3.8.2 Confidentiality and Security

Objective: To protect records from unauthorized access and ensure the confidentiality of sensitive information.

Procedure:

[redacted]

3.8.3 Retention and Disposal

Objective: Ensure records are retained for the required period and disposed of securely when no longer needed.

Procedure:

[redacted]

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3.8.3.1 Record Retention Schedule

Category	Records	Retention Period	Rationale
Clinical Records	[redacted]		
Fiscal Records			
Administrative Records			
Human Resources Records			

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3.8.4 Quality Assurance and Audits

Objective: Ensure compliance with documentation standards and improve record-keeping practices.

Procedure:

[redacted]

3.8.5 Training and Education

Objective: Ensure all personnel are knowledgeable about record management policies and procedures.

Procedure:

[redacted]

3.8.6 Review and Revision

Objective: Ensure the policy remains relevant and compliant with current regulations and organizational practices.

Procedure:

[redacted]

Review and Revision

This policy shall be reviewed and revised annually, or as necessary, to ensure compliance with data protection regulations and to reflect changes in organizational practices. The Chief Compliance Officer (CCO) shall be responsible for initiating the review and revision process.

References

- Iowa Administrative Code (IAC) Chapter 79.3(249A)
- Health Insurance Portability and Accountability Act of 1996 (HIPAA)

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- Provider Agreement Requirements

Policy Review and Approval

- This policy shall be reviewed and approved by the Chief Compliance Officer (CCO).
- Any amendments to this policy shall be documented and approved by the same authority.

Approval Signatures

Chief Executive Officer: _____ Date: _____

Policy Distribution

- Copies of this policy shall be distributed to all employees and relevant personnel.
- An electronic copy shall be available on the [COMPANY NAME] intranet.

Notes on Compliance with Data Protection Regulations

- All financial and clinical records shall be maintained in compliance with data protection regulations.
- Regular audits and reviews shall be conducted to ensure ongoing compliance.

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4.0 Organization Oversight

Policy Number: [COMPANY NAME]- 004
Effective Dates: July 1, 2024
Reviewed and Revised Dates: July 1, 2024
Policy Title: Organization Oversight

4.1 Purpose

The purpose of this policy is to establish a comprehensive framework for the oversight of [COMPANY NAME] by its governing body. This policy ensures that the organization's governing body demonstrates an active role in the administration of the agency, providing oversight to ensure the provision of high-quality support and services to members. The board membership is designed to represent a wide range of community interests, ensuring that the needs and interests of those served by the agency are adequately represented.

4.2 Additional Authority

1. Provider Agreement Requirements

4.3 Scope

This policy applies to all members of the governing body, including the committee, board, or advisory board, and all employees involved in the oversight and administration of [COMPANY NAME].

4.4 Responsible Party

Chief Executive Officer (CEO) Contact: (515-783-2614)

4.5 Definitions

1. **Governing Body**: The group of individuals responsible for overseeing the administration and operation of the organization.
2. **Oversight**: The act of overseeing and supervising the activities and operations of the organization to ensure compliance and quality.
3. **Committee, Board, or Advisory Board**: A group established to provide guidance, make decisions, and oversee the operations of the organization.

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4.6 Policy Statement

[COMPANY NAME] is committed to ensuring effective oversight of its operations by establishing a governing body that represents a wide range of community interests. This policy outlines the responsibilities and procedures for the governing body to provide active oversight and ensure the provision of high-quality services to members.

4.7 Policy

The organization has a committee, board, or advisory board to oversee operations as below:

4.7.1 Board Members

1. **Board Chair** -
2. **Board Secretary** -
3. **Board Treasurer** -
4. **Member** -
5. **Member** -

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4.7.2 Organization Chart:

4.7.3 Representation of Interests:

The committee, board, or advisory board includes members, caregivers, and professionals in a relevant field that represents the interests of members.

Board Members are compensated for their time and expertise in fulfilling their roles to ensure the effective representation and advocacy of members' interests.

Committee Members

1. **CEO –**
2. **Director - Programs and Planning –**
   - :
3. **Lead Supervisor –**
4. **Non-Committee Member:**

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Thank you,

The Write Direction Team

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