

## **Sixty-Day Bankruptcy Report (Honor, Conifer, and Sunflower)**

Please use this outline to provide ongoing reports for facilities under special Bankruptcy oversight.

### 1. Facility Name and City

### 2. Current occupancy

- On first report, establish the licensed capacity and current occupancy
- On first report, note the history of occupancy for the building. How does it compare with other neighboring facilities? How close are the other facilities, and what is their capacity
- Note any change from the previous report
- Note any significant change in resident mix, such as the admission of different client groups, younger residents, residents with a diagnosis of MI, etc.

### 3. Staffing levels

- List total number of RNs, LVNs, CNAs (include Med Aides in CNA total) and social workers. Note increases or decreases. This is usually offered by the Administrator, but will require your monitoring and confirming through observation and direct-care staff reports.
- Identify shortages, by shift if possible. If a vacancy exists, note how long it has been vacant and if the NF actively recruiting to fill it.
- Other vacancies in areas such as food service, housekeeping, administration, or maintenance should be noted only if the vacancy impacts care.

### 4. Contact with medical director (MD) and attending physicians

List physician names and dates of contact. The only “required” contact each sixty days is with the MD. Other physicians are a bonus.

- Note any issues, concerns, or observations made by them.
- When you contact the physician, use this opportunity to discuss your observations or concerns about care with them.
- Ask the MD about payment for services—is the MD owed any money from the corporation?
- Have supplies been readily available?
- Is documentation in medical charts, by the MD’s account, accurate and thorough?
- Is the MD aware of recent Regulatory findings (if applicable)? Does the MD’s answers to this question lead you to believe that he or she is “in touch” with the quality of care problems that exist?

### 5. Visitation and resident/family contact

- Indicate frequency of visits by either volunteer or staff (please separate volunteer from staff visits). If weekly visits are conducted, so indicate. If less than weekly visits are conducted, list the actual dates of visits.

- Note total resident and total family contacts during the period and list any concerns or observations made by each group. (Use the TOPPS definition of contacts and visits.)
- List any pertinent collateral information received from others in this section as well, such as information received from therapists or contractors who may have been in the facility during the ombudsman visit.

#### 6. Supply and Services

- Identify any concerns involving vendors, utilities, or external support factors that may impact care.
- Include any problems reported involving payroll or indications of cash flow problems.
- Best sources for this information are those staff who order supplies—food services manager, nursing, maintenance supervisor, and business office.
- Resident accounts of problems in these areas are the strongest evidence.

#### 7. Regulatory issues

List any Regulatory Services actions since the last report and any pending or outstanding deficiencies from any period that have not been cleared.

#### 8. Ombudsman issues

List any complaints or concerns addressed by the Ombudsman program during this period (There may be some duplication of information in #6). What actions have been taken to resolve the concerns and any pending issues that require follow-up.

#### 9. Miscellaneous

Convey important information that is not captured in any other section, such as initiation of a significant culture change initiative, the start of a major renovation project, etc.

If you have difficulties with anyone not responding to your calls or requests for information, please let me know. I will make a call to the corporate office. You and I have wider privileges in this home due to the court's appointment of me as "Patient Care Ombudsman," and you as my "delegate." You may also find it effective to go to the owners for information more frequently or under lesser circumstances than in normal operating conditions. Please submit your report by email.

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