**CHAPTER 2**

**Office Basics & Information**

**TABLE OF CONTENTS**

**Section Topic Page**

**Office Basics & Information**

1. **Personnel 2-3**
2. **Basic Office Operations 2-6**
3. **Office & Computer Equipment 2-10**
4. **Consumer Information 2-13**
5. **Program Organizational Information 2-16**
6. **Publicity/Media 2-20**
7. **Purchasing/P-Card 2-25**
8. **Program Information Distribution 2-26**

**PERSONNEL**

1. ***PERSONNEL***

The LTCOP follows all personnel policies and procedures of the Department of Elder Affairs and the State of Florida. See the DOEA intranet for further information

1. **Position Vacancies**

For standardized Position Vacancies information and forms, see the Program Intranet. Available items relevant to Position Vacancies include:

* Exit Interview Form
* Employee Property Checklist
* District Ombudsman Manager Interview Questions
* Request to Advertise memo
* Administrative Assistant Interview Questions
* Administrative Assistant Interview Tasks
* Reference Check form
* Request to Hire Memo
* Position Description – Administrative Assistant
* Position Description – District Ombudsman Manager

When a position becomes vacant:

* Obtain a resignation letter if possible and fax the letter to the Headquarters Liaison. A resignation acceptance letter will be forwarded to the employee by Human Resources.
* On the employee’s last day, ensure the employee has completed the final timesheet and exit interview form.
* Complete the Employee Property Checklist. The employee must return all Department property. If any property remains in the custody of the employee, the final timesheet may be held until all property is returned.

To fill a vacancy:

* When a position becomes vacant, the Headquarters Liaison will complete the necessary paperwork to have the position advertised on People First.
* The DOM should review the advertisement after it is posted. Errors should be reported to the Headquarters Liaison as soon as possible.
* The DOM will review applications and interview qualified applicants. Interviews should be conducted with two interviewers when possible. Standard interview questions and tasks are available for use.

**PERSONNEL**

* After deciding on a candidate, the DOM should ensure the application is completed in full. The DOM should ensure that there are no gaps in employment listed on the application.
* The DOM should contact the applicant’s references and complete a reference check form for each reference. Contact the Headquarters Liaison for specific reference check information.
* After all interview and reference paperwork has been completed, complete the Request to Hire memo and email the hire packet to the Headquarters Liaison.
* The hiring supervisor will receive an email from HR staff providing further instruction of the hiring process, to include introductory paperwork required before the employment offer, the position offer letter, and additional paperwork to be completed on the employee’s first day.
* Notify the required departments (as outlined in the instructional email) of a new hire at least 5 business days before the anticipated hire date.
* Level II Background Screening
* Ensure all paperwork is completed in a timely manner and return all signed forms as requested. The new employee will have to be fingerprinted and have to complete HIPAA training to obtain computer access. The employee’s position description should be provided to the employee and reviewed with the employee by the supervisor.
* Contact the Headquarters Liaison to acquire additional items needed for new staff. These items may include an air card, state cell phone, purchasing card, etc.
1. **Leave and Overtime Requests**

For standardized Leave and Overtime Requests information and forms, see the Program Intranet. Available items relevant to Leave and Overtime Requests include:

* Leave and Overtime Request Form
* Leave and Overtime Request Policy
* Variable Work Schedule Form
* To request time off, complete the Leave and Overtime Request form and submit the form to your immediate supervisor. Your immediate supervisor will approve or disapprove the time off or overtime.
* Once approved, submit a copy of your time off approval to the Headquarters Liaison for posting on the LTCOP Informer calendar and placement in the Department’s personnel file. A copy should be maintained by the direct supervisor as well.
* If an employee will be in leave without pay status during a calendar month, prior approval must be granted by the direct supervisor and the Headquarters Liaison must be notified. Time sheet deadlines occur earlier in the month for staff that enter leave without pay status than those who do not. An email will be received by Human

**PERSONNEL**

Resources staff of these additional deadlines and notification requirements during the month.

* Any leave hours or overtime worked should be recorded accurately in the People First System.
1. **Employee Performance Evaluations**
* DOEA begins annual performance evaluation cycles every May 1.
* All employees should provide their supervisors with an updated Achievement and Recognition Log to document major accomplishments achieved for the period of July 1 of the previous year through June 30 of the current year. This completed form should be provided as close to the start of the evaluation cycle as possible. These achievements may include, but are not limited to, awards, letters of commendation, major project accomplishments or certificates. The achievement log should be given to the supervisors as soon as possible as the preparation of performance evaluations and updates to performance expectations will begin on May 1.
* All Career Service and Selected Exempt Service employees are to have a completed employee performance evaluation no later than the Department’s deadline (usually June 30). The Program will establish additional timelines to ensure all required signatures are obtained within the Department’s deadline.
* ·       All performance plans for all employees must include the three core performance expectations established for the agency:
	+ Commitment to Public Service
	+ Efficiency, Productivity, and Effectiveness
	+ Internal and External Customer Service and Teamwork
* In addition, supervisors should identify three to five additional job-specific performance expectations for the program area or position based on the employee’s position description.
* Supervisors are required to timely inform the employee in writing on any performance expectation deficiencies that could result in a “Below Expectation” or “Unacceptable” rating and identify the necessary corrective action(s) to be taken prior to the end of the evaluation period.

**BASIC OFFICE OPERATIONS**

1. ***BASIC OFFICE OPERATIONS***
	1. **Quick Start Staff Guide**

For standardized Quick Start Staff Guide information and forms, see the Program Intranet. Available items relevant to Quick Start Staff Guide include:

* + Quick Start Staff Guide

The Quick Start Staff guide is available on the Program Intranet. It should be used as a guide for coordinating office operations at an introductory point in the local office until the supervisor can provide direct training to the new staff.

* 1. **Telephone Operations and Phone Logs**

Hours

The offices are open from 8:00 AM to 5:00 PM except holidays and emergency situations. Phones should be manned during these hours.

Telephone Standard Greeting

*“Hello, you have reached the \_\_\_\_\_\_(office name)\_\_\_\_\_\_ Long-Term Care Ombudsman Program. Our office hours are Monday thru Friday, 8 a.m. – 5 p.m. We are sorry we cannot take your call at the moment. Please leave your name, phone number, and a message and someone will return your call as soon as possible. Your call is confidential. If this call is regarding abuse, neglect or exploitation, please also call the Dept. of Children and Families Abuse Hotline at 1-800-962-2873. Thank you for calling and please wait for the beep before leaving your message.”*

Telephone Greeting for Holidays and/or Emergency Closure

*“Hello, you have reached the \_\_\_\_\_\_(office name)\_\_\_\_\_\_\_Long-Term Care Ombudsman Program.*

*Our office is closed for the \_\_\_\_(name of holiday or reason for emergency closure)\_\_\_\_ and will*

*reopen again at\_\_(time)\_\_on \_\_\_(day of week and date)\_\_\_. Please leave your name, phone*

*number, and a brief message and someone will return your call as soon as possible when the*

*office reopens. Your call is confidential. If you need to report abuse, neglect, or exploitation, please also call the Dept. of Children & Families Abuse Hotline at 1-800-962-2873. Thank you for calling and please wait for the beep before leaving your message.”*

**BASIC OFFICE OPERATIONS**

Telephone Operations

Complaints received from various sources about resident care are of primary importance. Frequently, the office receives requests for ombudsman/resident rights posters and brochures. Consult with the program’s Communication Director in regards to obtaining those items. The office also receives telephone inquiries about a number of issues and services that affect the elderly. The caller can be referred to the Elder Help Line for additional information. The office may receive complaints about staff and ombudsmen, which should be submitted in writing up the chain of command. Ombudsman complaints received at the office level can often be handled at the local level or referred as appropriate after notification is made to the appropriate supervisor.

Telephone Logs

Telephone logs are available in each office (refer to sample in Appendix A). The importance of this in preparing the **NORS Report** *(National Ombudsman Reporting System)*is explained in Chapter 3. Utilize the Phone Logs to facilitate tracking NORS data.

* 1. **Safety/Falls Report Procedures**

For standardized Safety Report information and forms, see the Program Intranet. Available items relevant to the Safety Report include:

* Office Safety Inspection Checklist
* Slips, Trips, and Falls Safety Inspection Checklist

Safety Reports are completed on a quarterly basis. Confer with CARES counterparts prior to submission of the reports, if applicable. Submit completed safety reports to the Deputy State Ombudsman for Headquarters Operations.

Supervisors should immediately report all on the job injuries or illnesses to AmeriSys by calling (800) 455-2079. For further information, employees should review the information found on the DOEA Employee Resource Center on the program’s Intranet.

* 1. **Filing System (E-filing)**

For standardized Filing System/E-filing information and forms, see the Program Intranet. Available items relevant to the Filing System include:

* Electronic Filing How To (October 2012) (.ppt)

Each office utilizes a **color-coded filing system** for facility complaints and assessments.

**BASIC OFFICE OPERATIONS**

Current Files

The file for each long-term care facility consists of a public file (LTCOP Facility Assessments) and a confidential file (LTCOP complaint investigations). DCF Abuse Reports and AHCA Transfer & Discharge Reports are filed in separate filing systems. Effective June 1, 2008 all AHCA reports beginning with that date will be available online (rather than LTCOP offices receiving hard copies). Go to AHCA website to access these: <http://ahcaxnet.fdhc.state.fl.us/dm_web>

**LTCOP Filing System:**

* Public Nursing Homes - **GREEN**
* Public Assisted Living Facilities - **YELLOW**
* Public Adult Family Care Homes - **PURPLE**
* All Confidential Files - **RED**

File LTCOP complaint case investigation documentation in the confidential file. File LTCOP facility assessment and visitation documentation in the public file. It is not necessary to retain a license or survey when the document is obsolete, is superseded, or has no administrative value. (**These are duplicate records and DOEA/LTCOP is not the custodian**.)

Each office also receives nursing home *Transfer & Discharge Notices* and DCF Adult Protective Services (APS) abuse reports/investigation documentation. These documents are confidential and may be used to open or augment a LTCOP complaint case. (**These are duplicate records and DOEA/LTCOP is not the custodian unless they are part of LTCOP complaint investigation documentation.)**

Transfer & Discharge Notices should be retained for 90 days (as that is the length of time a nursing home resident has to appeal the transfer or discharge) and examined to see if resident has requested Ombudsman assistance. If requested, a complaint case is initiated on behalf of that resident. APS reports should be kept for a period of 1 year (unless they are part of LTCOP case documentation). As this is confidential information, these **DOCUMENTS MUST BE SHREDDED** when no longer needed. Any DCF abuse reports or transfer/discharge notices should be filed when they are in conjunction with a case investigation.

 A file is maintained for each volunteer ombudsman. The file contains the initial application and certification documents, training logs and other relevant information. A personnel file is maintained for each staff person.

**BASIC OFFICE OPERATIONS**

E-filing

Refer to the Power Point Electronic Filing: How To (October 2012) found on the Program Intranet.

* 1. **Office Closures**

For state holidays/emergencies, refer to Chapter 2(B)(2) – Phone Logs, for instructions on setting up the office voice mailbox. For emergencies/disasters, refer to Chapter 3(G) – Disaster Recovery, for instructions on preparing the office for the closure and appropriate equipment information.

* 1. **Retention Schedules and Archiving**

For standardized Retention Schedules and Archiving information and forms, contact the Central Office.

State agencies are required to retain designated documents for a specified period of time. Facility complaints and assessments and inactive ombudsman files must be archived. Archiving is a detailed process.

* 1. **Records Requests**

All request for LTCOP records, including subpoena’s, must be sent immediately upon receipt to the Deputy State Ombudsman for Legal Affairs and copied to his/her Assistant and the State Ombudsman.

Any standardized forms for Basic Office Operations may be found on the Program’s intranet website. Appendix A includes tools that may be useful for the DOM to consider related to Basic Office Operations items. These tools include:

Sample Telephone Log (electronic copy)

PDF/Word Version of Phone Log

Public Records Request Log

**OFFICE & COMPUTER EQUPMENT**

1. ***OFFICE & COMPUTER EQUIPMENT***
	1. **General Office Equipment**

For standardized General Office Equipment information and forms, see the Program Intranet. Available items relevant to the General Office Equipment include:

* Order & Supply Forms
* Procedures for Ordering from Office Depot & Staples

Each office has a copier, fax, postage machine, camera, projector, laptop and one or more desk top computers. Some offices have additional equipment such as a TV/VCR/DVD Player. The copier is leased by DOEA. Depending how the office is set up, the copier may be used as a fax, scanner, and printer. (Vendor supplies toner and maintenance free of charge. The vendor should deal with any issues regarding hardware.)

Order all supplies for the postage machine through the distributor. Obtain approval from the State Ombudsman designee (usually the DSO for Operations) before downloading postage through the telephone hookup as detailed in the postage machine instruction manual.

Refer to the Intranet for Instructions and Forms detailing the process of purchasing office supplies through approved vendors such as Office Depot and Staples.

Manuals for equipment can be found in the office or online.

Inventory on all office equipment is completed once a year. DOMs will receive instructions on the inventory process from the Deputy State Ombudsman of Headquarters Operations.

* 1. **Computer Equipment**

 Administrative passwords are provided to new employees to initially access the network. The employees then create their own passwords per instructions provided.

Before obtaining access to email or the Department of Elder Affairs (DOEA) intranet, all employees must complete Health Insurance Portability and Accountability Act (HIPAA) training.

* 1. **Help Desk**

DOMs should create a Help Desk account through the DOEA Intranet. Help Desk tickets can be put in when an employee needs assistance with a technical problem.

* 1. **Encryption**

For encryption instructions, refer to the Encryption Power Points for sending and receiving encrypted e-mails. All confidential information should be sent via encrypted e-mail if the recipient is outside of the DOEA system.

* 1. **LTCOP Web Application**

Supervisors should contact the Deputy State Ombudsman for Headquarters Operations for username and passwords. For the employee to receive this information, the Deputy State Ombudsman for Headquarters Operations will need:

* + Employee name
	+ Phone number
	+ Supervisor’s name
	+ District number
* Class title (OPS, Career Service, SES, position title, etc.)
* Confirmation of HIPPA training completion

The web application is used to track ombudsman information, facility information, case information, and other LTCOP related information.

* 1. **People First**

For standardized People First information and forms, see the Program Intranet. Available items relevant to the People First include:

* Step-by-step guide for entering time onto People First Website.

Human Resource services are managed through the Department of Management Services at the peoplefirst.myflorida.com website. The website can be accessed through a link on the DOEA Intranet homepage. Each new employee is provided with a People First Update form and instructed to complete and fax this form to a designated person, along with a copy of the Social Security card and Driver’s License. An employee is then issued an employee identification number which is used with a password to access personnel information. A new employee is advised of the specific information the employee needs to initially enter into the database. Thereafter, use the database to enter timesheet data, as well as update/change any accessible employee information as appropriate.

If the employee is paid bi-weekly, payment is made every other Friday. The weekly pay period begins at 12:00 AM on Friday through 11:59 PM the following Thursday. Time must be entered by NOON on the Thursday one-week prior to payday. If the employee is paid monthly, payment is made the last workday of the month. Time must be entered and forwarded for approval by NOON the next business day after the end of the month (boxes turn yellow when properly submitted for approval). Supervisors have five business days to approve timesheets. All staff must check to make sure their timesheets have been approved by the supervisor’s deadline (boxes turn from yellow to green in color when approved). An email notification is sent to all employees when time has to be entered early due to a holiday.

LTCOP employees should ensure that the Charge Objects are coded correctly on the timesheet (DOEA16) for each leave type.

* 1. **Intranet & Networking**

When clicking on the Internet icon, the computer may default to the DOEA Intranet site, or the desktop may have an icon for the DOEA Intranet site. The LTCOP Web Based Application can be accessed through this site. Appendices #4 and #5 give instructions on entering information into the database. Refer to Chapter 2(E) – LTCOP Web Application for instructions for initial access to the database.

Contact the Deputy State Ombudsman for Operations for establishing a portal account. The portal account usually takes about 24 hours to set-up.

**CONSUMER INFORMATION**

1. ***CONSUMER INFORMATION***

The program can provide information to consumers in several different ways. The information can be provided on an individual basis or group basis. The following sections break down the type of information that can be provided for each of those categories.

* 1. **Individual Basis**

The Ombudsman Program is capable of providing education and information to residents, families or any other callers needing advice. It is important, however, to understand what is public and what is confidential.

Assistance when choosing a facility

It is not uncommon for consumers to contact the program when searching for a facility for themselves or a loved one. While the program cannot recommend facilities to an individual, there are things that can be done to aid the individual on their search.

* Provide the individual with information on how to access a list of facilities on AHCA’s website.
* If the caller does not have the internet or the means to print a list, a list of facilities by county can be offered to them.
* Helpful handouts can be provided such as Tips on Choosing a facility, Tips on Problems in a facility, Instructions for accessing AHCA’s Star Rating of Nursing Homes, Instructions for accessing complaint/survey reports on AHCA’s website.
* When the caller has a list of no more than 2-3 facilities of interest, they can call the office to obtain oral information about the Administrative Assessment. If actual documents are requested, then this is a public records request and policy for public records request will be followed.
* Advice on issues affecting residents in LTC

Program representatives are continually asked questions regarding elder issues. This may be regarding general issues affecting many residents or specific issues affecting one resident. Some callers are looking for information on ways to implement self-advocacy without opening a complaint. It is important to clarify if the caller would like to receive information or open a complaint investigation. The program can offer several resources to assist with these calls just needing information. (Legal advice can only be offered by an attorney)

* Information to access Federal and State Laws.
* Program guidelines and advice on how to pursue a problem.
* Financial assistance resource numbers.
* Tips on how to deal with problems in a facility. (Handout)
* Information on resident and family councils.
* Contact information for other agencies.
* Various programs available for the elderly such as SHINE, ALF Medicaid Waiver, Area Agency on Aging, etc.
* Resources for additional information on issues such as advanced directives, Do Not Resuscitate orders, and, other issues such as Power of Attorney, Durable Power of Attorney, Health Care Surrogate, etc. without providing legal advice, only general information and referral numbers.

Any information concerning a complaint is confidential and can only be disclosed to the resident or the residents legal representative, once consent has been provided. When an office receives a request for confidential information or case paperwork, by someone other than the resident or legal representative, the request along with the information requested must be sent to the Deputy State Ombudsman for Legal Affairs for review.

* 1. **Group Basis**

Presentations

When organizations or outside groups want to know more about long-term care, the program has the ability to provide presentations.

All presentations must be approved in advance by the State Ombudsman via the State Trainer and Deputy State Ombudsman for Legal Affairs.

Special Events

The District Offices can coordinate staff and volunteers to be involved in community events such as health fairs, senior fairs, etc., after first receiving approval from Central Office/State Ombudsman. Display boards can be requested from the ROM for such events. Giveaway items such as pens, magnets, etc. are located in the district office and Communications office.

Other information provided on a group basis includes:

* NEWSLETTER: The Ombudsman Outlook is usually published on a quarterly basis and distributed to all program staff and volunteers, as well as other interested parties by request. The State Ombudsman approves each issue prior to publication. All sources will be given credit for their contributions.
* ANNUAL REPORT: In accordance with State Law an annual report on the LTCOP is distributed each year. The report will capture statistical information from the prior fiscal year.
* OTHER LITERATURE (Printed Tools, etc.): Additional literature is produced and distributed on an as-needed basis for the purposes of recruitment, public awareness, and public service. The Director of Communication generally composes language, selects and executes graphics and layout, and oversees the printing procedures, utilizing support from the State Ombudsman and the Department or graphic artist.
* PROGRAM WEBSITE: http://ombudsman.myflorida.com is maintained internally and a concentrated effort will be made to maintain the site with current information, updated regularly.
	1. **Agency Requests for Information**

The program has Memorandums of Understanding with the following agencies:

* Agency for Health Care Administration (AHCA)
* Department of Children and Families (DCF)/Adult Protective Services (APS)
* Office of the Attorney General (OAG)/ Medicaid Fraud Control Unit (MFCU)

Office staff can share information about problem facilities, findings, etc. with the above named agencies, with the exception of abuse, neglect or exploitation cases, no names can be shared unless consent was obtained from the resident to release their name to other agencies. The Deputy State Ombudsman for Legal Affairs is responsible for maintaining the MOU’s for the LTCOP with agreement being met by the State Ombudsman. Contact the DSOLA if you have any questions regarding the requirements of the MOU’s.

It is common for representatives from AHCA to call the program for information when entering facilities to conduct survey’s or complaint investigations. The representatives need to be identified as an AHCA surveyor using the most current surveyor list provided by AHCA to the field offices. The office staff can provide a “Facility Summary Report” to the AHCA rep to detail any problems or concerns noted on the facility record.

* 1. **Information for Facilities & Staff**

It is very common for program representatives to be asked for advice from facilities on how to resolve difficult cases. The program should ensure that no violations of rights occur during the facility’s venture to resolve an issue. The program can provide guidance, laws and regulations, but, should always request the facility also contact the licensing agency, AHCA, for final determination to ensure no regulatory violations occur. If the issue of concern is affecting an individual resident the program staff can call that resident/legal representative or send an ombudsman out for a consultation with the resident to determine if there is an issue the resident would like assistance with.

**PROGRAM ORGANIZATIONAL INFORMATION**

1. ***PROGRAM ORGANIZATIONAL INFORMATION***
	1. **Program Staff Organizational Information**

**Department of Elder Affairs** - **the primary state agency administering human services programs to benefit Florida’s elders.** The Department administers a wide range of programs, ranging from Agencies on Aging, the Long-Term Care Ombudsman Program, Statewide Public Guardianship Office, and Communities for a Lifetime to SHINE (Serving Health Insurance Needs of Elders) and CARES (Comprehensive Assessment and Review for Long-Term Care Services).

**Secretary of the Department of Elder Affairs** -The Secretary, appointed by the Governor and confirmed by the Florida Senate, serves as the Department’s chief administrative officer and charts the agency’s overall direction. The Secretary represents the Governor on matters relating to Florida’s elder population and serves as an advocate regarding issues and programs that affect the Department and the elders it serves. The Secretary appoints the State Ombudsman.

**State Ombudsman** – Responsible for duties described within the Older Americans Act, Title III and VII and Florida Statute, Chapter 400, serving as the designated State Long-Term Care Ombudsman. The State Ombudsman is the head of the Program.

**Deputy State Ombudsman of Legal Affairs** – Responsible for duties described in Part 1, Chapter 400, F. S. and is responsible for developing and implementing advocacy procedures and other program policies.

**Deputy State Ombudsman of Operations** – Responsible for planning and implementing internal operations, preparation and administration of the LTCOP budget, provides technical assistance as needed, and manages operational aspects of the program.

**Communication Director**– Develops and maintains extensive public information and relations program, coordinating initiatives and events to aid in awareness and recruitment issues, coordinates and edits material for the LTCOP Annual Report, assists field staff and volunteers with public presentation materials, and assists with the program website.

**Central Office Support Staff** – Provides administrative support to Central Office and district office staff.

**Membership Coordinator** – Assistant to the State Ombudsman. Coordinates administrative tasks that include preparing, processing and tracking all ombudsman membership and certification files, answers telephone and maintains telephone log for incoming calls, and collects and disseminates mail.

**Recruitment Staff** – Assists the Communication Director local district recruitment efforts.

**State Trainer** – Develops training programs for program staff and volunteers, maintains a network of local ombudsman trainers designed to provide expertise and instruction on uniform training techniques, provides technical assistance to the Executive and Training committees of the State Council, and assists in the organization of the Annual Training Conference.

**Regional Ombudsman Manager** – Responsible for the overall operation of the districts within the region. Assists the District Ombudsman Manager in administrative, recruitment, and operational duties as needed.

**District Ombudsman Manager** – Responsible for the overall operation of the local district office. Recruits and trains new volunteers and provides continuing support to ombudsmen in conducting their duties. Acts as the representative of the program in local advocacy efforts.

**Administrative Assistant** – Assists the District Ombudsman Manager in the operation of the local office. Answers phones, provides clerical assistance, and assists the District Ombudsman Manager in coordinating office procedures. Assumes the duties and responsibilities of the District Ombudsman Manager in their absence.

* 1. **Volunteer Organizational Information**

**State Council** - Serve as an advisory body to the State Ombudsman. Consists of a Representative from each local district council and 3 at-large members appointed by the Governor.

**State Council Chair** – Elected by State Council members to oversee the operation of the State Council in coordination with program staff. Serves a 1-year term.

**State Council Vice Chair** – Chosen by the State Council Chair. Assumes the duties and responsibilities of the State Council Chair in the Chair’s absence. Serves a 1-year term.

**State Council Advocacy Committee** – Consists of elected State Council Representatives who meet to review and recommend necessary improvements to the advocacy efforts of the program.

**State Council Data & Information Committee** – Consists of elected State Council Representatives who meet to review and recommend necessary improvements to the data and information relating to the program.

**State Council Training Committee** – Consists of elected State Council Representatives who meet to review and recommend necessary improvements to the ombudsman training program.

**State Council Representative** - Ombudsman elected by their council to serve on the State Council. Brings forth issues from the local council to the attention of the State Council. Serves a 3-year term.

**Local Council** - Serves as a third-party mechanism for protecting the health, safety, welfare, and civil and human rights of residents. Consists of volunteers and program staff.

**Local Council Chair** – Elected by the Local Council members to oversee the operation of the Local Council in coordination with program staff. Serves a 1-year term.

**Local Council Vice-Chair** - Chosen by the Local Council Chair. Assumes the duties and responsibilities of the State Council Chair in their absence. Serves a 1-year term.

**Local Council Legislative Workgroup Chair** – Responsible for advising the district council on legislative activities affecting the program and coordinating legislative visits.

**Local Council Publicity & Recruitment Workgroup Chair** - Responsible for implementing and advising local publicity and recruitment strategies and reporting progress of these initiatives to the district council.

**Ombudsman** ­–An individual who has been certified by the State Ombudsman as qualified to be a representative of the Office of Long-Term Care Ombudsman.

**PROGRAM ORGANIZATIONAL INFORMATION**

Volunteer Organizational Chart – State Council

Volunteer Organizational Chart – Local Council

**PUBLICITY/MEDIA**

1. ***PUBLICITY/MEDIA***

**Long-Term Care Ombudsman Program
 Communications Procedures**

The Long-Term Care Ombudsman Program communicates information and activities through various methods and forms. The goal of the Communications Office is to promote consistency and professionalism in the program’s messaging. This is accomplished through press releases or advisories, media inquiries, publications or other means.

1. **MEDIA PROCEDURES:** When communications are generated, whether by media inquiries, releases or advisories, publications or other means, the Long-Term Care Ombudsman Program (LTCOP) shall circulate the communication in advance with the Department of Elder Affairs (DOEA) Communications Director for comments or suggestion; however, the State Long-Term Care Ombudsman retains the right to make the final decision on the communication presented. Such consultation and cooperation ensures that efforts are not needlessly duplicated, that other valuable information or contributions are considered; and further, it allows both entities to coordinate their efforts for maximum benefit. This level of cooperation and advance communication is implicit in the regulatory provisions which provide that the Department has the responsibility to ensure that the LTCOP performs its functions, and may establish policies for, and monitor the performance of, that Office.
2. **MEDIA INQUIRIES:** When a member of the media contacts the program, he/she should be immediately forwarded to the Communications Director within LTCOP. Questions are fielded and answered as necessary, and responses requiring additional time for research are arranged with the State Ombudsman and/or appropriate staff members. Opportunities are shared with DOEA or as directed above.
3. When a member of the media contacts a field office, the DOM/ROM is required to notify the LTCOP Communications Director of such communication as soon as possible or within the same business day with the name of the media contact, the news source name (e.g. Orlando Sentinel, Tampa Tribune, WCTV News Station), and subject matter of the inquiry. General questions may be fielded and answered only with the prior approval of the LTCOP Communications Director.  Further inquiries received by local offices may then be handled at the local level with the LTCOP Communications Director’s authorization or at the Central Office level at the discretion of the LTCOP Communications Director and State Ombudsman.
4. Volunteers should be directed to not answer media questions unless authorized by the LTCOP Communications Director and must notify their DOM of such inquiry as soon as possible or within the same business day it is received and provide the name of the media contact, the news source name (e.g. Orlando Sentinel, Tampa Tribune, WCTV News Station), and the questions asked.
5. The purpose of developing this policy is to ensure the proper observance of confidentiality and adherence to program policies and procedures. Should a request to speak to the media not be approved, a volunteer ombudsman or staff member may speak with a member of the media in his or her individual capacity, but cannot speak on behalf of the program. Under no circumstances are program staff and volunteers authorized to release confidential information retained by the LTCOP. Additionally, program representatives should refer all inquiries regarding legal matters or public records requests to the Deputy State Ombudsman for Legal Affairs. As professional representatives of the program, staff and volunteers should refrain from using inflammatory or derogatory language at all times.
6. If a media inquiry is received that falls outside the scope of the Ombudsman Program’s authority or area of expertise, these questions will be forwarded to the appropriate entity within the same business day of message receipt by the LTCOP Communications Director.
7. The following disclaimer will be placed on all press releases and/or verbally communicated when interacting with the media, when appropriate: *The Department of Elder Affairs fully supports the Office of the State Long-Term Care Ombudsman Program’s authority to independently advocate for the health, safety, rights and welfare of long-term care facility residents. Consequently, the views and opinions expressed by the Office may not necessarily represent the official policy or position of the Department of Elder Affairs or its employees.*
8. **SOLICITING THE MEDIA:** Volunteers and staff should not approach or solicit the media as program representatives, unless prior approval from the LTCOP Communications Director has been received.
9. **MEDIA RELEASES & ADVISORIES:**  These items are written and released as necessary to promote the program using appropriate messaging. The LTCOP Communications Director is responsible for writing and releasing [statewide releases or advisories](http://ombudsman.myflorida.com/News.php) using the advance consultative process described above in the Media Procedures. Always included in the process are the State Ombudsman and DOEA Communications Director. All quotes and attributions are approved by their sources prior to release. Media releases and standard media advisories written by local office staff or volunteers must be reviewed by the LTCOP Communications Director before release.
10. **MEDIA COVERAGE:**  Whenever media coverage is obtained in print, broadcast, or other forms of media, the LTCOP Communications Director notifies the DOEA Communications Director as soon as possible, and an electronic and/or hard copy of the article or piece should be distributed to appropriate program staff members and volunteer leadership. If a copy cannot be obtained (e.g., a television news story which was not captured by a member or affiliate of the program), the LTCOP Communications Director shall prepare and forward a summary to all parties mentioned above. [Articles which feature or mention the program](http://ombudsman.myflorida.com/News.php) are posted on the program’s website whenever possible.
11. **PUBLICATIONS:**
12. **Newsletter:** In accordance with Florida Statue 400.089, the Long-Term Care Ombudsman Program shall have the duty and authority to prepare quarterly complaint data reports published on the program's Internet webpage based on FFY (Oct 1- Dec 31, Jan 1 - Mar 31, Apr 1 - Jun 30, Jul 1 - Sep 30). The office shall maintain statewide uniform reporting system to collect and analyze data relating to complaints and conditions in long-term care facilities and to residents for the purpose of identifying and resolving significant problems. At a minimum of 30 days prior to the beginning of the next quarter, information and data collected from various positions within the program related to the reporting quarter is compiled and organized in Adobe Illustrator by the program's graphic designer. The first round of edits by the program is conducted and then routed through the DOEA Communications Office for any suggested edits. Any suggested edits are considered and/or implemented. Final routing is then conducted internally within the program with the State Ombudsman giving his or her final approval before publishing on the program's Internet webpage and emailed to program staff.
13. **Annual Report:** In accordance with Florida Statue 400.065(I), the Long-Term Care Ombudsman Program shall have the duty and authority to prepare an annual report describing the activities carried out by the office, the state council, and the local councils in the year for which the report is prepared. The program shall submit the report to the Department of Elder Affairs Secretary at least 30 days before the convening of the regular session of the Legislature. The secretary shall in turn submit the report to the United States Assistant Secretary for Aging, the Governor, the President of the Senate, the Speaker of the House of Representatives, the Secretary of Children and Family Services, and the Secretary of Health Care Administration.

At a minimum of four months prior to the report due date to the DOEA Secretary, information required in accordance with Florida Statue 400.0065(I) shall be collected from various positions within the program and organized in Adobe Illustrator by the program's graphic designer, The first round of edits by the program is conducted at least two months prior to the report due date before being routed to the DOEA Communications Office, DOEA Internal/External Affairs Director, DOEA Deputy Secretary, and DOEA Secretary. Any suggested edits are considered and/or implemented. Final routing is then conducted internally within the program with the State Ombudsman giving his or her final approval before printing. During the routing process, the graphic designer shall provide the report's specifications to at least four printing companies for bids in accordance with DOEA's policies and procedures. Once it is determined which company will be printing the report that information is then provided to the program's budget and fiscal coordinator for the Purchase Order. Once the report is printed, it is distributed evenly throughout the district offices, provided to Central Office staff, and provided to the Department of Elder Affairs Secretary, the United States Assistant Secretary for Aging, the Governor, the President of the Senate, the Speaker of the House of Representatives, the Secretary of Children and Family Services, and the Secretary of Health Care Administration. The PDF version of the report is then posted on the program's Internet webpage and Facebook page.

Annual reports and quarterly newsletters are posted on the program’s website under [Publications](http://ombudsman.myflorida.com/publications.html).

1. **OTHER LITERATURE (printed materials, etc.):** Additional literature is produced and distributed on an as-needed basis for the purposes of recruitment, public awareness, and public service.  The LTCOP Communications Director composes language, selects and approves graphics and layout, and oversees printing procedures, utilizing support from the State Ombudsman, the program graphic designer, and DOEA. All materials to be used for external purposes are posted on the program’s website under [Publications](http://ombudsman.myflorida.com/publications.html).
2. **COMMUNITY OUTREACH:**  Both locally and statewide, community outreach is always encouraged among all program staff and volunteers and the LTCOP Communications Director is available to research community partnerships and outreach opportunities at the request of the State Ombudsman. The LTCOP Communications Director is also available to provide key speaking points, presentation materials, etc. by request when possible. Approval for use of any program provided presentation must be obtained from the LTCOP Communications Director prior to attending a community event.
3. **WEBSITE:** The LTCOP maintains a program website; ombudsman.myflorida.com. Upkeep of the site will be maintained internally at Central Office, and a concentrated effort will be made to maintain the site with current information. Please contact the LTCOP Communications Director if you note incorrect information, broken links, or have other suggestions for the content or organization of materials on the site.
4. **SOCIAL MEDIA:** The Ombudsman Program maintains profiles on [Facebook](http://www.facebook.com/pages/Floridas-Ombudsman-Program/115258804707), OmBlog and [YouTube](http://www.youtube.com/floridaombudsman). The LTCOP Communications Director manages upkeep of these sites, posting relevant and timely information and closely monitoring each for inappropriate postings or messages which require a response or removal.  The State Ombudsman or LTCOP Communications Director reserves the right to edit material on these sites to maintain consistent messaging for the program and to promote a positive and professional face to the public. The State Ombudsman or LTCOP Communications Director may consult with DOEA; however, the State Ombudsman retains the right to determine what shall be posted on these social media sites. A disclaimer is included on each site to explain that the views and opinions expressed on the social media sites are those of the authors and do not necessarily reflect the official policy or position of the Department of Elder Affairs or its employees.
5. **ADVERTISING:** (Print, broadcast, radio, web, etc.) is conducted on an as-needed basis when funds are available. When funds are available, the program regularly produces and/or updates its printed advertisements and broadcast-quality public service announcements. Media buys are executed by the LTCOP Communications Director, taking into consideration elements such as return on investment, ratings, shares, vendor quality, audience demographics, and any other pertinent factors.  State purchasing guidelines are followed during the media buying process.
6. **SPECIAL EVENTS:** The program’s Communications Office staff provides assistance (displays, take-away materials, purchasing provisions) by request to district offices involved in community events such as health fairs, senior fairs, etc. The program as a whole participates as a sponsor or exhibitor in appropriate events held by or in conjunction with DOEA (such as Ambassadors for Aging Day, Golden Choices, Davis Productivity Awards, etc.) whenever possible, and staff in the geographical location of the event generally act as program liaison for such events. When funds are available, giveaway items such as pens, magnets, etc. are ordered and distributed to district offices.

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**PURCHASING/P-CARD**

1. ***PURCHASING/P-CARD***
* The LTCOP follows the requirements of the Department of Elder Affairs and the State of Florida.

Each District Ombudsman Manager will be assigned a purchasing card (p-card) for ordering office supplies, gasoline for rental cars, hotel stays, etc. in conjunction with ombudsman or office business. The DOM will also be provided a State of Florida Tax Exemption Certificate. This should be retained with the p-card. The p-card is a state-approved payment method used to procure goods and services that requires pre-authorization from the ROM.

A receipt should be obtained for all p-card purchases, signed by the cardholder on the original receipt, and a copy submitted to the Deputy State Ombudsman for Operations within three business days. The original receipt must be mailed the next business day upon your return. A replacement receipt form is available for use when no original receipt is obtained. All applicable p-card purchases should be documented on the second page of the travel voucher. Any P-Card receipts for charges listed on the travel voucher (hotel, parking, tolls, etc.) should each be signed and taped on an 8.5 X 11 piece of paper, copied, and the copies attached to travel voucher. **Do not** put tape over any verbiage on receipts.

**PROGRAM INFORMATION DISTRIBUTION**

1. ***PROGRAM INFORMATION DISTRIBUTION***

Information will be distributed to district offices through the immediate supervisor. The ROM will be the primary source of information distribution for a DOM, however, the Deputy State Ombudsmen or State Ombudsman may also provide information when appropriate.

A submittal sheet is available to identify which headquarters staff receives certain documents and reports from the district offices.

The Program will utilize conference calls and video meeting sessions to assist in the delivery of information to district offices. The ROM is encouraged to hold a monthly meeting for the respective region to update the district office staff on changes to Program policy and to discuss district issues.

The chain of command should be followed to address staffing and other Program issues. The DOM should notify the ROM of any concerns and a district office assistant should forward any concerns to their respective DOM. If a staff member has concerns addressing a specific issue with their supervisor, the chain of command should be followed to address the issue.