



Oregon

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COMMUNITY BASED CARE SURVEY TECHNICAL ASSISTANCE



To: CBC Providers
From: CBC Survey Unit
Date: September 2015
Topic: C252 Resident Move-in and Evaluation
O.A.R: 411-054-0034

Move-in Evaluation

- Many providers have a move-in evaluation tool, or form that is used to collect information about perspective residents. The resident evaluation must be completed before the resident moves into the facility.
- The initial evaluation must be updated and modified as needed during the 30 days following the resident's move into the facility.
- The original move-in evaluation should be maintained as part of the resident record for 24 months after the initial 30-day move in period. You may consider keeping it in a protective sleeve with "do not purge" marked on it. This is required even if your corporation uses software that combines the evaluation and service plan.
- OAR 411-054-0034 (5) includes a list of elements which must be contained in a resident move-in evaluation.

Subsequent Evaluations

- After the move-in evaluation, subsequent evaluations are required with updates and changes as appropriate within the first 30 days, and at least quarterly thereafter.
- Twenty-four months of past evaluations must be kept in the resident's files in an accessible, on-site location.
- Evaluations must also be completed if a resident experiences a significant change of condition.

URGENT Move-ins:

- If you have an urgent move-in situation, you are responsible for documenting the situation and completing the move-in evaluation within eight hours of the resident's arrival.

Thank you for your shared dedication to the residents we are privileged to serve.