

Sample Site Monitoring Tool – Employment and Day Services (DSA)

Date: _____

Agency: _____ **Facility Name:** _____

Agency staff name and title if assisting in review: _____ **Facility Address:** _____

Service Coordinator or Personal Agent Conducting Review: _____

SC/PA Entity Name: _____

Services delivered within setting: _____

Note: This tool is a **SAMPLE** and intended to cover the annual provider site evaluations CDDPs are required to conduct under [Oregon Administrative Rule 411-415-0090\(3\)](#).

Case managers are also required to meet monitoring requirements that are not covered in this tool including:

- i. Annual face to face contact with the person;
- ii. Quarterly contact (monthly if more significantly health and safety needs); and
- iii. Employment path facility services must be monitored by the Service Coordinator (SC) or Personal Agents (PA) two times on site per ISP year while the individual is present, to verify and document the progress being made to support the individual to achieve employment goals documented in the Career Development Plan. Each visit must be at least three months apart.

	Yes	No	Notes/Concern/Need
1. Provider has a written emergency plan that includes instructions for staff and volunteers to follow in event of fire, explosion, accident, pandemic, or other emergency, including evacuation of individuals receiving services.			
2. Documentation of quarterly safety review to ensure the site is free of hazards. Kept in central location by provider for three years.			

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3. Documentation individuals have been trained to leave site in response to alarm or other emergency signal.			
4. Documentation of quarterly evacuation drills.			
5. Provider has documentation of a health and safety inspection completed during the last five years.			
6. Site has had a fire and life safety inspection.			
7. A DSP or employment professional on site has the following: Current CPR certification; Current First Aid certification; training to meet needs of all individuals on site.			
8. If facility based DSA or employment path services, the staffing ratios do not exceed one DSP or employment professional to eight individuals.			
9. There are sufficient staff on site to meet the support needs of the individuals present.			
10. If providing transportation, the provider has insurance coverage for all vehicles and all authorized drivers.			
11. All vehicles have a first aid kit.			
12. Are there any other health or safety concerns?			
13. ISP and supporting documents in place (CDP, risk mitigation strategies to address each identified risk).			
14. Staff have been trained to meet the support needs of the individuals present.			

Date	Comments	Follow Up Necessary	Responsible Party	Timeline