

# Provider Training Matrix

## Standards for Direct Care Staff and Allowable Tasks/Activities

Effective training is the foundation of a Personal Care Program. It is imperative that training provides the knowledge and skills that can improve competence and confidence and thereby improve the effectiveness of the care we deliver to those we serve.

**In accordance with IDAPA 16.03.10.329.03 Provider Qualifications**, all providers of homemaker services, respite care, adult day health\*, transportation, chore services, companion services, attendant care, adult residential care, and home delivered meals must meet, either by formal training or demonstrated competency, the training requirements contained in the provider training matrix and the standards for direct care staff and allowable tasks or activities in the Department's Aged and Disabled Waiver as approved by CMS.

\*Adult Day Health providers that are licensed settings in full compliance with one of the following chapters of IDAPA are presumed to meet the standards of this Provider Training Matrix.

- IDAPA 16.03.21, "Developmental Disabilities Agencies (DDA)"
- IDAPA 16.03.19, "Rules Governing Certified Family Homes"
- IDAPA 16.03.22, "Residential Care or Assisted Living Facilities in Idaho"

The following are requirements/procedures regarding the implementation of the Provider Training Matrix and Standards:

### General Description

The Provider Training Matrix is divided into six main categories.

- General
- Personal Care and Attendant Care
- Homemaker
- Non-Medical Transportation
- Chore Services
- Participant-Specific Endorsements

Each category identifies what core body of knowledge or skill level is expected, what limitations (if any), including specific endorsements, who can verify competency and by what method, and which type of provider is covered.

### General

This category affects the majority of Aged and Disabled (A&D) and Personal Care Services (PCS) providers.

### Personal Care and Attendant Care

This category affects direct care providers and requires an agency registered nurse (RN) to approve the curriculum and tests.

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### Homemaker

This category affects direct care providers for participants who have Instrumental Activities of Daily Living (IADL) needs and requires agency personnel to oversee tasks performed by caregiver.

### Non-Medical Transportation

This category affects any provider giving transportation to an A&D participant. The caregiver cannot transport any other person except for the participant.

### Chore Services

Chore Services are a separate service. Providers need to have the skills to perform the service and not have any restrictions identified on the PCS Health Screen and in Administrative Code.

### Participant Specific Endorsements

Involves direct care providers for participants who have care needs that require specific training, delegation, and/or demonstration.

### Requirements

Personal Assistance Agencies and Adult Day Health providers (that are not associated with a licensed DDA; CFH, or RALF) must develop policies and procedures to cover the following;

- The content of instruction must be approved by an agency RN and must comply with the minimum standards identified under the “Required Competencies and/or Demonstrated Skills” column of the Provider Training Matrix.
- The written examination required under an identified category, must be approved by an agency RN and at least *ten percent of the content must be in a narrative response format*.
- An agency RN will determine the minimum standards for a passing grade.
- All training curriculum and copies of written examinations will be maintained in an agency training manual and made available for Department review.
- Any completed written examinations can be maintained in an agency file.
- Any proof of completion for the Provider Training Matrix or Participant Specific Endorsement will be maintained in the employee’s file.

### Fiscal Intermediary (FI) and Self Direction Participant

- The agency RN/Personnel must approve any competency curriculum used for *the General and Participant Specific Endorsements*.
- The Agency and/or *Participant* are responsible for personal assistant training and documentation for *Attendant Care/Homemaker and Participant Specific Endorsements* (The Fiscal Intermediary-Participant Responsibilities form determines who is responsible for personal assistance training).

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- The FI RN is responsible for verification of competency for *Participant Specific Endorsements*.

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		Written Test	Return Demo	Verbal Demo	Experience/ Written
<b>GENERAL</b>					
<b>1. Communication Ability</b> School records, GED, high school diploma, or demonstrated ability	Agency Personnel				X
<b>2. Criminal History Check</b> Proof of clearance by the Idaho Department of Health and Welfare Criminal History Unit  May not provide services until completes application; signed, notarized, and reviewed by employer for no disqualifying offenses	Agency Personnel				X
<b>3. Confidentiality &amp; Participant Rights</b> Knowledge of the limitations regarding participant information including Advanced Directives, Physician Scope of Treatment (POST) or DNR status  Adheres to Health Insurance Portability and Accountability Act (HIPAA) and agency confidentiality guideline	Agency Personnel	X			
<b>4. Documentation -</b> Knows basic guidelines and fundamentals of documentation  <ul style="list-style-type: none"> <li>• <b>Observation</b> - Basic knowledge of and ability to identify participant's physical and mental factors along with usual daily routines</li> <li>• <b>Reporting</b> - Knowledge of mandatory and incident reporting as well as role in reporting condition changes</li> </ul>	RN, Agency Personnel	X		X	
<b>PERSONAL CARE AND ATTENDANT CARE</b>					
Personal Care and Attendant Care Services are personal and medically oriented tasks dealing with the functional needs of the participant that accommodate the participant's needs for long-term maintenance, supportive care, or activities of daily living.					
<b>1. Eating/Feeding</b>  <b>For Feeding Tube or feeding complications see PARTICIPANT SPECIFIC ENDORSEMENTS 9 &amp; 10</b>	RN	X			

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Basic knowledge of fluid balance/hydration Strategies to ensure adequate nutritional/fluid intake					
<p><b>2. Toileting/Incontinence</b></p> <p><b>For participant with Catheters or Ostomies see PARTICIPANT SPECIFIC ENDORSEMENTS 3, 4, &amp; 6</b></p> <p>Knowledge of elimination, terms, and problems with urinary and bowel function. Knowledge of proper cleansing procedure. Knowledge of toileting equipment/supplies including care, cleaning, and disposal</p>	RN	X			
<p><b>3. Mobility/Transfer</b></p> <p><b>For mechanical lifts and maintenance exercises see PARTICIPANT SPECIFIC ENDORSEMENTS 1 &amp; 2</b></p> <p>Knowledge of basic terminology and assistive devices including cane, walker, wheelchair and crutches. Knowledge of proper body mechanics and transfers: Bed to chair/commode, bed to wheelchair and back and participants with weak or paralyzed side</p> <p><b>Limitations of caregivers identified on Employee Health Screen</b></p>	RN, PT	X	X		
<p><b>4. Hygiene</b></p> <p>Diabetic or circulatory compromised/nail filing only</p>	RN	X			
<p><b>5. Bathing</b></p>	RN	X			
<p><b>6. Skin Care</b></p>	RN	X			
<p><b>7. DRESSING:</b></p> <p><b>For compression hose, prosthetics and orthotics see PARTICIPANT SPECIFIC ENDORSEMENT 5</b></p> <p>Basic knowledge of dressing practices including putting on/off clothes, bras, etc. tying shoes</p>	RN	X			

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<p><b>8. Medications/Treatments</b></p> <p>For participant specific medications, oxygen therapy, inhalation equipment, or participant specific treatments see <b>PARTICIPANT SPECIFIC ENDORSEMENTS 4, 6, 7, 8, 12 &amp; 13</b></p> <p>Knowledge of program limitations in accordance with IDAPA 23.01.01 "Rules of the Board of Nursing"</p> <p>Participant or designee must be able to self-direct medication/treatment administration</p> <p>Knowledge of current standard of practice for participant specific treatment</p> <p><b>Limitation: No sterile treatments or procedures</b></p>	RN	X	X	X	
<p><b>9. Infection Control</b></p> <p>Identifies ways infections are spread, proper hand washing techniques, and current accepted practice of infection control</p> <p>Gloves must be worn when handling anything warm, wet, and not yours</p>	RN, Agency	X			
<p><b>HOMEMAKER</b> Homemaker Services consist of performing for the participant, or assisting him with, or both, laundry, meal preparation, and other routine housekeeping.</p>					
<p><b>1. Meals</b></p> <p><b>Special Diets see PARTICIPANT SPECIFIC ENDORSEMENT 11</b></p> <ul style="list-style-type: none"> <li>• <b>Planning</b>- Basic nutrition - sources and function</li> <li>• <b>Purchasing</b> - Healthy diet basics - using a food pyramid</li> <li>• <b>Preparation</b> - Basic menu planning for special dietary requirements</li> </ul> <p><b>Storage and Handling</b> Understanding labels, seasonal foods, and purchasing on a fixed income. Safe food storage and handling</p>	RN, Dietician	X			
<p><b>2. Finances</b></p> <p>Demonstrates ability to add, subtract, and accurately report client directed</p>	Agency Personnel	X			

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<p>expenditures</p> <p><b>Caregivers will not be involved in Participants financial affairs</b></p>					
<p><b>3. Shopping</b></p> <p>Basic knowledge in helping participants on fixed incomes meet nutritional and personal needs</p> <p><b>Service is only for authorized participant</b></p>	Agency Personnel	X			
<p><b>4. Laundry</b></p> <p>Knowledge of accepted practice in laundry procedures including minor clothing repair, following label and washing machine instructions, folding and putting away</p> <p><b>Service is only for authorized participant</b></p>	Agency Personnel	X			
<p><b>5. Housework</b></p> <p>Knows generally accepted practice for maintaining kitchen, bedroom, and other rooms used by participant in clean and safe condition</p> <p><b>Limited to rooms or areas used by participant only</b></p>	Agency Personnel	X			
<p><b>NON-MEDICAL TRANSPORTATION</b></p> <p>Non-Medical Transportation Services are services that enable a participant to gain access to waiver and other community services and resources. They are in addition to the medical transportation in IDAPA 16.03.09, "Medicaid Basic Plan Benefits" and will not replace it.</p>					
<p><b>Valid Driver's License</b></p> <p>Proof of current valid Driver's license and expiration date</p>	Agency Personnel				X
<p><b>Liability Insurance</b></p> <p>Proof of liability insurance that meets current Idaho requirements and expiration date</p>	Agency Personnel				X
<p><b>Safe Driving Record</b></p> <p>Verification obtained from Driver's License Bureau</p>	Agency Personnel				X

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<b>Safe Vehicle</b> Self-declaration regarding vehicle condition  No unresolved citation for deficient equipment	Agency Personnel				X
<b>CHORE SERVICES</b> Chore Services are services to maintain the functional use of the home or to provide a clean, sanitary, and safe environment. Chore services include services such as yard maintenance, minor home repair, and chopping wood.					
<b>Minor Home Maintenance</b>  Evidence of formal training, education, or previous employee/supervisor reference  Identified and authorized by Medicaid  <b>Limitations per Administrative Code</b>	Agency Personnel				X
<b>Minor Home Repair</b>  Basic knowledge and ability to use tools or equipment to complete specific tasks	Agency Personnel				X
<b>Safety Equipment Installation</b> Reads and follows manufacturer's instructions and recommendations	Agency Personnel				X
<b>Heavy Housework</b>  <b>Limitations noted on Health Screen</b>	RN Review of Health Screen				X
<b>PARTICIPANT SPECIFIC ENDORSEMENTS</b>					
<b>1. Maintenance Exercises</b>  Formal program established by a PT, RN, or Physician  Passive ROM could be established by RN  <b>Delegated by a Licensed Professional</b>	PT, OT, RN		X		
<b>2. Mechanical Lift</b>  Knows current standard of safe practice for mechanical transfers  <b>Delegated by a Licensed Professional</b>	PT, RN		X		

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<b>3. Catheter Care</b>  Knows current standard of practice for routine care procedure of indwelling catheter  <b>No sterile catheterization</b> <b>No sterile irrigation</b>	RN		X		
<b>4. Bowel Care</b>  Knows current standard of practice for routine bowel program	RN		X		
<b>5. Dressing</b>  Current standard of practice in applying compression hose, prosthetics and orthotics  <b>Established prosthetics</b>	RN, PT, OT, Orthotics expert		X		
<b>6. Ostomy Care</b>  Knows current standard of practice for routine care procedure of participant ostomy  <b>Well established ostomy site and routine</b>	RN		X		
<b>7. Oxygen Therapy</b>  Knows generally accepted practice when dealing with oxygen supplies and equipment  <b>Flow meter setting as prescribed by physician only</b>	RN, RT	X	X		
<b>8. Inhalation Equipment</b>  Knows generally accepted practice in care of nebulizers or other inhalation equipment	RN, RT		X		
<b>9. Gastrostomy Tube Feeding</b>  Knows current accepted procedure for gastrostomy tube feedings. Knows current accepted procedure for care of gastrostomy site and tube.  <b>Monthly performance evaluations by RN. Medications via G-Tube may only be given if authorized by RN</b>	RN		X		

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<b>10. Feeding Complications</b>  Knows current accepted practices when dealing with a participant with specialized feeding needs (i.e. difficulty swallowing, frequent aspiration, set-up, and specialized equipment)	RN, RD, ST, OT		X	X	
<b>11. Special Diets</b>  Knows generally accepted practice for special dietary needs	RN, RD			X	
<b>12. Medication Assistance</b>  Completed an Idaho Board of Nursing approved Medication Assistance Certification Course or Department approved course to assist with medications in a Certified Family Home or Residential Assisted Living Facility  <u>In-home settings:</u>  Assisting the participant with physician-ordered medications that are ordinarily self-administered in accordance with IDAPA 23.01.01 "Rules of the Board of Nursing"	RN	X		X	
<b>13. Treatments</b>  Knows current accepted and prescribed procedure  <b>Monthly performance evaluations by RN</b>	RN		X	X	
<b>14. Supervision</b>  Psychological or Social Disorders: General knowledge of major mental illness, behaviors, interventions and medication side effects	RN, SW		X	X	
<b>15. Cognitive Impairments</b>  Knowledge of cognitive impairments, care needs, and techniques when working with cognitively impaired individuals  <b>Department approved course for people with a developmental disability</b>	RN, SW	X			

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<b>16. Psychological or Social Disorders</b>  General knowledge of mental illness/behaviors and basic interventions for Alzheimer's, dementia, depression, and generalized anxiety	RN, SW	X			