

Compliance Review Services Inc.

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**Steps to Opening a PAS Agency Non-Accredited**

**Note:** This is a general flow of steps, it is not all inclusive of all of the work needing done to set up the HR files, contracts if used, admit paperwork, background checks on staff, etc. It is a lot of steps to get the agency up and running and to be compliant. We work with our clients one visit/ step at a time, or it is too overwhelming.Some clients move faster than others, it depends on their experience level. We expect our clients to do the implementation work and so will the State office when they come out. The State does not want to talk to the consultants, they want to know the key managers know the policies, procedures, systems, and forms and will follow and abide by them.

We do recommend you hire someone with experience to assist in the office or as the Alternate to help coach and guide you as well. We cannot help if you do not keep your consulting visit appointments and will not know where you are at with compliance. We need you to communicate weekly where you are at in the processes and tasks and share how we can assist you as well. This is team approach. We are coaching and mentoring you and your team but are not your employee and are not full-time, so we need good communication.

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|  **Item / Task** | **Date Planned** | **Date Done** |
| 1. Establish business name
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| 1. Make sure no one else is using the name
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| 1. Register for EIN
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| 1. Establish Bylaws, Articles of Incorporation
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| 1. Set up D/B/A in county
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| 1. Create logo
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| 1. Establish marketing plan/ business plan with finite goals and dates
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| 1. Complete opening up a business bank account
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| 1. Take the computer based courses online by DHHS that are required (Administrator and Alternate must do this)
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| 1. Take the initial 8 clock hour of training by an approved provider of DHHS (Administrator and Alternate must do this)
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| **Item / Task** | **Date Planned** | **Date Done** |
| 1. Update resume including name of business and your role, need Administrator and Alternate to do this as well

 Appoint Administrator and Alternate, with dated meeting minutes by the Gov Body. Establish budget and approve it by the Governing Body with dated meeting minutes. |  |  |
| 1. Create or purchase policies and procedures which meet state guidelines for state you are in
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| 1. Create of purchase forms (HR, Admission, System forms like complaints, incidents, infection control, safety, etc. ) depending on state requirements
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| 1. TULIP- do online license application
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| 1. Once license approved hang on wall with Rts of Elderly 102 by it
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| 1. Admit one patient onto service
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| 1. Within 6 months of license issuance submit form 2020 to the state “readiness for survey”
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| 1. Begin implementation of policies procedures and forms. This is ALL systems
2. Complaints
3. Incidents/accidents
4. Covid policies
5. Infection control
6. Personnel files and verifications
7. Contracts with home health, therapy companies, etc.
8. Hire RN to do med box set ups as applicable and training for medication assistance
9. Safety
10. Admissions
11. All other state requirements as outlined in TAC 558 for Home and Community Support Service Agencies licenses / PAS
 |  |  |
| 1. Keep consultant appointments so we can evaluate where you are at in the process! Canceling visits delays progress. Remember the state can come out as soon as they receive the Form 2020.
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I have read and understand this information:

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Client Signature/ Agency Name Date