

# SOP Template: Resident Admission and Onboarding Procedures

This SOP details the **resident admission and onboarding procedures**, covering the processes for initial resident intake, verification of documentation, orientation to facility policies and services, health and safety assessments, assignment of accommodations, and introduction to care plans and staff. The goal is to ensure a smooth, respectful, and efficient transition for new residents, promoting their comfort, safety, and well-being from the moment of admission.

## 1. Purpose

To outline the standardized process for admitting and onboarding new residents, ensuring all legal, safety, and care requirements are met, and supporting a positive experience for the resident and their family.

## 2. Scope

This SOP applies to all staff involved in the admission and onboarding of residents at the facility.

## 3. Responsibilities

- **Admissions Coordinator:** Oversees and coordinates the resident intake process.
- **Nursing Staff:** Conducts health and safety assessments; initiates care planning.
- **Administrative Staff:** Verifies documentation and records.
- **Support Staff:** Prepares and assigns accommodations; assists with orientation.

## 4. Procedure

Step	Description	Responsible Party
4.1	<b>Pre-Admission Assessment</b> Collect and review preliminary information, including medical history, care needs, and expectations.	Admissions Coordinator, Nursing Staff
4.2	<b>Documentation Verification</b> Obtain and verify identification, insurance, legal documents, medical records, and consents.	Administrative Staff
4.3	<b>Admission Interview and Intake</b> Welcome resident and family, review admission agreement, and complete intake forms.	Admissions Coordinator
4.4	<b>Health and Safety Assessments</b> Conduct physical, cognitive, and safety risk assessments; document findings.	Nursing Staff
4.5	<b>Assignment of Accommodations</b> Assign and prepare room, personalize as needed, and provide keys/access.	Support Staff
4.6	<b>Resident and Family Orientation</b> Introduce facility policies, schedules, emergency procedures, dining, and social services.	Admissions Coordinator, Support Staff
4.7	<b>Staff Introductions</b> Introduce resident to care team and other key personnel.	Admissions Coordinator
4.8	<b>Initiate Care Plan</b> Develop preliminary care plan in collaboration with resident and family; schedule follow-up assessments.	Nursing Staff
4.9	<b>Documentation and Record Update</b> Update electronic and paper records with all relevant admission details.	Administrative Staff

## 5. Documentation

- Resident admission agreement and intake forms
- Identification and legal documentation
- Medical and care records
- Assessment forms and care plan documents
- Orientation checklist and attendance record

## 6. References

- Facility policies and procedures manual
- Local health and safety regulations
- Resident rights and responsibilities documentation

## 7. Review and Revision

This SOP will be reviewed annually or as needed following changes in regulations or facility operations.