Abbeyfield The Dales Limited

Policy & Procedure / Good Practice Guidelines

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Effective Date: July 2026

Next Review Date: July 2029

Admission of Residents

Index

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Reviewed by: Nigel Billson (Quality Manager) / Clare Hobbins (Director of Operations) / Philip Birkinshaw (Chief Executive)
Approved by ATD Board: 31/07/2026

1. Background

It is recognised that any move is a significant life changing decision and that sometimes the decision is triggered by difficult circumstances. It is important that anyone considering moving to any Abbeyfield The Dales (ATD) property registered to deliver care and support is given the information they need to make the right choices. If they then decide to move in, the admission process is well planned and handled sensitively.

This policy has been developed to ensure a consistent approach to the admission process for residents moving into an ATD property.

2. Objectives

The aim of this policy is to:

- Assure residents, and others involved in their care/support, that the location they choose can meet their needs and that admission will be managed sensitively and efficiently.
- Ensure the needs and wishes of the resident will be at the centre of all decision making and we will consult with the resident's family and close friends unless the resident instructs otherwise; and
- Ensure ATD complies with all relevant current legislation and regulation.

3. Scope

All staff, and volunteers working in ATD properties registered to deliver care and support facilities and others who may be involved in the admission of residents.

This policy applies to Abbeyfield the Dales Limited and its corporate trustee responsibilities for registered providers Charles Edward Sugden Almhouses, and Frank Crossley's Almshouses, also for the non-registered provider The Pawson Cottage Homes, and its subsidiary Abbeyfield Court Limited.

4. Policy

4.1. Information for Prospective Residents

The Registered Manager should make available an information pack for prospective residents and their representatives which includes key information about ATD, and the facilities and services provided in their chosen location. This information should be given to prospective residents and their representatives when they first contact the home. Information should be clear, accurate and unambiguous and available in a range of different formats to meet the communication needs of prospective residents.

The Registered Manager should ensure that important, additional information is provided to prospective residents and their representatives when they want or need it, and in good time before they accept an offer of a place and before signing a Contract/Tenancy. This includes details of all charges and what these include, and the terms and conditions of residence.

All prospective residents must be advised to consider the long-term financial implications of moving into buildings and will be asked to complete a financial assessment prior to admission to ensure that there are arrangements in place to meet the cost of their care and/or accommodation.

Prospective residents should be advised to request an assessment of their needs by the local authority regardless of the source of their funding.

4.2. Pre-admission Assessment

A pre-admission assessment will be completed with prospective residents. This should consider the views of the resident, their family where the resident so wishes or other nominated representative, including community or hospital-based health and social care professionals involved in their care. The purpose of the assessment is to establish the person's needs and preferences and whether the home can provide the level of care and support that the person requires.

Following the pre-admission needs assessment the Registered Manager, or suitably trained member of staff, will inform the prospective resident whether a place will be offered having considered all the following:

- The needs and dependency level of the person
- The home's ability to meet the person's assessed needs
- The suitability of the accommodation and facilities available
- The dependency levels of the existing residents; and
- The staffing implications of the placement.
- CQC registration considerations.

Prospective applicants will be treated fairly and equally, and applications will be considered in relation to their housing and or care need as appropriate at that time. This may mean that an applicant who has been on a waiting list for some time may not be prioritised for the next available vacant flat.

4.3. On Admission

On or before the day of admission, the Contract and/or Tenancy must be signed by the resident or by a person lawfully authorised to act on their behalf. The rent or charge for their flat / room from the date they move in up until the end of that month must be paid in advance of the keys being issued.

The arrangements for how the care and accommodation fees will be paid should be agreed and a direct debit form completed.

All residents are admitted based on a pre-admission needs assessment which involves the development of a care plan detailing the resident's care needs.

The Registered Manager must ensure that the Day1 Assessment form is complete during the scheduled meeting with the new resident and their family or advocate.

The Registered Manager should also obtain a summary of the Social Care Needs Assessment and associated Care Plan for residents who are admitted through health and social services care management arrangements.

The Registered Manager should develop a local procedure for the admission of residents. A named worker should be allocated to greet the resident and to oversee the admission process and time should be set aside to support the resident and their family with the move. Moving can be an emotional time for both the resident and their family, and staff should be sensitive

and reassuring; carrying out regular welfare checks for the first 6 weeks of a new resident's stay.

Residents will remain registered with their own GP whenever this is possible but supported to register with a new GP if necessary.

4.4. Emergency Admissions

Unplanned admissions should be avoided if possible although occasionally a resident may need to be admitted in an emergency. Should this occur, the Registered Manager or the person in charge should find out as much information as possible from as many sources as possible and an emergency admission will only be agreed if the needs of the person can be met safely.

Emergency admissions should be for no more than fourteen days in the first instance during which time a full needs assessment should be completed. A care review meeting should be held at the earliest opportunity and within fourteen days of admission if the placement is expected to last longer than this.

In the event of an unplanned admission, the new resident should be informed about key aspects of the service, practices, and philosophy of care in the home as soon as possible after admission.

The Registered Manager should monitor unplanned admissions to ensure they are not happening regularly and should take steps to minimise the number of unplanned admissions.

5. Finance, Value for Money & Social Value

N/A

6. Supported Appendices

N/A

7. Linked Policies

Needs Assessment (C017P)
Care Planning and Key Working (C008P)

8. Legislation/Regulation

Health and Social Care Act 2008 (Regulated Activities) Regulations 2014
Regulation 9: Person-centred care

9. Review

Every 3 years, subject to any regulatory or legislative updates.

10. Procedure/Guidance

10.1. Pre-admission needs assessment

When an application is received, the Registered Manager or a suitably trained member of staff should arrange to complete a pre-admission needs assessment with the prospective resident.

The assessment will take place either in the building they are looking to reside, in their own home, or place of accommodation, for example a hospital, at a mutually convenient time.

The prospective resident must visit the building prior to admission if possible so that they can make an informed decision about whether they would like to move in.

The prospective resident should be given information about the building to include full details about the costs and fees and what they include, and the terms and conditions of residence.

The Registered Manager will decide about whether a place is to be offered to the prospective resident and will ensure the decision is communicated to the prospective resident.

If a placement or tenancy for an applicant is agreed and a move in date confirmed, then the details of the pre-admission assessment must be entered onto our resident care plan System, Person-Centred Software (PCS), and other parts of the initial care plan must be complete at least the day prior to the applicant moving in.

10.2. Prior to Admission

When arranging an admission, the resident and their relatives should be asked to ensure that they bring personal clothing and belongings and if possible that they are labelled/named. The resident should bring a minimum of seven days of medication with them.

The prospective resident should be given two copies of the Contract/Tenancy which sets out the terms and conditions of occupancy, and these must be signed and dated on or before the day of admission.

The Registered Manager must ensure that the prospective resident and their representatives/relatives are clear about the charges, understand the financial implications of the move and that arrangements are in place for the payment of the fees.

An appointment must be made with the resident and their family (or advocate) for the day they move in so more information can be gathered about our new resident to ensure a more tailored and person-centred service can be provided from day 1.

The Registered Manager should ensure that plans are made ahead of the admission to ensure the move goes smoothly. This should include:

1. Carrying out a full check of the prospective resident's room to ensure it is clean, safe and ready for occupation.
2. Ensuring that any equipment that the prospective resident needs is in place.
3. Ensuring the resident has a supply of their prescribed medication and that arrangements are in place for reordering medication.

4. Making all relevant staff aware of the planned admission, to include the catering, housekeeping, maintenance, reception, and finance.
5. Ensuring that care planning records are set up in readiness for admission; and
6. Where someone has been lawfully authorised to act on behalf of the prospective resident that documentary evidence is requested and held on file.

10.3. On Admission

The Registered Manager must ensure that the Day1 Assessment form is complete during the scheduled meeting with the new resident and their family or advocate. The resident's care plan on PCS must be updated with the additional information from the Day1 Assessment Form within 48 hours; this means a comprehensive care plan will be created within 72 hours of a new resident moving in.

On admission the resident should be introduced to Key Workers who will be responsible for building on the information gathered during the pre-admission needs assessment to develop a comprehensive person-centred care plan with the resident. Through the Day1 Assessment, and with information received from other sources the care plan for the new resident should be developed in collaboration with the resident and others involved in their care and should reflect:

- the resident's likes and dislikes;
- personal routines and preferences for all activities of daily living;
- their interests and cultural needs; their wishes and desires;
- and a personal profile which details their life history and information about important life events and experiences.

The new resident's care record on PCS must be updated with this information within 48 hours to ensure that all staff understand what is important to the resident and that person-centred care is provided.

The Worker should:

1. Ensure a signed copy of the Contract and/or Tenancy is retained in their file.
2. Ensure that the short-term care plan and all associated risk assessments are completed with the resident.
3. Explain the principles of consent and ask the resident to sign the Consent form as part of their care plan to indicate their consent to the care and support detailed.
4. Take photographs of the resident for their care plan and medication records. Photographs should be named and dated and stored in the resident's electronic care plan folder.
5. Discuss the medication arrangements with the resident and where the resident wishes to self-administer some or all their medicines, complete the necessary documentation and ensure the resident understands the arrangements for safe storage of their medicines. Where the resident requests that we manage their medication on their behalf, ensure that all medication is carefully checked and signed in, documented on the Caremeds EMAR system.

6. Ensure further supplies of medication are ordered if required to ensure there is no interruption to the resident's supply.
7. Provide the resident with their key/s, pendant and a fob if appropriate, and also for members of the family as necessary. If the resident does not wish to hold the keys, this must be documented.
8. Where a resident moves into one of our residential care services, the Nobi Lighting system must be explained and a consent document must be completed.
9. Explain the fire safety procedure to the resident and make sure the resident knows how to use the call bell system.
10. Show the resident the communal areas of the home and begin introductions to other residents and staff.
11. Help the resident to unpack and complete an inventory.
12. Explain the arrangements for the safekeeping of valuables and insurance of resident's belongings this applies to residential settings only.
13. Ensure the resident's GP is aware of the resident's change of address or that the resident is supported to register with a new local GP if this is necessary; and
14. Establish whether the resident has an Advance Care Plan, DNACPR and if so, ensure that this is clearly documented.