

# MONTGOMERY MUTUAL, INC.

## CAREGIVER POLICY

Adopted by Board Resolution: # 62 9/20/2010  
Updated by Board Resolution #125, 1/26/2011

Although Leisure World, including Montgomery Mutual, is considered an independent-living, active-adult community; it is recognized that some residents may need visiting or live-in caregivers on a short- or longer-term basis.

**Any person 18 years of age or older who provides care or assistance to a Mutual resident on either a visiting or live-in basis will be considered a caregiver under this policy and is subject to the rules and regulations of Montgomery Mutual, Leisure World, and the provisions of this policy.**

Leisure World Social Services staff are available to assist residents and their families in finding qualified caregivers.

1. Residents who will be utilizing a **live-in caregiver** must notify the Mutual office and provide the caregiver's contact information. The resident must also provide to the Mutual office a physician's note stating why a live-in caregiver is needed by the resident.
2. Residents are permitted to have one (1) **live-in caregiver**. If two (2) concurrent live-in caregivers are needed:
  - a. prior approval must be obtained from the Mutual office, and
  - b. unit occupancy must comply with the Mutual's occupancy limits.
3. Caregivers are considered employees of the resident. The caregiver (or resident) is to obtain a Guest pass for caregivers, which is issued for a three-month period, from the Leisure World Administration Office front desk. These passes are to be renewed every three months as needed.

In addition, the caregivers (or resident) are to obtain a **Caregiver Parking Identification card** from the Area Director (in the Area in which the resident receiving care resides) which is to be prominently displayed in the caregiver's vehicle.

4. Leisure World rules state that:
  - a. employees of residents (which includes caregivers) may not invite guests into the community;
  - b. caregivers are not permitted to use any of the Leisure World facilities and amenities (such as the use of the swimming pool) except when providing direct care or aide to the resident; and
  - c. use of the Leisure World shuttle bus is permitted by caregivers, when necessary, to move about the community and/or shop for the resident.
5. If a caregiver(s) will be driving the resident's car, it is strongly recommended that the resident obtain a copy of the caregiver's driver's license and contact his/her own insurance company to determine if the caregiver is covered by the resident's insurance.
6. The resident is responsible for the actions and behavior of his/her caregiver and to make sure that the caregiver is aware of the Mutual's policies and rules (to include, but not limited to parking, trash disposal, and noise).

7. No caregivers may occupy the Dwelling Unit **for more than 30 days unless the resident is concurrently residing in the Dwelling Unit.**

### **Parking**

1. **Caregivers may not use VISITOR parking spaces except as permitted in # 2 and #3 below.**
2. If a caregiver is providing care for less than three (3) hours per day or on an occasional basis, they may park in the VISITOR parking spaces in the Court in which the resident resides.
3. If a caregiver (whether live-in or providing care for longer than three (3) hours per day) will be driving his/her own car, the resident or the caregiver is to contact the Area Director in which the resident resides for caregiver parking instructions.

Area Directors' names and phone numbers are listed on the front page of the Mutual newsletter (*The Megaphone*).

4. A Caregiver Parking Identification card must be prominently displayed in the caregiver's vehicle when parked in any Court in the Mutual.
5. **Cars of long-term or live-in caregivers who park in VISITOR parking spaces, without a current Caregiver Parking Identification card, will be towed.**

### **Complaints**

If a complaint or infraction of the Mutual rules and policies by caregivers is reported to the Mutual office, the Property Manager will meet with the resident and the caregiver to work on resolution of the problem.

If further complaints are received, the caregiver will be asked to leave the property and return their Guest pass to the Mutual office. If the caregiver fails to leave the property, they will be considered to be trespassing and appropriate action will be taken by Montgomery Mutual Management.

Leisure World Social Services will be contacted to assist the resident and/or family members in finding another caregiver.

***The provisions of this policy apply to all caregivers and residents as of the date of its adoption.***