

STATEMENT OF DEFICIENCIES AND PLAN OF CORRECTION	(X1) PROVIDER/SUPPLIER/CLIA IDENTIFICATION NUMBER: 365566	(X2) MULTIPLE CONSTRUCTION A. Building B. Wing	(X3) DATE SURVEY COMPLETED 01/17/2025
NAME OF PROVIDER OR SUPPLIER Heritage Center for Rehab and Speciality Care		STREET ADDRESS, CITY, STATE, ZIP CODE 24 North Hamilton Street Minster, OH 45865	

For information on the nursing home's plan to correct this deficiency, please contact the nursing home or the state survey agency.

(X4) ID PREFIX TAG	SUMMARY STATEMENT OF DEFICIENCIES (Each deficiency must be preceded by full regulatory or LSC identifying information)
<p>F 0568</p> <p>Level of Harm - Minimal harm or potential for actual harm</p> <p>Residents Affected - Few</p>	<p>Properly hold, secure, and manage each resident's personal money which is deposited with the nursing home.</p> <p>**NOTE- TERMS IN BRACKETS HAVE BEEN EDITED TO PROTECT CONFIDENTIALITY** 37451</p> <p>Based on medical record review, review of resident trust accounts, resident interview, staff interview, resident representative interview and review of facility policy, the facility failed to maintain a complete, accurate and accessible accounting of resident trust accounts and further failed to provide quarterly statements to residents for those accounts. This affected three (#1, #2 and #3) of three residents reviewed for personal funds. The facility identified 35 residents who had resident trust accounts. The facility census was 57.</p> <p>Findings include:</p> <p>1. Review of Resident #1's medical record revealed an admitted [DATE]. Diagnoses included epilepsy, anxiety disorder, post-traumatic stress disorder, major depressive disorder, and dementia.</p> <p>Review of the Minimum Data Set (MDS) assessment, dated 12/31/24, revealed Resident #1 had a Brief Interview for Mental Status (BIMS) score of nine, indicating the resident was moderately cognitively impaired.</p> <p>Review of the care plan, revised 01/17/25, revealed Resident #1 had supports and interventions for pain, communication problems, limited physical mobility, impaired cognition and a self-care deficit.</p> <p>Review of Resident #1's profile information revealed the resident's daughter was his responsible party and guarantor.</p> <p>Review of Resident #1's Management of Personal Funds consent form, dated 09/26/22, revealed Resident #1 and his representative signed the consent for the facility to manage his resident funds.</p> <p>Review of the last available quarterly statement for Resident #1's resident trust account, dated 09/30/24, revealed accounting was kept from 07/10/24 to 09/30/24. There was no evidence of a quarterly statement, including transactions and account balance, for the quarter from 10/01/24 to 12/30/24.</p> <p>Review of the last accounting of Resident #1's resident trust account, dated 11/30/24, revealed a balance of \$995.10, which was transferred to the new facility owner.</p> <p>(continued on next page)</p>

Any deficiency statement ending with an asterisk (*) denotes a deficiency which the institution may be excused from correcting providing it is determined that other safeguards provide sufficient protection to the patients. (See instructions.) Except for nursing homes, the findings stated above are disclosable 90 days following the date of survey whether or not a plan of correction is provided. For nursing homes, the above findings and plans of correction are disclosable 14 days following the date these documents are made available to the facility. If deficiencies are cited, an approved plan of correction is requisite to continued program participation.

LABORATORY DIRECTOR'S OR PROVIDER/SUPPLIER REPRESENTATIVE'S SIGNATURE	TITLE	(X6) DATE
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<p>F 0568</p> <p>Level of Harm - Minimal harm or potential for actual harm</p> <p>Residents Affected - Few</p>	<p>Review of the facility's Petty Cash Withdrawal Record from 11/30/25 to 01/17/25 revealed Resident #1 withdrew \$10.00 on 12/09/24, \$20.00 on 12/13/24, \$15.00 on 12/27/24, \$10.00 on 01/03/25, and \$10.00 on 01/16/25. There was no accounting for Resident #1's resident trust balance following each withdrawal.</p> <p>Review of the facility's resident trust fund balances, requested on 01/17/25 and provided on a word document, revealed Resident #1 had \$995.10 in his resident trust account. No itemization of deposits and/or withdrawals was provided. Reconciliation of Resident #1's petty cash withdrawals from 11/30/24 through 01/17/25 with the account balance from 11/30/24 and the balance provided on 01/17/25 revealed a balance of \$930.10, indicating a discrepancy of \$65.00.</p> <p>Interview on 01/17/25 at 11:50 A.M. with Resident #1 revealed the resident was alert and orientated. Resident #1 reported he was able to get out money from his account at the facility but had not been told how much was in his account. Resident #1 reported his daughter was in charge of his money and she would get any statements.</p> <p>Interview on 01/17/25 at 12:20 P.M. with Resident #1's daughter verified she was the resident's responsible party when it came to finances. Resident #1's daughter confirmed she had not received a quarterly statement or any updates of any kind regarding Resident #1's account at the facility and she should be provided that information.</p> <p>Review of Resident #1's current account balance detail, provided by the facility's corporate staff on 01/17/25 at 3:45 P.M., revealed a balance on 01/07/25 of \$1,025.19. The Trust Balance log indicated Resident #1 had \$995.10 in his account. The accounting was inaccurate and not accessible in a timely manner.</p> <p>2. Review of Resident #2's medical record revealed an admitted [DATE]. Diagnoses included mild cognitive impairment, anemia, cellulitis, major depressive disorder, anxiety disorder, lymphedema, morbid obesity, and type II diabetes.</p> <p>Review of Resident #2's MDS assessment, dated 12/26/24, revealed a BIMS score of 14, indicating the resident was cognitively intact. Resident #2 displayed no behaviors at the time of the review.</p> <p>Review of Resident #2's care plan, revised 01/16/25, revealed supports and interventions for psychosocial well-being, behavior of picking skin related to anxiety, potential for pain, and self-care deficit.</p> <p>Review of Resident #2's profile information revealed the resident was her own responsible party.</p> <p>Review of Resident #2's Management of Personal Funds consent form, dated 12/11/23, revealed the resident signed the consent for the facility to manage her resident funds.</p> <p>Review of the last available quarterly statement for Resident #2's resident trust account, dated 09/30/24, revealed accounting was kept from 07/10/24 to 09/30/24. There was no evidence of a quarterly statement, including transactions and account balance, for the quarter from 10/01/24 to 12/30/24.</p> <p>Review of the last accounting of Resident #2's resident trust account, dated 11/30/24, revealed a balance of \$1592.93, which was transferred to the facility's new owner.</p> <p>(continued on next page)</p>		

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<p>F 0568</p> <p>Level of Harm - Minimal harm or potential for actual harm</p> <p>Residents Affected - Few</p>	<p>Review of the facility's Petty Cash Withdrawal Record from 11/30/24 to 01/17/25 revealed Resident #2 withdrew \$50.00 on 12/04/24 and \$50.00 on 01/03/25. There was no accounting for Resident #2's personal funds balance found following each withdrawal.</p> <p>Review of the facility's trust fund balances, requested on 01/17/25 and provided on a word document, revealed Resident #2 had \$1592.93 in her resident trust account. No itemization of deposits and/or withdrawals was provided. Reconciliation of Resident #2's petty cash withdrawals from 11/30/24 through 01/17/25 against the account balance on 11/30/24 and the balance provided on 01/17/25 revealed a balance of \$1492.93, a discrepancy of \$100.00.</p> <p>Interview on 01/17/25 at 10:48 A.M. with Resident #2 revealed she was alert and aware. Resident #2 reported the facility managed her money for her and she used to get quarterly statements with her balances, but she had not received one in a while. Resident #2 reported she was not aware of what her account balance was.</p> <p>Review of Resident #2's current account balance detail, provided by the facility's corporate staff on 01/17/25 at 3:45 P.M., revealed a balance on 01/03/25 of \$1,592.97. The Trust Balance log indicated Resident #2 had \$1,592.93 in her account. The accounting was inaccurate and not accessible in a timely manner.</p> <p>3. Review of Resident #3's medical record revealed an admitted [DATE]. Diagnoses included paranoid schizophrenia, schizoaffective disorder, chronic pain, major depressive disorder, suicidal ideation, paranoid personality disorder, and anxiety disorder.</p> <p>Review of Resident #3's MDS assessment, dated 11/05/24, revealed a BIMS score of 15, indicating the resident was cognitively intact. Resident #3 had delusions and displayed other behavioral symptoms not directed toward others, rejection of care, and wandering behaviors one to three days during the review period.</p> <p>Review of Resident #3's profile information revealed the resident had a Power of Attorney (POA).</p> <p>Review of Resident #3's Management of Personal Funds consent form dated 10/30/24 revealed the resident's POA signed the consent for the facility to manage her resident funds.</p> <p>Review of Resident #3's accounting record revealed no evidence of a quarterly statement or accounting of her resident trust funds, including deposits, withdrawals or account balance.</p> <p>Review of the last accounting of Resident #3's resident trust account, dated 11/30/24, revealed a balance of \$1,850.57, which was transferred to the facility's new owner.</p> <p>Review of the facility's Petty Cash Withdrawal Record from 11/30/24 to 01/17/25 revealed Resident #3 withdrew \$10.00 on 12/04/24 and \$10.00 on 01/16/25. There was no accounting for Resident #3's personal funds balance found following each withdrawal.</p> <p>Review of the facility's trust fund balances, requested on 01/17/25 and provided on a word document, revealed Resident #3 had \$1,820.57 in her resident trust account. No itemization of deposits and/or withdrawals was provided. Reconciliation of Resident #3's petty cash withdrawals and the resident trust fund balance provided on 01/17/25 revealed a discrepancy of \$10.00.</p> <p>(continued on next page)</p>		

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<p>F 0568</p> <p>Level of Harm - Minimal harm or potential for actual harm</p> <p>Residents Affected - Few</p>	<p>Interview on 01/17/25 at 1:24 P.M. with Resident #3 revealed she was not aware of what her resident trust balance was. Attempts to contact Resident #3's POA were unsuccessful.</p> <p>Review of Resident #3's current account balance detail, provided by the facility's corporate staff on 01/17/25 at 3:45 P.M., revealed the resident had a resident trust balance on 01/08/25 of \$1,835.62. The Trust Balance log indicated Resident #3 had \$1,820.57 in her account. The accounting was inaccurate and not accessible in a timely manner.</p> <p>Interview on 01/17/25 at 10:24 A.M. with Business Office Manager (BOM) #256 revealed a new company took over ownership of the facility on 12/01/24. Since that time, BOM #256 reported she was no longer able to access the system to log accounting and was unable to run quarterly statements. BOM #256 verified quarterly statements had not been provided to residents or their representatives for the quarter of 10/01/24 to 12/30/24. BOM #256 showed a written log of petty cash withdrawals and reported residents still had access to their funds, but the clip board with the sign out amounts (petty cash withdrawals) was all the documentation she had. BOM #256 confirmed there were no account balances, record of deposits, or interest tracked. BOM #256 stated her ability to log transactions and balances ended 11/30/24 when the accounts were closed and transferred to the new company for management.</p> <p>Interview on 01/17/25 at 1:26 P.M. with the Administrator verified account statements were not provided to the residents or their representatives when their accounts were closed 11/30/24. The new company took over 12/01/24 and quarterly statements would be provided with a start date of 12/01/24. Review of the corporate provided accounting for all resident trust accounts, viewed with the Administrator on the Administrator's computer, revealed the accounting for all residents that had been done by the new company. The surveyor requested clarification as only the transactions and accounting for Resident #1, Resident #2 and Resident #3 was requested and unable to be determined from the information provided. The Administrator was unable to provide clarifying information related to the accounting of Resident #1, Resident #2 or Resident #3's resident trust accounts.</p> <p>A follow-up interview on 01/17/25 at 3:40 P.M. with the Administrator revealed the current accounting was not yet available for Residents #1, #2, or #3 as the information was not accessible onsite and had to be sent from the corporate office. The information was subsequently provided on 01/17/25 at 3:45 P.M.</p> <p>Review of the facility policy titled, Management of Residents' Personal Funds, revised March 2021 revealed the facility would manage the personal funds of residents who requested the facility to do so. Funds were to be managed in accordance with established policies and federal/state requirements. Copies of all financial transactions were filed in the resident's permanent record. Funds would be placed in an interest-bearing account, separate from the facility's accounts, quarterly accounting statements would be provided, resource limit notices would be provided, personal funds would be returned to appropriate sources within 30 days of discharge, and no charges would be assessed against the personal funds account unless the items were requested by the resident.</p> <p>(continued on next page)</p>		

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<p>F 0568</p> <p>Level of Harm - Minimal harm or potential for actual harm</p> <p>Residents Affected - Few</p>	<p>Review of the facility policy titled, Accounting and Records of Resident Funds, revised April 2021 revealed the facility's business office was to maintain accounting records of all financial transactions involving the resident's personal fund. Individual accounting records were made available through quarterly statements and upon request. Quarterly statements were to include the resident's balance at the beginning and end of the statement period, the total deposits and withdrawals by the resident for the quarter, interest earned on the resident's funds, resident funds available through the petty cash, and the total amount of petty cash on hand.</p> <p>This deficiency represents non-compliance investigated under Complaint Number OH00160687.</p>		