FORM APPROVED

STATEMENT OF DEFICIENCIES AND PLAN OF CORRECTION	(X1) PROVIDER/SUPPLIER/CLIA IDENTIFICATION NUMBER:	(X2) MULTIPLE CONSTRUCTION	(X3) DATE SURVEY COMPLETED
	HAL077012	A. BUILDING: _____ B. WING _____	C 02/21/2025

NAME OF PROVIDER OR SUPPLIER	STREET ADDRESS, CITY, STATE, ZIP CODE
HERMITAGE RETIREMENT CENTER	139 MALLARD LANE ROCKINGHAM, NC 28379

(X4) ID PREFIX TAG	SUMMARY STATEMENT OF DEFICIENCIES (EACH DEFICIENCY MUST BE PRECEDED BY FULL REGULATORY OR LSC IDENTIFYING INFORMATION)	ID PREFIX TAG	PROVIDER'S PLAN OF CORRECTION (EACH CORRECTIVE ACTION SHOULD BE CROSS-REFERENCED TO THE APPROPRIATE DEFICIENCY)	(X5) COMPLETE DATE
D 000	Initial Comments The Adult Care Licensure Section conducted a complaint investigation on February 18, 19 and 21 2025.	D 000		
D 426	10A NCAC 13F .1105 (b) Refund Of Personal Funds 10A NCAC 13F .1105 Refund Of Personal Funds (b) If a resident dies, the administrator of his estate or the Clerk of Superior Court, when no administrator for his estate has been appointed, shall be given all of his personal funds within 30 days after death. This Rule is not met as evidenced by: The facility failed to ensure the administrator of a resident's estate received a refund of the residents' personal funds within 30 days after the resident's death for 2 of 3 sampled residents (#6, #7). The findings are: 1. Resident #6 current FL2 dated 02/19/24 revealed diagnoses included dementia, non-insulin dependent diabetes mellitus, mild intellectual disabilities, speech disturbance, and nontoxic single thyroid nodule. Review of Resident #6's Resident Register revealed an admission date of 06/22/17. Review of Resident #6's personal funds ledger dated 07/10/24 to 01/10/25 revealed Resident #6's personal funds balance was $2771.16.	D 426	Deficiency Identified: D426 10A NAC 13F .1105 (b) Refund Of Personal Funds. (b) If a resident dies, the administrator of his estate or the Clerk of Superior Court, when no administrator for his estate has been appointed, shall be given all of his personal funds within 30 days after death. An accurate accounting of all residents' personal funds will be maintained by the facility, and a check will be issued to the resident/and or payee as stated in the regulations. The business office manager and/or designee will ensure confirmation of personal fund refund process and document in all resident Files. The Administrator and/or designee will check within 30 days to confirm personal fund refund processing has been completed and place a copy of the cashed check in the resident's file.	4/15/2025

LABORATORY DIRECTOR'S OR PROVIDER/SUPPLIER REPRESENTATIVE'S SIGNATURE

TITLE: Administrator

(X6) DATE: 3/27/25

RECEIVED AND ACKNOWLEDGED ON 04/0425 BY NURSE CONSULTANT Tina B Nielsen

PRINTED: 02/28/2025
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D 426	Continued From page 1 Interview with Resident #6's family member on 02/19/25 at 1:40pm revealed: -Resident #6 lived at the facility for several years. -Resident #6 had esophageal cancer and transferred from the facility to a local hospice facility a few days before he died on 01/12/25. -She knew Resident #6 had a personal funds account but did not usually make withdrawals because his family usually paid for things he needed. -When she was moving Resident #6's possessions out of the facility, she asked a staff member if she needed to sign anything regarding his personal funds account. -The staff member said she would check with the Administrator regarding Resident #6's personal funds account and let her know if any action was required. -When the staff member returned, she informed her that she did not need to sign anything regarding Resident #6's personal funds; the person listed on Resident #6's account would receive a check in the mail. -She had not received any checks from the facility or the facility's corporate office for Resident #6's personal funds. Interview with the Administrator on 02/19/25 at 1:20pm revealed: -Resident #6 transferred from the facility to a local hospice facility and passed away on 01/12/25. -Resident #6 still needed to have his personal funds dispersed to the appropriate party. -She was aware residents' personal funds should be dispersed within 30 days after death. -Since the facility did not have a BOM, this caused the refund of the residents' personal funds to be delayed. Telephone interview with the Vice President of	D 426		

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D 426	Continued From page 2 Administration and Human Resources (VPAHR) on 02/21/25 at 11:55am revealed she was unsure why the check for Resident #6's resident funds was not written to his estate at the time of discharge. Refer to interview with the Administrator on 02/19/25 at 1:20pm. Refer to telephone interview with the Vice President of Administration and Human Resources (VPAHR) on 02/21/25 at 11:55am. 2. Resident #7's current FL2 dated 08/30/24 revealed diagnoses included dementia with psychosis, hypertension, history of low back pain, insomnia, bladder dysfunction, history of right hip fracture and incontinence. Review of Resident #7's Resident Register revealed an admission date of 10/18/16. Review of the facility's ledgers on 02/19/25 at 12:01pm revealed Resident #7 had two separate ledgers, one titled personal funds and the other titled spending account. Review of Resident #7's personal funds ledger dated 11/10/24 to 01/14/25 revealed: -Resident #7's personal funds balance was $2121.08 on 01/10/25. -Resident #7's guardian signed as receiving $2121.08 on 01/14/25. Review of Resident #7's spending account ledger dated 10/10/23 to 01/10/25 revealed Resident #7's spending account balance was $5290 on 01/10/25. Telephone interview with Resident #7's guardian	D 426		

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D 426	Continued From page 3 on 02/18/25 at 5:01pm revealed: -She was appointed as Resident #7's guardian when she started working with the Department of Social Services (DSS). -Resident #7 had been assigned to a previous guardian with DSS prior to her guardianship appointment. -Resident #7 had been in hospice care for a few years while she was a resident at the facility. -Due to a recent decline in Resident #7's condition in January 2025, she had been transferred to the hospice house facility where she died on 01/14/25. -On 01/14/25, the guardian had reached out to the facility in regard to Resident #7's resident funds. -She met with the facility's Executive Director on 01/14/25 where she received $2121.08 in cash to be used towards Resident #7's burial expense. -She promptly went to the funeral home and paid $2121.08 towards Resident #7's burial and has the receipts if needed. -She was not aware if there were any other funds due to Resident #7 but they would go to the resident's estate now. Interview with the Administrator on 02/19/25 at 1:20pm revealed: -Resident #7 transferred from the facility to a local hospice facility and passed away on 01/14/25. -She had received a call from Resident #7's guardian on 01/14/25 in regards to the decline in Resident #7's condition and requested to receive Resident #7's personal funds in order to pay for the burial services with the local funeral home. -Resident #7's guardian came to the facility and was given $2121.08 in cash from Resident #7's personal funds. -The guardian signed the ledger for Resident #7 when she received the cash.	D 426		

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D 426	Continued From page 4 -She did not recall telling the guardian that there were other monies due to Resident #7 during that visit due to the need for the guardian to get to the funeral home as soon as possible. -Resident #7 had other personal funds that would need to be dispersed to the resident's estate. -She was aware residents' personal funds should be dispersed within 30 days after death. -Since the facility did not have a Business Officer Manager (BOM), this caused the refund of the residents' personal funds to be delayed. -There was a total of $5290.00 remaining to be paid to Resident #7's estate. Refer to interview with the Administrator on 02/19/25 at 1:20pm. Refer to telephone interview with the Vice President of Administration and Human Resources (VPAHR) on 02/21/25 at 11:55am. _____ Interview with the Administrator on 02/19/25 at 1:20pm revealed: -The Business Office Manager (BOM) was responsible for residents' personal funds. -The facility did not currently have a Business Office Manager (BOM) and the previous BOM left the facility in November 2024. -She was currently handling the residents' personal fund ledgers in the absence of the BOM. -The facility dispersed residents' personal funds to the appropriate party within 1-2 weeks of death or discharge, but with no BOM, the process was taking longer. -The Vice President of Administration and Human Resources (VPAHR) was assisting her with some of BOM's responsibilities. -She was aware residents' personal funds should be dispersed within 30 days after death. -Since the facility did not have a BOM, this	D 426		

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D 426	Continued From page 5 caused the refund of the residents' personal funds to be delayed. Telephone interview with the Vice President of Administration and Human Resources (VPAHR) on 02/21/25 at 11:55am revealed: -Residents' personal funds were issued on the date of the residents' discharge from the facility. -The facility had a checkbook for the resident personal funds account and could write checks to the resident or responsible person. -There was not a wait time for a resident to receive their personal funds. -If a resident or their responsible person inquired about the residents' personal funds at discharge, a check should be issued from the facility at that time. -There should be no delay in processing residents' personal fund refunds because the facility had a checkbook for the account at the facility.	D 426		
D 432	10A NCAC 13F .1106 (f) Settlement Of Cost Of Care 10A NCAC 13F .1106 Settlement Of Cost Of Care (f) If a resident dies, the administrator of his or her estate or the Clerk of Superior Court, when no administrator for his or her estate has been appointed, shall be given a refund equal to the cost of care for the month minus any nights spent in the facility during the month. This is to be done within 30 days after the resident's death.	D 432	Deficiency Identified: D432 10A NCAC 13F .1106 (f) Settlement Of Cost Of Care 10A NCAC 13F .1106 Settlement Of Cost Of Care (f) If a resident dies, the administrator of his or her estate or the Clerk of Superior Court, when no administrator for his or her estate has been appointed, shall be given a refund equal to the cost of care for the month minus any nights spent in the facility during the month. This is to be done within 30 days after the residents death. The facility will immediately complete the facility financial records to notify the corporate office to process refunds. The business office manager and/or designee will ensure confirmation of refund process and document in all resident files. The Administrator and/or designee will check within 30 days to confirm the refund processing was completed and place a copy of the cashed check inthe resident's file.	4/15/25

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D 432	Continued From page 6 This Rule is not met as evidenced by: Based on interviews and record reviews, the facility failed to ensure the administrator of a resident's estate received a refund for the cost of care within 30 days after a resident's death for 1 of 2 sampled residents (#10). The findings are: Review of Resident #10's current FL2 dated 06/20/24 revealed diagnoses included Alzheimer's dementia, hypertension, and vitamin B12 deficiency. Review of the facility's 2024 discharged residents list revealed Resident #10 was discharged from the facility on 10/12/24. Review of Resident #10's October 2024 facility invoice dated 10/13/24 revealed Resident #10 was owed a refund in the amount of $527.75. Telephone interview with Resident #10's family member on 02/21/25 at 9:21am revealed: -Resident #10 resided at the facility for over 2 years. -Resident #10 paid privately for her room and board at the facility. -She had received a monthly statement each month Resident #10 lived at the facility. -She had written a check each month to the facility for Resident #10's room and board. -Resident #10 died at a local hospice house on 10/12/24. -She thought there should have been a refund for Resident #10's October 2024 payment but she had not received a refund from the facility. -She had not spoken to anyone at the facility about a refund for Resident #10's October 2024	D 432		

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D 432	Continued From page 7 payment. Interview with the Administrator on 02/21/25 at 11:33am revealed: -The facility did not currently have a Business Office Manager (BOM). -The previous BOM left the facility in November 2024. -The BOM ensured that the facility's corporate office would process refunds for cost of care. -Since there was not a BOM, she and the Vice President of Administration and Human Resources (VPAHR) handled some of the BOM tasks. -She was unsure what the process was for processing refunds to residents after discharge. -She was unsure of the time frame in which a resident's refund should be processed. -Resident #10's family had not received a refund because the corporate office was not informed by the facility that Resident #10 needed a refund. Telephone interview with the VPAHR on 02/21/25 at 11:55am revealed: -When a resident was discharged from the facility, either the BOM or Administrator completed a resident discharge worksheet to reconcile the resident's account. -If there was no BOM in the facility, the Administrator was responsible for ensuring discharge information was sent to the corporate office so any refunds could be processed. -The resident discharge worksheet was sent to the corporate office and should be processed within 30 days of a resident's death. -She did not complete the resident discharge worksheet for discharged or deceased residents; this worksheet was usually completed by a representative from the facility. -She was unsure why Resident #10's refund was	D 432		

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D 432	Continued From page 8 not processed within 30 days. -Resident #10's refund for cost of care should have been refunded within 30 days of Resident #10's discharge date.	D 432		