

2021
Residents' Manual



Heritage on the Marina
Laguna Street
Francisco Street
Octavia Street

Revised November 2019

TABLE OF CONTENTS

EMERGENCY INSTRUCTIONS	3-5
SECURITY	6-8
GENERAL INFORMATION	9-11
GENERAL POLICIES	12-14
GENERAL SERVICES	15-17
FRONT OFFICE SERVICES	18-19
GUEST POLICY	20-21
DINING SERVICES	22-23
HOUSEKEEPING SERVICES	24-25
MAINTENANCE SERVICES	26-27
RESIDENT APARTMENT TRANSFER POLICY	28
HEALTH SERVICES	29-31
ACTIVITIES/COMMITTEES	32-33
CONSTITUTION OF THE RESIDENTS' COUNCIL	34-35

EMERGENCY INSTRUCTIONS

**In an EMERGENCY, use the
EMERGENCY CALL BUTTON
in your apartment or your
EMERGENCY PENDANT**

EMERGENCY CALL SYSTEM:

If you become ill or suffer an accident in your apartment, push the button at the end of the intercom extension cord in your living area, or pull the emergency cord in your bathroom. This will activate an alarm at the Nurses' Station in the Health Center.

EMERGENCY PENDANTS:

Each Resident living in the main building on Laguna Street is given an Emergency Pendant, on their first day of residency at Heritage on the Marina. You are strongly encouraged to wear the provided Emergency Pendant at all times. This is to ensure a quick response, regardless of your location in the building. If activated within the walls of the community, the Health Center Team Member will respond.

EMERGENCY TRAINING:

All employees receive training for emergency situations, such as fire, earthquakes, power failure and explosions. Many employees have received Red Cross First Aid Training and CPR Training.

EARTHQUAKES:

When a quake begins, take the following actions:

1. **Duck, Cover, Hold.** Use a corner, doorway, or inside wall if you cannot get under something. Cover your head. Do not come out until shaking stops.
2. If you are indoors, stay there. If outdoors, try to move to an open area.
3. Stay away from windows and overhead wires.

When the quake stops:

1. **If you are in your apartment, stay there.**
2. Close your curtains/blinds to protect yourself from broken glass.
3. If you are in the Dining Room, or other areas of Heritage on the Marina, stay there and wait for instructions.
4. Team Member will assess each building and perform a thorough check to locate all Residents, evaluate injuries and damage to apartments.
5. If you are injured, Team Member will attend to you. If the building is severely damaged and unsuitable for occupation, Team Member will assist you in evacuating.
6. Heritage on the Marina is equipped with emergency supplies, and is prepared to continue standard operations.

Earthquake Preparation:

1. Request Maintenance Team Member to anchor large pieces of furniture to the wall (any piece of furniture over 5 feet).
2. Do not hang glass or heavy pictures at the head of your bed.
3. Place an emergency container near or under your bed. This container should have at least one week's supply of medications, sturdy shoes, a jacket, an umbrella and a flashlight.

FIRES:

When A Fire Alarm Is Sounded, **Stay Calm!**

- Listen to the instructions provided by the Fire Alarm System, Incident Commander and/or the Fire Department
- Touch the door knob of your apartment
- If it is hot, KEEP THE DOOR CLOSED!
- Place a wet towel at the base of the door
- Stay in your apartment, go to your window, and wait for help
 - **DO NOT EXIT THE BUILDING unless instructed to do so by the Incident Commander or the Fire Department.**

IF NECESSARY TO EVACUATE, DO NOT USE ELEVATORS!

- **Cautiously proceed to the designated meeting area(s) and remain there until instructed by the Incident Commander**

FIRE DOORS:

Fire Doors (Laguna Street only) are to be kept closed at all times. Some doors use magnetic closing mechanisms, and will shut automatically in the event of a fire.

FIRE EXTINGUISHERS:

Fire extinguishers are located at strategic points throughout the buildings. “In Case of Fire” instructions are posted next to each extinguisher and in each apartment.

EMERGENCY DRILLS:

All Residents and Team Member are required to participate in fire, earthquake and other disaster drills.

ELEVATORS:

In the event of a power outage, fire, earthquake or other emergency:
DO NOT use the elevators.

If you happen to be in an elevator when an emergency occurs, press the Emergency Button. Use the Emergency Flashlight if needed. Sit down on the bench and keep calm – assistance will be on the way.

EMERGENCY POWER SYSTEM:

Should we experience a power outage, an emergency power system will automatically activate and supply limited power to 3400 Laguna Street.

PLUMBING:

If a plumbing disruption occurs in the Morgan and/or Perry buildings, or in the Health Center, hot and cold bypass water lines are automatically activated.

SYMPTOMS OF ILLNESS:

When you feel ill, please notify the Health Center immediately. This includes but is not limited to: fever, “common cold,” flu, GI distress (i.e. diarrhea and/or vomiting). Do not come to the Dining Room for a meal or join in other group activities until the Health Center has cleared you to do so.

Some symptoms, such as GI distress, may constitute an emergency situation when one or more Residents become ill. These symptoms, which are associated with Norovirus, are reportable to the Department of Health. When the Health Center becomes aware, the following steps must be taken:

1. The Nursing Home Administrator and Department of Health are immediately notified.
2. Group activities are eliminated until the last resident presenting symptoms is completely well for 72 hours.
 - a. Meals are served directly to Residents’ apartments.
 - b. In-house/community activities are cancelled.

Remember:

1. **Wash your hands frequently to stay well.**
2. **Report symptoms of illness to the Health Center immediately.**

PANDEMIC PROTOCOLS

Heritage on the Marina is strictly regulated by the California and San Francisco Departments of Public Health, therefore we must follow the guidelines and procedures Prescribed by both agencies. Additionally, our Health Center, or Skilled Nursing Facility is governed by State, Federal and Medicare laws which we must adhere to.

If we are instructed to “lock-down,” “shelter-in-place,” close our dining room, cancel Activities, and any other instruction to maintain the safety and well-being of our Residents and Team Members, we must comply with all instructions.

The following instructions are important to follow during a pandemic such as COVID-19, in order to ensure the health of our Community:

- Do not enter or exit through the Health Center
- If you have symptoms of, or have tested positive for COVID-19, or any other Virus, you must isolate and quarantine in your apartment for 14 days
- If you spend 24 hours away from Heritage on the Marina you must quarantine in your apartment for 14 days
- If you have come in contact with anyone who has tested positive for the virus, you must quarantine for 14 days

SECURITY

APARTMENT SECURITY:

You are requested to lock your door when you are away from your apartment. No outside visitors are authorized to enter your apartment in your absence, unless you have submitted written, or in some cases, verbal permission to the Front Office. The only exception is during an emergency, when Medical, Maintenance or other Team Member members are authorized to make an **emergency** entrance.

KEYS:

Each Resident is given an apartment key, a mailbox key, and a key to the outside entrances. Do not give your keys to, or create duplicates for, any other persons. Do not put Heritage on the Marina's name and/or address on your keys.

If you forget the key to your apartment, you may borrow a key from the Front Office. After office hours, Nursing or Security Team Member can assist you with entrance to your apartment.

If you forget your key to the outside doors, you can re-enter the building as follows:

- From 8:00am to 8:00pm- ring the bell at the main entrance
- From 8:00pm to 8:00am- ring the bell at the Health Center entrance

If you lose your key, you must request a replacement key from the Front Office. A charge will be made per the Fees for Optional Services, found in your Resident Telephone and Resource Directory.

BUILDING ENTRANCES/EXITS:

The primary entrances for Residents are the main entrance at 3400 Laguna Street and the parking lot door by the Cottage. **You may also use your key to enter the building through the Health Center, but for the benefit of Health Center Residents, you are strongly encouraged to enter and exit through other doors when possible.**

Please do not prop doors open. Doors leading outside are to remain closed at all times. **Do not allow any unknown person to follow you into the building.**

FRONT OFFICE HOURS:

The Front Office operates during the following times:

Monday – Friday: 8:00am to 4:30pm

Saturday and Sunday: 9:00am to 5:00pm

Holidays: 10:00am to 2:00pm

VISITORS SIGN IN AND OUT:

In the interest of safety, **ALL** visitors to Heritage on the Marina are required to sign in using the kiosk located near the Front Office before they are permitted beyond the Morgan Hall lobby. This includes, but is not limited to, relatives, friends, business agents, repair technicians, volunteers and delivery people. They must also sign out when they leave the premises, to maintain an accurate roster of persons currently in the building.

After Front Office business hours, you will need to greet your guests at the Morgan building main entrance. **All guests must sign in.** For guests staying in the Guest Room who plan to arrive after hours, make special arrangements with the Front Office in advance.

NOTE: The Health Center door provides accessible entry to Heritage on the Marina. Visitors with accessibility needs may enter through the Health Center door and sign in using the kiosk in the Health Center.

SECURITY GUARD:

A security guard is on duty from 4:30pm to 8:00am Monday through Friday, and 6:00pm to 8:00am on weekends.

AUTHORIZING ANOTHER PERSON TO ENTER YOUR APARTMENT IN YOUR ABSENCE:

Unless as noted in cases of emergency or absence, the Front Office is not authorized to release a key to your apartment to any person without your

written permission. Heritage on the Marina cannot allow family members or friends to stay in your apartment in your absence, without a signed authorization.

ABSENCE FROM MEALS:

To ensure your safety, Residents are required to communicate with Dining Services if they intend to miss lunch or dinner at Heritage on the Marina. Residents may communicate their absence by calling the Dining Services Reservation Line at (415) 202-0714.

In the event that the phone is not answered, a Resident may leave a voicemail message. The messages will be checked throughout the day. Dining Services will maintain a log for those who are present during meals and for those who have given notice of their absence.

- Residents must call or speak to the host or a member of the Dining Services Management Team. Residents may not communicate their absence with the server at their table.
- Residents may not report for other Residents.
- Residents may not leave notes at the dining tables.

If you are not recorded as being present for a meal, and you have not notified the Reservation Line of your absence, the Health Center will contact you by telephone. If you are not reached by phone, further steps will be taken to locate you, which are detailed below.

OVERNIGHT ABSENCE:

If you plan to be away overnight or longer, you are required to notify the Front Office at least one day in advance. Please use the Departure Notification Form provided at the reservation desk in the Morgan Hall lobby.

If you have not notified the Front Office that you will be away and you do not come to the Dining Room for a meal, the Nursing Team Member will take the following actions to locate you:

- A Nursing Team Member will call your apartment.
- If there is no answer, a Team Member from the Health Center will perform a thorough check of your apartment.
- If you are not in your apartment, a note will be left for you. Your absence without prior notice will be considered an Emergency.
- If it is nighttime and a Nursing Team Member has not been informed of your return, they will perform regular checks by intercom to determine if you have returned to your apartment.

- After 8:00pm, the security guard will conduct regular hourly searches of the buildings' public areas, restrooms, closets, etc., as well as the parking lot, gardens and other outside areas.
- If Heritage on the Marina has not received an update on your whereabouts for 24 hours, additional measures will be taken to locate you. Your Emergency Contacts will be notified accordingly.

GENERAL INFORMATION

ARTS & CRAFTS ROOM:

This room is located on the lower level of the Perry Building and is available to all Residents. The Arts and Crafts Room is open at all times. We offer painting classes every Monday at 9:30am.

BASEMENT STORAGE:

Heritage on the Marina has limited storage space, in which Residents may store up to two trunks or suitcases. Stored items must be properly labeled with your name and apartment number.

If you need to retrieve something from the storage room, please submit a completed Maintenance / Housekeeping Request Form one day in advance, and arrangements will be made to deliver your item to you.

CHAPEL SERVICES:

Chapel services are held every Sunday morning at 9:00am. People of Faith from various denominations lead Sunday worship services. Roman Catholic services are held once a month on a Friday, at 10:30am.

Chapel services are organized to accommodate the religious preferences of all Residents. If your religious affiliation is not included in the schedule of services, and you would like to have it included, you are encouraged to join the Chapel Committee so that you can assist with making the arrangements. The Chapel is open at all times for private prayer and meditation. Every Thursday at 1:00pm is dedicated for meditation.

COMMON AREA KITCHENETTES:

The kitchenettes on each floor are equipped with a microwave, refrigerator, toaster and a Keurig coffee machine for your use. Heritage on the Marina supplies: fresh fruit, milk, yogurt, juice, cereal, bread and other condiments. Please refrain from adding any additional appliances to the Common Area kitchenettes.

If you store food in the communal refrigerator, you must mark it with your name, apartment number, and the date. Please remember to dispose of old food. The refrigerators are cleaned weekly. Any unmarked food will be discarded periodically.

COMMON LIVING ROOM CLOSETS:

Each Common Living Room has a closet equipped with an ironing board and iron.

HAIR DRESSER/BARBER:

A beauty salon is located on the lower level of the Perry Building. Typical beauty shop services are provided at standard rates by a licensed operator. Residents make their own appointments with the operator and pay them directly for services. Heritage on the Marina is not responsible for any schedule changes.

GARDEN CONFERENCE ROOM:

This room is located at the garden level of the 1530 Francisco Street Building and is available by reservation to all Residents and Team Members from Monday through Friday, during regular business hours. If you would like to reserve this room, you may do so through the Front Office.

JOHN KILLEEN FITNESS CENTER:

This room is located on the lower level of the Perry Building and is available to all Residents. Residents must have their physician's written permission to use equipment in the Center.

LAUNDRY ROOMS:

There are automatic washers and dryers for your use, located in the Laundry Room on the lower level of the Perry Building, and on the third floor of the Morgan building. Schedules are posted so that Residents may reserve the machines for a two-hour period of time.

Laundry Usage for Francisco Street & Octavia Street – 8:30am-:8:30pm.
Please respect neighbors during quiet hours.

LIBRARY:

The Stucky Library at Heritage on the Marina provides a large selection of books and DVDs for your use, including many books in large print. New books are acquired regularly by purchase and gift, and Heritage on the Marina receives a number of periodicals. You are asked to sign for any books you borrow from the Library. ~~Please do not remove books from the Library premises.~~

In addition to the Stucky Library in the Morgan building, there is a selection of books in the Porter Library in first floor Perry building sitting room, which are available for your enjoyment.

MORGAN AND PERRY COMMON ROOMS:

There are sitting rooms on each floor of the Morgan and Perry buildings for you to use and enjoy. We ask that you please refrain from rearranging or adding to the existing furniture in the sitting rooms or hallways. Also, please avoid resting/falling asleep in these areas.

PARKING FACILITIES:

A private parking lot, for Residents who maintain their own cars, is provided **for a monthly fee** on the Bay Street side of the Morgan Building. Space is very limited, and assigned on a first come, first served basis. To be eligible for a parking space, proper proof of a current California driver's license, automobile registration, and insurance, as required by law, must be provided to Heritage on the Marina.

Residents must use their car at least once per month in order to be eligible for a parking space in the Heritage on the Marina parking lot.

Your guests and visitors **cannot park in the residents' parking lot under any circumstances.** For guests staying several days, a temporary parking permit may be obtained at the San Francisco Municipal Transportation Agency (SFMTA) for a small fee. The permit will allow your guests to park on the street all day (**except during street cleaning days/times**), avoiding the 2-hour limit. You will be asked to provide the license plate number of your guest's vehicle.

GENERAL POLICIES

ADJUSTMENT PERIOD:

All new Residents must complete an introductory Adjustment Period of 90 days before they are considered to be a permanent Resident. Please refer to your contract for complete details.

DAMAGE TO HERITAGE ON THE MARINA PROPERTY:

Residents responsible for damage to Heritage on the Marina property through negligence or carelessness will be charged for any repairs.

EMERGENCY INFORMATION FORM:

Upon entry to the Community, you are required to complete an “Emergency Information Form.” It is your responsibility to keep the emergency information up to date. If you need to make changes or additions to your Emergency Information Form, please submit revisions to the Front Office.

GIFTS TO HERITAGE ON THE MARINA:

Thanks to the generosity of so many people over the years, Heritage on the Marina has been able to offer an exceptional standard of care for our Residents. The difference between Monthly Care Fees, paid by Residents, and the actual cost of care is supplemented by contributions and income generated by invested contributions. Just as yesterday’s gifts have ensured a comfortable lifestyle for Residents, today’s gifts and bequests will ensure that the same commodities may be enjoyed by Residents in years to come.

Residents frequently designate Heritage on the Marina to receive gifts honoring special events such as birthdays and anniversaries, as well as memorial gifts from family and friends. Personal gifts of property, investment securities or cash can be made during your lifetime or through your will or trust.

Heritage on the Marina welcomes monetary gifts and bequests. If you wish to make a monetary gift to Heritage on the Marina, or would like to make arrangements for honorary and memorial gifts, **please contact the Chief Executive Officer at (415) 202-0343.**

MONTHLY FEES AND CHARGES:

You will **not** receive an invoice for your Monthly Care Fee. You will receive an invoice for any miscellaneous charges, such as guests’ meals, etc. On the first day of each month, payment of your Monthly Care Fee and any miscellaneous charges must be delivered to the Front Office.

Heritage on the Marina can automatically deduct your Monthly Care Fee from your bank account each month. This must be setup in advance with the Accounting Office. Please obtain the necessary information from them. **This is the preferred and most convenient method of payment.**

PERSONAL PROPERTY INSURANCE:

We highly recommend you obtain personal property insurance.

PETS:

Residents are not permitted to maintain pets in the Morgan or Perry Buildings at Heritage on the Marina. Visitors who bring a dog must keep it on a leash at all times and clean up after it. Dogs are not allowed in the Dining Room, with the exception of service animals. **Pets are permitted to live in the Francisco Street and Octavia Street properties.**

PRIVATE EMPLOYMENT OF HERITAGE ON THE MARINA EMPLOYEES:

The private employment of Heritage on the Marina employees by Residents is not permitted. Outside suppliers and service providers must be bonded, provide proof of insurance, and be pre-approved by the Chief Executive Officer or his designee.

SALES AND FUNDRAISING:

Any fundraising with Heritage on the Marina (such as bazaars, fairs, white elephant sales, etc.) shall be solely for the benefit of Heritage on the Marina and/or its programs, and not for personal gain. **Please contact the Director of Marketing and Admissions at (415) 202-0307 to discuss the use of Heritage on the Marina's name or logo, prior to making any arrangements.**

SERVICES AND FEES:

Heritage on the Marina reserves the right to modify or adjust services and fees at any time, with appropriate notice, as per your contract.

SMOKING:

Smoking is not permitted inside Heritage on the Marina. There are designated smoking areas outside of the building. These areas are:

- Resident parking area on Bay Street
- Bench outside of Health Center entrance

Please keep in mind that California state law prohibits smoking within 20 feet of entrances, exits or operable windows of public buildings

TELEPHONE:

You are required to have a landline or mobile phone. Arrangements and charges for telephone services and equipment in your apartment are your responsibility. Heritage on the Marina must have your phone number in order to reach you in the event of an emergency. This applies to unlisted phone numbers as well. Your telephone number will not be given to persons outside of Heritage on the Marina under any circumstances. If you prefer to not be listed in the Residents' Telephone and Resource Directory, please notify the Front Office.

TIPS AND GIFTS TO EMPLOYEES:

Residents are not permitted to give tips or any gratuity (tip, gift, or anything of value) to any employee of Heritage on the Marina. Any employee who accepts or asks for any gratuity is subject to immediate discharge.

Residents wishing to express their appreciation to employees/ Team Members, may do so by contributing to the Employees' Appreciation Fund. The Fund is distributed, on an equitable basis, to all non-management employees in December at the annual employee appreciation luncheon. Gifts to the Employees' Appreciation Fund may be made at any time during the year, and are tax-deductible. Envelopes for such gifts can be found at the Reservation Desk outside of the Stucky Library.

Residents of Heritage on the Marina may not sell or give articles of furniture, clothing or other personal possessions to Heritage employees.

VISITS BY PUBLIC OFFICIALS:

Heritage on the Marina is a state licensed residential living facility. Therefore, public officials have the right to inspect Heritage on the Marina, including Residents' apartments, at any time. The Administration will try to make an appointment with you before a state official enters your apartment, however, advance notice cannot be guaranteed. A Team Member will accompany any state official making an unannounced visit.

QUIET TIME:

The official quiet time at Heritage on the Marina is 10:00pm to 6:00am. During these hours, please respect your neighbors by being mindful of your noise level. Small things (such as shutting your door quietly, and refraining from using loud electronics) can make a big difference in the quality of community life at Heritage on the Marina. We thank you in advance for your cooperation.

GENERAL SERVICES

CHECK CASHING SERVICES:

If you are unable to access the bank, you may cash a check for up to \$50.00 at the Accounting Office from 2:00pm to 3:00pm, Monday through Thursday. The Accounting Office is located on the lower level of the Perry Building.

DRY CLEANING/LAUNDRY SERVICE:

Agents from various laundry and dry cleaning businesses make regular stops at Heritage on the Marina to pick up and deliver for Residents. Please inquire at the Front Office for a list of vendors currently providing this service.

MAIL DELIVERY:

Mail is delivered to Heritage on the Marina daily, except Sunday and Federal holidays. Mail is deposited by the U.S. Postal Service in locked postal boxes on the lower level of the Perry Building. Mail for Assisted Living and Skilled Nursing Residents, will be delivered to their apartments/rooms.

Registered mail, special deliveries, mail with postage due, and mail too large for postal boxes will be left at the Front Office. Additionally, if your box is too full, the postal carrier will leave your mail at the Front Office. You will be notified if such mail is being held for you.

MESSAGES:

We strongly recommend that you setup up a voicemail or purchase an answering machine system. The Front Office cannot take messages for Residents, except in the event of an emergency.

NEWSPAPER SUBSCRIPTIONS:

Residents wishing to subscribe to any newspaper may do so by contacting the newspaper directly. You will be billed directly by the newspaper. If you subscribe to a morning paper, it will be delivered to your door.

If you plan to be away for a length of time, please arrange to have newspaper delivery stopped for the duration of your absence. If you plan to be away for a short period and do not wish to stop delivery, please arrange for another Resident to collect your paper.

NOTARY PUBLIC:

Heritage on the Marina does not offer notary services. The Front Office has a list of nearby notary offices.

OUTGOING MAIL:

There is a box for outgoing mail at the Front Office. The outgoing mail is picked up when the daily mail is delivered. The nearest post office is located on Buchanan Street, between Beach and Marina (across from Safeway). There is also a post office on Lombard Street, between Webster and Fillmore.

PACKAGE DELIVERY:

Packages and other deliveries to Residents are normally left at the Front Office. If a delivery is too large or heavy to be carried easily, it will be delivered to your apartment by a Heritage on the Marina Team Member.

REPAIR/SALES PEOPLE:

If you have an appointment with a sales or repair person, please notify the Front Office so that the vendor may be readily identified and admitted to the building.

RESERVATION DESK:

A reservation desk is located in the Morgan Hall lobby. Here you will find Request Forms for Maintenance / Housekeeping, Van Transportation and Bag Lunches. Additionally, there are forms for notifying Heritage on the Marina when you will be away overnight (Departure Notification) and for making a Guest Room Reservation. Employees' Appreciation Fund and Accounting Office envelopes are also kept at this desk for your convenience. Completed forms may be submitted to the Front Office, or deposited in the Request Form box after business hours.

TAXI / RIDESHARING SERVICE:

When calling for a cab, please inform the dispatcher of which entrance you wish to be picked up. The front entrance is 3400 Laguna Street; the Health Center entrance is 1550 Francisco Street.

VAN SERVICE:

Heritage on the Marina's van is available, free of charge, to transport Residents to and from medical and/or dental appointments Monday, Wednesday, Thursday and Friday, 8:30am – 12:00pm and 12:30pm - 4:30pm.

The van is also available for non-medical appointments. However, please keep in mind that medical appointments take priority. All non-medical transportation requests are granted on a first come, first served basis.

Saturday and Sunday from 1:30pm – 5:00pm, if 5 or more Residents reserve the van each day.

Reservations are required for both medical and non-medical appointments. Transportation Request Forms can be found at the reservation desk at the entrance to the Stucky Library.

In order to accommodate your request, please leave your completed **Transportation Request** form at the Front Office at least two working days prior to your appointment. If you are turning in your request form after business hours, place it in the Request Box outside of the Front Office.

FRONT OFFICE SERVICES

FAX:

Fax service is available at the Front Office

Sending Faxes: If you wish to send a fax, please bring your documents to the Front Office during normal business hours. The Front Office will send your fax for you. **There is NO charge for sending domestic faxes.**

Receiving Faxes: The fax number at Heritage on the Marina is (415) 292-7080. If someone is sending you a fax, they must put your name on any incoming documents. When we receive a fax for you, the Front Office will call you to pick it up, just as we do for packages.

LOST AND FOUND:

You may report the loss of any personal item to the Front Office. If you find an item, please turn it in to the Front Office. To minimize permanent loss of your property, please put your name in or on everything you carry with you in public areas at Heritage on the Marina, such as your purse, key chain, pillbox, eyeglasses, cane etc.

CAUTION: Do not put Heritage on the Marina's name or address on your keys.

PHOTOCOPYING:

Residents wishing to have documents photocopied may leave them at the Front Office with instructions as to the number of copies desired. A Front Office Team Member will copy the documents. There is NO charge for copying up 25 pages. For 26+ copies, there is a charge of 10 cents per page for black and white, and 25 cents per page for color copies.

POSTAGE STAMPS:

Stamps may be purchased at the Front Office. Up to 10 stamps may be purchased at a time. There is a small postage scale in the Front Office that may be used for weighing letters. If you require a large quantity of stamps, they should be purchased at the post office or online at www.usps.com

GUEST POLICY

GUESTS:

Residents are welcome to have visitors and guests at any time, and are responsible for their guests. For your safety, all visitors (including relatives) are required to **sign in on the kiosk** when they enter, and **sign out** when they leave. Visitors arriving during the day will sign in and out at the Front Office. After the Front Office hours, you must meet your guests in person at the Morgan Building main entrance.

The Health Center door, located at 1550 Francisco Street, is the accessible entrance to Heritage on the Marina. Guests with accessibility needs may enter through this door.

GUEST MEALS:

People of all ages are welcome to dine as guests of Residents, provided there is Dining Room seating. You are required to make reservations and accompany your guest in the Dining Room. To make a reservation, please call the Dining Services Reservation line at (415) 202-0714. Reservations for Sunday supper must be made by Saturday at noon.

Because the Dining Room has limited capacity, the number of guests a Resident may have at any one meal is generally limited:

- Single residents may have up to 5 guests per meal.
- Couples may have up to 4 guests per meal.
- During major holidays, singles and couples may have up to 3 guests per meal.

Of course, the amount of space actually available in the Dining Room will determine how many guests can be accommodated.

Special menu requests, other than listed substitutions, cannot be accommodated, nor can private party service be provided.

GUEST ROOMS:

Heritage on the Marina has one overnight Guest Room, which can accommodate two guests. The Guest Room is located in the Morgan Building, and must be reserved in advance.

Reservations must be in writing using a **Guest Room Reservation** form, available at the Reservation Desk outside of Stucky Library, and submitted to the Front Office. Each stay is limited to a maximum of five days. If no one else has reserved the room, and if approved by the Director of Marketing and Admissions, guests may stay past the five-day limit on a day-to-day basis.

Guests may not stay at Heritage on the Marina unless the Resident is present. You are required to meet and stay with your guest(s) while they are on the premises, except when they are in the Guest Room. **Guests in the Dining Room must be accompanied by their host(s).**

RATES FOR GUESTS:

A schedule of current guest meal and room rates is available at the Front Office.

BILLING:

You will be billed on the first of each month for any guest charges incurred during the previous month.

DINING SERVICES

RESERVATIONS:

We request that all Residents call the **Dining Services Reservation Line** at (415) 202-0714 to make meal reservations. For your safety, we also request that you call the Reservation Line if you **do not** plan on dining at Heritage on the Marina (See **ABSENCE FROM MEALS** in the **SECURITY** section on page 5).

MEAL HOURS:

The Dining Room is open daily from 7:30am to 7:30pm, with last seating at 7:00pm. Meal hours are as follows:

BREAKFAST	7:30-9:30am
LUNCH	11:00am-2:00pm
DINNER	5:00pm-7:00pm

On Sundays and some holidays, such as Thanksgiving, the Mid-Day meal is served at 12:00pm. Supper is usually a light meal, served at 5:30pm.

An “Always Available Menu” is offered to those dining between meal hours.

If you are going to be away from Heritage on the Marina during lunch time, you may request a bag lunch. Bag lunches must be requested one day in advance by filling out a **Bag Lunch Request** Form at the reservation desk outside of the Stucky Library, and submitting it to the Front Office.

DIETICIAN:

An ADA Dietitian is available by appointment for Resident consultations concerning individual dietary needs. Dietary consultations can be arranged through the Health Center. Special diets can be provided, but must be authorized by Heritage on the Marina’s Medical Director.

MENUS:

The menu for the coming week is printed and distributed to Residents every Friday. Additionally, daily menus will display on the digital monitors on the first floor, and on the In-House Television Channel (998).

DINING ROOM SEATING:

The Dining Room is open seating for all Residents.

DINING ROOM ATTIRE:

Residents are expected to dress comfortably and in good taste for meals. Bathrobes or slippers are not permitted in the Dining Room or other common areas of our community.

TABLE DECORATIONS AND PERSONAL ITEMS:

Fresh flowers are placed on Dining Room tables weekly. Personal condiments, vitamins, prescription medications, etc., may not be left on tables between meals and will be removed by Dining Services Team Members.

COMMENT CARDS:

Residents are encouraged to give feedback to the Director of Dining Services on the comment cards available in the Dining Room. Completed comment cards should be placed in the box next to the blank cards in the Dining Room.

MAIN KITCHEN RESTRICTIONS:

Residents may not enter the kitchen area at any time.

HOUSEKEEPING SERVICES

HOUSEKEEPING SERVICE:

A Housekeeping Team Member will clean your apartment once a week. They will change your bed linens and supply a clean set of towels, as well as a bath mat.

You are responsible for daily bed making and maintenance of your apartment. A Team Member can make your bed for you temporarily, when recommended by Heritage on the Marina's physician. Mattresses are turned upon written request.

You are responsible for dusting and maintaining personal possessions such as art objects, china and glass, photographs, etc. Housekeepers are instructed not to clean personal possessions.

A Housekeeping Team Member is not authorized to enter your apartment if you are not there. To authorize entry to your apartment in your absence, you must give written permission to the Front Office, on your completed Departure Notification form. If you are away and Heritage on the Marina does not have your written authorization, your apartment will not be cleaned.

HOUSEKEEPING REQUEST FORM:

All requests for non-routine Housekeeping services should be made in writing on the **Maintenance / Housekeeping** Request form, available at the reservation desk outside of the Stucky Library. All forms must be signed by the Resident making the request for services.

GENERAL CLEANING:

General cleaning is performed by a Housekeeping Team Member upon written request. You should remove all bric-a-brac and other objects from bureau tops, tables, etc., before a general cleaning.

You are responsible for the maintenance and cleaning of all personal furnishings. This includes the cleaning of upholstery, shampooing of rugs or carpeting not belonging to Heritage on the Marina, and the cleaning of items such as chandeliers, sconces, and other fixtures that are your personal possessions.

WINDOWS AND CURTAINS:

Windows are washed twice a year and curtain cleaning is available upon written request using a Maintenance / Housekeeping Request form.

WASTE DISPOSAL:

You are asked to empty your wastebaskets into containers located in one of the trash closets on your floor. Recycling boxes are also located in each closet, and on the lower level of the Perry Building.

MAINTENANCE SERVICES

MAINTENANCE REQUESTS:

All requests for maintenance service should be made in writing on a **Maintenance / Housekeeping** Request form and submitted to the Front Office. Forms are available at the reservation desk outside of the Stucky Library.

Painting will be scheduled by maintenance as needed.

Residents are asked to not approach members of the Maintenance Team to request apartment repairs or other services, unless there is an emergency.

Emergencies are situations that may cause damage to the facility if not immediately corrected, such as heavy leaks or flooding, or where there is threat of danger, such as fire, elevator malfunction, etc. Except in emergencies, Maintenance Team Members are not permitted to make any repairs or perform any services without an authorized work assignment from the Director of Environmental Services.

EMERGENCY MAINTENANCE SERVICES:

If there is a situation that requires immediate attention, notify the Front Office.

If a maintenance emergency occurs after Front Office business hours, notify the Health Center.

PLUMBING:

Maintenance Team Members will resolve any plumbing problems that may occur. Any plumbing emergencies, such as leaks, blockages, or other serious problems that you notice, either in your apartment or elsewhere in the building, should be reported immediately.

LIGHT BULBS:

A Maintenance Team Member will install light bulbs for Residents by written request, and will supply bulbs for the permanent fixtures that belong to Heritage on the Marina. Residents are expected to furnish light bulbs for lamps and any other fixtures that are their own personal property.

ELECTRICAL APPLIANCES AND WIRING:

The Director of Environmental Services will make periodic inspections of electrical appliances, cords, plugs, and wiring in Residents' apartments, and may require the correction, repair or removal of equipment that is potentially hazardous.

Hot plates, toasters, electric coffee pots, electric irons and other heating devices are not permitted in the Morgan and Perry Building apartments.

The only exception is a microwave oven, which Residents may purchase independently. The microwave must be smaller than .7 cubic feet, and use 700 watts or less when operating. The Director of Environmental Services must approve the type and installation of all microwave ovens. Microwave ovens may be removed from apartments if they are being misused or have repeatedly triggered the smoke alarms.

TEMPERATURE CONTROL:

Each apartment is equipped with a heating unit. The valve controls the flow of warm air into the apartment. Questions pertaining to heating unit operation may be directed to a Maintenance Team Member.

REFRIGERATORS:

Refrigerators may not be operated inside closets.

MAINTENANCE OF YOUR PERSONAL PROPERTY:

As mentioned above, you are responsible for maintaining your personal property, including, but not limited to: furniture, lamps, video recorders, televisions, and remote controls.

PICTURE HANGING:

By written request, a Maintenance Team Member is able to hang pictures or mirrors for Residents. These articles will be hung only if the Resident is present. Pictures, large mirrors, bookcases, and tall pieces of furniture may be potential **earthquake hazards**. A Maintenance Team Member can assist you with advice and adaptive safety devices.

Resident Apartment Transfer Policy (Residential Living Only)

Residents who wish to transfer to an upgraded or larger apartment must contact the Director of Marketing and Admissions in writing to be added to the waiting list for Resident Apartment Transfers. A submitted request **does not** guarantee that the request will be granted.

Residents on the waiting list will be contacted when a vacancy occurs. Residents must communicate in writing whether they wish to move to the apartment and Heritage on the Marina will confirm the Resident's decision.

The following procedure applies to a current Resident desiring to relocate from their apartment to a different apartment:

- Only **one** transfer is permitted per the Resident's Contract.
- Residents must occupy their apartment for at least one year, prior to requesting a transfer to another apartment.
- A financial recertification will be required in order to determine eligibility for the transfer.
- The Resident must pay the difference between the original Entrance Fee paid by the Resident and the current Entrance Fee for the new apartment.
- The Resident must pay the current market rate Monthly Fee for the new apartment.
- Residents must pay their moving and cleaning costs and the cost of restoring their old apartment to its original condition.

***This policy supersedes all previous Resident Apartment Transfer policies.
This policy is subject to review at the discretion of Heritage on the Marina.***

HEALTH SERVICES

MEDICAL COVERAGE:

Your Heritage on the Marina contract describes the medical care that is provided.

New Residents are advised to maintain any private medical insurance they may have until they complete the ninety-day Adjustment Period.

EMERGENCY MEDICAL CARE:

A licensed nurse is on duty in the Health Center twenty-four hours a day to attend to any medical emergencies. A physician, retained by Heritage on the Marina, or an associate is always on call.

PHYSICIAN:

Heritage on the Marina's physician sees Residents in the Henderson Clinic on regularly scheduled days. Appointments must be made in advance in the Health Center. A physical exam will be scheduled annually during the birthday month of each Resident.

CONTINUING HEALTH SUPERVISION:

Heritage on the Marina provides general health supervision for all Residents. A Nursing Team Member is available to discuss any health problems or concerns you may have. You are strongly advised to notify the Health Center of any injuries, illnesses, or unusual symptoms that you experience.

MEDICAL RECORDS:

A medical chart is maintained at the Health Center for each resident. Current information about your health care must be given to a Nursing Team Member to be included in your chart. It is your responsibility to keep the Health Center updated on any changes that may arise.

INJECTIONS:

Injections prescribed by a physician can be administered by a licensed nurse in the Health Center. You must notify the nurse if you have ever experienced any allergic reactions to previous injections.

Flu vaccinations prescribed by a physician are administered annually to those who wish to receive them. If you are eligible to receive a flu vaccination elsewhere, you will not be given a vaccination at Heritage on the Marina.

TREATMENTS:

Many treatments that the physician prescribes can be provided by a Health Center Team Member, when necessary, at a prearranged time.

MEDICATIONS:

Each Resident is responsible for following his or her physician's orders concerning medication. For your own protection, it is your responsibility to inform the Health Center of any medications and/or drugs you take regularly. This information will be listed in your medical record to ensure that you receive proper care.

MEAL TRAYS TO RESIDENTS' APARTMENTS:

Meal trays are provided only for medical reasons, as recommended by the physician and authorized by the Director of Nursing or the Charge Nurse. If you do not have a physician's order but feel too ill to go to the Dining Room, notify the Health Center. A nurse will evaluate your condition and if needed, authorize trays to be sent to your apartment until you can be seen by the physician.

****NOTE: The Front Office and Dining Services Team Members cannot order meal trays.**

BILLS FOR HOSPITAL AND MEDICAL SERVICES

Residents must maintain Parts A and B of Medicare. After Medicare, or your Medicare HMO, and secondary insurance have paid their portions of outside medical expenses, Heritage on the Marina may pay balances due, if the services are covered under your Life Care Contract. These bills for medical and hospital care should be submitted to the Accounting Office for payment. The Nursing Department reviews, and either approves or denies payment, based on an individual's applicable contract exclusions.

REFERRALS FOR OUTSIDE MEDICAL CARE

In order for outside medical care expenses to be covered by Heritage on the Marina, residents must obtain a referral from the Director of Nursing. Referral forms for this purpose are at the Nurses' Station in the Health Center. These forms are used to authorize Heritage on the Marina to make co-payments for outside medical services which are payable under the conditions stated in your Life Care Contract. The forms are also used to track medical tests and treatments received.

HEALTH CARE DECISIONS

All Residents are strongly encouraged to execute an Advanced Health Care Directive and a Pre-Hospital Do Not Resuscitate Form, if applicable. After you are settled in, arrange an appointment with the Director of Nursing to discuss these documents.

END OF LIFE ISSUES:

Heritage on the Marina supports Residents' dignity and self-determination and will honor the decision of a qualified Resident with a terminal illness to end their life by taking aid-in-dying drugs, in accordance with the California End of Life Option Act. However, Heritage on the Marina will not participate under the Act, and does not allow its employees, volunteers, or independent contractors to participate under the Act at Heritage on the Marina. For more information about the End of Life Option Act and Heritage on the Marina's policy, please contact the Director of Nursing.

ACTIVITIES

A monthly calendar of activities is distributed to all Residents prior to the beginning of each month. Additionally, activity offerings will be displayed on the digital monitors on the first floor, and on the In-House Television Channel (998). The activities are organized by the Director of Activities and Social Services/Wellness and Community Life.

There is a separate activity calendar for Health Center Residents.

COMMITTEES

RESIDENTS' COUNCIL:

All Residents are members of the Residents' Council. The Council meets monthly to share ideas, suggest activities, and discuss matters of general interest or concern to Residents.

Officers and members of the Residents' Council are elected annually in December, at the Annual Meeting. The Officers make up the Executive Committee, and are responsible for overseeing the Council. Heritage on the Marina's Chief Executive Officer, and at least one representative from the Board of Directors attend Council meetings. The Board representative serves as a liaison between Residents and the Board.

In addition to the Council, there are a number of standing committees. Currently, these are the Activities, Food, Chapel, and Library Committees. Occasionally, special committees are appointed to handle various in-house activities, such as bus trips, picnic excursions, Bingo, etc. There is an active in-house volunteer program which helps with planned activities.

ACTIVITIES COMMITTEE:

The Activities Committee is responsible for providing Residents with a variety of programs. The Committee arranges interesting musical acts, guests, film presentations, parties and other such activities.

FOOD COMMITTEE:

The Food Committee meets regularly with the Director of Nursing and the Director of Dining Services to discuss comments and suggestions by Residents.

CHAPEL COMMITTEE:

The Chapel Committee is responsible for arranging clergy, organists and singers for Chapel services.

LIBRARY COMMITTEE:

The Library Committee oversees the maintenance and acquisition of books for the Stucky Library. If there is a particular book or periodical you would like to suggest Heritage on the Marina purchase, speak to someone on the Library Committee.

CONSTITUTION OF HERITAGE ON THE MARINA RESIDENTS' COUNCIL

ARTICLE I

SECTION 1. NAME

The name of this organization shall be Heritage on the Marina Residents' Council, hereinafter referred to as the Residents' Council. All residents of Heritage on the Marina are considered to be members of the Residents' Council.

SECTION 2. PURPOSE

- A. The Residents' Council exists to provide residents with an avenue for expressing views on any matter directly affecting them, including suggestions and recommendations to the Administration.
- B. The Residents' Council shall provide the Administration an avenue for working constructively and cooperatively with Residents on matters of mutual concern.
- C. The Residents' Council may propose educational, recreational and cultural programs and any such other activities as desired by the Residents and Administration as mutually beneficial.

SECTION 3. RESPONSIBILITY

It is the responsibility of the Residents' Council to elect for a term of two(2) calendar years seven (7) of its members, hereinafter called Councilors, to form Heritage on the Marina Residents' Council Executive Committee, hereinafter referred to as the Executive Committee, for the purpose of conducting the business of the Residents' Council. Any member nominated for the Executive Committee must have been in residence for a minimum of one (1) year at the beginning of his/her tem.

ARTICLE II JURISDICTION

The jurisdiction of the Residents' Council shall be limited to those matters which directly concern the participation of the Residents in the ongoing life of the community.

ARTICLE III EXECUTIVE COMMITTEE

1. It is the responsibility of seven (7) elected Councilors who form the Executive Committee to meet once a month to propose effective procedures for implementing the purpose of the Residents' Council as stated in Article I, Section 2, above. Four (4) Councilors shall constitute a quorum.
2. No Councilor shall hold office for longer than two (2) years. To preserve continuity on the Executive Committee, it shall be the practice to elect four (4) new Councilors one year and three (3) new Councilors the next year. One (1) full year shall elapse before a Councilor shall be nominated for re-election after an expired term.
3. No two people occupying the same apartment may serve on the Executive Committee at the same time. No siblings may serve on the Executive Committee at the same time.
4. The Executive Committee shall annually elect from its members a President, Vice President, a Secretary, and a Treasurer to serve for a one (1) year term. These four officers shall be known as Officers of the Residents' Council as well as Officers of the Executive Committee.
5. Should any Councilor of the Executive Committee be unable to continue serving his/her full elected term, the President shall appoint a successor for the unexpired term with the option of leaving a vacancy of three (3) months or less at the end of an expiring term. The same restriction for subsequent nomination for a two (2) year term applies to an appointee as well as to an elected Councilor (Paragraph 2 above).
6. Residents may submit signed suggestions and observations to a Councilor of the Executive Committee. All such communications shall be given consideration by the Executive Committee at a subsequent meeting.

ARTICLE IV OFFICERS

1. The President shall preside at all Executive Committee meetings, any special meetings of the Residents' Council, and at the Annual Meeting. The President shall appoint a member of the Residents' Council to fill a vacancy on the Executive Committee (Article III, Paragraph 5).

It is part of the President's duties to appoint ad hoc committees as deemed necessary by the Executive Committee.

2. The Vice-President shall assume all of the duties of the President in the absence of the President.
3. The Secretary shall keep minutes of all meetings of the Executive Committee and Residents' Council and post minutes of meetings in timely fashion on Residents' bulletin boards. The Secretary shall also handle all required correspondence.
4. The Treasurer shall be responsible for collecting and disbursing all monies of the Residents' Council and shall maintain proper books of this procedure. No expenditure in excess of fifty (\$50.00) dollars shall be paid by the Treasurer without first receiving authorization from the Executive Committee.

ARTICLE V ANNUAL MEETING OF THE RESIDENTS' COUNCIL

1. The Annual Meeting of the Resident's Council shall be scheduled for this first week in December of each year. At this time members of the Executive Committee shall be elected for the ensuing two (2) year term fill the positions of members whose terms on the Executive Committee are expiring (Article III, Paragraph 2). Prior to the Annual Meeting, the Executive Committee shall appoint a committee of three (3) Residents' Council members to act as a Nominating Committee to interview and obtain consent of the nominees for the upcoming vacancies, prepare a slate and post their names on three (3) bulletin boards for at least ten (10) days prior to the Residents' Council Annual Meeting.

Additional nominations may be made from the floor at the Annual Meeting. If more nominations are proposed than the vacancies to be filled, then the election shall be by written ballot. As soon as convenient, the new Executive Committee shall hold a special meeting to elect officers for the coming year.

2. Committee Annual Reports shall be presented at the Annual Meeting, as well as reports by the President and Treasurer.
3. Twenty (20) residents shall constitute a quorum.

ARTICLE VI RATIFICATION

After prior notification, any clarifications, changes, or amendments to this Constitution must be ratified by a two-thirds (2/3) majority vote of the Residents attending the Annual Meeting or a special meeting.