

California RCFE Licensing Project Tracker

A printable project workbook for organizing orientation, administrator certification, application preparation, property readiness, agency responses, and inspection follow-up.

Applicant / entity:

Facility address:

Target opening:

Master milestone plan

#	Milestone	Owner	Target	Completed
1	Confirm facility concept, capacity, ownership structure, and responsible parties.			
2	Complete required orientation and document attendance or certificates.			
3	Complete administrator certification steps and track renewal dates.			
4	Confirm property, zoning, fire, accessibility, and local-agency requirements.			
5	Assemble application forms, supporting documents, fees, and clearances.			
6	Submit the application and maintain a copy of the complete submission.			
7	Respond to deficiency letters and agency questions by the stated deadlines.			
8	Prepare the home, records, staffing plan, policies, and inspection materials.			
9	Complete interviews, inspections, corrections, and final follow-up.			
10	Confirm written approval and license conditions before admitting residents.			

Current official starting points

Use the current CDSS licensing orientation, Adult and Senior Care application-unit information, administrator-certification procedures, and RCFE regulations. Record the version or access date for every form and instruction set you use.

Important

These worksheets provide general educational and organizational guidance. They are not legal, medical, accounting, employment, insurance, tax, or licensing advice. California requirements change, and each facility may have different license conditions. Verify current requirements with the California Department of Social Services, applicable local agencies, and qualified professionals.

Orientation and Administrator Certification Tracker

Keep dates, certificates, training records, and renewal planning together. Confirm which requirements apply to each person and role.

Facility:

Applicant:

Updated:

Orientation

Done	Task	Owner / due
☐	Confirm the correct RCFE orientation format and registration instructions.	
☐	Register the appropriate applicant or responsible individual.	
☐	Complete orientation and save proof of completion.	
☐	Record orientation date, certificate or reference number, and expiration if applicable.	
☐	Review the application instructions and list questions requiring agency clarification.	

Administrator certification

Item	Date	Provider / agency	Reference	Follow-up
Administrator candidate				
Initial training				
Examination				
Application / documentation				
Certificate received				
Renewal planning				

Questions and follow-up

Date	Question	Contact	Answer / next step

RCFE Application Package Checklist

Track the current form version, responsible person, status, and where the final signed copy is stored. This is an organization aid, not a substitute for the current CDSS application checklist.

Facility:

Application unit / contact:

Planned submission:

Document group	Form / version	Status	Owner	Notes
Application and identifying information		Not started		
Ownership, organization, and responsible-party documents		Not started		
Administrator information and certification records		Not started		
Applicant and personnel clearances or required background documentation		Not started		
Facility plan, sketches, room use, and capacity information		Not started		
Property control, lease, deed, or required authorization		Not started		
Financial information and operating plan		Not started		
Emergency, disaster, admission, medication, staffing, and operating policies		Not started		
Fire-clearance and local-agency documentation		Not started		
Fees, signatures, attachments, and copies for the facility file		Not started		

Submission control

Done	Task	Owner / due
☐	Review names, addresses, capacity, entity information, and signatures for consistency.	
☐	Confirm every attachment is labeled and included in the retained submission copy.	
☐	Record the delivery method, tracking number, payment, and submission date.	
☐	Create a response log for every agency request, deficiency, or correction.	

Property, Fire, and Local Approval Tracker

Confirm requirements with CDSS, the local fire authority, planning or zoning officials, building officials, and other applicable agencies before committing to major property work.

Property:

Owner / landlord:

Project lead:

Approval	Agency	Contact	Requested	Status	Next step
Use / zoning review					
Building / permit review					
Fire clearance					
Accessibility review					
Water / septic / health review, if applicable					
CDSS facility review					

Property readiness

Done	Task	Owner / due
☐	Compare intended resident needs and capacity with the property layout and license plan.	
☐	Review bedrooms, bathrooms, common areas, exits, paths, ramps, lighting, alarms, and evacuation needs.	
☐	Track every repair or correction with an owner, budget, permit requirement, and completion evidence.	
☐	Prepare furnishings, emergency supplies, required postings, records storage, and staff work areas.	
☐	Keep invoices, photographs, approvals, inspection reports, and correction evidence together.	

Repair and correction log

Item	Required by	Owner	Cost	Due	Closed

Agency Communication and Deficiency Log

Record each communication, requested correction, deadline, response, and closure evidence. Keep the original agency notice with the facility's application records.

Facility:

Application number:

Agency contact:

Date	Agency / person	Request or deficiency	Due	Response / evidence	Closed

Inspection preparation

Done	Task	Owner / due
☐	Confirm the inspection date, attendees, access instructions, and records requested.	
☐	Walk the property using current requirements and the facility's own plans and policies.	
☐	Prepare organized records without exposing unrelated confidential information.	
☐	Assign one person to record questions, findings, deadlines, and promised follow-up.	

Pre-Opening Readiness and Launch Plan

Do not admit residents until the facility has the required written approval and can safely deliver the services represented to residents and families.

Facility:

Planned opening:

Administrator:

Final readiness

Done	Task	Owner / due
☐	Written licensing status, approved capacity, ambulatory status, and conditions are understood.	
☐	Administrator and staff coverage are ready, with required clearances and training documented.	
☐	Admission, assessment, medication, care, emergency, incident, and complaint systems are ready.	
☐	Resident rooms, common areas, food, supplies, utilities, transportation, and emergency equipment are ready.	
☐	Rates, agreements, services, house rules, and family communication processes are ready.	
☐	Insurance, payroll, vendor accounts, bookkeeping, and cash controls are active.	
☐	Marketing statements and listing information match the approved license and actual services.	

First 30 days

Week	Priority	Action	Owner	Due	Result
1					
2					
3					
4					

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