

Curriculum Guide for Preceptors Home Health Agency (HHA)

Introduction

This guide assists State Agency (SA) Preceptors in planning training for new surveyors in Federal programs. For each Federal program, a basic training timeline is given along including both required (marked with an asterisk [*]) and recommended classes and presentations.

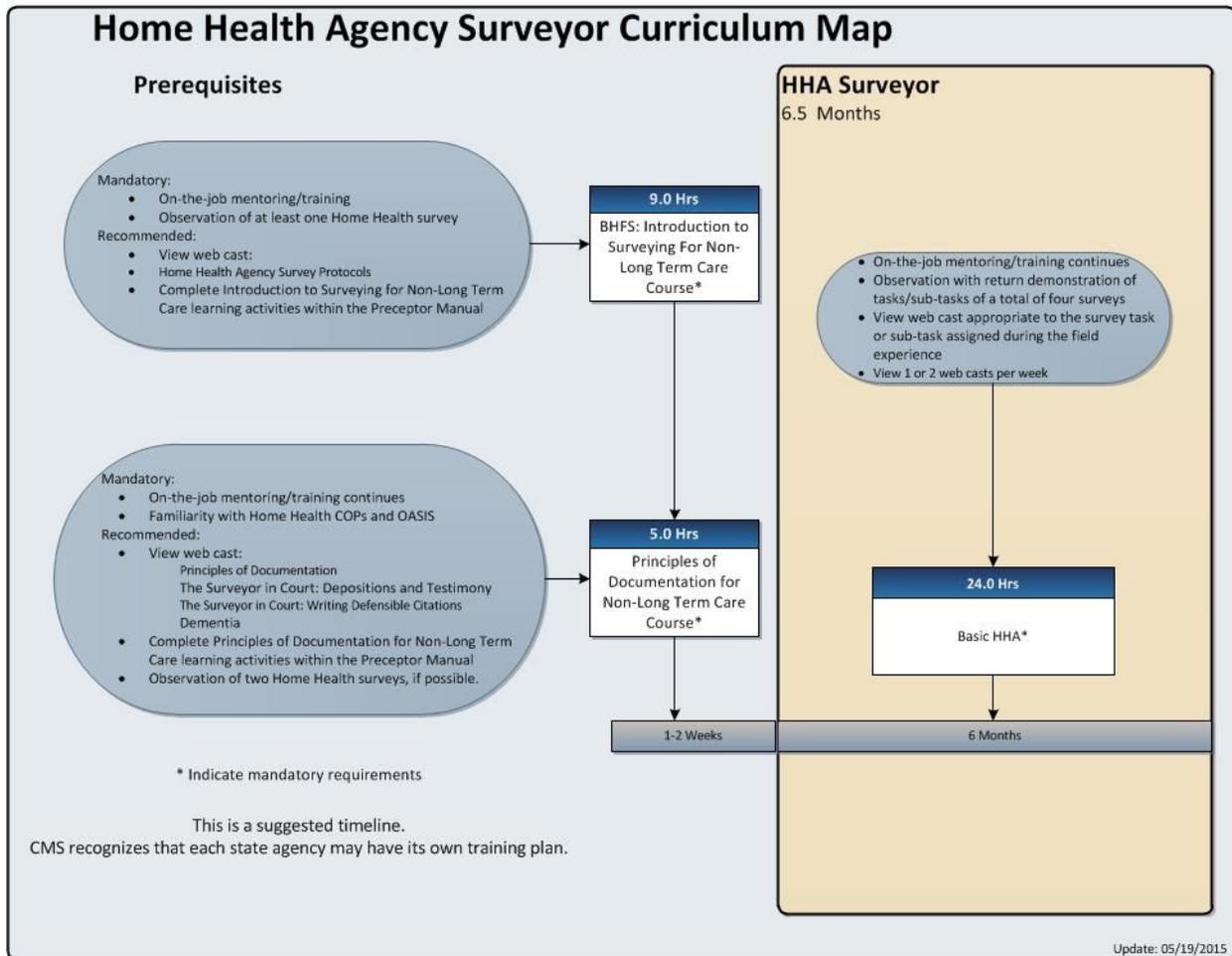
As a general guide, students should be scheduled to attend basic Centers for Medicare and Medicaid Services (CMS) training when they have an understanding of the related regulatory process, have completed any Federal (or state) pre-requisites, and have related field observations. The SA Training Coordinator and other agency personnel, as appropriate, should evaluate each surveyor individually to determine progress during the orientation period. CMS recommends a certain number of observational surveys for the new surveyor, but that number may be flexible based on the volume of surveys available.

The average time required before a student has completed the prerequisites and has an appropriate knowledge base to successfully complete a basic CMS course is three to six months. Remember, a student cannot register in the TotalLMS for a basic course until the prerequisites are complete.

Any referenced satellite broadcasts are on the Surveyor Training website at [CMS Surveyor Training](#). Archived webinars are listed with the corresponding link; however, registration must be done in the TotalLMS if the surveyor wants credit for having viewed the archived webinar.

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- Orientation and state level training begins.
- Completion of Introduction to Surveying for Non-Long Term Care* online training within the first two to four weeks of employment is recommended. The course is self-paced and web-based training, and takes approximately nine hours to complete. Once enrolled, the surveyor has three months to complete this training.
- Continue introduction to the survey process and begin field experiences. The Webinar Home Health Agency Survey Protocols at [CMS Survey Protocol Webinar](#) should be viewed around the start of the field experience.
- Completion of Principles of Documentation* (POD) online training within the first three months of employment is recommended. The course is self-paced, web-based training, and takes approximately five hours to complete. Once enrolled, the surveyor has two

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months to complete this training. The preceptor should correlate this training to the development of actual deficiency statements, providing continuing examples and opportunities for the orientee to practice and improve new skills.

- The following archived webcasts are recommended during orientation:

- Principles of Documentation

This webcast highlights the POD, including an explanation of each principle and an examination of a specific case law example where the statement of deficiencies was inadequate. All surveyors should review this webinar, as recommended, as a refresher regardless of provider type. New employees should view this webcast after the online POD class. View this program while the orientee is actively learning to construct deficiency statements. The preceptor may also use this broadcast in small segments, providing examples of each principle throughout the webcast to enhance the learning experience.

- The Surveyor in Court: Depositions and Testimony

This webcast highlights the role of the surveyor when giving testimony. It includes vignettes and subject matter expert examination of the surveyor findings and testimony specifically related to Immediate Jeopardy (IJ). This program is highly recommended for any surveyor. New employees should view this webcast after having some field experience and an understanding of the definition of IJ.

- The Surveyor in Court: Writing Defensible Citations

This webcast highlights the pitfalls of inadequate investigation and weak Form CMS-2567s. Video clips of surveyor interviews and courtroom testimony pinpoint weaknesses and identify strategies to avoid similar events. While the case presented is from a long-term care perspective, this webcast is highly recommended for all surveyors. New surveyors should view this program during the latter part of orientation when the surveyor is actively learning and applying investigative skills and writing Form CMS-2567s with the guidance of the preceptor. Ideally, this webcast should be viewed by new surveyors after completing the POD course and POD webcast.

- Dementia

This webcast increases the surveyor's knowledge base. It reviews the effects of long-term caregiving and strategies for managing behaviors with a focus in the home health and long-term care arenas. It is also appropriate for any surveyor interested in the topic. New employees may view this webcast at any time.

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- Surveyors must be familiar with the Home Health Conditions of Participation (COP) and Outcome and Assessment Information Set (OASIS).
- Schedule the surveyor to take Basic Home Health Agency (HHA)* training.
- After Basic HHA* training is successfully completed, the surveyor may survey independently but mentoring should continue as indicated.
- OASIS Modules

These non-mandatory OASIS-C online training modules provide instruction to assist HHAs in accurately completing the OASIS. In addition to providing an overview of the OASIS and conventions for data accuracy, these modules cover specific OASIS-C domains and provide item-specific guidance such as item intent, time points for item completion, response-specific item instructions, and data sources and resources. This training is found at [OASIS-C Training](#).