

Curriculum Guide for Preceptors

Introduction

As a general guide, students should be scheduled to attend basic Centers for Medicare & Medicaid Services (CMS) training when they have an understanding of the related regulatory process, have completed any Federal (or state) prerequisites, 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 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 Enterprise Learning Management System (ELMS) for a basic course until the prerequisites are complete.

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

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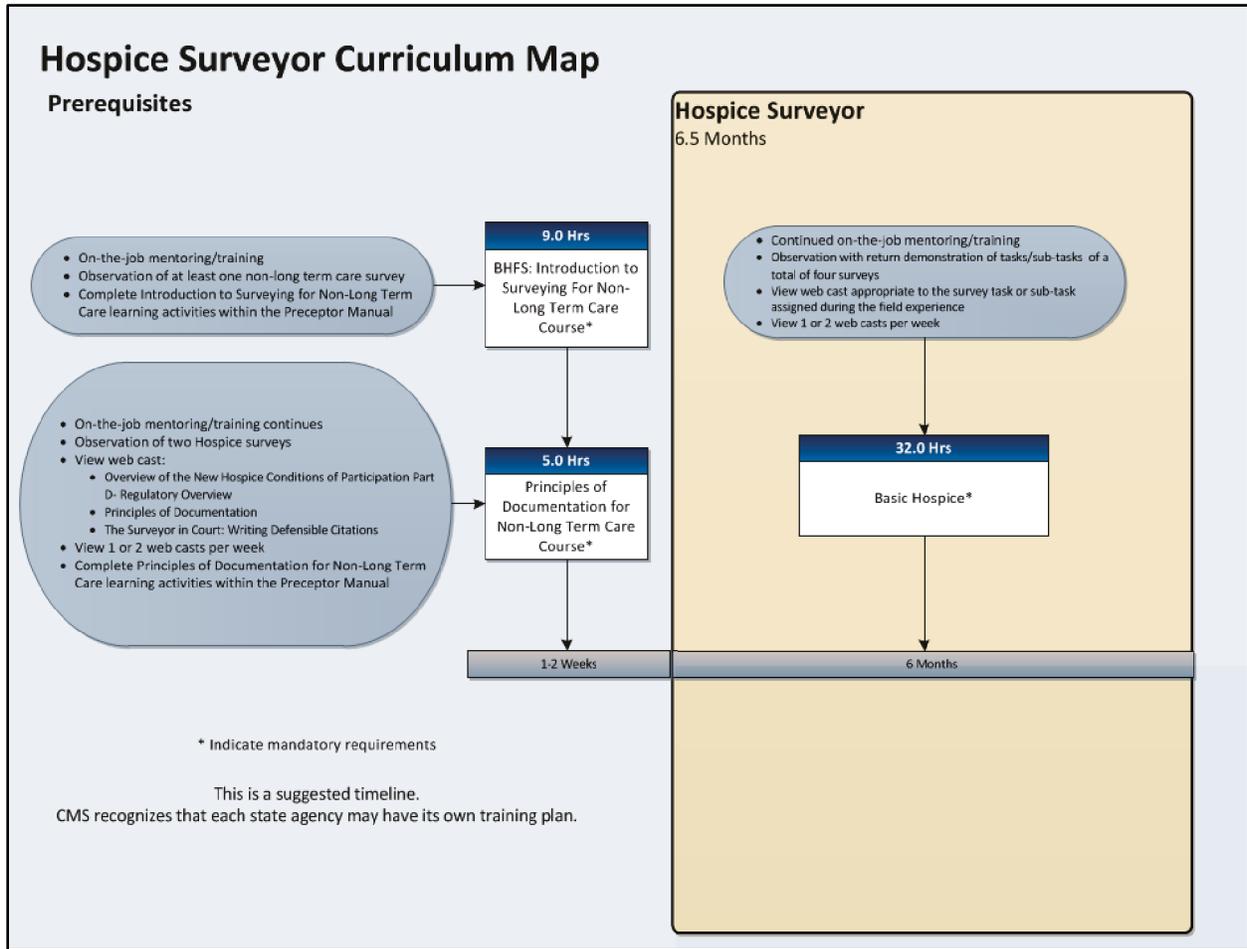


Figure 1. Hospice Curriculum Map

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, web-based training, and takes approximately nine hours to complete. Once enrolled, the surveyor has three months to complete this training.
- Continue the introduction to the survey process and begin field experiences.
- 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 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 mandatory during orientation:

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- o Overview of the New Hospice Conditions of Participation Part C
- o Overview of the New Hospice Conditions of Participation Part D
- The following archived webcasts are recommended during orientation:
 - o QAPI Part I: The QAPI Condition of Participation-Regulatory Overview
 - o QAPI Part II: Hospice QAPI Requirements in Practice-Regulatory Overview
 - o Principles of Documentation

This informative 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. This is recommended as a refresher for all surveyors, regardless of provider type. For new employees, it is recommended that this be viewed after the online POD class. Ideally, this program should be viewed while the orientee is actively learning to construct deficiency statements. The preceptor may also want to use this broadcast in small segments, providing examples of each principle throughout the webcast to enhance the learning experience.

- o The Surveyor in Court: Depositions and Testimony

This informative webcast highlights the role of the surveyor when giving testimony with 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. For new employees, this webcast is ideally viewed after the orientee has some field experience and understands the definition of IJ.

- o The Surveyor in Court: Writing Defensible Citations

This informative webcast highlights the pitfalls of inadequate investigation and weak Form CMS-2567s. Video clips of surveyor interviews and courtroom testimony are used to 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. For new surveyors, this program should be viewed during the latter part of the orientation when the surveyor is actively learning and applying investigative skills and writing Form CMS-2567s with the guidance of the preceptor. Ideally, the POD course and POD webcast should be completed before viewing this webcast.

- Schedule the surveyor to complete Basic Hospice.*
- After Basic Hospice* is successfully completed, the surveyor may survey independently but mentoring should continue as indicated.