

The “Call”

Imagine this. You have had a busy day and are getting ready to leave for an extended weekend when the phone rings. It is your supervisor. She tells you that surveyors from a Federal program are not meeting the standards for documentation on the Form CMS-2567 and that you must provide remedial training immediately.

Have any of you lived this scenario? How do you handle this request? What should you do next? Here are some helpful tips when faced with emergent training requests:

- 1) Conduct a needs assessment. It is easy to neglect this in the rush to provide training; however, this is an essential step. In the scenario provided, the prudent trainer would:
 - a. Ask the supervisor to describe the problem. Is grammar a problem? Is accuracy an issue? Is the Deficient Practice Statement (DPS) written correctly?
 - b. Ask the surveyors to describe their process and challenges when writing Form CMS-2567. Are they new and having problems organizing material? Are they under such time constraints that they are unable to adequately proofread? Do they not think it important to abide by the Principles of Documentation (POD)?
 - c. Review actual Form CMS-2567s and evaluate.
 - d. From this review, write a one- or two-sentence description of your findings and pertinent training solutions. You may find that there are other issues that cannot be addressed by training. Share this with the management team at your agency.

- 2) Develop the training based on your analysis of the needs assessment.
 - a. What are the objectives?
 - b. How will the training meet these objectives?
 - c. Pearls of Wisdom
 - i. Engage the learners.
 - ii. Lectures should be short.
 - iii. Feedback and activities relevant to the material are essential.

- 3) Deliver the training at the office or other central location.
 - a. Establish ground rules (cell phones off, participation, mutual respect, etc.).
 - b. Environment should be such that learners are able to focus on the material without distractions.

- 4) Evaluation: How do you know what the students have learned?

In the preceding scenario, our fearless trainer was told about a problem with documentation. When she conducted a needs assessment here is what she found out:

- 1) The supervisor says that the Form CMS-2567s are confusing and difficult to read. The staff in question is a team of four surveyors who each have less than 18 months’ experience. There were two other 30-year employees who have retired.

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- 2) The surveyors express overwhelming frustration at how difficult writing a Form CMS-2567 is. One of them states, “We hear about everything we are doing wrong but not shown how to fix it.”
- 3) Your review of the Form CMS-2567s confirms the findings of the supervisor when the deficiency is more complex. Straightforward deficiencies are clear, accurate, and compliant with the POD.

From this information, our trainer concludes that the surveyors understand the POD and have difficulties processing more complex findings. There is also a lack of support for the newer surveyor.

In response to this, the trainer sets up a meeting with the program director to discuss the need for mentoring for these new surveyors. Now that the trainer has a better idea of the knowledge deficit, she determines the following two objectives:

- 1) Surveyors will be able to describe the requirements for documenting findings on the Form CMS-2567.
- 2) Given selected findings, surveyors will be able to organize them in accordance with the POD.

From these objectives, she can develop a targeted training solution. Here is her training development/plan:

- 1) Presents an icebreaker activity where surveyors briefly describe their favorite movie or book (This segues to the topic for today where, as surveyors, they are telling a story as they document their findings.) (7 minutes)
- 2) Prepares a brief PowerPoint presentation on the POD related to documentation of findings and encourages discussion/feedback (5 minutes)
- 3) Provides the team with a set of index cards containing separate findings, which the trainer deconstructed from one of the Form CMS-2567s (1 minute)
- 4) Instructs the team to put the cards into the correct order and attach/tape to a flip chart or board (2 minutes)
- 5) Team completes the activity and presents the findings in order (20 minutes)
- 6) Trainer gives feedback (5 minutes)
- 7) Team discussion on challenges when doing activity and identifies strategies for organizing findings (5 minutes)
- 8) Summary/Q&A (5 minutes)
- 9) Session time: (50 minutes)

After the training, the trainer must evaluate the learning. This may take place by evaluating future Form CMS-2567s or a state agency-defined process. In this instance, more sessions with

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hands-on practice will probably be needed and the assignment of mentors for these newer surveyors can be invaluable.

As trainers, careful attention to analyzing training needs and formulating solutions can help improve surveyor performance and meet the mission of improving health care in our communities.

— *Submitted by Linda Taylor*