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 Form CMS-2567 and that you must provide remedial training immediately.

Have any of you lived through 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 processes and challenges when completing a 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 the actual Forms CMS-2567 and evaluate them.
   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 training based on your analysis of the needs assessment.**
   a. What are the objectives?
   b. How will the training meet these objectives?
   c. Provide Pearls of Wisdom
      - Engage the learners.
      - Lectures should be short.
      - Feedback and activities relevant to the material are essential.

3. **Deliver the training at the office or other central location.**
   a. Establish ground rules (e.g., cell phones off, participation required, mutual respect expected).
   b. Ensure the environment is 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, she discovered:
a. The supervisor said that Forms CMS-2567 are confusing and difficult to read. The staff in question is a team of four surveyors who each have less than 18 months of experience. There were two other 30-year employees, but they have retired.

b. The surveyors expressed overwhelming frustration at how difficult writing a Form CMS-2567 is. One of them stated, “We hear about everything we are doing wrong but not shown how to fix it.”

c. Your review of Forms CMS-2567 confirmed the findings of the supervisor when the deficiency was more complex. Straightforward deficiencies were clear, accurate, and compliant with POD.

From this information, our trainer concludes that the surveyors understand POD but have difficulties processing findings that are more complex. 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 Form CMS-2567.
2. Given selected findings, surveyors will be able to organize them in accordance with POD.

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

1. Present 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. Prepare a brief PowerPoint presentation on POD related to documentation of findings and encourage discussion and feedback. (5 minutes)
3. Provide the team with a set of index cards containing separate findings, which the trainer deconstructed from a Form CMS-2567. (1 minute)
4. Instruct the team to put the cards into the correct order and attach or tape them to a flip chart or board. (2 minutes)
5. Complete the activity and have the team present the findings in order. (20 minutes)
6. Give feedback to the learners. (5 minutes)
7. Discuss challenges when doing the activity and identify strategies for organizing findings. (5 minutes)
8. Provide a summary and a question-and-answer period. (5 minutes)

Total session time: (50 minutes)

After the training, the trainer must evaluate the learning. This may take place by evaluating future
The “Call”

Forms CMS-2567 or a state agency-defined process. In this instance, more sessions with hands-on practice will probably be needed and the assignment of mentors for these newer surveyors can be invaluable.

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

References