

Preceptor Manual Grab-n-Go Document

The Preceptor Manual Grab-n-Go document is provided to assist and support you with the task of being a preceptor to new surveyors. The materials listed in this document are resources located within the Preceptor Manual in a simplified manner for quick and easy access and are not official CMS documents.

Table 1 lists each document contained in the general tab and a brief description.

Table 1 Preceptor Resources

General	Preceptor Manual Related Items	Document Link	Description
Navigating the Online Sites			
Preceptor Manual	Preceptor Manual	Preceptor Manual	A web-based source of information for new and experienced preceptors and surveyors.
Blackboard	Blackboard	Blackboard	This online platform is utilized by CMS to house selected web-based trainings.
Enterprise LMS	Enterprise LMS	ELMS	The Learning Management System used by CMS State Training Coordinators to administer training to surveyors.
Surveyor Training Website (STW)	Surveyor Training Website	Surveyor Training Website	A website used by CMS to house selected web based trainings and archived webinars.
Survey & Certification (S&C) Memos	Survey & Certification Memo Search	Survey & Certification Memo Search	This document provides tips to assist in searching specific S&C memos.
Websites for LTC Surveyors	Websites for LTC Surveyors	LTC-websites	This resource is a listing of helpful websites and links for LTC surveyors.
LTC CMS Link Resource Page	LTC CMS Website Link Resource Page	CMS- LTC-website Links	This document contains a list of helpful CMS links for LTC surveyors

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Preceptor Basics			
	Preceptor Guidelines During Orientation	Preceptor Guidelines During Orientation	A list of suggested guidelines for the preceptor during a new surveyor’s orientation.
	Surveyor Guidelines During Orientation	Surveyor Guidelines During Orientation	A list of suggested guidelines for the new surveyor (the preceptee) during orientation.
	Curriculum Maps	Curriculum Maps	Maps provide a curriculum path and narrative for each surveyor specialty.
	Preceptor Letter	Preceptor Letter	This letter introduces the new surveyor and sets expectations with other team members that may assist you in their training.
	CMS Survey & Certification Group (SCG) Course Catalog	CMS SCG Course Catalog	The Course Catalog is a comprehensive volume of all of the SCG courses, not all of which are necessarily offered in any given term. Course descriptions can be found by searching for the appropriate division or specialty.
Preceptor Resources			
	Coaching Guide	Coaching Guide Introduction	These presentations and Participant Guides (PG) take a preceptor through the process of establishing a relationship, coaching adults, and helps the preceptor assess their readiness for coaching new surveyors.
	Adult Learning Principles	Adult Learning Principles Introduction	These materials provide explanations and theories for how adults learn along with practical tips for how to impart knowledge to your new surveyors.
	Training Techniques	Training Techniques Introduction	Techniques and tips to support training effectiveness.
Role of the Surveyor	Module 1-Lesson 1 Conducting Federal	Conducting Federal Surveys Role-Play	This role-play activity coordinates with Module 1, Lesson 1 Conducting Federal Surveys.

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	Surveys Role-Play		
	Module 1-Lesson 2 BINGO	BINGO	Survey Terminology BINGO uses terms from Module 1, Lesson 2.
	Module 1-Lesson 2 Word Square	Word Square	Find survey-related acronyms from Module 1, Lesson 2 in this Word Square.
	Module 1-Lessons 3—4 State Licensure Federal Certification Activity	State Licensure Federal Certification Activity	The objectives of this 10-minute quiz are: <ul style="list-style-type: none"> • The surveyor will identify the differences between state licensure and Federal certification of facilities. • The surveyor will describe the interactive relationships between his or her state CMS Regional Office (RO), and CMS Central Office (CO).
	Module 2-Lesson 2 Survey Scramble	Survey Scramble	In this activity, new surveyors scramble to assign activities to survey tasks.
	Module 2-Lesson 5 What Would You Do?	What Would You Do?	What Would You Do? This lesson provides new surveyors with difficult real-life situations. The new surveyors must determine how to handle each situation appropriately, per regulations.
Teamwork	TeamSTEPPS	TeamSTEPPS Introduction	TeamSTEPPS focuses on specific skills supporting team performance principles, including training requirements, behavioral methods, human factors, and cultural change.
Communication Skills	Conflict Management Style Assessment	Conflict Management Style Assessment	This self-assessment tool will help you determine your conflict management style.
	Techniques for Dealing with Anger	Dealing With Anger	There are times when a surveyor must deal with an angry provider, patient, or family member. This document provides tips for dealing with anger.

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General	Preceptor Manual Related Items	Document Link	Description
	Tips for Interviewing Children in Nursing Facilities	Interviewing Children Nursing Facilities	These tips guide you when interviewing children involved in abuse in nursing facilities.
	Interviewing Residents with Developmental Disabilities	Interviewing Residents with Developmental Disabilities	These tips assist you when interviewing residents/patients with intellectual disabilities.
Learning Activities			
	Investigative Skills Activities	Investigative Skills Activities	This link will take you to a table that lists the Investigative Skills activities and their descriptions available within the Preceptor Manual.
	LTC Activities	LTC Activities	This link will take you to a table that lists the LTC activities and their descriptions available within the Preceptor Manual.
	Non-LTC Activities	Intro Non-LTC Activities	This link will take you to a table that lists the Non-LTC activities and their descriptions available within the Preceptor Manual.
	Principles of Documentation (POD) Aids	Principles of Documentation (POD) Aids	This link will take you to a table that lists the Principles of Documentation Aids and their descriptions available within the Preceptor Manual
	Principles of Documentation for LTC activities	POD – LTC Activities	This link will take you to a table that lists the Principles of Documentation for LTC activities and their descriptions available within the Preceptor Manual
	Principles of Documentation for	POD – Non-LTC Activities	This link will take you to a table that lists the Principles of Documentation for Non-LTC

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	Non-LTC Activities		activities and their descriptions available within the Preceptor Manual.