

Surveyor:

Orientation Tasks
Long Term Care

Directions: This list provides the trainer or preceptor a mechanism to document basic orientation topics which may be a part of the state based orientation program. This list is not all-inclusive and may be further modified by the State Agency. Quality Indicator Survey (QIS) specific items are indicated with an asterisk (*) mark. Once each topic area is reviewed with the new surveyor, the date of completion and the trainer’s initial are placed in the boxes.

Item	Date Completed	Trainer Initials
Orientation to the Workplace		
Abbreviations, Acronyms, and Common Terms		
Tables of Organizations (state-specific)		
Office Policy and Procedure		
Licensure, Certification, and Surveys		
Review of the State Operations Manual		
Appendix P		
Appendix PP		
Surveyor Dress and Approach		
Surveyor Conduct and Etiquette		
Teamwork-Working as a Team		
Role of the Regulator		
Investigative Skills		
Information Analysis for Deficiency Determination		
Exit Conference		
Form CMS–2567, Acceptable Plan of Correction		
The Person-Centered Approach to Surveying		
The Aging Process		
Individuals with Developmental Disabilities and Cultural Diversity (state-specific)		
Enforcement (IDR/The Hearing Process)		
The Hearing Process		
Introduction to the Outcome Oriented Survey Process		
Introduction to the Quality Indicator Survey * (QIS)		
Surveyor Desktop Folder *		
Introduction to QIS software *		