

# Guidance to Maryland Ombudsman Staff & Volunteers

## Quality Advocacy Visits

### **Before the visit**

Be informed before your visit to help identify areas of focus, particularly if the facility is not visited regularly.

When possible, review the following information:

- Your notes from previous visits (or the notes of other ombudsmen)
- OHCQ survey report (2567)
- The website of the facility
- Information on Nursing Home Compare and Assisted Living website  
<http://www.medicare.gov/nursinghomecompare/search.html>  
<http://mhcc.maryland.gov/consumerinfo/longtermcare/AssistedLiving.aspx>
- Recent complaints about facility
- Topics your Local Program would like addressed (i.e., Residents' Rights Month, Bedhold Policy, etc.)
- If the above information isn't readily available, call your Local Program

***Be relaxed and help residents relax. Communicate with residents at eye level, take your time, develop rapport, and clearly explain your role. Treat residents respectfully and maintain confidentiality. Be a good listener.***

### **Upon arrival**

- Sign in as an ombudsman if the facility wants you to sign in
- Find out if there are any new residents
- Request resident council meeting minutes as appropriate
- Wear your name tag so that your name is visible

### **During most visits**

Some activities will be a part of every visit, depending on the frequency.

- As you are visiting, these are some things to observe:
  - Sensory observations – what you see, smell, hear
  - Staff-to-resident interactions – what is philosophy of care in facility?
  - Resident comfort – positioning in chairs, in & out of bed as desired, hydration
  - Privacy in a homelike environment – hallways clear, noise level, resident-centered
  - Call lights answered and staff respond appropriately to resident requests
  - Have residents been encouraged to personalize their living space?
  - Evidence of Culture Change

- Meet the new residents and introduce them to the ombudsman program and their rights.
  - Explain how to contact an ombudsman if needed
  - Leave information for the resident about the ombudsman program
  - Give the resident the opportunity to tell you about themselves
- Are any residents potential candidates for and interested in returning to the community?
- Spend time with residents who may not have capacity
  - Are residents engaged and interactive?
  - Does staff interact with them in a caring way - use their name, look them in eye, touch & reassure, and converse with them?
- Talk with the resident and family council president about pending issues, facility response, and any assistance the council needs from you including advice, follow-up on pending issues, and a presentation to the council on rights or other topics.
- During meal time, observe the meal – does it match the menu, is help provided to those who need it, are substitutes offered and given in a timely manner, are the residents enjoying the food and the dining experience? If residents are eating in their room are they doing so by choice?
- Observe activities – do they match the calendar, are they appropriate for the participants, are residents engaged, what are the other residents doing, were they given the option to participate?
- Discuss and distribute written information - ombudsman program, residents’ rights, Advancing Excellence, prevention of involuntary discharge, opportunities to return to the community
- Get to know the staff so you’ll learn who will be helpful in resolving problems. Make sure the administrator knows who you are and has information about the Ombudsman Program.
- Only discuss specific resident problems with staff IF you have permission and if you are in a location where the discussion can be private.

**Treat staff with respect. Commend staff for good work and improvements that you see. Remember - your role is to work with and for residents to address problems and improve the resident experience.**

**During regular visits** look at these:

- Required postings are “conspicuous”, accurate, and easy to access and read  
Evacuation Plans; Most recent survey and statement of deficiencies; Bill of Rights;  
Complaint Procedures; NH: Staffing information for each floor or unit; ALF: visiting hours
- License is posted and provider information is accurate – beds, owner, facility name
- In ALFs, request copy of blank resident agreement
- In NHs, request a copy of the admission agreement

**After every visit** make notes in a timely manner so they accurately reflect the visit. Report your visit to the Local Program.