



Long-Term Care Ombudsman Casework: Advocacy and Communication Skills Trainer Guide

PURPOSE: Effective communication and a resident-directed approach are the most critical skills for Long-Term Care Ombudsmen (LTCO) advocacy. Even the most knowledgeable LTCO with in-depth understanding of residents' rights and facility responsibilities cannot be effective advocates without good communication, investigation and resolution skills. This video reviews LTCO complaint investigation procedures and demonstrates resident-directed advocacy and effective communication skills during complaint intake, investigation and resolution that are applicable to all aspects of LTCO work.

AUDIENCE: This video reviews basic complaint handling skills, including effective communication, resident-directed advocacy, complaint investigation and resolution skills and is intended to be used with the accompanying trainee guide during classroom training for new LTCO.

NOTE: Experienced Ombudsmen can refresh their skills or explore more complicated situations by applying the skills and procedures discussed in the video to other scenarios. Alternatively, they can use the questions asked in the teaching notes of the NORC curriculum modules, "Problem-Solving Process – Investigation and Resolution" and "Basic Complaint Handling Skills for Ombudsmen – A Training Guide" (<http://www.ltcombudsman.org/ombudsman-support/training#Curriculum>).

OBJECTIVES:

- Define resident-directed advocacy
- Describe LTCO procedures for complaint investigation and resolution
- Introduction of relevant policies and procedures related to access, visits and disclosure of resident and Ombudsman records
- Identify effective communication skills

USE OF VIDEO AND PARTICIPANT GUIDE: The video has two scenarios and the total length is approximately 35 minutes (22 minutes for the first scenario and 13 for the second). The first scenario shows the process of complaint intake, investigation and resolution and the second scenario demonstrates how a LTCO uses a different strategy to address a complaint that had been previously resolved.

Gloria, the LTCO in this video, models effective communication techniques and appropriate LTCO advocacy strategies when working with the residents and facility staff. Trainers can use this video and trainee guide to highlight good practices, discuss LTCO procedures and identify specific state and local LTCO program policies related to these scenarios and Gloria's actions (e.g. access to resident records, disclosure of LTCO records, obtaining resident consent, visiting protocols). Review the "Trainer Tips" boxes in the answer guide for suggested times to discuss LTCO program policies and procedures and applicable requirements of the Older Americans' Act and facility regulations.

Note: Reviewing LTCO program policies and procedures may require additional training time beyond the scope of this these materials, but there are opportunities to introduce core LTCO requirements related to complaint work when discussing this video and trainee guide.

This video and trainee guide may be used a variety of ways depending on the trainer's style and number of participants. A few training suggestions include:

- Watch the video in its entirety during one training followed by discussion.
- Show the first scenario and give the trainees a few minutes to respond to some of the questions in the trainee guide, then show the second scenario, allow time for the completion of the guide and then facilitate large group discussion about the entire video.
- Create two separate training opportunities to view and discuss one scenario per training.
- Ask trainees to watch the video off-site and complete the trainee guide in preparation for an in-person training and discussion.

DEVELOPMENT: This video was developed, funded and produced by the Texas Department of Aging and Disability Services, Media Services Department in coordination with the Texas Long-Term Care Ombudsman Program.

USE OF TRAINER GUIDE: This guide provides examples of appropriate responses to the trainee guide as well as additional questions or tips for trainer's to use in order to further the discussion initiated by the video (see insert title Trainee Guide-Answers document). The responses, questions and tips in this document are not comprehensive, but should help generate a productive discussion about LTCO complaint investigation procedures, communication skills and resident-directed advocacy.