

Office of the LTC Ombudsman Trainee Checklist: Updated FY 19-20

This checklist will guide you through the training curriculum. It will help you to track your progress and plan your shadowing and mentoring.

- Each stage of training must be completed in order to qualify for certification, but you can move through the stages at whatever pace works best for you
- Shadowing activities do NOT have to be completed in the sequence shown – but all must be completed prior to certification
- Pay close attention to pre-requisites required for some of the classroom modules
- Review the manuals and the course catalog for specific regarding each component
- Boxes marked N/A do not need to be completed for the title topic.

| Stage 1 | | Independent Modules | | Classroom Modules | | Shadowing/Mentoring | | Signatures | |
|---|----------------|-------------------------|----------------|-------------------------|----------------|-------------------------|---------|------------|--|
| Title | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Trainee | Mentor | |
| Onboarding/Interview | N/A | N/A | N/A | N/A | | | | | |
| Welcome to the Office of the Long-Term Care Ombudsman | | | N/A | N/A | N/A | N/A | | | |
| Aging Resources | | | N/A | N/A | N/A | N/A | | | |
| Facility Visit | N/A | N/A | N/A | N/A | | | | | |
| Stage 2 | | Independent Modules | | Classroom Modules | | Shadowing/Mentoring | | Signatures | |
| Title | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Trainee | Mentor | |
| Pennsylvania's Ombudsman Program Structure | | | N/A | N/A | N/A | N/A | | | |
| Ethics | | | N/A | N/A | N/A | N/A | | | |
| Abuse and Individual Conflicts of Interest | NA | N/A | | | N/A | N/A | | | |
| Confidentiality, Consent & Resident Direction | N/A | N/A | | | N/A | N/A | | | |

| | | | | | | | | |
|--|----------------------------|--------------------------------|--------------------------|--------------------------------|----------------------------|--------------------------------|-------------------|---------------|
| Facility Visit | N/A | N/A | N/A | N/A | | | | |
| Info & Consult to Individual | N/A | N/A | N/A | N/A | | | | |
| Consult to Provider | N/A | N/A | N/A | N/A | | | | |
| Stage 3 | Independent Modules | | Classroom Modules | | Shadowing/Mentoring | | Signatures | |
| Title | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Trainee | Mentor |
| Risk | | | N/A | N/A | N/A | N/A | | |
| Intro to Documentation: Facility Visit Forms | | | N/A | N/A | N/A | N/A | | |
| The Three C's: Case/Complaint/Consultation | N/A | N/A | | | N/A | N/A | | |
| Ombudsman/Facility Staff Relationship and Interpersonal Skills | N/A | N/A | | | N/A | N/A | | |
| Resident Council Meeting | N/A | N/A | N/A | N/A | | | | |
| Licensing Survey/Activity | N/A | N/A | N/A | N/A | | | | |
| OmbudsManager Documentation | N/A | N/A | N/A | N/A | | | | |
| Facility Staff Training | N/A | N/A | N/A | N/A | | | | |
| Community Education | N/A | N/A | N/A | N/A | | | | |
| PEER Training/PEER Meeting | N/A | N/A | N/A | N/A | | | | |

| Stage 4 | Independent Modules | | Classroom Modules | | Shadowing/Mentoring | | Signatures | |
|--|---------------------|-------------------------|-------------------|-------------------------|---------------------|-------------------------|------------|--------|
| Title | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Trainee | Mentor |
| Life as an Ombudsman: Dealing with Grief & Loss | | | N/A | N/A | N/A | N/A | | |
| Regulations: The Foundation of Residents' Rights | N/A | N/A | | | N/A | N/A | | |
| Case Study I | N/A | N/A | | | N/A | N/A | | |
| Observe Essential Elements of Casework: Intake, Resident Direction, Investigation, Negotiation, Resolution, Follow-up, Review, Documentation | N/A | N/A | N/A | N/A | | | | |
| Volunteer Management/Meeting | N/A | N/A | N/A | N/A | | | | |
| Resident Care Plan Meeting | N/A | N/A | N/A | N/A | | | | |
| Case Study II Pre-requisite- Complete AFTER Case Study I; PRIOR to Case Study II | | | N/A | N/A | N/A | N/A | | |
| Stage 5 | Independent Modules | | Classroom Modules | | Shadowing/Mentoring | | Signatures | |
| Title | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Trainee | Mentor |
| Understanding Diversity: Issues, Challenges and Approaches | | | N/A | N/A | N/A | N/A | | |
| OmbudsManager: Bean Counting: Part I | N/A | N/A | | | N/A | N/A | | |
| OmbudsManager Practice Session: Part II | N/A | N/A | | | N/A | N/A | | |
| Case Study II | N/A | N/A | | | N/A | N/A | | |

| Stage 6 | Independent Modules | | Classroom Modules | | Shadowing/ Mentoring | | Signatures | |
|--|---------------------|-------------------------|-------------------|-------------------------|----------------------|-------------------------|------------|--------|
| Title | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Date Completed | Date Reviewed by Mentor | Trainee | Mentor |
| Alzheimer's & Other Dementia-Related Disorders | | | N/A | N/A | N/A | N/A | | |
| Culture Change | | | N/A | N/A | N/A | N/A | | |
| Legal Levels of Authority | | | N/A | N/A | N/A | N/A | | |
| Facility Closures, Discharges & Appeals | | | N/A | N/A | N/A | N/A | | |
| Self-directed Independent Study – PEER Interview/Resident Training | | | N/A | N/A | N/A | N/A | | |
| Case Study III | N/A | N/A | | | N/A | N/A | | |

Certification Training Completed!