



**URGENT MEMO AND POLICY ANNOUNCEMENT**

To: All Illinois Long-Term Care Ombudsmen  
From: Kelly Richards, Illinois State Ombudsman  
Date: 05/19/2020  
Subject: Ombudsman Program Window Visits Guidance

This memo provides guidance on window visits to long-term care facilities during this public health crisis.

**Please be aware that this policy is subject to change as the COVID-19 situation develops.**

As Ombudsmen, our role is to advocate for the health, safety, welfare, and rights of long-term care facility residents. Right now, we are faced with a challenge on how to meet the needs of residents while dealing with this potential emergency. First and foremost, all Ombudsmen must put their own health and safety needs before the needs of residents. If an Ombudsman has a serious underlying medical condition, that individual should talk to his or her doctor to see if they should conduct window visits. For information on people who are at higher risk, see the CDC's guidance here: <https://www.cdc.gov/coronavirus/2019-ncov/need-extra-precautions/people-at-higher-risk.html>

**OMBUDSMAN WINDOW VISITS TO LONG-TERM CARE FACILITIES**

As Ombudsmen begin to conduct window visits to long-term care facilities in Illinois, it is important to be mindful that the recommendations for how to conduct a window visit will likely change. During the initial phase, Ombudsmen are asked to coordinate visits with a facility staff member.

Window visits may not be practical at every facility. Consideration needs to be given to the layout of the facility as well as the cognitive ability of the residents. A window visit cannot fully replace the effectiveness of a routine visit made inside of a facility, but it is a step towards maintaining a visible presence to the residents during this unprecedented time.

A facility may feel the need to screen all visitors to their property including taking temperatures. If requested, the Ombudsman should cooperate with this screening. If the Ombudsman has any concerns, they should reach out to their Regional Ombudsman and/or the Office.

#### **A. Practical tips to follow before making a window visit**

1. Contact the facility to discuss how they are conducting window visits at their facility.
  - Activity Directors are often a good person to assist with coordinating a visit.
2. Discuss with the staff member, the options for an Ombudsman visit.
  - a. When is the best time for the visit?
  - b. How will the Ombudsman know which residents want to be visited?
  - c. How will communication take place (phone, white board, etc.)
3. Discuss providing the front door flyer as well as postcards or other Ombudsman literature for staff to hand out to residents.
4. Remember – while Ombudsman visits to facilities are typically unannounced, during the initial phase of rolling out window visits, Ombudsmen are strongly encouraged to work with a facility staff member to arrange the visit.
5. Take time to prepare a set of questions to ask residents during the visit as conversation starting points.
6. The Regional Ombudsman should email the Office for approval of the initial visit plan prior to conducting the visit.

#### **B. Practical tips to follow during a window visit**

1. Be prepared with the required items needed to facilitate communication with residents. Depending on the method agreed upon with the facility staff person, this may mean bringing a dry erase board, using a mobile phone, or some other method.
2. Use hand sanitizer before and after your visit to the facility.
3. Avoid touching people. Don't get close to an open window. It is okay to explain that you want to be careful about spreading your own germs.
4. Unless previously arranged with the facility staff, do not allow the resident to open the window. It is okay to tell a resident you will have to leave if they open the window.

NOTE: Some facilities are conducting window visits through open windows. However, in this scenario, the Ombudsman must stay at least 6 feet from the window and wear a face covering during the visit.
5. Follow the plan discussed with the facility staff member.
6. Wear a face covering.

NOTE: If you are speaking to residents through closed windows and there are no other people around, it is okay to remove the mask during that conversation so the resident can see your face. However, before moving to the next room, or if you be within 6 feet of another person, you must put the face covering back on your face.
7. Do the good Ombudsman work that you are trained to do.
  - a. Make eye contact
  - b. Ask the preplanned questions as appropriate.
  - c. Encourage residents to speak up if they have concerns.
  - d. Give residents an opportunity to discuss their concerns.
  - e. Remind the residents that while Ombudsmen are not currently entering facilities, we are still here to advocate for their needs.

- f. Use your observation skills as if you were inside the building.
8. Consider confidentiality
  - a. Be mindful of whether or not the conversation you have with the resident is being done in a confidential manner.
  - b. Inform residents if there is someone outside who can hear the conversation.
  - c. Discuss with the resident if he/she would prefer to discuss case information at a later date over the phone or via an electronic video chat, if possible.
9. Provide front door flyers and/or postcards to the facility staff in the manner discussed.

NOTE: You should ask the facility to hang the flyer on the inside of the door facing outwards, so it can be read from the outside. This will protect the flyer from wind and rain. However, it is acceptable to tape it to the front door if that is their preference.

### C. Other types of in-person visits

There are times when a facility is open to in-person visits.

1. Lobby Visits

Some facilities may ask Ombudsmen to sit inside the lobby to meet with residents. At this time, this is not an approved visit method by the Office. We anticipate this will change as we move into the next phase of visitation, but it is not allowed at this time.
2. Outdoor Visits

Some facilities may allow the Ombudsman to conduct visits in an outdoor courtyard. This is allowable as long as the Ombudsman follows social distancing guidelines:

  - a. The Ombudsman must maintain a minimum of 6 feet distance from other individuals.
  - b. The Ombudsman should wear a mask during the visit and use hand sanitizer as appropriate.

### D. Documenting the visit

1. Enter the visit in PeerPlace as a "Window Visit" in the Activity Tracker OAAPS section. Enter all pertinent sections in a similar manner that Routine Visit entries are made.
2. In addition, if flyers/postcards were delivered, enter "Distributed Postcards/Flyers" in the Activity Tracker OAAPS section.
3. If I&A to Individuals or I&A to Staff were conducted, enter those activities as appropriate.

### E. What to do if you are sick or have symptoms?

1. As an Ombudsman, you must put your own health and safety before the needs of residents.
2. If you are showing signs of illness (coughing, sneezing, or fever), do not visit any long-term care facility.
3. Coughing, sneezing, and fever do not necessarily mean that you have COVID-19. But use precaution. If you are sick, call your healthcare provider and then notify your supervisor as soon as possible.