



The National **Long-Term Care**  
**Ombudsman** Resource Center

# ***INITIAL CERTIFICATION TRAINING CURRICULUM FOR LONG-TERM CARE OMBUDSMAN PROGRAMS***

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**Module 6: Facility Visits**

# WELCOME AND INTRODUCTION

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Section 1

# Welcome

- Your name
- Where you are from
- One thing you learned from Module 5
- What you hope to learn since the last module



ANY  
QUESTIONS  
?

# Today's Agenda

Section 1: Welcome and Introduction (15 minutes)

Section 2: Ombudsman Program Advocacy (15 minutes)

Section 3: Conducting a Facility Visit (45 minutes)

Section 4: Conclusion (15 minutes)

# Module 6 Learning Objectives

- The dos and don'ts of advocacy
- How to prepare for, and conduct, a facility visit

# OMBUDSMAN PROGRAM ADVOCACY

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Section 2



Speak with the resident in a quiet, private area

Communicate in a way the other person can understand

Explain your role as a resident-directed advocate

Be respectful, considerate, and professional

Be clear and succinct

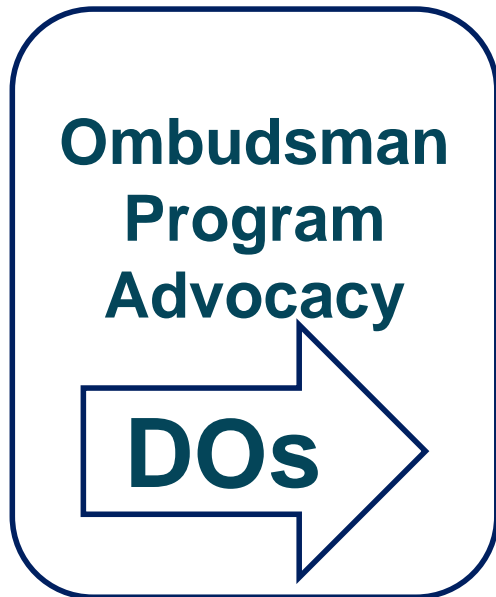
Be objective

Be accurate and honest

Be mindful that the resident may tire easily, have a short attention span, or become confused

Empower the resident to be involved





Explain all possible options and outcomes

Be patient, persistent, and thorough when seeking answers

Convey the resident's wishes from their point of view

Work with the resident, staff, and administration as appropriate to resolve problems

Verify information received.

Utilize as many sources of information as possible

Keep accurate records as required by the LTCOP

Maintain confidentiality

Follow all state and federal requirements for the Ombudsman program

**Ombudsman  
Program  
Advocacy**

**DON'Ts**

Provide any care or physical assistance (e.g., push their wheelchair, help them transfer, assist with eating, etc.)

Give the resident anything other than program-related materials or resources (e.g., do not give food, drinks, medication, tobacco products, gifts, etc.)

Treat the resident as a child (They have a lifetime of experience)

Diagnose or prescribe for a resident

Make promises

Provide business or legal advice

Voice criticism of a resident or the facility

Engage in arguments

Portray yourself as a surveyor or inspector

Use abbreviations, acronyms, or slang

# → State-Specific Requirements for Field Observation



# FACILITY VISITS

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## Section 3

# Facility Visits



## Routine Access Visit

- Regular and timely access
- Visit residents, provide information, observe
- Follow up on complaints

## Complaint Visit

- In response to a complaint
- Complaint-related actions

# Before Your Visit

- ✓ Review previous LTCOP activities
- ✓ Review notes
- ✓ Review most recent survey/licensing/certification inspections
- ✓ Review current cases
- ✓ Discuss the LTCOP's experience with the facility
- ✓ Gather program brochures, business cards, posters, & consumer education information
- ✓ Determine how you will take notes about the visit

# → Program Visit Requirements

# During Your Visit



Announce your visit

Wear your badge

Get a listing of resident names and room numbers

Follow program policies and procedures

Visit residents

Talk to visitors

Follow up on complaints

Check for LTCOP posters

Document



# Approach and Introductions



Assume residents understand



Smile and use a friendly voice



Approach from the front



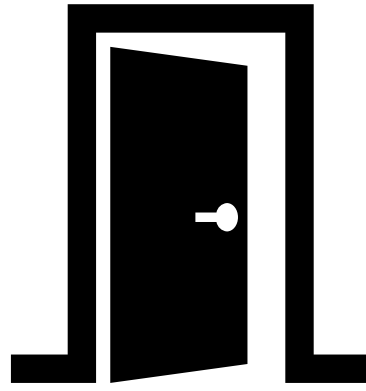
Respect personal space



Have the resident's attention



Be at eye level



- You knock on a resident's door; how do you ask for permission to enter?
- Once you approach a resident or enter their room with permission, what is the first thing you say to start a conversation with a resident you have never met?
- How do you describe why you are visiting?
- How do you describe the program?

# Monkey Business

## **The Monkey Business Illusion**

Daniel J. Simons

# Observation

## Sight

Facility  
Environment

Resident  
Appearance

Resident  
Activities

## Sound

Noisy  
Environment

Staff tone of  
voice

Residents  
yelling out

## Smell

Odors

## Feel

Air  
Temperature

Surface

# Case Study: Anne Walker - Introduction



**QUESTIONS?**

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# ADDITIONAL RESOURCES

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Refer to your trainee manual for other sources of information related to topics discussed in this module.

# Contact Information

- INSERT PRESENTER CONTACT INFORMATION





# The National **Long-Term Care** **Ombudsman** Resource Center

*Connect with us:*

[www.ltcombudsman.org](http://www.ltcombudsman.org)

[ombudcenter@theconsumervoice.org](mailto:ombudcenter@theconsumervoice.org)



The National LTC Ombudsman Resource Center



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