



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

Ombudsman Activities

Webinar March 7, 2012

NORS TRAINING

PART IV

PURPOSE of TRAINING

- Improve consistency in NORS reporting
- Provide clarifying information on Ombudsman Activities required to be reported to AoA by:
 - Reviewing the AoA definitions,
 - Reviewing the activities and their corresponding measures or topic,
 - Answering the Quiz coding scenarios,
 - Answering questions related to the Quiz scenarios and answers, and
 - Responding to other questions and examples.

Initial Comments on Coding

Shelley Hitt, Colorado State Ombudsman
Chair, NASOP WINC

Working to Improve NORS Consistency

(303) 722-0300 x 508

1-800-288-1376

skhitt@thelegalcenter.org

Louise Ryan,
Ombudsman Program Specialist
Administration on Aging
Washington, DC

Patty Ducayet, Texas State Ombudsman

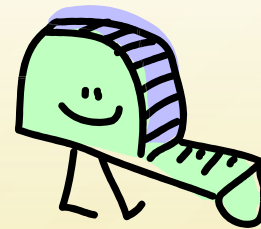
Ombudsman Activities



- Provide a National Snapshot
 - Services provided in support of residents
 - Represents the range of work LTCO routinely conduct
- States May Collect Additional Information
 - States can use discretion in capturing program activities.
 - States may choose a specific method to calculate percentage of time on TA or systems advocacy.
 - States frequently capture information beyond the AoA requirements for NORS.

Activity Chart

- Annotated chart lists and defines 12 activities.
- Describes measures for each activity.
- Intended to add clarity in reporting activities.



Activity Chart




- Software impacts how activities are calculated.
 - *Example:* LTCO enter all routine visits into LTCO software program. When the State LTCO completes the NORS report, the software determines which facilities met the definition of facility coverage for AoA reporting.
 - *Example:* LTCO enter primary topic for each training or consultation. When the State LTCO completes the NORS report, the software produces the top three topics to report to AoA.

Activity Chart Activities



- Training for LTCO Staff and Volunteers
 - Perspective of the trainer
 - Training for LTCOP staff
 - Count and Report
 - Number of sessions 📅
 - Number of hours 📅
 - Total number of trainees that attended 📅
 - Topics




Activity Chart Activities

- Technical Assistance to LTCO staff and/or volunteers
 - Staff time managing and administering local LTCOPs and LTCO volunteer programs
 - Covers all aspects of working with LTCO
 - Estimated percentage (%) of total staff time 
 - SLTCO provides guidance on how to measure

Activity Chart Activities



- Training for Facility Staff
 - Number of sessions, unduplicated count 
 - Topics covered, primary topic
- Consultation to Facilities
 - Via phone, email questions, or in person
 - Number of consultations, unduplicated count of information and assistance 
 - Topics covered, primary topic

Activity Chart Activities


- Information & Consultation to Individuals
 - Count each *separate* request for information and assistance, not each call related to the same request. 
 - Do not count conversations related to a specific case.
 - Record the primary topic in each consultation.




Activity Chart Activities

- Facility Coverage
 - Facilities visited \geq quarterly, Federal fiscal year
 - Visited not in response to a complaint
 - Unduplicated count of facilities 
- Participation in Facility Surveys
 - LTCO participation in surveys, including inspections in board and care facilities
 - Participation in various parts of survey process counts
 - Count participation in same survey only once
 - Number of surveys 

Activity Chart Activities

- Work with Resident Councils
 - Resident council meetings attended by LTCO
 - If \geq one LTCO attends same meeting, count as 1
 - Do not count prep work that does not include attending a meeting
 - Talking with residents during the meeting is not counted as consultations
 - Number of meetings attended 
- Work with Family Councils
 - Report in same way as work with resident councils

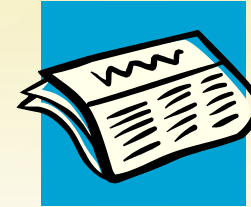
Activity Chart Activities


- Community Education
 - Number of presentations made and/or
 - Other meetings where you represent the LTCOP
 - Number of sessions 





Activity Chart Activities

- Work with Media



- Primary topic covered
- Number of interviews/discussions and press releases 
- If several discussions with same reporter on the same story, count as 1
- Sending press release to several media outlets counts as one press release

Activity Chart Activities

- Monitoring/work on Laws, Regs, Policies and Actions
 - Best estimate of percentage (%) of staff time working with others 
 - Includes time reviewing, commenting and developing proposed laws and regs 
 - Federal, state, and local level
 - SLTCO provides guidance on how to measure

Quiz

- Answer the following questions.
 - What is the proper activity?
 - What is the corresponding measure or topic?

- **Tips**

- Count activities by staff and volunteers.
- Count each activity only once.
- Choose most appropriate heading.



Quiz #1

One of your volunteers investigated a complex case of potential resident abuse. She called you several times for advice. You provided strategies for investigation and suggested additional questions to ask residents. You spent approximately two and a half hours researching relevant laws, discussing the case and advising the ombudsman.



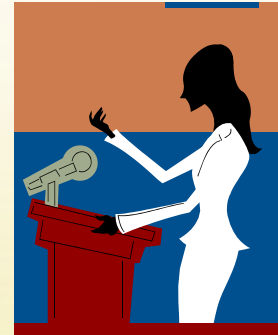
Quiz #1 Answers

One of your volunteers investigated a complex case of potential resident abuse. She called you several times for advice. You provided strategies for investigation and suggested additional questions to ask residents. You spent approximately two and a half hours researching relevant laws, discussing the case and advising the ombudsman.

- Activity?
 - Technical assistance to local LTCO and volunteers
- Measures/topics?
 - Measure: Estimated % of total staff time
 - Topic: Not required

Quiz #2

A nursing home association asks you to provide culture change training at their statewide annual convention. The audience is primarily nursing home administrators and other lead staff.



Quiz #2, Answers

A nursing home association asks you to provide culture change training at their statewide annual convention. The audience is primarily nursing home administrators and other lead staff.

- Activity?
 - Training for facility staff
- Measures/topics?
 - Measure: 1 session
 - Topic: Culture change

Quiz #3

You make an unscheduled visit to Mountain View nursing home, upon entering you ask for a list of residents so that you can see who is new to the home. You make rounds introducing yourself to new residents and checking in with residents that you know; one resident asks you about the Money Follows the Person program and facility staff approaches you with questions about a potential resident discharge.



Quiz #3, Answers

You make an unscheduled visit to M.V. nursing home, upon entering you ask for a list of residents so that you can see who is new to the home. You make rounds introducing yourself to new residents and checking in with residents that you know; one resident asks you about the Money Follows the Person program and facility staff approaches you with questions about a potential resident discharge.

- **Activities?**

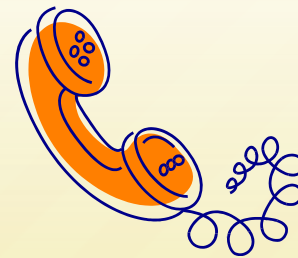
- Facility coverage,
- Information & consultation to individuals,
- Consultation to facilities

- **Measures/topics?**

- Measure: Facility coverage: 1 visit
- Measure: Information & consultation to individuals: 1,
Topic: MFP
- Measure: Consultation to facilities: 1, Topic: Transfer/discharge

Quiz #4

Prior to the beginning of an annual nursing home survey, you call the team leader and leave a voice mail message with facility complaint information. The team leader calls you back to clarify some information. You then call the volunteer assigned to the facility to alert him to the upcoming survey. The volunteer is on site at the facility including at the exit meeting.



Quiz #4, Answers

Prior to the beginning of an annual nursing home survey, you call the team leader and leave a voice mail message with facility complaint information. The team leader calls you back to clarify some information. You then call the volunteer assigned to the facility to alert him to the upcoming survey. The volunteer is on site at the facility including at the exit meeting.

- **Activity?**

- Participation in facility surveys

- **Measures/topics?**

- Measure: 1 survey
- Topic: None required

Quiz #5

During a routine nursing home visit the Social Services Director asked to speak to you. She reported that she has noticed an increase in the number of residents who request to return to the community but that families are preventing discharge planning. You explained residents' rights and the role of power of attorney. The Social Services Director felt that with this additional information she would try to work on the issues with the residents, their families and facility staff.

Quiz #5, Answers

During a routine nursing home visit the Social Services Director asked to speak to you. She reported that she has noticed an increase in the number of residents who request to return to the community but that families are preventing discharge planning. You explained residents' rights and the role of power of attorney. The Social Services Director felt that with this additional information she would try to work on the issues with the residents, their families and facility staff.

- Activity?
 - Consultation to facilities
- Measures/topics?
 - Measure: 1 consultation
 - Topic: Resident Rights

Quiz #6

You attend a resident council meeting. During the meeting, you respond to several resident concerns and questions as well as a question from a staff member about the upcoming resident's rights celebration.

Quiz #6, Answers

You attend a resident council meeting. During the meeting, you respond to several resident concerns and questions as well as a question from a staff member about the upcoming resident's rights celebration.

- Activity?
 - Work with resident council
- Measures/topics?
 - Measure: 1 resident council meeting
 - Topic: Not required

Quiz #7

A family council president asks you for advice about an upcoming family council meeting. You discuss agenda items and recommend a speaker to present on the requested topic of pressure ulcers. You are invited but unable to attend the meeting.



Quiz #7, Answers

A family council president asks you for advice about an upcoming family council meeting. You discuss agenda items and recommend a speaker to present on the requested topic of pressure ulcers. You are invited but unable to attend the meeting.

- Activity?
 - Information and consultation to individual
- Measures/topics?
 - Measure: 1 information & consultation to individual
 - Topic: Family council

Quiz #8

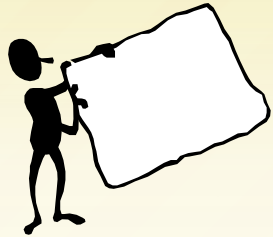
You are invited to speak to a group of older adults with hearing impairments who live in the community. The organizer states that she will arrange for a sign language interpreter. At the presentation you talk about long-term care options and provide information about nursing homes, hospice, and assisted living facilities.

Quiz #8, Answers

You are invited to speak to a group of older adults with hearing impairments who live in the community. The organizer states that she will arrange for a sign language interpreter. At the presentation you talk about long-term care options and provide information about nursing homes, hospice, and assisted living facilities.

- **Activity?**
 - Community education
- **Measures/topics?**
 - Measure: 1 community education
 - Topic: Not required

Quiz #9



You receive a request to have a display table for the Long-Term Care Ombudsman Program at “Senior Day” at the County Fair. During the fair, you hand out information about the Long-Term Care Ombudsman office and talk to people passing through.

Quiz #9, Answers

You receive a request to have a display table for the Long-Term Care Ombudsman Program at “Senior Day” at the County Fair. During the fair, you hand out information about the Long-Term Care Ombudsman office and talk to people passing through.

- Activity?
 - Community education
- Measures/topics?
 - Measure: 1 community education
 - Topic: Not required

Quiz #10

You receive a telephone call from an anonymous person. He states that he recently resigned from a nursing home on good terms. He wants to go back to visit some of the residents whom he considers friends and wants to know if there are any laws restricting him from visiting.

Quiz #10, Answers

You receive a telephone call from an anonymous person. He states that he recently resigned from a nursing home on good terms. He wants to go back to visit some of the residents whom he considers friends and wants to know if there are any laws restricting him from visiting.

- Activity?
 - Information & consultation to individuals
- Measures/topics?
 - Measure: 1 information & consultation
 - Topic: Resident rights

Quiz #11

You serve as an information source for a reporter investigating the quality of assisted living facilities. Over a period of two months you have five discussions with the reporter related to the story.



Quiz # 11, Answers

You serve as an information source for a reporter investigating the quality of assisted living facilities. Over a period of two months you have five discussions with the reporter related to the story.

- Activity?
 - Work with media, interview
- Measures/topics?
 - Measure: 1 interview
 - Topic: Facility quality

Quiz #12

An ombudsman program develops materials in preparation for this year's Residents Rights Month, including a press release. The program distributes the release to four regional newspapers.



Quiz #12, Answers

An ombudsman program develops materials in preparation for this year's Residents Rights Month, including a press release. The program distributes the release to four regional newspapers.

- Activity?
 - Work with media, press releases
- Measures/topics?
 - Measure: 1 press release
 - Topic: Resident rights

Quiz #13

You are a member of a coalition to support expansion of Home and Community Based Programs. A primary goal of the coalition is to comment on proposed legislation related to the Medicaid Waiver to ensure increased consumer access and quality assurance. The group meets monthly and the agenda includes reports from stakeholders and review of other state programs.

Quiz #13, Answers

You are a member of a coalition to support expansion of Home and Community Based Programs. A primary goal of the coalition is to comment on proposed legislation related to the Medicaid Waiver to ensure increased consumer access and quality assurance. The group meets monthly and the agenda includes reports from stakeholders and review of other state programs.

- Activity?
 - Monitoring laws and regulations
- Measures/topics?
 - Measure: Estimated % of total staff time
 - Topic: Not required

Quiz # 14

A local ombudsman provides training for 14 volunteer and two staff ombudsmen. The training is from 1:00 to 5:00 p.m. on the first day and 9:00 a.m. to 1:00 on the second day, which includes a working lunch. The agenda includes training on ombudsman investigation techniques and resolution strategies. Several outside speakers, as well as the State Ombudsman, serve as presenters.

Quiz #14, Answer

A local ombudsman provides training for 14 volunteer and two staff ombudsmen. The training is from 1:00 to 5:00 p.m. on the first day and 9:00 a.m. to 1:00 on the second day, which includes a working lunch. The agenda includes training on ombudsman investigation techniques and resolution strategies. Several outside speakers, as well the State Ombudsman, serve as presenters.

- **Activity?**
 - Training for LTCO staff and volunteers
- **Measures/topics?**
 - Measure: 1 session
 - Measure: 8 hours, 16 LTCO
 - Topic: Investigation strategy

Bonus Question #1

A family council asks the local ombudsman program to give a presentation on residents' rights at a monthly family council meeting. Two ombudsmen attend the meeting and each participates in the presentation.

Bonus Question # 1, Answer

A family council asks the local ombudsman program to give a presentation on residents' rights at a monthly family council meeting. Two ombudsmen attend the meeting and each participates in the presentation.

- Activity?
 - Work with family councils
- Measures/topics?
 - Measure: 1 Family council meeting
 - Topic: Not required

Bonus Question # 2

An assisted living facility director asks you to present training on resident abuse and neglect. In the audience are staff members from three long-term care facilities, a new ombudsman who is observing the training, and a few family members who also are interested in the information.

Bonus Question # 2, Answer

An assisted living facility director asks you to present training on resident abuse and neglect. In the audience are staff members from three long-term care facilities, a new ombudsman who is observing the training, and a few family members who also are interested in the information.

- Activity:
 - Training to facility staff
- Measures/topics?
 - Measure: 1 Training
 - Topic: Abuse and neglect

QUESTIONS?



SUMMARY

- Activities = range of LTCO work
 - LTCO staff and volunteers
 - Local level and State level activities
- States can use discretion in capturing topics and percentage measures.
- States may collect more information than is required to be reported to AoA in NORS.

Need more clarity related to coding?

- Contact WINC, Shelley Hitt, Chair

(303) 722-0300 ext.508 or 1-800-288-1376

skhitt@thelegalcenter.org



NORS Training

Posted on the NORC website

<http://ltcombudsman.org/ombudsman-support/training#NORS>

- Watch for an announcement about the posting of Q & A's related to NORS coding.
- Check NORC website for most recent NORS training materials prior to conducting training.



The National Long-Term Care Ombudsman Resource Center

The National Long-Term Care
Ombudsman Resource Center (NORC)

www.ltcombudsman.org

The National Consumer Voice for Quality Long-Term Care
(formerly NCCNHR)

<http://www.theconsumervoice.org/>

This presentation was supported, in part, by a grant from the
Administration on Aging, Department of Health and Human Services.