NORS TRAINING
TRAIN the TRAINER
SESSION OVERVIEW

- **GOAL:** Provide tips to make ongoing NORS training engaging and beneficial
- **FOCUS:** Using the NORS Training Modules developed by state and local ombudsmen and AoA
- **PROCESS:**
  - How the WINC can help
  - AoA’s perspective
  - Training tips from NORC consultant and state and local ombudsmen
  - Top tips from everyone
  - Questions and dialogue
  - Summary and closing
WINC Perspective and Process

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Workgroup to Improve NORS Consistency
Process for obtaining a vetted response when questions arise
AoA’s Perspective

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PART I: Three Cs
- Case, Complaint, Consultation

PART II: Complaint Codes

PART III: Verification, Disposition, Closing Cases

PART IV: Activities

FOUNDATION = NORS INSTRUCTIONS from AoA
Equip NORS training in basic curriculum

- Equipping LTCO for Effective Advocacy, Curriculum
  - Contains opportunities for introducing NORS in bite size pieces
  - Integrates some of the NORS reporting with teaching the ombudsman process
    - Identifying the complainant and the role of the ombudsman
    - Verification
  - Intended to help new ombudsmen see NORS as part of what they do, not a stand alone, onerous process after the “good stuff” is done
BACKGROUND PREPARATION

- Decide what to emphasize
  - Identify most frequent questions related to NORS reporting.
  - What’s the LTCOP story based on your state’s NORS data?
  - Review your NORS data for patterns, discrepancies, changes among local programs (regions) and for the State.

- Gather applicable state policies or guidance
  - Responding to complaints from family members of residents
  - Responding to a complaint related to a resident who is deceased
<table>
<thead>
<tr>
<th>AUDIENCE</th>
<th>CONTENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>• New ombudsmen</td>
<td>• Basic, very clear</td>
</tr>
<tr>
<td>• Ombudsmen, previous</td>
<td>• More “what if” questions, disagreement</td>
</tr>
<tr>
<td>NORS training</td>
<td></td>
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<tr>
<td>• Mixture</td>
<td>• Basics, answer questions, return to basics</td>
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</table>
CONTENT & LOGISTICS

- **What will you teach?**
  - Which modules will you use?
  - Why? What do you want ombudsmen to gain from the training?
    - Basic NORS coding?
    - More clarity and consistency in using specific codes such as *disposition*, based on your review of the current data and your knowledge?

- **Do you have the most recent materials?**
  - Check NORC website for latest versions of modules.
  - NORC website will contain vetted Q & As for additional clarity.
How much time is available?
- Limit the number of module(s) to the available time
  - Read the modules to refresh your memory of the content and case scenarios that are included.
  - Which modules will take more time? Less time?
- Consider the number of areas that you think need emphasis.
- Anticipate questions.
- Build in extra time for dialogue and for taking the quiz.
Why does NORS matter?

- More than paper compliance
- Tells story of LTCOP, national, state and local
- How NORS is used on national and state levels
- How local LTCOPs and individual ombudsmen can use NORS
- Share a few examples illustrating the importance of consistency in coding applicable to the module you’ll cover.
<table>
<thead>
<tr>
<th>NORS DOES</th>
<th>NORS DOES <strong>NOT</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reflect local, state and national data</td>
<td>Reflect 100% of LTCO activities</td>
</tr>
<tr>
<td>Provide overview of range of LTCOP activities</td>
<td>Reflect the quality of LTCO work</td>
</tr>
<tr>
<td>Provide information on residents’ complaints</td>
<td>Reflect LTCO time for management or other reporting purposes</td>
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</table>
Tips: Experience, Ombudsmen, Early versions of modules

- State and Reiterate: Purpose is to teach coding.
- When more clarity is needed
  - Refer to the full NORS Instructions or
  - Table the question and submit to WINC for a response.
- Build in participation.
- Shift your energy, pace, and techniques during the session.
  - Move around.
  - Jot key points on flip chart.
  - Ask for raised hands for some responses.
TEACHING TIPS FOR MODULES

• Basic Principles
  - Ask for volunteers to read definitions aloud.
  - Ask group to explain differences, such as between a case and a consultation.
  - Ask for a few, brief examples of each principle covered.
    - Ask group to identify the key elements that make the example fit the specific code, in contrast to other options.
      - Case vs. consultation?
      - Verified?
      - Resolved vs. referred or withdrawn?
• **Complaint Coding**
  - Explain the big groupings of complaint categories, e.g. against facility, not against facility.
  - Ask each person to read a code and go around the room until all of the codes have been read aloud.
    - After each section, ask if there are any questions.
    - If any code is similar to a code in another category, ask participants to explain the difference. Reinforce the importance of thinking about the context and primary complaint.
  - Example: Several codes and at least three categories relate to communication.
TEACHING TIPS for MODULES

- **B** is Access to Information by resident. B14: Information communicated in understandable language.
- **D** is autonomy, Choice, Preference, Exercise of Rights, Privacy. D29 is used if caregiver does not speak the resident’s language or if resident cannot communicate.
- **M** is staffing. M96 is used for staff language or other communication barrier related to staff.
- A resident has not received any information about the facility’s services...in German, though it is the resident’s primary language. (B14)
  - If time is too short to cover all codes, select a few key codes to read and discuss in each big category.
  - Ask for brief examples of a case that relates to a particular category or code, as each category is covered.
QUIZ

- **Purpose**
  - Learning
  - Affirmation of knowledge
  - Assist with accurate reflection of LTCOP’s story

- **Self-Grading**

- Use answer key and your background prep to identify areas to focus on for
  - Questions,
  - Dialogue, or
  - Clarity about program policies.
QUIZ

- Check for understanding of the principles.
  - Select a few questions where there may be uncertainty.
  - Ask why the answer is correct.
  - What would have to change to use a different code?
- Select codes where you receive questions, give another example and ask the group what code to use.
- If there are different views about the correct answer, ask ombudsmen to explain the rationale for their answers.
  - Discuss responses.
  - Explain why the answer is the answer.
  - Why is the answer X instead of Y?
Bonuses Questions may be used for ombudsmen who are waiting for everyone else to finish the quiz.

Add some fun.
- Give prizes for correct responses.
  - Sign pages/quizzes with 100% correct responses. Use the pages to draw for prizes.
  - Divide into teams and give prizes to team with most correct responses.
- Toss candy, gum, etc., to individuals who share an example or ask a question.
Don’t over-think the scenarios.
- NORS coding is about making a choice.
- Typically, the NORS code is the big thing that jumps out, the best fit.
- Return to the NORS Instructions for further assistance and encourage ombudsmen to do this.

Keep the module focus on the context and purpose.
- If it’s Module III, the context for choosing a code is the verification, disposition and closing.
- Do not second guess the issues or the ombudsman investigation.
STATING THE OBVIOUS, TIPS

- Use the NORS Modules to teach coding.
  - Avoid becoming sidetracked by lengthy discussions of ombudsman skills and approaches.
    - Take advantage of teachable moments. Include some applicable program policy and good ombudsman practice pointers in the discussion as time permits.
    - Too many *what if* scenarios may increase confusion and divert the focus.
  - After discussion, return to the correct answer with a brief rationale explaining why the answer is correct.
  - If a quiz answer may be confusing for new ombudsmen, e.g. the answer rationale includes *it depends*, discuss that question last.
STATING THE OBVIOUS, TIPS

- Ongoing training is essential for everyone.
- Experience and repetition increase understanding, reinforce learning and retention.
- Need NORS training opportunities to avoid any tendencies to develop individual variations in NORS coding.

Share your innovations in teaching with us!
TIPS from VERMONT

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YOUR TIPS & QUESTIONS
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/

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