



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

# ***INTRODUCTION TO THE NEW INITIAL CERTIFICATION TRAINING CURRICULUM FOR LONG-TERM CARE OMBUDSMAN PROGRAMS***

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Wednesday, January 26, 2022

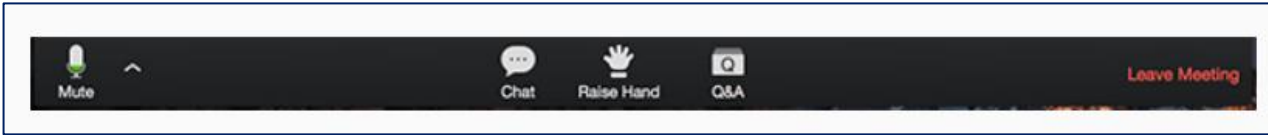
## **Speakers:**

Amity Overall-Laib, Director, NORC

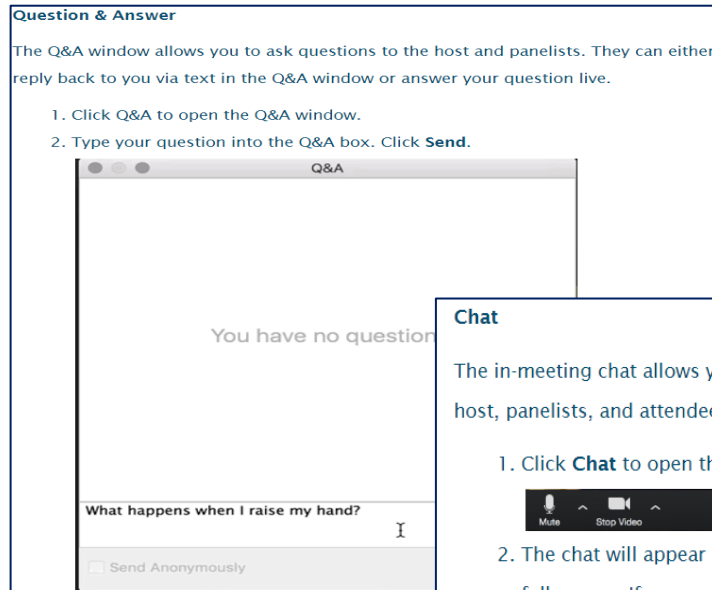
Beverley Laubert, National Ombudsman Program Coordinator, Administration for  
Community Living (ACL)

Carol Scott, Ombudsman Specialist, NORC

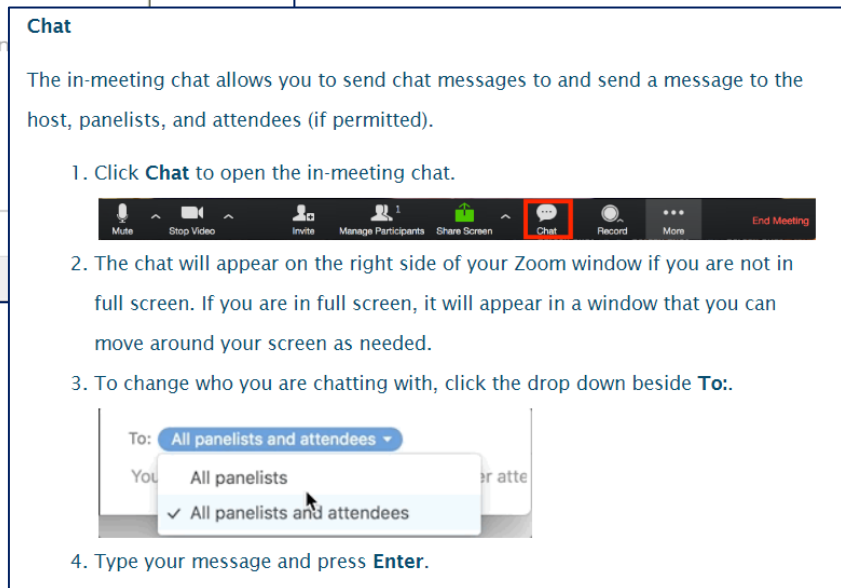
# Welcome and Reminders



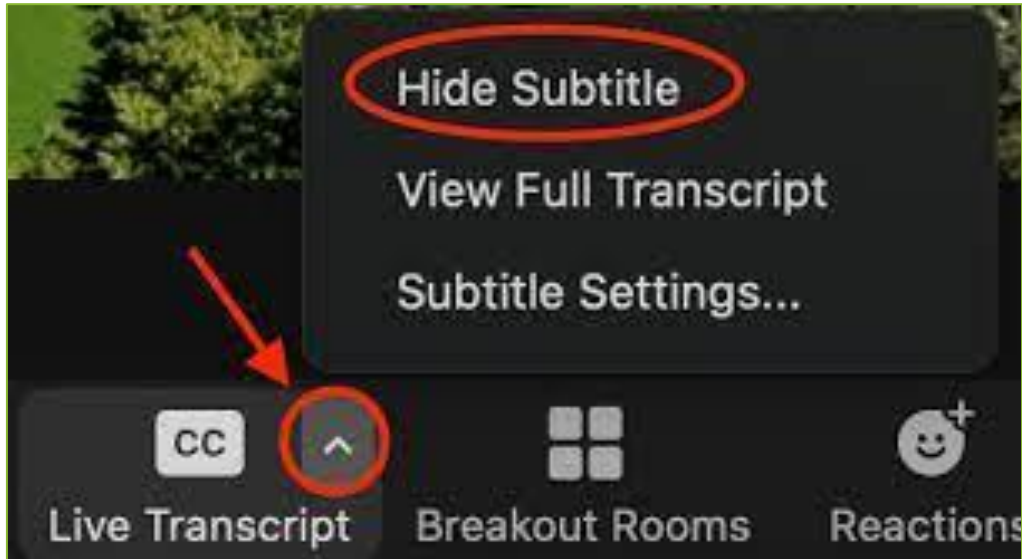
- Use the Q&A feature for questions for the speakers.



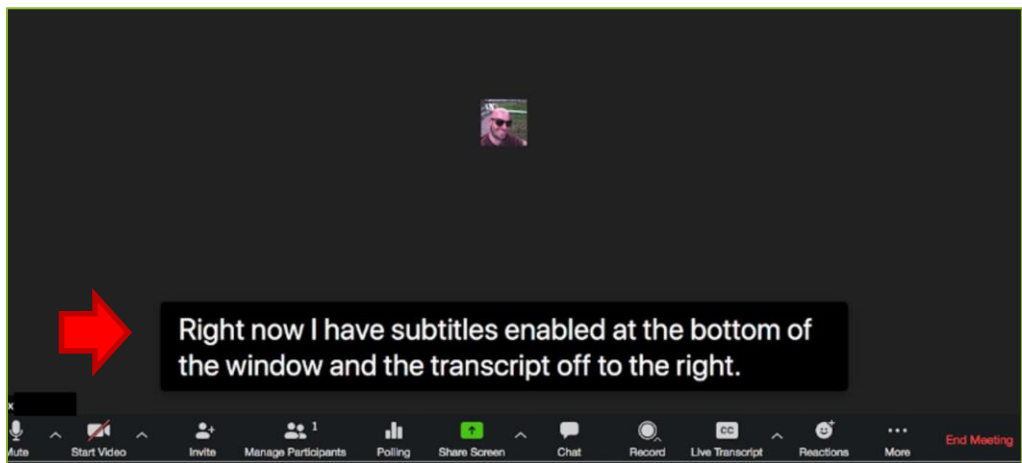
- Use the chat feature to submit comments or respond to questions from speakers or other attendees.



# Closed Captions and Live Transcription



- Turn on live closed captioning by clicking **Live Transcript** at the bottom of your screen.
- Options to view or hide subtitles will appear, you can also change the size of your subtitles.
- Download the full transcript by clicking **View Full Transcript**.



# NEW Certificates of Participation

- Assist representatives in achieving their annual in-service training/continuing education.
- Must participate in live Zoom training for at least 30 minutes.
- Certificate will include name, training details, and amount of time on webinar.
- FAQs - [https://ltcombudsman.org/omb\\_support/training/certificates](https://ltcombudsman.org/omb_support/training/certificates)



# Learning Objectives



Identify core components of the minimum training standards established by the Administration for Community Living (ACL)



Describe the materials that are part of the revised *Initial Certification Training Curriculum for Long-Term Care Ombudsman Programs*



Know where to find the revised curriculum



**Beverley Laubert**  
National Ombudsman Program Coordinator  
Administration for Community Living (ACL)

# Long-Term Care Ombudsman Program Training Standards

[https://ltcombudsman.org/uploads/files/support/2019\\_LTCOP\\_Training\\_Standards.pdf](https://ltcombudsman.org/uploads/files/support/2019_LTCOP_Training_Standards.pdf)

- Specify a minimum numbers of hours of initial training
- Specify the content of training, including training related to –
  - Federal, State, and local laws, regulations, and policies, with respect to long-term care facilities in the State
  - Investigative techniques
  - Other matters as the State determines to be appropriate
- Specify an annual number of in-service training for all designated representatives

Administration for Community Living/Administration on Aging  
Office of Long-Term Care Ombudsman Programs  
Long-Term Care Ombudsman Program Training Standards

**Why do Long-Term Care Ombudsman programs need training standards?**

The Long-Term Care Ombudsman Program (Ombudsman program) promotes and protects the health, safety, welfare and rights of individuals (residents) living in long-term care facilities (nursing homes, residential care communities, including assisted living and similar settings.) The Older Americans Act and corresponding regulation directs the Ombudsman and the representatives of the Office to conduct a variety of activities in support of residents. These activities<sup>1</sup> include:

- Services to assist the residents in protecting the health, safety, welfare, and rights of the residents,
- Investigating Complaints,
- Informing residents about how to obtain services,
- Ensuring that residents have regular and timely access to the Ombudsman program,
- Representing the interests of residents before governmental agencies,
- Seeking administrative, legal, and other remedies to protect the health, safety, welfare, and rights of residents,
- Analyzing, commenting on, and monitoring the development and implementation of Federal, State, and local laws, regulations.

To fulfill this mandate the Ombudsman and the representatives of the Office must have subject matter knowledge of resident rights, facility regulatory standards, the resident experience, complaint investigation and the Ombudsman program's policies and procedures. They also need to know how to operationalize this knowledge; for instance, how to carry out the program policies on complaint handling procedures, how to access resident records and steps to disclose resident information.<sup>2</sup> Residents call on Ombudsman programs to resolve a variety of problems; often times to address basic quality of life concerns and complex matters of eviction or abuse and neglect, therefore a baseline competency of both knowledge and skills is necessary to support effective and credible Ombudsman program services.

**Statutory Background:**

The Older Americans Act requires the Director of the Office of Long-Term Care Ombudsman Programs (within the Administration for Community Living) to establish standards applicable to the training required for representatives of the Office of Ombudsman in each state<sup>3</sup>.

<sup>1</sup> Older Americans Act Sec. 712 (a) (3) Functions of the Ombudsman

<sup>2</sup> *The Long-Term Care Ombudsman Program: Rethinking and Retooling for the Future*, (April, 2003) "The skills needed to be an ombudsman are diverse and sophisticated, ranging from the ability to communicate effectively with providers and regulators, family members and representatives of community organizations, and, most importantly, residents. Communication skills must include the ability to interview and to effectively elicit facts and then to document the facts and information obtained."

<sup>3</sup> (L) not later than 180 days after the date of the enactment of the Older Americans Act Reauthorization Act of 2016, establish standards applicable to the training required by section 712(h)(5); and

# Long-Term Care Ombudsman Program Training Standards

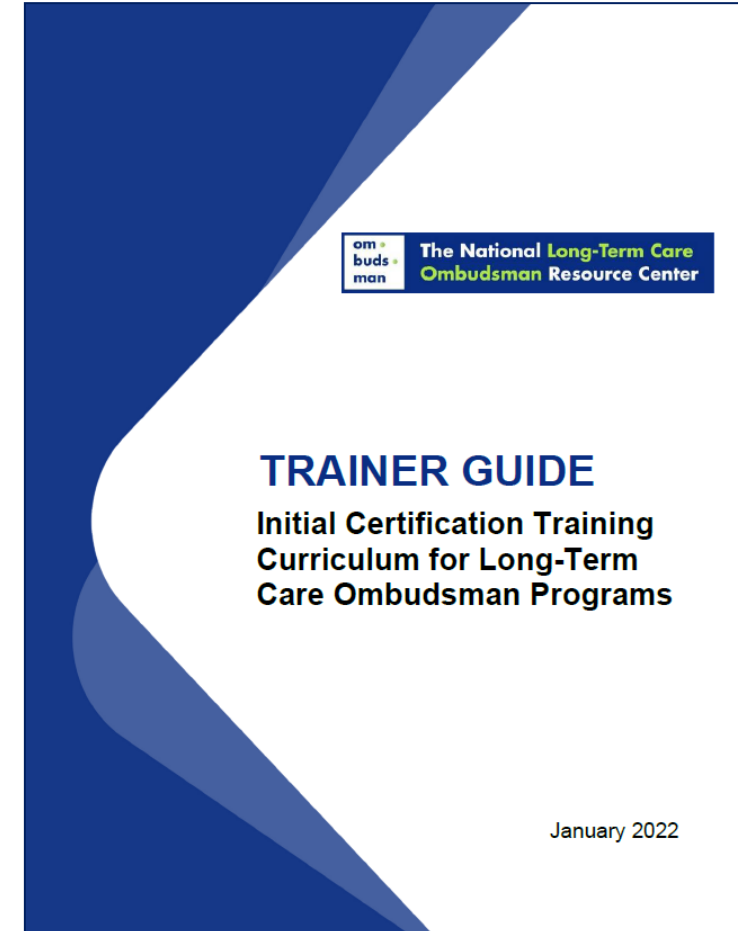
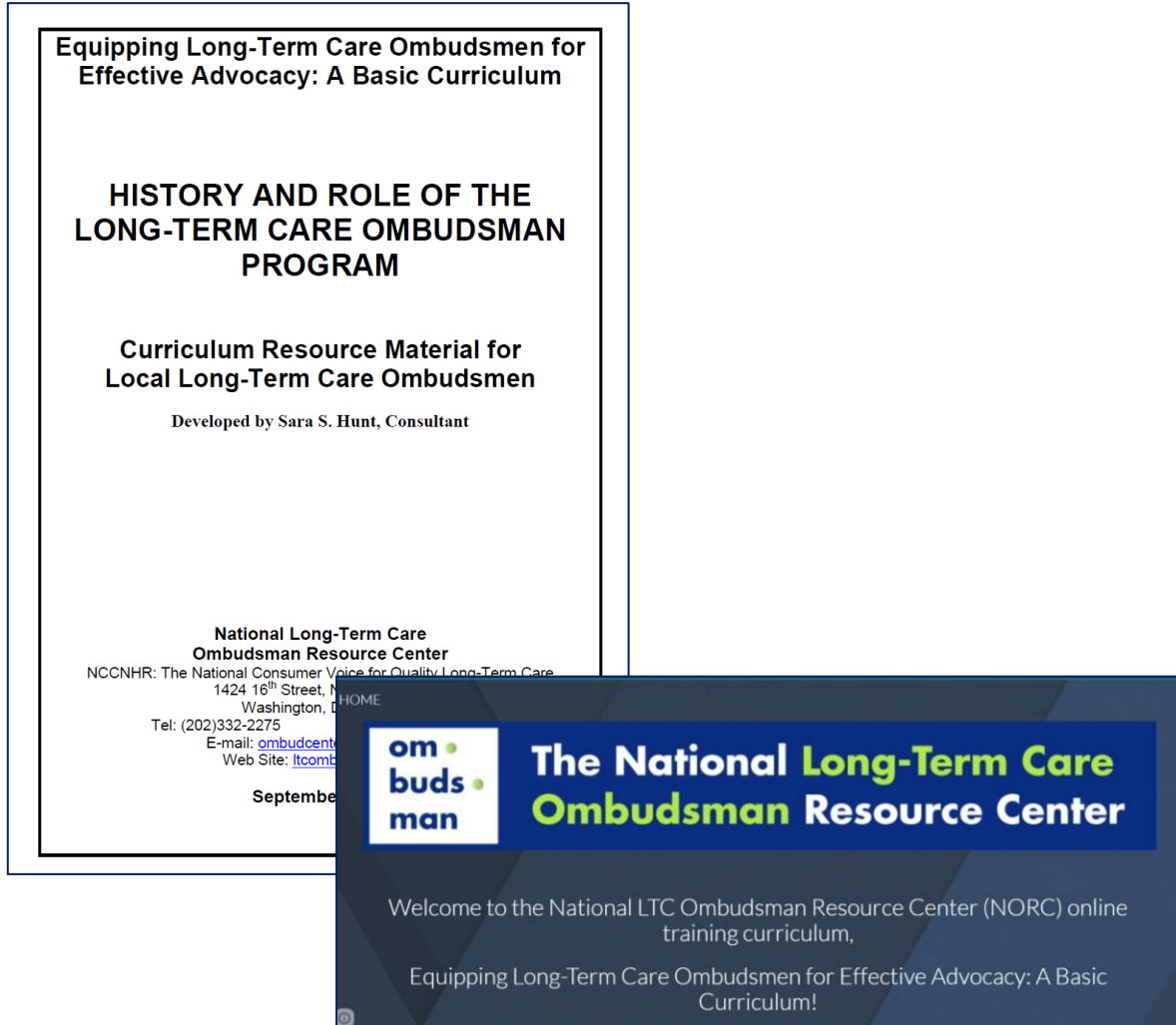
## *Core Components*

- Each state is required to provide a minimum of 36 hours of initial certification training that includes:
  - Up to 7 hours of independent study
  - At least 10 hours in the field
  - 16-20 hours of classroom style training
- Once designated, at least 18 hours of in-service training (also known as “continuing education training”) is required annually.



# Then and Now

[https://ltcombudsman.org/omb\\_support/training/norc-curriculum](https://ltcombudsman.org/omb_support/training/norc-curriculum)



# Curriculum Development



- Large group discussion
- Small group discussion
- Videos
- Role play

[ACL Training Standards for LTCOP Training](#)



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# The training materials include:



**Trainer Guide**



**Trainee Manual**



**PowerPoints**



**Curriculum  
Overview**



**Preparation  
Checklist and  
Training Tips**



**Glossary of Key  
Words**



**List of State-  
Specific  
Information**

# Introduction and Planning Documents

- Introduction and Overview
- Preparation Checklist and Training Tips
- State-Specific Information
- Glossary of Key Words
- Links to Training Videos
- Acknowledgments

## Introduction and Overview

*Initial Certification Training Curriculum  
for Long-Term Care Ombudsman Programs*

## Preparation Checklist and Training Tips

### *Initial Certification Training Curriculum for Long-Term Care Ombudsman Programs*

### State-Specific Information Needed for the *Initial Training Curriculum for Long-Term Care Ombudsman Programs*

The curriculum is not a stand-alone, complete package containing everything an individual needs to be designated as a representative. The federal training standards<sup>1</sup> require states to add their state-specific information for certain topics. To assist trainers, we have identified the required state-specific information to address within the introduction of each module in the **Trainer Guide** and in this comprehensive list.

We understand that including entire sections of program policies and procedures, or relevant state statute or regulations, may not be feasible if the text is too long to insert directly into the training materials. However, it is important to refer to applicable state-specific information as indicated. States may determine the most appropriate way to incorporate the information (e.g., review the information verbally, add text directly, include a link to relevant policies and procedures, law, and/or regulations).

Within the **Trainer Guide** you will find the **bold, blue arrow (→)** to indicate where the information should be discussed or added.

#### State-Specific Information

**NOTE:** *Section 1 is the same in each Module.*

##### Section 1: Welcome and Introduction

- Explain training requirements in your state if they exceed federal requirements.

#### Module 1 – The State Long-Term Care Ombudsman Program: Roles, Responsibilities, and Authorities

##### Section 2: An Overview & History of the Long-Term Care Ombudsman Program

- Describe additional qualifications for designation of a representative of the Office if they exceed federal requirements (optional).
- Share information relevant to the history of the Long-Term Care Ombudsman program (LTCOP) in your state.

<sup>1</sup> Final Long-Term Care Ombudsman Program Training Standards  
[https://ltcambudsman.org/uploads/files/support/2019\\_LTCOP\\_Training\\_Standards.pdf](https://ltcambudsman.org/uploads/files/support/2019_LTCOP_Training_Standards.pdf)

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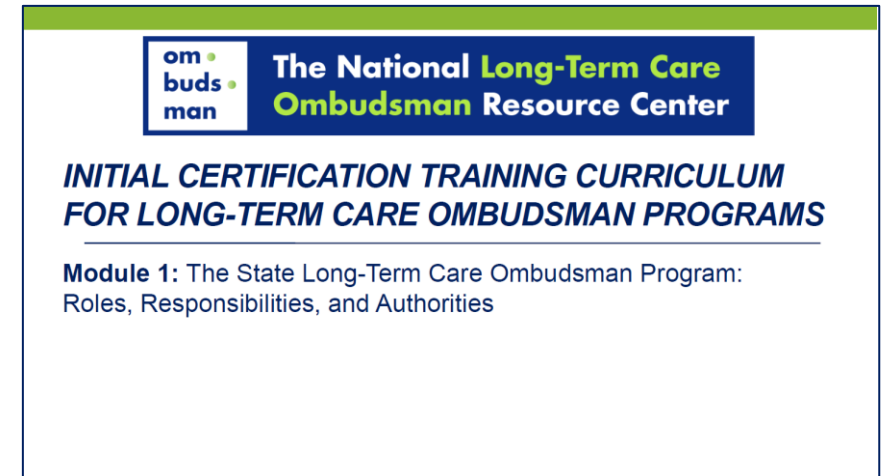
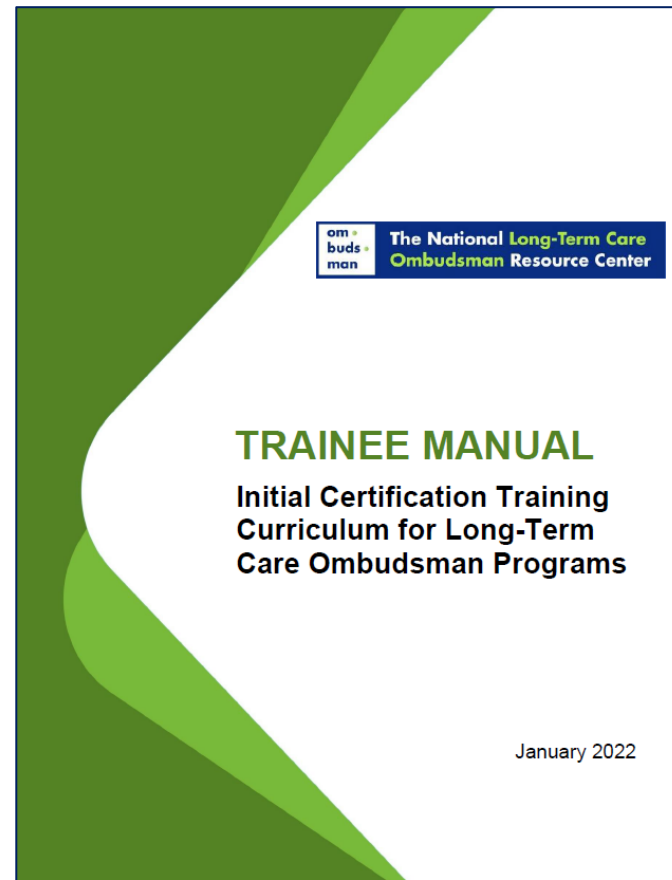
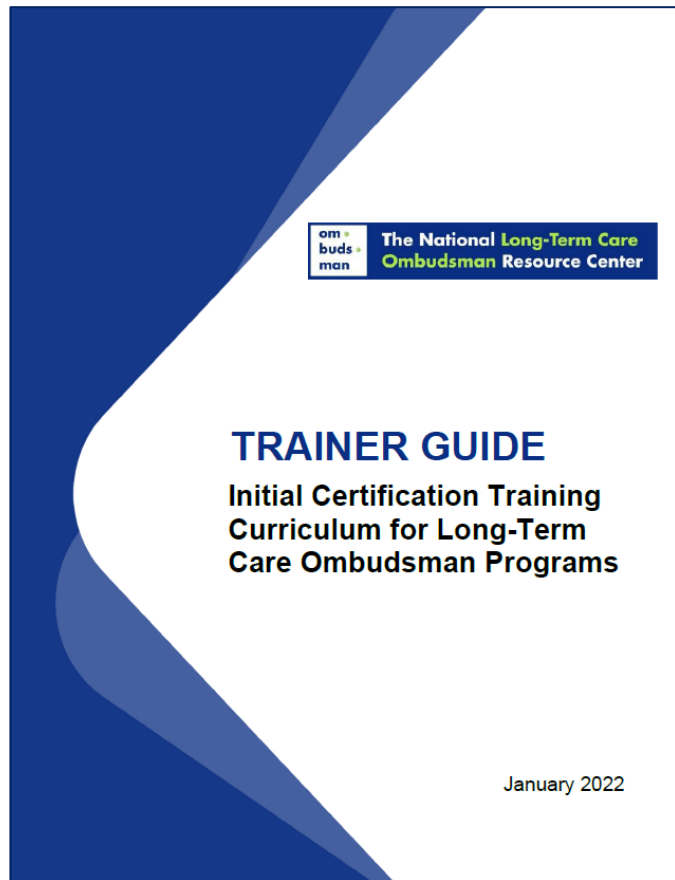
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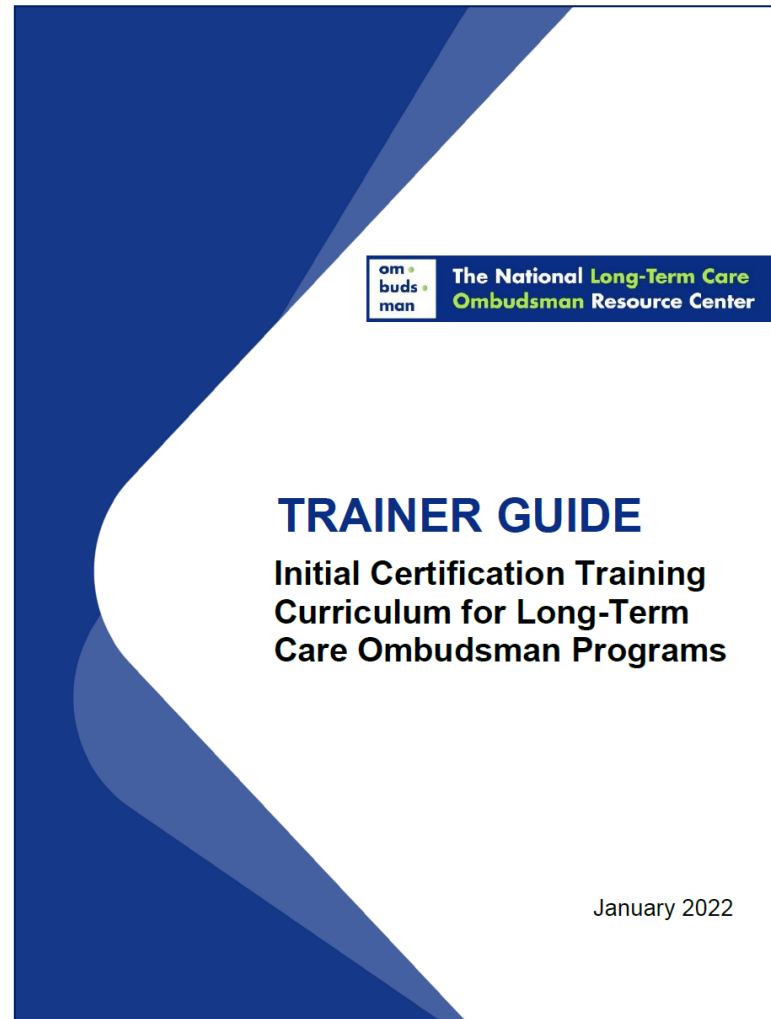
# 10 Modules





# Trainer Guide

- Table of Contents
- State-Specific Information
- Key Words
- Trainer's Notes
- Objectives
- Footnotes
- End of Module Questions
- Resources



## MODULE 1

### What is an Ombudsman?


*Trainer's Note: Allow at least 20 minutes to cover Section 2.*

Ombudsman is a Swedish word meaning agent, representative, or someone who speaks on behalf of another. There are many different types of ombudsmen which may lead to some confusion with people understanding what type of ombudsman is working within the Long-Term Care Ombudsman program.

The Long-Term Care Ombudsman program (LTCOP) serves as an **advocate ombudsman**. The LTCOP is impartial while investigating to determine the facts relevant to a case. Once the facts are determined, the LTCOP advocates, seeking a resolution the resident wants. An advocate ombudsman does not represent their own views but amplifies those of the person they are supporting. The goal is resolution to the satisfaction of the resident.

*Trainer's Note: Show the video below or show your state promotional video to provide a brief introduction to the Long-Term Care Ombudsman program. Clarify that when the video refers to "ombudsmen," it is referring to representatives of the Office.*

*After you show the video, ask the trainees if anything surprises them and if they have any questions.*

 **Watch the video:** [What is a Long-Term Care Ombudsman?](#)<sup>14</sup> The video provides a brief introduction to the program.

### The State Long-Term Care Ombudsman

*Trainer's Note: This is an introduction to the Ombudsman. The functions and responsibilities are discussed in more detail later in this Module.*

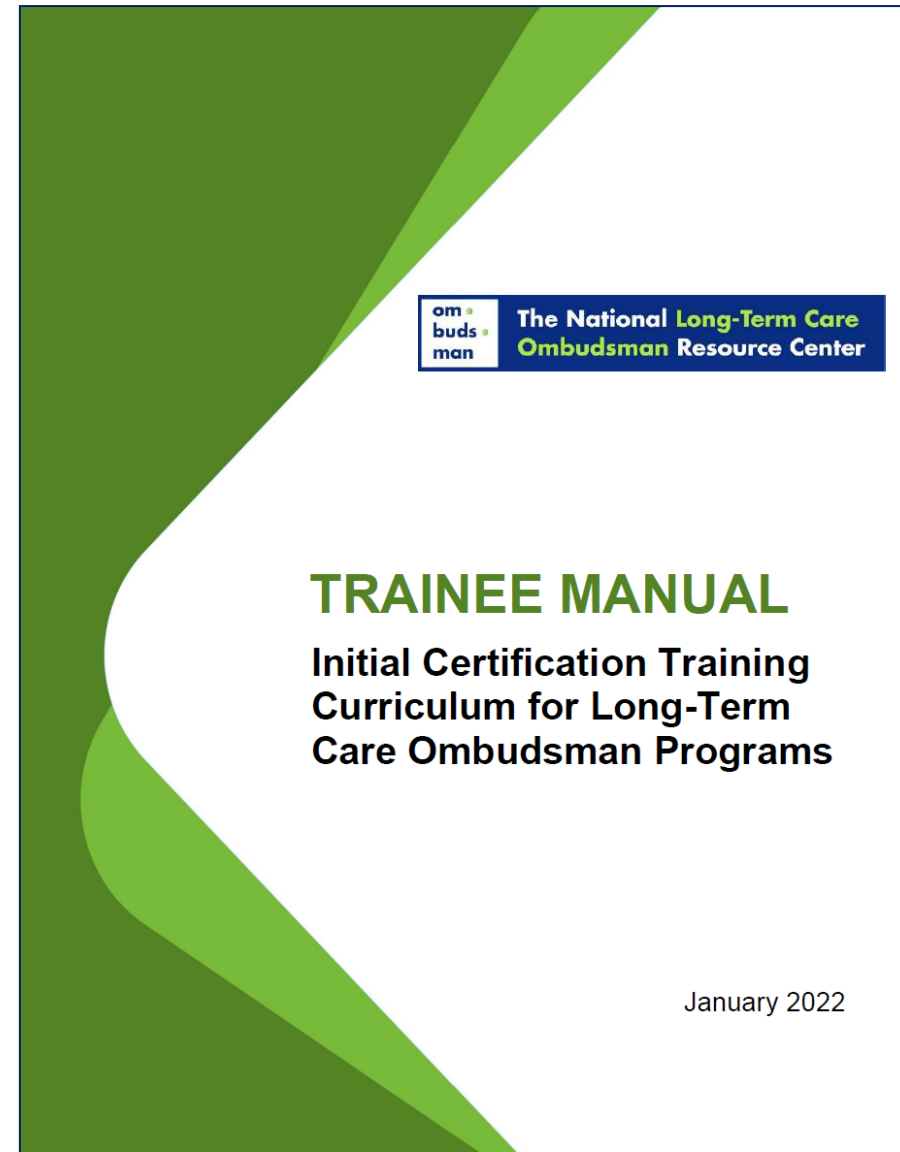
The Ombudsman is the head of the Office of the State Long-Term Care Ombudsman program (the Office) and is responsible personally, or through representatives of the Office, to carry out a variety of functions and responsibilities about which you will learn in this Module. In general, the Ombudsman is responsible for:

- Ensuring that residents have access to the program
- Responding to and resolving complaints
- Representing the interests of residents before governmental agencies
- Ensuring all program requirements are fulfilled
- Ensuring representatives of the Office fulfill their duties
- Designating representatives of the Office and local Ombudsman entities

<sup>14</sup> This video series was developed by the Texas Department of Aging and Disability Services in coordination with the Texas Long-Term Care Ombudsman Program. <https://www.youtube.com/watch?v=8VRmetXQVEY>

# Trainee Manual

- Table of Contents
- Key Words
- Objectives
- Footnotes
- Module Questions
- Resources





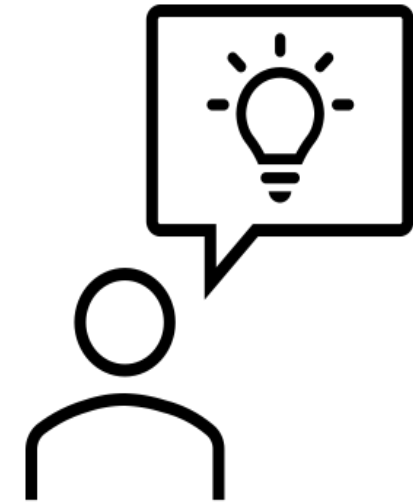
# Trainer's Notes

- Give you a timeframe
- Guide you
- Explain the teaching point(s)
- Tell you how to conduct an activity

*Trainer's Note: The timeframes for each Section are approximate. Allow at least 3.5 hours for Module 1. If you think additional time is needed, ask the trainees to read about the history of the LTCOP prior to attending the training session or on their own time (in Section 2).*

# ADULT LEARNING THEORY

- Need to know why they need to learn
- Need to learn experientially
- Approach learning as problem solving
- Learn best when the topic is of immediate value
- Teacher relinquishes authority and becomes a facilitator
- Bring a package of experiences and values – each unique
- Bring expectations about the learning process
- Have competing interests – the realities of their lives
- Have their own set patterns of learning
- Learner's past experiences used in process
- Don't forget normal age-related changes in cognition, memory, dexterity changes



For more information about adult learning principles watch this [session](#) and review the [materials](#).

**Be patient**

**No tech shaming (we  
were all new to  
technology at one  
point)**

**Speak slowly  
and clearly**

**Take it one step at  
a time**

**Utilize different  
teaching styles**

**I, We, You method**

**Utilize online  
tutorials**

**Practice,  
practice,  
practice!**



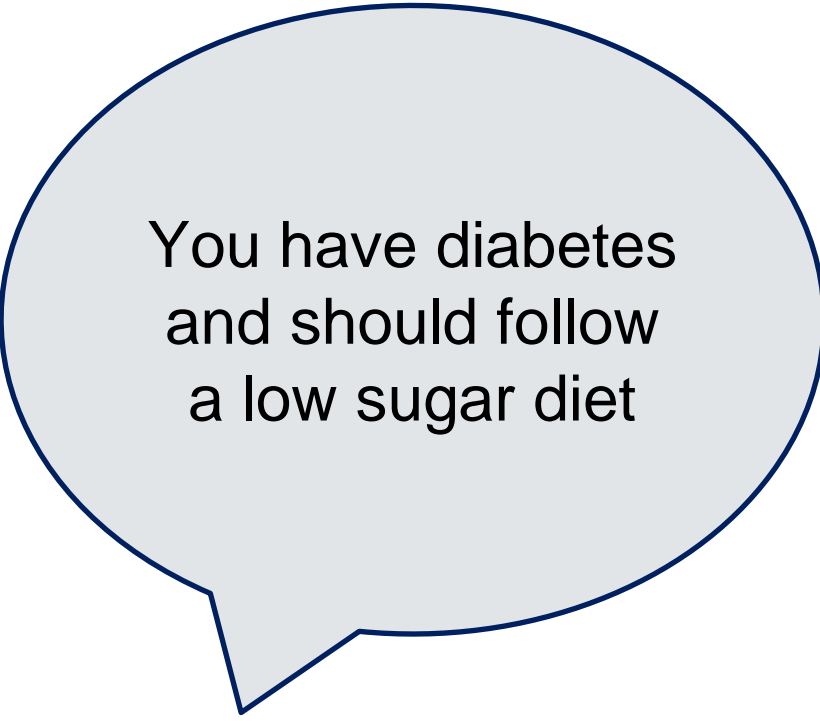
# Best Interest

- Best interest?
- It sounds nice...
- What is it?
- Who can tell me what is in **my** best interest?




# The LTCOP does NOT focus on best interest

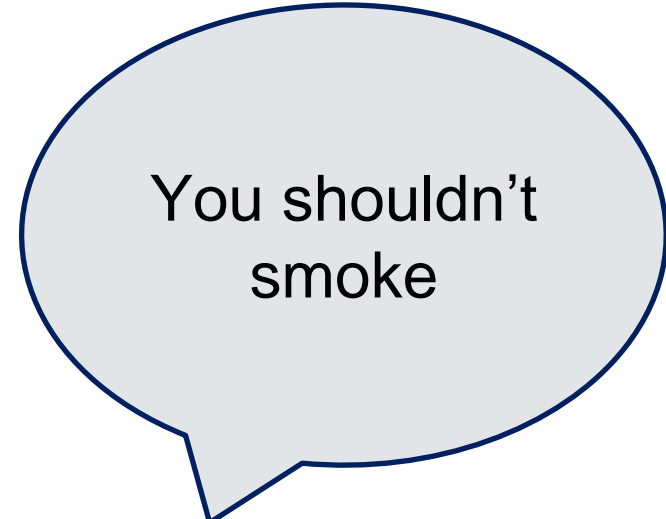
- LTCOP *does not* make decisions for the resident.

A light blue speech bubble with a dark blue outline and a tail pointing towards the bottom left.

You have diabetes  
and should follow  
a low sugar diet

A light blue speech bubble with a dark blue outline and a tail pointing towards the bottom left.

It's not safe to  
live at home  
without services

A light blue speech bubble with a dark blue outline and a tail pointing towards the bottom left.

You shouldn't  
smoke

LTCOP does support and advocate on behalf of resident wishes, supporting the resident's right to self-determination.

You have diabetes and should follow a low sugar diet

You have a right to choose what to eat.

It's not safe to live at home without services

No one can keep you in the facility against your will. What can be done to assure you will be safe when you go home?

You shouldn't smoke

If the facility allows smoking, and you wish to smoke, let's talk to the staff to try and make that happen.

# Training Curriculum and Adult Learning Summary

- Expectations are explained out at the beginning of each module
- The purpose of the activities is explained
- Certification training provides the opportunity to take information learned and apply it to on-the-job training
- Each module provides concrete examples of ombudsman advocacy
- The curriculum considers different learning styles
- Trainers seek participants' past experiences to process questions and answers





## What is the plan?

*Before using the curriculum...talk to your State Ombudsman*







## Initial Certification Training Curriculum for Long-Term Care Ombudsman Programs

January 2022



Share the video with your programs [here](#).

The *Initial Certification Training Curriculum for Long-Term Care Ombudsman Programs* is a basic curriculum for initial certification training based on the requirements included in the

[https://ltcombudsman.org/omb\\_support/training/norc-curriculum](https://ltcombudsman.org/omb_support/training/norc-curriculum)

# Do You Receive Our Emails?

Join our database to receive webinar notifications, the *Ombudsman Outlook* (quarterly e-newsletter), and more.

To receive our emails directly, use this link to sign up now:

<https://ltcombudsman.org/sign-up>





## The National Long-Term Care Ombudsman Resource Center

*Connect with us:*

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



The National LTC Ombudsman Resource Center



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