

Introduction and Overview

Initial Certification Training Curriculum for Long-Term Care Ombudsman Programs

About the Curriculum

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 Administration for Community Living (ACL) *Long-Term Care Ombudsman Program Training Standards*.¹ In developing the curriculum, the National Long-Term Care Ombudsman Resource Center (NORC) worked with subject matter experts, adult learning experts, Ombudsmen, and Ombudsman program representatives (paid and volunteer). Several Long-Term Care Ombudsman programs assisted with pilot testing the curriculum materials and the online training resources (see Acknowledgements for details). This document provides an overview of the curriculum, the curriculum materials, and training methods.

Before Using the Curriculum

Review the following documents and complete the tasks in each document before using the curriculum to conduct training.

- ✓ Curriculum Overview (this document)
- ✓ Preparation Checklist and Training Tips
- ✓ Review the online training modules
- ✓ State-Specific Information

Curriculum Materials, Online Training, and Training Methods

The curriculum materials are available as PDF documents as well as Word and PowerPoint formats that you can customize to meet your needs (e.g., move sections around, add your program logo, etc.) and add state-specific information. The free online training modules are available to complement, not supplant, the written curriculum and your state-specific information.

Training materials include:

- the **Trainer Guide**
- the **Trainee Manual**
- **PowerPoint** presentations for each module

¹ U.S. Administration for Community Living/Administration on Aging, Office of Long-Term Care Ombudsman Programs. Long-Term Care Ombudsman Program Training Standards. November 27, 2019. https://ltcombudsman.org/uploads/files/support/2019_LTCOP_Training_Standards.pdf

- **Appendix**
 - Glossary of Key Words
 - Links for Training Videos in Curriculum
- **Online Training Modules**

As designed, the materials are most effective when used for in-person training. However, the materials can be adapted to your needs as they were used successfully for virtual learning via webinar during pilot testing. While both in-person and virtual learning training options satisfy the federal training standards for classroom style instruction, in-person training offers the benefit of direct interaction and facilitates relationship building while more fully addressing individual questions and needs.

The curriculum is intended to be presented in its entirety, with the ten (10) modules sequentially building upon one another, leading trainees through the learning steps necessary to understand and integrate information to achieve certification. That said, trainers may present the order of modules according to their state training process as states conduct training differently due to a variety of factors. Additionally, states may determine what part(s) of the curriculum they would like trainees to complete as independent study (e.g., prework prior to classroom training, homework in between classroom training or shadowing experienced representatives during field work). If your state has additional requirements and/or information, you may integrate the supplemental information into the modules or add new modules.

This training was developed with adult learning principles in mind and is not meant to be read to trainees. Many opportunities for dialogue are provided through interactive questions and answers, activities, case studies/examples, and videos.

Icons are used throughout the curriculum as a visual reminder to highlight different training methods and activities. Icons are described below.

Icon Key		
	Activity	Indicates an individual or group activity.
	Example/ Case Study	Indicates an example or case study.
	Homework/ Pework	Indicates an option to assign content as homework or prework for independent study.
	Learn More	Shares a link and/or resource for trainees to learn more about a specific topic.
	Video	Indicates the use of a video (either to watch independently outside of classroom style training or as a group).

Online Training

As of January 2025, the online training modules are available as a new resource. There are ten modules, and it takes approximately 30 minutes to one hour to complete a module. An overview of ACL's minimum training standards is provided in the next section. You may incorporate online modules into your overall training program as self-study/homework to complement in-person training and as a companion piece to the written curriculum.

Examples of how to incorporate the online modules include:

- Ask trainees to complete the online module for *Module 1: The State Long-Term Care Ombudsman Program: Roles, Responsibilities, and Authorities* prior to attending the first in-person (or virtual) training as a brief orientation to the program.
- Ask trainees to complete the online modules in lieu of the written modules you usually assign as independent study (pre-work/homework).
- Ask trainees to complete a module (or more) to reinforce information you provide during in-person training, shadowing visits, or virtual training.

Trainees may view the online modules from home, their office, or during in-person training. Completion of the online modules does not mean that a trainee has met all the training requirements.

The platform for the modules is very accessible and user friendly. After the completion of each module, the participant has ten questions to answer. With a test score of 80% or higher, the participant will receive acknowledgment, and their results will become part of the Learning Management System (LMS). The Office of the State Long-Term Care Ombudsman will receive notification via the LMS. Participants who do not receive a passing score of 80% or higher will have an unlimited number of times to review the module and retake the test.

Prior to using the online training:

- ✓ review the course instructions (for trainees and states) to learn how to set up accounts and utilize the platform; and
- ✓ read this document that identifies state-specific information and activities not included in the online modules.

Certification Training

Per ACL's training standards, 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; and
- a range of 16-20 hours of classroom style training (can be provided in-person, virtual, or by phone).

Training Time

This curriculum provides approximately 30 hours of training time. However, the training time is customizable for your needs and will depend on a variety of factors, such as the number of trainees; amount of time used for discussion, questions, and activities; state-specific information; etc. The ten

online training modules take approximately 10 hours to complete, so when used in coordination with the original training materials those hours will be incorporated into the total training time.

State-Specific Information

This curriculum is not a stand-alone, complete package containing everything an individual needs to be designated as a representative. The federal training standards² 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 as well as compiled a comprehensive list for the entire curriculum in the appendix.

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, 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.

For example:

→ ***Provide state information relevant to the history of the Ombudsman program.***

Review each module and insert your State-Specific Information before presenting.

Terminology

Terminology used in the curriculum is based on federal requirements. To maintain consistency, “representatives of the Office” or “representatives” are the terms used to refer to individuals (paid and volunteer) designated by the State Ombudsman (states may refer to representatives as “local ombudsmen,” “ombudsmen”). Tell the trainees if your state uses terms that differ from the federal language.

Federal requirements also use the term “designation” not “certification” when referencing the State Ombudsman’s authority to designate, refuse to designate and remove designation of a local Ombudsman entity and representatives of the Office. For the purposes of the training, the term “certification” is used to describe the training process to become designated as representative of the Office by the State Ombudsman. Inform the trainees if your state uses the terms differently.

Another example is the use of “Residential Care Communities (RCCs)” in the curriculum to describe facilities other than nursing facilities (often referred to as assisted living facilities, board and care homes, etc.).

Trainer Guide

Even for the most experienced trainer, it is vital to spend time reviewing the materials and as much as possible follow the outline provided. Included within the Trainer Guide are case and situational examples. Feel free to use your own examples that demonstrate the teaching point, instead of the examples provided.

² Final Long-Term Care Ombudsman Program Training Standards https://ltombudsman.org/uploads/files/support/2019_LTCOP_Training_Standards.pdf

- Each module has several **Sections** with suggested timeframes.
- **Table of Contents** - Provides Section topics and corresponding page number(s).
- **State-Specific Information** – The first section of each module lists the state-specific information trainers must address and there is a comprehensive list for the entire curriculum.
- **Key Words** – Are defined at the beginning of each module and in the Glossary.
- **Trainer’s Notes** - Appear in *blue italics* throughout the text and assist the trainer by providing additional information, examples, and directions to conduct activities & process videos
- **Objectives** – Highlight the key points and skills the trainee needs to learn.
- **Footnotes** – Include citations for the source material and/or links for additional information.
- **End of Module Questions** – The questions at the end of each module are intended to be addressed in a large group discussion. The trainer asks the questions to the group and listens for the responses to be sure the objectives were met. **NOTE:** The Trainer’s Guide has the answers, so make sure trainees cannot see the correct responses during the discussion of the questions. Alternatively, you may ask trainees to provide their answers in written form so that the trainer can confirm individual comprehension.
- **Resources** – Additional resources are available at the end of each module. States are welcome to incorporate their state-specific resources for reference.

Trainee Manual

The Trainee Manual is like the Trainer Guide but does not contain trainer-specific information (e.g., section regarding state-specific information, Trainer’s Notes, answers to the end of module questions). Provide each trainee with their own copy to use during the training so they can take notes and keep the manual for future reference.

PowerPoint Presentation

PowerPoint slides highlight the key points of the Trainee Manual. The PowerPoints are meant to be a visual training tool and are not comprehensive. Make sure you are comfortable with the Trainer Guide material and use the guide as the primary resource. Each module has a customizable deck of slides with the following features:

- **Animations** - Some slides have animations that only show up when you click on the slide. There are specific instructions in the Notes Section to guide you in utilizing.
- **Notes Section** - Contains the Trainer’s Notes and the script. The Trainer’s Notes are all *italicized* and provide the trainer with instructions on what to do. The non-italicized notes are the “script”. Having a script does not mean we are asking you to read to the trainees. As a trainer, you are responsible for conveying the information in the materials accurately and in a manner that the trainees understand.
- **State-Specific Information** – There are blank slides within the PowerPoint for you to add your state-specific information.
- **Videos** - Hyperlinks are imbedded in the PowerPoint slides and in the Trainer Guide. You are free to use your own state/local video if it covers the same teaching points, but please view the videos provided in the Trainer Guide on your own before deciding which to show.