



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



THE NATIONAL CONSUMER VOICE  
ANNUAL CONFERENCE  
OCTOBER 26, 2011

**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



**Louise Ryan**

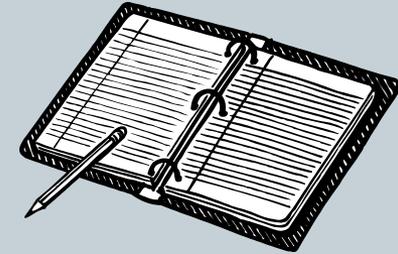
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# NORS TRAINING MODULES



- **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**

# 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

# BACKGROUND Prep continued



## AUDIENCE

- New ombudsmen
- Ombudsmen, previous NORS training
- Mixture



## CONTENT

- Basic, very clear
- More “what if” questions, disagreement
- Basics, answer questions, return to basics

# CONTENT & LOGISTICS

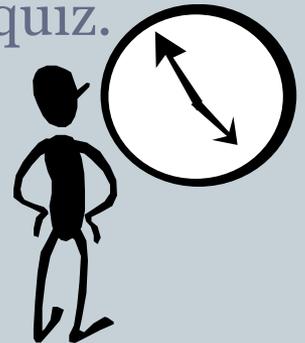


- What will you teach?
  - Which modules will you use?
  - Why? What do you want ombudsmen to gain from the training?
    - ✦ Basic NORS coding?
    - ✦ More clarity and consistency in using specific codes such as *disposition*, based on your review of the current data and your knowledge?
- Do you have the most recent materials?
  - Check NORC website for latest versions of modules.
  - NORC website will contain vetted Q & As for additional clarity

# CONTENT & LOGISTICS, continued



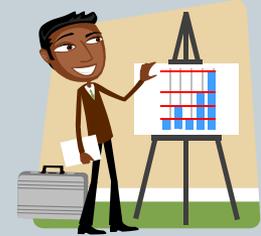
- How much time is available?
  - Limit the number of module(s) to the available time
    - ✦ Read the modules to refresh your memory of the content and case scenarios that are included.
    - ✦ Which modules will take more time? Less time?
  - Consider the number of areas that you think need emphasis.
  - Anticipate questions.
  - Build in extra time for dialogue and for taking the quiz.



# INTRODUCTION TO TRAINING



- **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.



# UPFRONT CLARITY about NORS



## NORS DOES

- Reflect local, state and national data
- Provide overview of range of LTCOP activities
- Provide information on residents' complaints

## NORS DOES NOT

- Reflect 100% of LTCO activities
- Reflect the quality of LTCO work
- Reflect LTCO time for management or other reporting purposes

# TEACHING TIPS for MODULES



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?

# TEACHING TIPS for MODULES



## ● 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?

# QUIZ



- Bonus 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.



# STATING THE OBVIOUS, TIPS



- **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

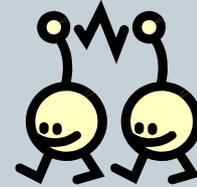


- Use the NORS Modules to teach coding.
  - Avoid becoming sidetracked by lengthy discussions of ombudsman skills and approaches.
    - ✦ Take advantage of teachable moments. Include some applicable program policy and good ombudsman practice pointers in the discussion as time permits.
    - ✦ Too many *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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# TIPS from CALIFORNIA



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# TIPS from Maryland



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# TIPS from PENNSYLVANIA



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# TIPS from COLORADO



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# YOUR TIPS & QUESTIONS





# The National Long-Term Care Ombudsman Resource Center

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

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

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

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

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