

**Center for Clinical Standards and Quality/Survey & Certification Group**

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**Admin Info: 17-14-CLIA**

**DATE:** April 28, 2017

**TO:** State Survey Agency Directors

**FROM:** Director  
Survey and Certification Group

**SUBJECT:** Online Clinical Laboratory Improvement Amendments (CLIA) Surveyor Basic Training (Available May 5, 2017)

**Memorandum Summary**

- **Online CLIA Surveyor Basic Training** is a comprehensive overview of the regulatory requirements and their application to surveyors.
- Topics covered include regulation interpretation, compliance assessment using the Outcome-Oriented Survey Process, and Principles of Documentation.
- All State and Regional Office (RO) CLIA surveyors will be required to complete the course. The training will be available 24 hours/7 days a week.
- New surveyors (those with less than two years' experience) will be required to complete the modules within three months. Experienced surveyors have up to one year from the go-live date, to complete the course.
- **“Go-live” date for the training will be May 5, 2017.**

**Background and Goal of Training**

The online CLIA Surveyor Basic Training course replaces and updates the previous classroom-based CLIA Basic Training.

The goal of the training is to enable surveyors to effectively survey clinical laboratories for compliance with the CLIA regulations, citing deficiencies as appropriate, using the outcome-oriented survey process (OOSP).

**Description**

This training course is a web-based, self-paced course that takes approximately 30 hours to complete. There are 14 lessons in this course. To get the most out of the course, the modules are set up in a particular order for completion. To receive a certificate of completion, each participant must complete the pre-test, all course lessons, the post-test with a passing score of 80, and the course evaluation, in addition to the successful completion of Federal Monitoring Survey review by the RO.

## **Target Audience**

**All CLIA State Agency surveyors who conduct CLIA surveys are required to complete this basic training course in total, even if CLIA Basic training was previously completed.** CLIA Support Staff are expected to complete the lessons marked for “Non-surveyors” and are welcome to take the entire course.

## **Course Prerequisites**

- Completion of the CLIA Orientation Manual
- A working knowledge of the Public Health Service Act, specifically Section 353, Subpart 2 Clinical Laboratories, 42 CFR part 493, the CLIA Regulations, the State Operations Manual (SOM), and SOM Appendix C

## **Access**

This training will be located on the Surveyor Training Website (STW) at <https://surveyortraining.cms.hhs.gov>. All State Surveyors and RO Surveyors may access the training any time after May 5, 2017.

Follow the instructions for **State Surveyors and RO Surveyors** to self-register and self-launch the course from the CMS SCG Surveyor Training Website:

### Login Instructions:

1. Go to the CMS Surveyor Training Website at <https://surveyortraining.cms.hhs.gov>.
2. Select the “**I AM A SURVEYOR**” link.
3. Enter your username and password into the fields\*.
4. Select the “**Submit Logon**” button.
5. Select “**Course Catalog**.”
6. Scroll down and search for the **Online CLIA Surveyor Basic Training** course.
7. Select the “**Register for this Course**” button.
8. Select the “**Launch this Course**” button.

\* Contact the [Help](#) desk for assistance if you don't have a username or password.

**CLIA Support Staff** must use the “I am a Provider” in the Web Based Training section. Access and select “CLIA Online Basic Training” to complete the 4 required modules. Pre/Post Tests are not required.

Follow the instructions for **CLIA Support Staff** to self-register and self-launch the course from the CMS SCG Surveyor Training Website:

Login Instructions:

1. Go to the CMS Surveyor Training Website at <https://surveyortraining.cms.hhs.gov>.
2. Select the “**I AM A PROVIDER**” link.
3. Select “**Web-based Training.**”
4. Scroll down and search for the **Online CLIA Surveyor Basic Training** course.
5. Select the “**Launch this Course**” button.

**Contact:** For more information about the content of this course, please contact:  
Cindy Flacks ([Cindy.Flacks@CMS.hhs.gov](mailto:Cindy.Flacks@CMS.hhs.gov)) (410) 786-6520 or Clarissa Weaver  
([Clarissa.Weaver@cms.hhs.gov](mailto:Clarissa.Weaver@cms.hhs.gov)) (410) 786-3406.

Technical issues such as logging in, password resets and disabled accounts should be directed to the **CMS Surveyor Training Site Help Desk**, either by phone (1-855-791-8900) or by email at [cmstraininghelp@hendall.com](mailto:cmstraininghelp@hendall.com).

**Effective Date:** Immediately. This information should be communicated with all survey and certification staff, their managers and the State/Regional Office training coordinators within 30 days of this memorandum.

/s/  
David R. Wright

cc: Survey and Certification Regional Office Management