



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

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**Admin Info: 17-23-ALL**

**DATE:** September 01, 2017

**TO:** State Survey Agency Directors  
State Training Coordinators and Regional Office Training Administrators

**FROM:** Director  
Survey and Certification Group

**SUBJECT:** Training Update: New and Coming Soon Trainings – On Demand on the Integrated Surveyor Training Website 24/7 - 365

**Memorandum Summary**

CMS is migrating courses that were previously offered on a scheduled basis for a limited time, to an online, on-demand format where learners may self-register and self-launch the course when needed. CMS is also developing several new on-demand training courses. Once enrolled, learners will have continued (ongoing) access to those courses.

- CMS converted several courses that were previously offered on a scheduled basis to an on-demand format so that learners may access them at their convenience 24 hours a day, 7 days a week, and 365 days a year. These courses are now available on-demand:
  - Emergency Medical Treatment and Labor Act (EMTALA) Basic Training
  - Fundamentals of Patient Safety in Hospitals
- A newly developed required training for Long Term Care (LTC) is also available on-demand:
  - Principles of Documentation Learning Activity - For LTC
- CMS is developing new on-demand trainings, coming soon in September 2017:
  - Ambulatory Surgical Centers (ASC) Basic Training
  - Emergency Preparedness Basic Surveyor Training
  - Rural Health Clinic (RHC) and Federally Qualified Health Centers (FQHC) Basic Training
  - Introduction to Webinar Basics

**Background**

The CMS Survey & Certification Group (SCG) is continuously working to improve our distance learning initiatives. Our goal is to provide State Agency (SA) and Regional Office (RO) surveyors, reviewers, and other staff with continual access to CMS training and resources. Several courses have been converted into an online training format, so that learners may access them on-demand when needed. Ninety percent of our current courses are now online and on-

demand, and one hundred percent of our basic courses will be on-demand by May 2018 - which is one of our strategic initiatives. Several new on-demand trainings are also being developed.

### **Request for New Training Development**

New Training Development is underway, and we are requesting that you send suggestions and descriptions of your need for a new training. One example of a new training to be developed is Triage Training. Please send your suggestions and descriptions to [Anita.Segar@cms.hhs.gov](mailto:Anita.Segar@cms.hhs.gov) and/or [Anita.Moore@cms.hhs.gov](mailto:Anita.Moore@cms.hhs.gov) by September 29, 2017.

### **Surveyor Training Courses: Now Available Online On-Demand (24/7/365)**

Several new online courses are available on the Integrated Surveyor Training Website (ISTW) on-demand. Learners may self-register and self-launch an online course at their convenience; 24 hours a day, 7 days a week, and 365 days a year. Once enrolled, learners will have continued (ongoing) access to the course, so that they can review it when needed.

### **Course Access: How To Self-Register and Self-Launch the Course**

Learners may self-register and self-launch these courses on the ISTW. After the initial enrollment, learners will have continuous (or ongoing) access to the training and resource materials.

#### **How to Enroll:**

1. Go to the ISTW at <https://surveyortraining.cms.hhs.gov>.
2. Select “**I AM A SURVEYOR**”.
3. Enter your username and password into the fields\*.
4. Select the “**Submit Logon**” button.
5. Select “**Course Catalog**”.
6. Search for the course:
  - You may scroll down and search for the Name of the online course, or
  - You may type the course name into the “Search Courses” field.
7. Select the “**Register**” button.
8. Select the “**Launch the Course**” button.

*\*Contact the **CMS ISTW Help Desk** at [cmstraininghelp@hendall.com](mailto:cmstraininghelp@hendall.com) for assistance if you forgot or do not have your username and password or if you need technical support.*

### **Course Information: Trainings Available On-Demand (24/7/365)**

- **EMTALA Basic Training**  
CMS SCG Training Division developed the EMTALA Basic Training online course in 2009. It is now available on-demand on the ISTW. This is a required course for all EMTALA surveyors and reviewers.

- **Fundamentals of Patient Safety in Hospitals**

CMS developed the Fundamentals of Patient Safety in Hospitals online course in 2012. It is now available on-demand on the ISTW.

This is a required course for all SA and RO hospital surveyors and reviewers who survey the hospital Quality Assurance and Performance Improvement (QAPI) Conditions of Participation (CoPs). The course may be valuable on a voluntary basis to surveyors for other types of health care facilities subject to QAPI requirements as well.

- **Principles of Documentation Learning Activity - For LTC**

CMS has developed a new training entitled, Principles of Documentation Learning Activity- for LTC. It is available on-demand on the ISTW.

RO representatives approached the SCG Training Division with several identified training needs. The first was a surveyor writing course, and the second was a course providing practical application of the Principles of Documentation. As a result, the Training Division, in conjunction with a RO Technical Expert Panel and the Division of Nursing Homes, developed the Basic Writing Skills for Survey Staff (release in March 2017) and this new Principles of Documentation Learning Activity- for LTC.

The Principles of Documentation Learning Activity– for LTC training provides an opportunity for experienced LTC surveyors to review and apply correct language and effective writing techniques when composing defensible statements using Form CMS-2567. In addition, it provides the staff who perform quality reviews of the Form CMS-2567 documentation additional surveyor coaching tips, using real-life examples of deficient practice statements and findings.

- This is a required course for all LTC surveyors.
- All current LTC surveyors are required to take the training within one year of this memo.
- The course may be valuable on a voluntary basis to other types of health care facilities surveyors.

### **Course Information: Trainings Coming Soon (September 2017)**

- **Updated ASC Basic Training**

CMS SCG Training Division developed the ASC Basic Training online course in 2013. The training has been updated to reflect new regulations, clarify content, and enhance learner interactivity. The updated training will be available on-demand on the ISTW.

- This is a required course for all ASC surveyors and reviewers.
- All existing ASC surveyors and reviewers who have previously completed this online training are encouraged to refresh their knowledge by reviewing this updated course.

- **Emergency Preparedness Basic Surveyor Training**

CMS SCG Training Division has developed the new Emergency Preparedness Training. This new training will be available on-demand on the ISTW.

This is a required course for all SA and RO surveyors and reviewers who conduct or review Health and Safety or Life Safety Code (LSC) surveys for Emergency Preparedness requirements. Non-survey professionals and other SA or RO support staff responsible for ensuring compliance with regulations are also encouraged to take the course. **Surveying for requirements begins November 15<sup>th</sup>, 2017.**

- All surveyors are required to take the training prior to surveying the Emergency Preparedness requirements.

- **RHC and FQHC Basic Training**

CMS SCG Training Division has developed the new RHC/FQHC Basic Training online course. The new training will be available on-demand on the ISTW.

- This is a required course for RHC and FQHC surveyors and reviewers.
- All RHC and FQHC surveyors and reviewers are required to take the training within one year of this memo.

- **Introduction to Webinar Basics**

CMS SCG Training Division has designed a self-paced “Introduction to Webinar Basics” video. This training video will review webinar basics such as accessing audio, webinar etiquette, use of training tools, and the chat features of Adobe Connect. We recommend that all learners who plan to attend a future webinar take this training in advance of the webinar. Registration is not required. You may access this video, on-demand.

Because the video is a flash file, this training will not run in Chrome. It will only work in Internet Explorer (IE). Please click on the following link to access the “Introduction to Webinar Basics” video: <http://surveyor-training-content2.s3.amazonaws.com/data/WebinarBasics/project.htm>.

Next, click the play button on each screen to hear the audio. Be sure that your computer speakers are on and turned up or that your headphones are plugged in.

For additional support with accessing the video, please contact the CMS ISTW Help Desk, either by phone (1-855-791-8900) or by email at [cmstraininghelp@hendall.com](mailto:cmstraininghelp@hendall.com). Support is available from 8:00 AM ET to 5:00 PM ET, Monday through Friday.

### **Additional Information**

**New Staff** are required to take basic training prior to participating in a survey as a team member. Basic training is the first part of the learning process for surveyors to gain proficiency. After completing the basic training courses and successfully passing the post-tests, the new surveyors should participate in field survey observations and mentoring with an experienced preceptor.

**Experienced Staff** will benefit from periodically reviewing and completing these trainings to remain current with their skill set. All surveyors, reviewers, and certification staff are encouraged to self-enroll and self-launch their trainings to review them on an as-needed basis or as directed by their SA to refresh their knowledge.

**Preceptors, Mentors, Training Coordinators, and Managers** are encouraged to enroll in the online courses prior to and/or along with a new surveyor candidate. This will maintain the preceptor's skill and allow the preceptor to assist and guide the new surveyor through their whole training process, including the on-line course, mentoring, and field survey observations and activities.

**Contact:** If you need assistance with any of the online on-demand courses, please contact the CMS ISTW Help Desk, either by phone (1-855-791-8900) or by email at [cmstraininghelp@hendall.com](mailto:cmstraininghelp@hendall.com). Support is available from 8:00 AM ET to 5:00 PM ET, Monday through Friday. For general training questions, please do not hesitate to email the training mailbox at [SCG\\_training@cms.hhs.gov](mailto:SCG_training@cms.hhs.gov).

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

/s/

David R. Wright

cc: Survey and Certification Regional Office Management  
State Survey Agency Training Coordinators, Regional Office Training Administrators