DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services
7500 Security Boulevard, Mail Stop C2-21-16
Baltimore, Maryland 21244-1850

Center for Clinical Standards and Quality/Survey & Certification Group

DATE: September 25, 2015

TO: State Survey Agency Directors

FROM: Director
Survey and Certification Group

SUBJECT: Mandatory State Agency/Regional Office Surveyor Training for Individualized
Quality Control Plan (IQCP) Part II

Memorandum Summary

- **Mandatory IQCP Surveyor Training Class**—Training will take place from
  November 4-6, 2015. The class will consist of three two-hour webinar presentations
  that will be held each day from 2:00 p.m. to 4:00 p.m. EST.
- **Budget Information**—Training is web-based and does not require travel. No
  additional funding is required or authorized.
- **Attendee Information**—Information about registration and prerequisite work is
  provided. **This training class is mandatory for all Clinical Laboratory
  Improvement Amendments (CLIA) surveyors.**

The Centers for Medicare & Medicaid Services (CMS) will conduct a web-based training class
on IQCP on November 4 to November 6, 2015. The class will consist of three two-hour webinar
presentations that will be held from 2:00 p.m. to 4:00 p.m. EST. The agenda for this training
will use scenarios to train the surveyor how to identify deficiencies related to IQCP, identify
possible D-tags that may be cited and how to write the deficiency. There will also be a module
of frequently asked questions. Please note that this training will be technical in nature.

**This training class is mandatory for all Clinical Laboratory Improvement Amendments
(CLIA) surveyors.** CMS Regional Office (RO) CLIA surveyors and State Agency (SA) CLIA
surveyors are required to attend. Managers, supervisors, and other CLIA staff who do not
perform laboratory surveys are also invited to attend, but it is not mandatory.

Before Training Action Steps:

Attendees must take the following steps before the training class begins:

1. Complete the IQCP Refresher module. This includes taking and passing the post-
   assessment with a minimum score of 80 percent. This must be completed by October 21,
   2015 in order to register for the webinar training.

2. It is highly recommended that all surveyors review the PowerPoint presentations and handouts from the November 2013 IQCP Surveyor Training.

3. Review the IQCP Interpretive Guidelines.

4. Upon completion of the refresher module and post-assessment, the surveyor may register for the webinar training.

5. Upon the completion of the three-day webinar training, a completion post-test must be completed by November 13, 2015 in order to receive a certificate of completion for the course.

Materials will be provided in the resource library within the Learning Management System (LMS).

Prerequisite Module

Before the webinar, participants must complete the prerequisite module, IQCP Refresher Training, and successfully pass the post-assessment. This is a requirement prior to registering for the webinar.

To access the IQCP Refresher Training, users will need to log into TotalLMS (https://cms82.sumtotalsystems.com/sumtotal) and enter '0CMSCLIAIQCP2_ONL_20151104_Refresher' in the search field.
Click on the activity name and click 'Register.' The PowerPoint presentation and post-test will be displayed in their 'To Do' list. To launch these activities, the user will need to click the 'Start' button.

Registration Information

IQCP Part II is now open in TotalLMS. If you do not have access, please contact your Training Coordinator. If you experience issues registering for this class, please contact the LMS Help Desk at Help@qtso.com.

To register for the webinar, enter '0CMSCLIAIQCP2_ONL_20151104' in the search field in TotalLMS. Click on the activity name and then click the 'Register' button.

Logistics

Webinar Instructions for Learning Management System (LMS) users (Surveyors):

Prior to the Day of the Webinar

1. To receive credit for participating in the webinar, register in TotalLMS at http://cms82.sumtotalsystems.com/sumtotal/. Use your surveyor ID to log into TotalLMS.

2. Type "Live Webinar" in search box or click on any of the disciplines under 1-Surveyor or 2-Surveyor columns, in "Catalog" section of TotalLMS. Select intended Webinar and follow instructions.

3. After completing the registration process, a "Start" button with the name of the Webinar will appear in your "To Do List" in TotalLMS.

On the Day of the Webinar

1. Log into TotalLMS, go to your "To Do List" select the "Start" button to launch the webinar. (If you have not registered for the Webinar prior to the scheduled date and wish to receive credit see instructions in "Prior to the Day of the Webinar.")

2. From the Adobe Connect Meeting window you will enter as a guest. Type your first and last name in the "Name Box." (Do NOT check the button next to "Enter with your login and password" and do NOT enter a login and password on the Adobe Connect screen).

3. Click on "Enter Room" to access the webinar.

4. To hear the audio dial, 1 (800) 603-1774;
    a. The Conference ID number will be different each day:
        i.   November 4 – 32422438
        ii.   November 5 – 33769065
        iii. November 6 – 33804250

5. At the conclusion of the webinar, exit the webinar. The system will return to TotalLMS. Your screen will display "Have you completed this activity?" select 'Yes'.

6. Proceed to complete the evaluation in TotalLMS (the evaluation link can be found on your "To Do List".

Contact: If you have any questions about the training, please send them to IQCP@cms.hhs.gov.

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/
Thomas E. Hamilton

cc: Survey and Certification Regional Office Management