



Center for Clinical Standards and Quality/Survey & Certification Group

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DATE: April 14, 2017

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

FROM: Director
Survey and Certification Group

SUBJECT: Basic Writing Skills for Survey Staff Online Course Available on the Surveyor Training Website On-Demand (24/7, 365 days/year)

Memorandum Summary

- The new **Basic Writing Skills for Survey Staff** online course is now available on the Surveyor Training Website. The goal of the course is to improve the ability of survey staff to document findings using proper writing skills. It reviews the proper use of grammar, punctuation, voice, and plain language consistent with the Principles of Documentation (POD).
- **How to Self-Enroll:** Learners may self-register and self-launch the course on the Surveyor Training Website at <https://surveyortraining.cms.hhs.gov>. The course is available on demand so that learners may access the course at their convenience. It is available 24 hours a day, 7 days a week, and 365 days a year.

Background

The survey and certification of a health care facility that participates in the Medicare, Medicaid, or Clinical Laboratory Improvement Amendments (CLIA) is a process that must adhere to legal requirements. These programs are administered under extensive laws, regulations, operation manuals, and other guidelines. Surveys and the documentation from surveys may become an important part of subsequent legal proceedings arising out of the certification process.

The Form CMS-2567 Statement of Deficiencies and Plan of Correction is the record of the survey where the surveyor(s) documents and justifies the determination of compliance, and informs the health care facility of its state of compliance for certification. This information serves as the basis for the health care facility to analyze its deficient practices or system failures, and to develop plans of correction. It is extremely important for survey staff to utilize proper writing skills to document their findings.

Regional Office (RO) representatives approached the Survey & Certification Group (SCG) with an identified training need for a surveyor writing skills course.

As a result, SCG developed the Basic Writing Skills for Survey Staff (BWS) online course. This course is for all surveyor types.

Course Goal & Description

The goal of the course is to improve the ability of survey staff to document findings using proper writing skills consistent with the POD when composing a Form CMS-2567 Statement of Deficiencies and Plan of Correction. It provides opportunities to practice and demonstrate the correct use of grammar, punctuation, voice, and plain language.

This self-paced, asynchronous online course takes about two hours to complete. It provides 0.25 continuing education units. It consists of a Pre-Test, one learning module with practice questions, and a Post-Test*.

**Learners are given three attempts to pass the Post-Test with a score of 85 percent or higher. Learners who do not successfully pass the Post-Test within three attempts may reenroll.*

Target Audience

All survey staff who complete official survey forms and documents are required to complete this course. The target audience includes surveyors, reviewers, and all other survey staff who are responsible for composing, reviewing, or approving Form CMS-2567 Statement of Deficiencies and Plan of Correction content and other official survey forms and documents. This course is beneficial for survey staff of all provider and supplier types in both Long Term Care and Non-Long Term Care.

- New State Survey Agency (SA) staff are expected to take this required prerequisite course during their State Survey Agency orientation.
- Experienced surveyors are required to take this course within one year of this memo.

Thereafter, we highly recommend that all surveyors and survey staff review this training annually, on an as needed basis, or as directed by their SA to refresh their skills.

Non-survey professionals, generalists, managers, supervisors, training coordinators, and other SA or RO support staff responsible for ensuring compliance with regulations are also encouraged to take the course.

Course Access Instructions

Follow the instructions below to Self-Register and Self-Launch the online course:

Login Instructions:

1. Go to the CMS Surveyor Training Website at <https://surveyortraining.cms.hhs.gov>.
2. Select the “I AM A SURVEYOR” link.

Login Instructions Continued:

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

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

Recommended Course Prerequisites

New surveyors and staff will benefit from completing the following recommended prerequisites prior to (or concurrent with) the BWS for Survey Staff online course:

- Basic Health Facility Surveyor (BHFS) Online Course: Introduction to Surveying
- POD Online Course

These foundational courses provide an overview of the survey process and introduce learners to the principles of documentation. Both are available on the Surveyor Training Website.

Contact: If you need technical assistance, please contact the CMS Surveyor Training Site Help Desk, either by phone (1-855-791-8900) or by email at cmstraininghelp@hendall.com.

Effective Date: Immediately. This policy 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