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**Center for Clinical Standards and Quality**

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**Ref: Admin Info- 23-08-ALL**

**DATE:** June 20, 2023

**TO:** State Survey Agency Directors

**FROM:** Directors, Quality, Safety & Oversight Group (QSOG) and Survey & Operations Group (SOG)

**SUBJECT:** 2022 Surveyor Skills Review (SSR) Assessments

**Memorandum Summary**

- **SSRs:** Eligible surveyors are required to log into the Quality, Safety, and Education Portal (QSEP), **before September 30**, to complete their annual SSR Assessment, and successfully pass with a score of 85% or higher.
- Regional Training Administrators (RTAs) and State Training Coordinators (STCs) are requested to remind surveyors to complete their SSRs as soon as possible.

**Background:**

CMS is responsible for providing comprehensive training to surveyors (see: Article IV (B)(2) of the 1864 Agreement and 42 CFR 488.314(b)). We're exercising this responsibility through the annual SSR assessment.

**Purpose of the SSR Assessment**

The SSR Assessment is an annual measure of competency and knowledge surveyors need for consistent and effective survey processes.

**Who is Required to Take the SSR Assessment**

Eligible surveyors:

- Are required to take the SSR for their primary survey type and pass with a score of 85% or higher **by September 30**.
- Will be registered for the SSR every year on October, with a due date to complete and pass the SSR by September 30 of the following year.
- Identify their primary survey type as the provider type they surveyed most often in the 12 months before the SSR was available.

Four 2022 SSRs were launched on October 1<sup>st</sup>, 2022:

- Intermediate Care Facilities for Individuals with Intellectual Disabilities (ICF/IID)
- Life Safety Code Facilities
- Psychiatric Residential Treatment Facilities (PRTF)

- Psychiatric Hospitals

Surveyors are eligible to take the SSR if they have:

- Designated their primary survey type in QSEP as:
  - ICF/IID
  - Life Safety Code Facilities
  - PRTF
  - Psychiatric Hospitals
- Completed all of the prerequisite and basic training courses listed on the Quality, Safety, and Education Portal (QSEP) training plan for their primary survey type.
- One year of experience surveying health facilities.

**Action Needed: Before September 30, eligible surveyors are required to log into QSEP, complete their SSR Assessment, and successfully pass with a score of 85% or higher.**

We urge RTAs and STCs to remind their surveyors:

- To complete the SSR as soon as possible.
- The SSR must be completed within 3 hours of starting the assessment.
- They have 3 attempts to complete the SSR. If they don't pass the SSR by the 3rd attempt, they'll need to:
  - Reach out to their RTA/STC and ask for their assessment to be unlocked.
  - Review content in the QSEP remediation plan provided by their RTA/STC.
  - Pass the competency assessment within 30 days of the exam being unlocked with a score of 85% or higher (they'll get 3 more attempts).

Please remind surveyors that it may take time for the RTA/STC to unlock the assessment, so completing the SSR as soon as possible is highly encouraged.

As of June 14, 2023, 50% of surveyors haven't started the SSR yet. With only 4 months until the deadline, it's crucial that those surveyors who haven't already, act as soon as possible to allow time, if needed, to retake and pass the SSR by September 30.

**Contact:**

For questions or concerns relating to this memorandum, please contact [QSOG\\_QSED@cms.hhs.gov](mailto:QSOG_QSED@cms.hhs.gov)

**Effective Date:**

Immediately. Please communicate to all appropriate staff, including RTAs and STCs, as soon as possible.

/s/

Karen L. Tritz  
Director, Survey & Operations Group

David R. Wright  
Director, Quality, Safety & Oversight Group

**Resources to Improve Quality of Care:**

*Check out CMS's new Quality in Focus interactive video series. The series of 10–15 minute videos are tailored to provider types and aim to reduce the deficiencies most commonly cited during the CMS survey process, like infection control and accident prevention. Reducing these common deficiencies increases the quality of care for people with Medicare and Medicaid.*

*Learn to:*

- *Understand surveyor evaluation criteria*
- *Recognize deficiencies*
- *Incorporate solutions into your facility's standards of care*

*See the [Quality, Safety, & Education Portal Training Catalog](#), and select Quality in Focus.*

# Surveyor Skills Review (SSR) Assessment Fact Sheet

## *Overview*

The Surveyor Skills Review (SSR) Assessment is an annual assessment that measures competency and knowledge required for successful surveys. Surveyors will take the SSR assessment after completing all of the prerequisite and basic training courses listed on the training plan for their primary area of expertise.

The SSR is a scenario-based assessment that measures the surveyor's ability to accurately identify situations encountered while on a survey. The competency assessment is based on content from the basic training.

The competency assessment comprises 20 brief scenarios. Each scenario is followed by two questions the surveyor must complete using the given information. Scenarios are specific to provider type and the corresponding questions are randomly selected.

## *Timing*

Initial SSR competency assessments will be released by provider type and in a phased approach.

The SSR will be available October 1<sup>st</sup> each year and will close September 30<sup>th</sup> the following year. Each surveyor will be notified when they are eligible to take the SSR.

## *Eligibility*

To attempt a given SSR assessment, a surveyor must have:

- Successfully completed all prerequisite and basic trainings listed on the primary training plan.
- One year of experience surveying health care facilities.

The required year of experience is counted from the date that a surveyor most recently completed a training in the Basics section of the surveyor's training plan. For example, if a surveyor completed the last basic training in August 2022, the surveyor would be eligible to take the SSR assessment when it becomes available in October 2023.

## *Which SSR Assessment Should a Surveyor Complete?*

Surveyors will only be expected to complete the SSR assessment for the provider type they surveyed most often in the 12 months leading up to the SSR becoming available. For example, if a surveyor's surveys break down to 70% Psychiatric Hospitals and 30% Psychiatric Residential Treatment Facilities between October 2022 and September 2023, the surveyor would only be expected to complete the Psychiatric Hospitals SSR assessment when it becomes available in October 2023.

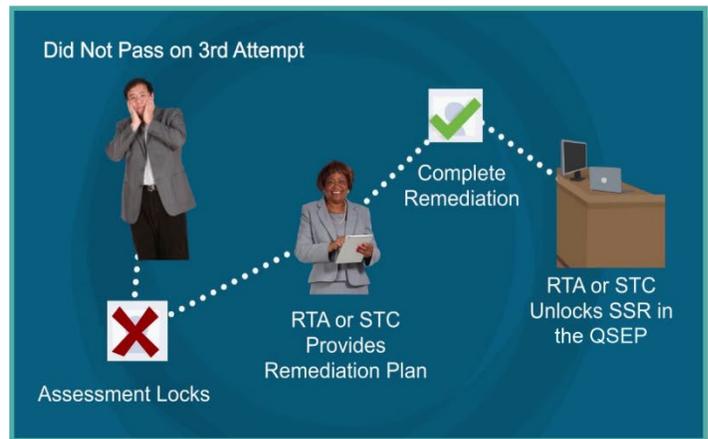
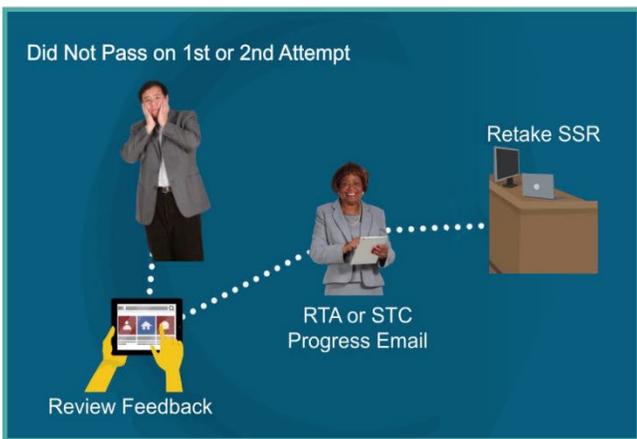
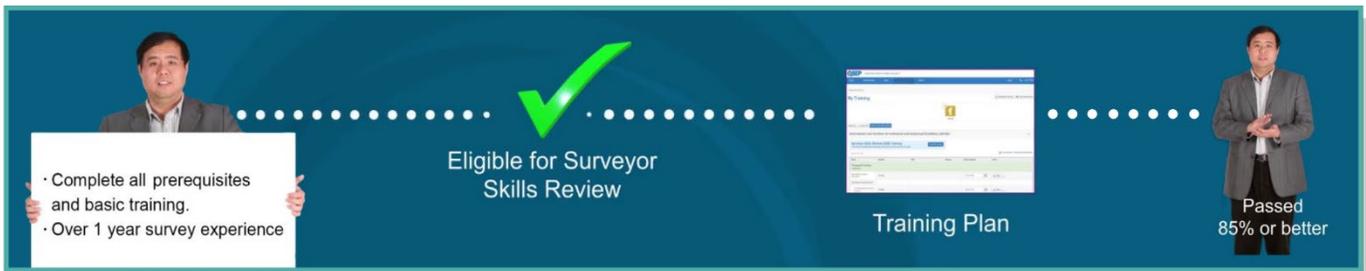
## Format and Passing Requirements

Surveyors must receive a passing score of 85% on the SSR assessment.

After completing the SSR assessment, each surveyor will receive feedback related to the surveyor's success or failure on the competency assessment. The feedback can be accessed at any time through QSEP using the My Training tab. Whether the surveyor passed or failed the competency assessment, the feedback will include recommendations on trainings or sections of the State Operations Manual to review related to each scenario the surveyor completed.

Regional Training Administrators (RTAs) and State Training Coordinators (STCs) will receive a progress email after each surveyor's attempt to complete the SSR assessment. This email includes instructions on where to find the surveyor's feedback forms.

Surveyors may attempt an SSR assessment three times. If the surveyor fails on the first or second attempt, the surveyor may immediately make a new attempt at completing the competency assessment. If the surveyor fails on the third attempt, the competency assessment is locked and the surveyor may not attempt the assessment again. The surveyor's RTA or STC will use the provided feedback to approve a remediation plan that may include retaking trainings from the corresponding training plan. Once the surveyor has completed the approved remediation plan, the RTA or STC may unlock the competency assessment and the surveyor may attempt the SSR assessment again.



## Frequently Asked Questions

### Surveyor Skills Review (SSR) Competency Assessment

**October 2022**

#### **Overview**

This Frequently Asked Questions (FAQs) document will help surveyors prepare for the mandatory annual Surveyor Skills Review (SSR) competency assessment scheduled to be released in the Quality, Safety and Education Portal (QSEP) at the beginning of each fiscal year. The document also addresses the required completion of any outstanding Prerequisite and Basic trainings that are required before the SSR competency assessment can be completed.

#### **Completing Prerequisites and Basics in Your Training Plan**

The Centers for Medicare & Medicaid Services (CMS) is launching a new series of SSR competency assessments for surveyors who survey federal facilities. To be eligible for these new competency assessments, surveyors must have completed **all** prerequisite and basics courses on their training plans and must have at least one year of experience surveying health care facilities. This year will be counted from the last basics course completion date recorded for you in the QSEP system for your Primary Training Plan.

**Q: I have a reading / observational activity that I completed, but it is marked incomplete in my Training Plan. How do I correct it?**

A: You may enter the completion date on your Training Plan.

**Q: I have training that shows incomplete in QSEP, but I completed the training. How do I correct it?**

A: Notify the QSEP Help Desk of the training name and your completion date and provide a certificate of completion.

**Q: I have Training Plans on my record that do not apply to me. What should I do about them?**

A: You can remove an unwanted Training Plan from your "My Training" page by checking the plan you want to remove and then selecting "Remove from My Training". Completed courses from this Training Plan will still show on your completion reports.

**Q: If I remove a Training Plan, can I reactivate it later?**

A: Yes. You can add a Training Plan to "My Training" page at any time.

**Q: If I remove a Training Plan and reactivate it later will QSEP retain completions on that Training Plan?**

A: Yes, QSEP will retain completions on reactivated Training Plans.

**Q: Will QSEP automatically restrict the SSR assessments from surveyors who have not completed all Prerequisite and Basic Training Plans?**

A: Yes, all surveyors' Training Plans will be automatically reviewed for completion of all Prerequisite and Basic trainings before the SSR assessments are made available. In addition, one year must have passed from the completion date of the last basic training in the Primary Training Plan.

**Q: Will all basic provider-type Training Plans have this same format?**

A: Yes, all basic provider-type Training Plans will have SSR assessments available.

**Q: What do I do if one of my surveyors has left?**

A: Please notify the QSEP Help Desk of the surveyor's name and Learner ID.

### **Surveyor Skills Review (SSR)**

The SSR measures surveyor competencies and knowledge required for successful surveys of specific provider types. You will demonstrate competency based on skills and knowledge provided in guided surveys and online trainings.

You are eligible for the SSR assessment after completing all required training on your QSEP Training Plan and after you have one year of experience surveying federal facilities. You will be notified when you are required to complete the SSR assessment.

Each yearly competency assessment will include simulated scenarios and scenario-specific questions to evaluate your skills and identify opportunities for improvement.

Learners must achieve a score of 85% or greater to pass the SSR assessment.

**Q: Who is required to take the SSR competency assessment?**

A: You are eligible for the SSR assessment after completing all required training on your QSEP Training Plan and after at least one year has passed since you completed the last training in the corresponding QSEP Training Plan. You will be notified when you are required to complete the SSR assessment.

**Q: Where can I find the SSR competency assessment?**

A: SSR assessments can be accessed on QSEP in the Surveyor Skills Review (SSR) section of the surveyor's primary Training Plans.

**Q: Are SSR competency assessments mandatory?**

A: Yes, the SSR assessments are mandatory.

**Q: When will I be required to take the SSR assessment?**

A: The initial SSR competency assessments will be released by provider type and in a phased approach. The SSR will be released annually on these dates:

<b>Competency Assessment</b>	<b>Competency Assessment Available</b>	<b>Completion Due Date</b>
SSR Annual	October 1	September 30 of the following year

**Q: How will I know when I have a mandatory SSR assessment coming up?**

A: Once you become eligible for an SSR assessment, you will receive several email notifications, as shown on the schedule below:

<b>SSR Notifications</b>	<b>Delivery Timeline</b>
1 <sup>st</sup> notification sent	30 days before the SSR assessment becomes available
2 <sup>nd</sup> notification sent	On the same day the SSR assessment become available
3 <sup>rd</sup> notification sent	2 months prior to the SSR completion due date
4 <sup>th</sup> notification sent	1 month prior to the SSR completion due date
5 <sup>th</sup> notification sent	3 weeks prior to the SSR completion due date
6 <sup>th</sup> notification sent	2 weeks prior to the SSR completion due date
7 <sup>th</sup> notification sent	1 week prior to the SSR completion due date

**Q: Do I need to complete the annual SSR assessment to be eligible for the next year's SSR?**

A: Yes, you will need to complete the previous year's competency assessment before you move on to the next year.

**Q: Is the SSR assessment a timed activity?**

A: Yes. You must complete the competency assessment within 3 hours of starting.

**Q: What happens if I am unable to complete the SSR assessment within 3 hours?**

A: The competency assessment will be marked as "failed." If failed on the 1<sup>st</sup> attempt, you will be given two more attempts to complete the SSR assessment. If 3<sup>rd</sup> attempt is failed, the competency assessment will be locked and notification will be sent to your supervisor, State Training Coordinator (STC) or Regional Training Administrator (RTA). Once your supervisor unlocks the SSR assessment, you will have 3 more attempts to complete the SSR assessment within 30 days.

**Q: Will I be able to print a certificate of completion for the SSR assessment?**

A: Yes, you will be able to print a certificate of completion.

**Q: If I fail the SSR assessment, will I be able to retake it?**

A: Yes, surveyors will have up to six attempts to complete the SSR assessment over the course of one year.

**Q: Will I get feedback on how well I did on the competency assessment?**

A: Yes, a feedback report will be generated after completion of each competency assessment. This report will provide the following information: whether the correct/incorrect answer was provided, feedback on how to approach the scenario, resources, and training material you should reference to help answer the question.

**Q: If I miss an SSR assessment completion due date, can I take it later?**

A: The competency assessment will be marked "failed" and will be locked. Notification will be sent to your State Training Coordinator (STC) or Regional Training Administrator (RTA). You should communicate with your STC or RTA to unlock your account. Once they unlock the SSR assessment, you will have 3 more attempts to complete the SSR.

**Q: Are there any CEUs related to the SSR assessment?**

A: No, there are no CEUs related to the SSR assessment.

**Q: Can STCs and RTAs generate the SSR assessment status report?**

A: Yes, STCs and RTAs will be able to generate the SSR status report. They will have access to the "Find By SSR Assessment" report detailing the completion status and completion date for their assigned surveyors. RTAs and STCs can also filter the report by SSR assessment status (In Progress, Completed, Not Started). This report can be found in the Reports section within QSEP.

**Q: Where can STCs and RTAs locate the Remediation plans to assist surveyors in successfully completing the competency assessment?**

A: The SSR Remediation Plan Guide can be found in QSEP by selecting the RTA/STC's name in the blue navigation bar. Select the SSR Remediation Plan Guide in the drop-down menu. These can be downloaded if desired.

# ANNUAL SURVEYOR SKILLS REVIEW ASSESSMENTS

## WHAT IS THE SURVEYOR SKILLS REVIEW (SSR) ASSESSMENT?

The Surveyor Skills Review (SSR) Assessment is an annual assessment that measures competency and knowledge required for successful surveys.

The SSR assessment measures a surveyor's ability to accurately identify situations encountered while on an actual survey. The competency assessment is based on content from the basic training.

The competency assessment comprises 20 brief scenarios.

Each scenario is followed by two questions the surveyor must complete using the given information. Scenarios are specific to provider type, and the corresponding questions are randomly selected.

## WHO NEEDS TO TAKE THE SSR?

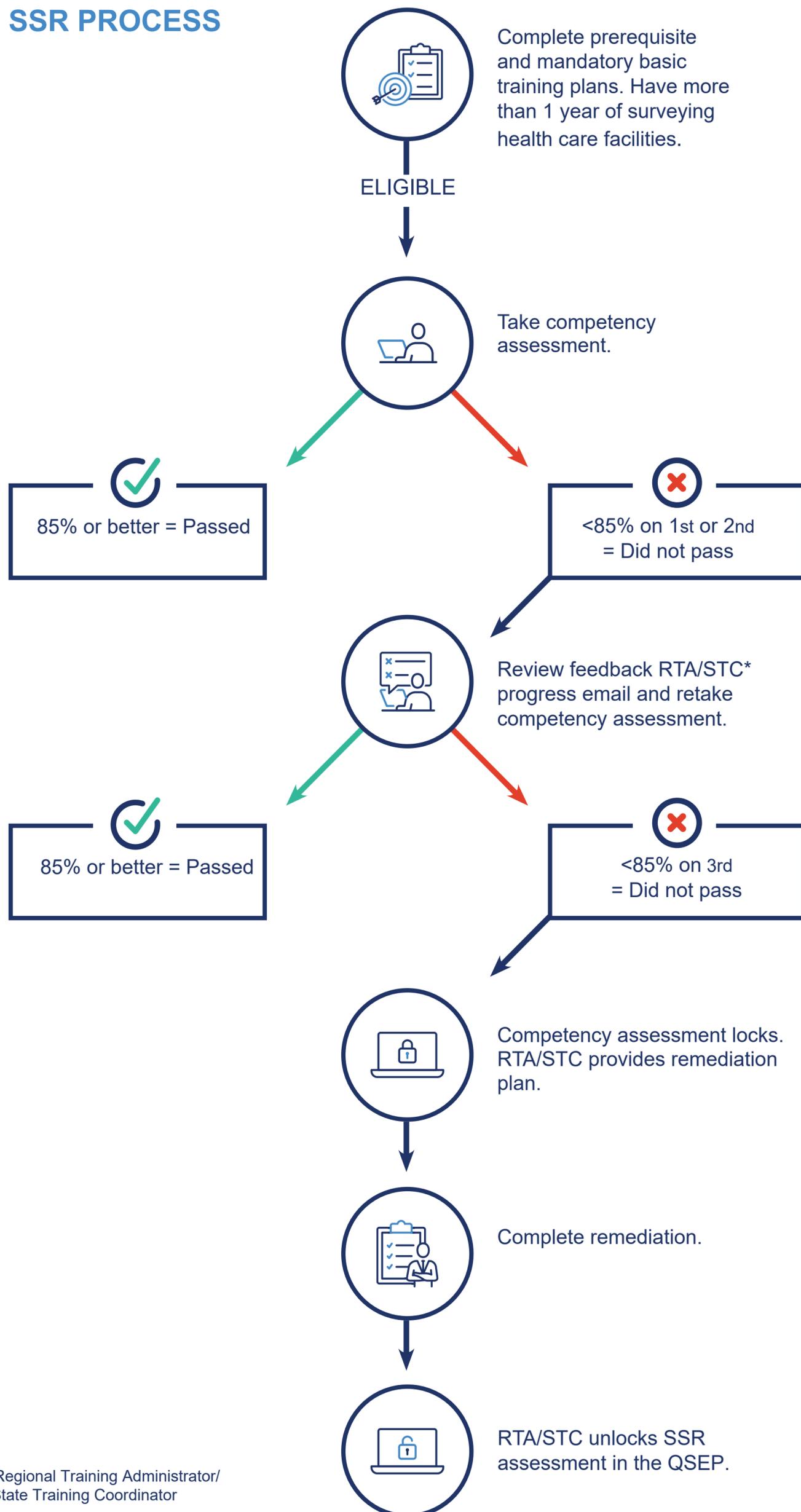
To attempt a given SSR assessment, a surveyor must have:

- Successfully completed all prerequisite and basic trainings listed on the surveyor's Primary Training Plan.
- More than one year of experience surveying health care facilities. This year will be counted starting from the last basics course completion date recorded in the Quality, Safety & Education Portal (QSEP) on the surveyor's Primary Training Plan.

## WHEN IS THE SSR ASSESSMENT COMING?

The SSR competency assessment becomes available on October 1 and closes on September 30 the following year.

## SSR PROCESS



\* Regional Training Administrator/  
State Training Coordinator