



The National Long-Term Care Ombudsman Resource Center

Long-Term Care Ombudsman Certification Survey

March 2010



States that participated in the survey:

1. Indiana
2. Rhode Island
3. Colorado
4. Nebraska
5. North Dakota
6. Vermont
7. Wisconsin
8. Maryland
9. Connecticut
10. Michigan
11. South Carolina
12. Utah
13. Oklahoma
14. Arkansas
15. Alabama
16. Alaska
17. Wyoming
18. Florida
19. Pennsylvania
20. Kansas
21. Montana
22. Louisiana
23. Ohio
24. New York
25. South Dakota
26. Washington
27. Puerto Rico
28. Iowa
29. Delaware
30. Kentucky
31. Georgia
32. North Carolina
33. Nebraska
34. Minnesota
35. Texas
36. Massachusetts
37. California
38. Tennessee
39. Arizona
40. Illinois
41. Hawaii
42. District of Columbia

- 43. New Mexico
- 44. Nevada
- 45. Missouri

*Represents States that completed the survey.

** Special thanks to the training committee: Kathie Gately, Linda Sadden, Dale Watson, Kimberly Baker, Bob Dreyer, Mary McKenna, Carol Scott, Arlene Franklin, Virginia Bell, Cathy Hart, Teresa Stricker, Daniel Musto and Patty Pierson

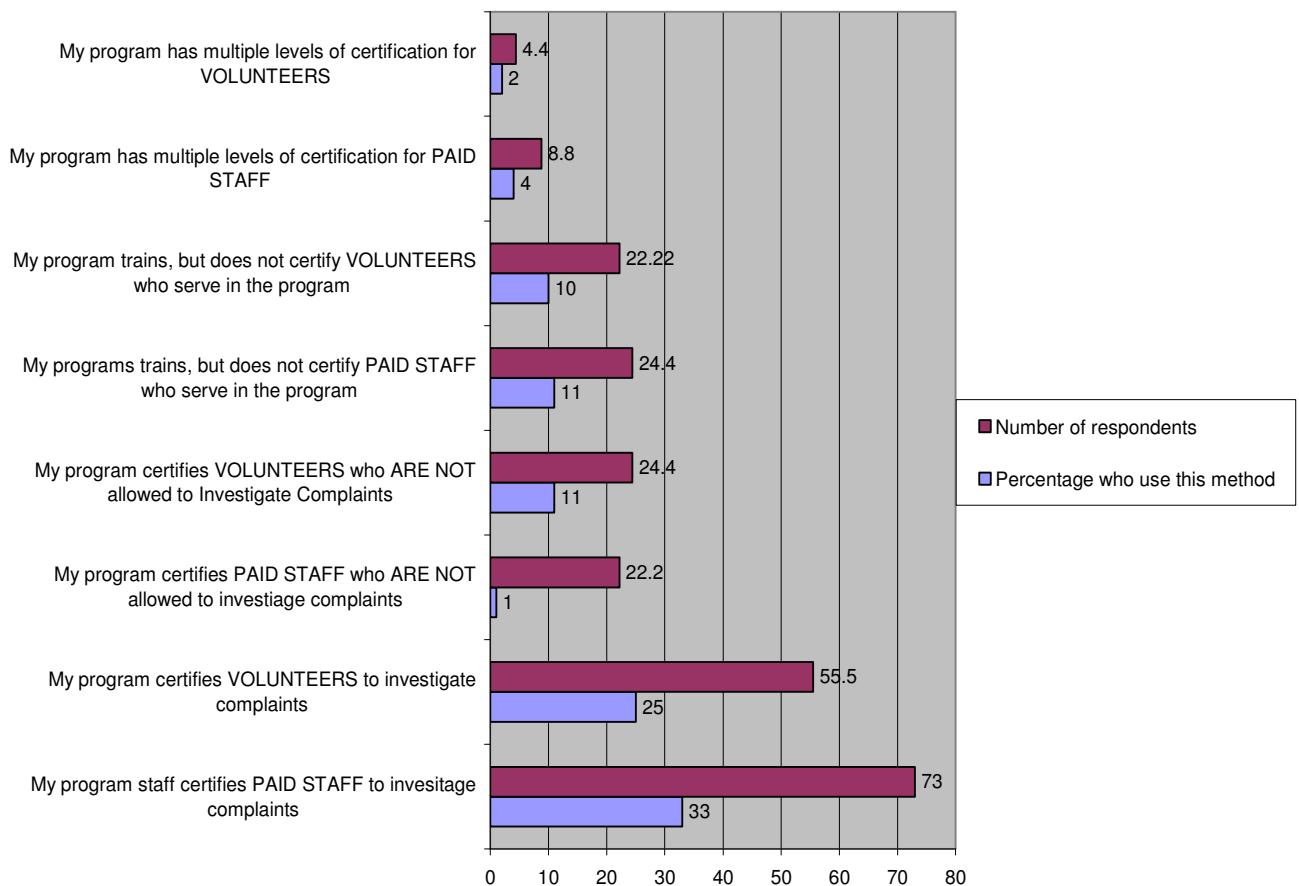
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Survey Questions and Results

Certification is achieved when an individual successfully fulfills the requirements of the training process to become a long-term care ombudsman (LTCO). Some states have additional criteria that must be met before an individual is designated to serve as a LTCO. The questions in this form relate to the initial training process.

1. Certification/Initial Training (check all that apply)



Other:

- My program trains and certifies residents living in LTC facilities (PEER) (PA)
- I train and certify paid Regional Ombudsman Coordinators (AZ)

Additional Comments:

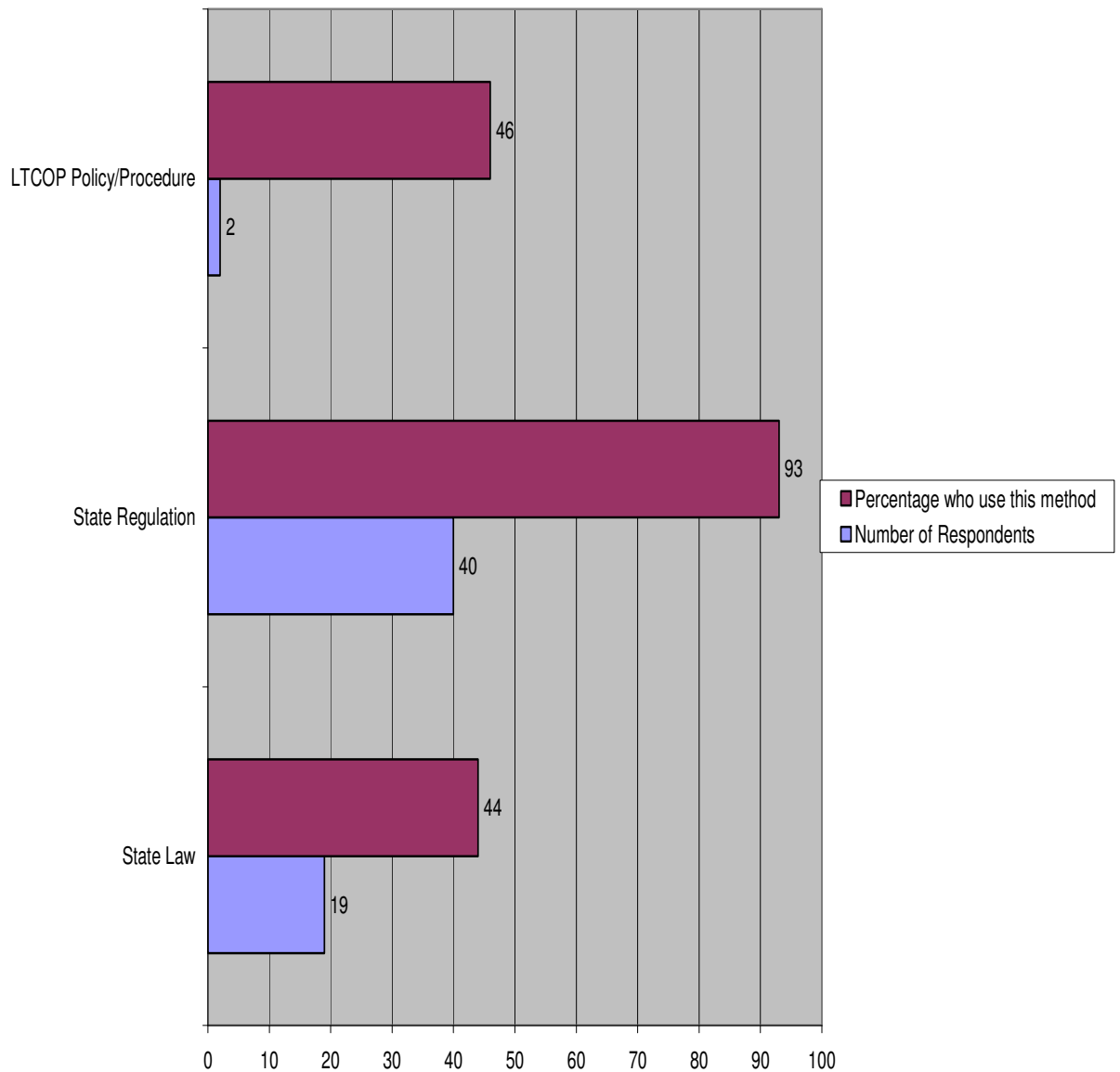
- The SLTCO provides 28 hours of orientation training to paid staff. Volunteers are welcome to attend state-sponsored training; however, they are mostly trained at the local level.
- Certification for paid staff and volunteers in development. New training program implemented in summer of 2009.
- All Ombudsmen in Oklahoma are required to be fully trained and certified before they are allowed to investigate any complaint or visit any long-term care facility as an Ombudsman. (OK)
- We also have 3 AAAs who have trained their own Friendly Visitors; they are volunteers and ARE NOT allowed to investigate complaints.
- Paid Staff completes the same Certification training as volunteers although it is not an "investigation certification"
- Currently both paid staff and volunteers must complete a 36-hour training to become certified. Only certified staff and volunteers may investigate complaints and access residents' records when necessary.
- Associate Level 1 volunteers handle uncomplicated complaints.
Associate Level II volunteers ASSIST paid staff with complex complaints.
However, there are unique/rare circumstances where a volunteer is certified as a Specialist, which enables him/her to investigate complaints alone.
- All LTCO are state employees under my direction at this time
- Some of our volunteers get a little burned out and so participate in senior fairs or do office work instead of visiting residents in the facilities but ALL volunteers receive the same training and are then certified. If they discover going into the facility just isn't for them but still want to help our program, we will find things for them to do. (HI)
- NM has one certification for staff and volunteers. We are a centralized state, so the volunteers "report to" paid state Regional Ombudsmen Coordinators (NM)
- In N. C. our community advisory committee volunteers are provided jurisdiction to assist residents with grievances through the N. C. General Statutes that created them. There are initial training requirements for newly appointed volunteers prior to assuming their duties. (NC)
- All staff and volunteers are trained and certified to investigate complaints. (RI)
- Currently we do not have volunteers only paid state staff. (NV)
- Uncertified volunteers may provide office support or may make "friendly visits" to facilities to provide life enrichment or one on one visit with individuals. If a complaint were voiced, the uncertified volunteer shares ombudsman contact info or contacts the ombudsman to assist the resident. (TX)
- I'd like to say we certify the staff and volunteers, but based on the fact that there is no testing or requirement for continued training, I am thinking that the answer is that we don't certify people. No one is assigned to visit a facility until they have completed the training and the local ombudsman approves them. (MO)
- Our program also makes sure that any interns or short term granted volunteers (scholarships, law firm donations, small 6 to 12 month granted programs) attend 15 hours of class room training, 16 hours of field training, and attend our monthly 2 hour in-services; however, they are not certified to conduct investigations. (DC)
- We have one volunteer who does data entry. She receives relevant training, but is not certified. (VT)

2. If, in question 1, you responded that your program has multiple levels of certification for paid staff and/or volunteers, please list and define/describe each level

Additional Comments:

- Level of certification.....
Certified Back-Up's
Regional Ombudsmen
State Certified Volunteer Ombudsman Instructors
Certified Volunteer Ombudsmen
Certified Regional Ombudsmen
Certified Volunteer Ombudsman Coordinators
- VOLUNTEERS:
Associate Level 1-advocacy, intake, handle uncomplicated complaints, w/supv follow up on complex complaints, enter volunteer reports upon approval
Associate Level 2-LEVEL I duties + assist staff w/complex complaints
PAID:
Specialist-handle complex complaints, vol prog mgt
Program Director-Specialist duties, manage prog
- Our state requires that the Ombudsman pass a written test at the end of certification training. In addition before, becoming certified the Ombudsman must visit 2 NF's and 2 Group Homes with the supervisor. During these visits the supervisor is shadowing the Ombudsman to ensure they are putting what they have learned into practice.

**3. Certification/Initial Training Requirements for PAID STAFF are located in:
(check all that apply)**



Other:

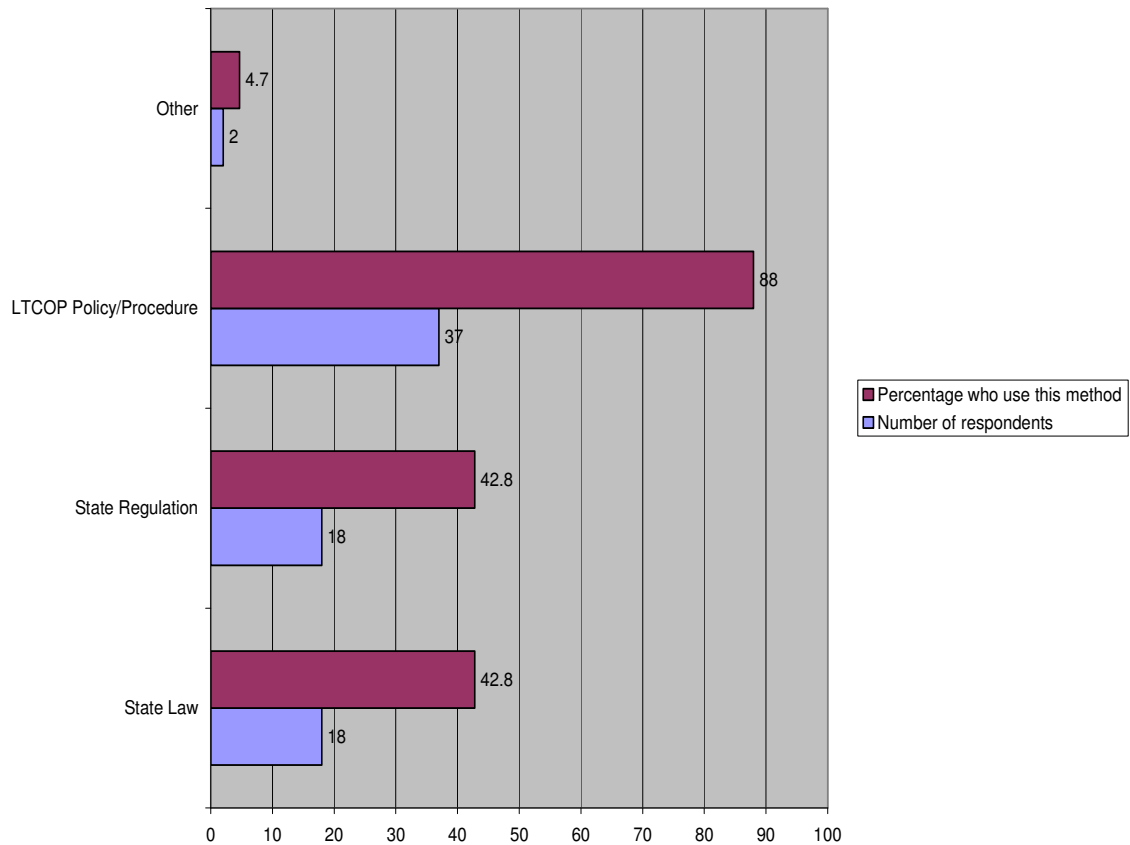
- SUA program standards
- Aging Program Directives

Additional Comments:

- All of the above are being updated.
- Training criteria can be found in Oklahoma Administrative Code 340:105-11-240
- Referenced in law, rule, and policy.
Ch. 101 Human Resource Code, Ch. 85 Texas Administrative Code

- We have standardized training material, but each local program does their own training, so there is not standardized training, yet.
- State law requires training and certification, but the actual requirements are in procedures developed by the SLTCO and program staff.

4. Certification/Initial Training Requirements for VOLUNTEERS are located in: (check all that apply)



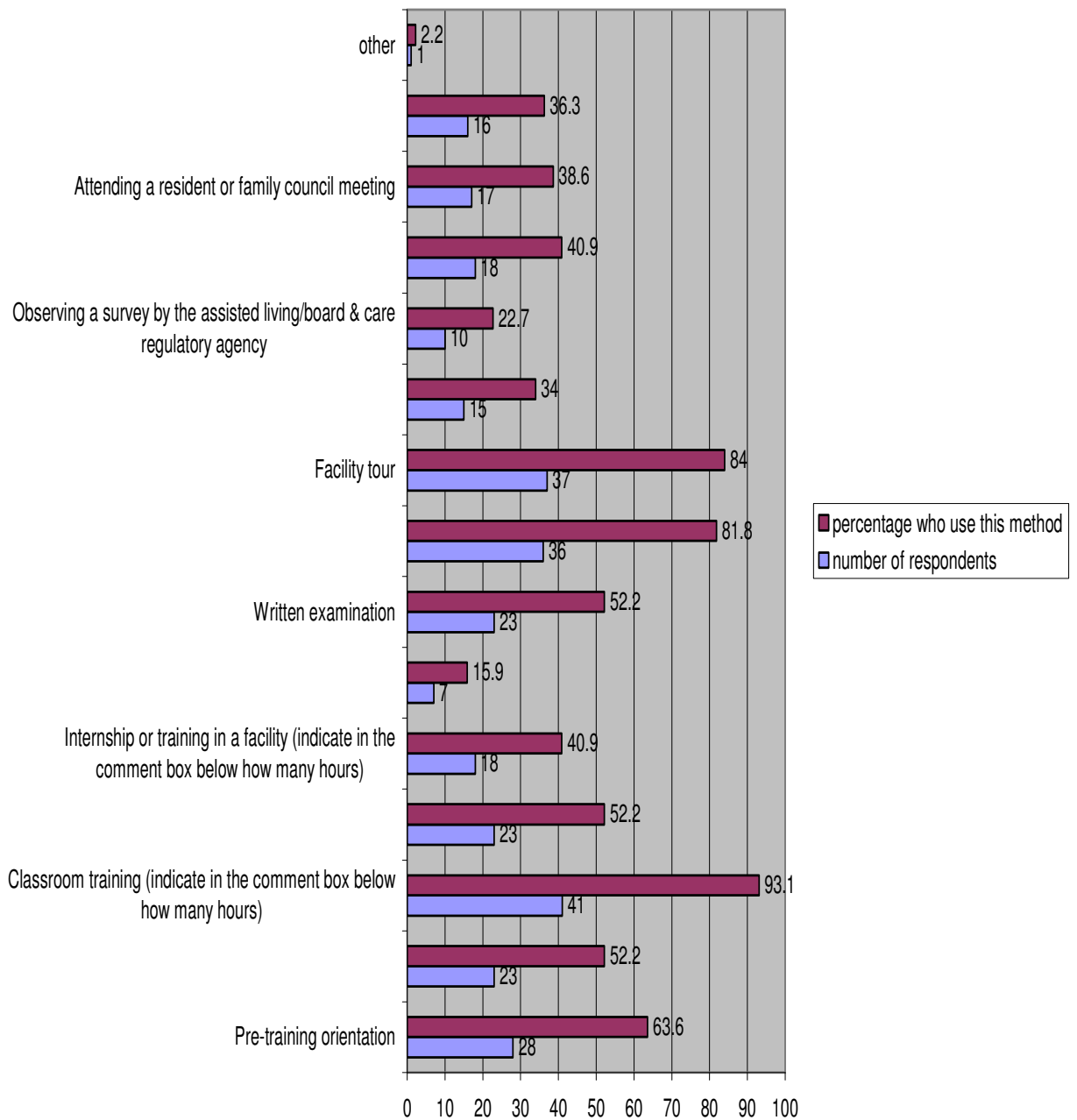
Other:

- Volunteer Training Manual
- Aging Program Directives

Additional Comments:

- Training criteria can be found in Oklahoma Administrative Code 340:105-11-240
- Our state ombudsman law references certain orientation/initial training requirements for volunteers

5. Components of Certification/Initial Training does training for individuals who investigate complaints include: (check all that apply)



Categories for chart above:

- Other
- Formal performance evaluations
- Attending a resident or family council meeting
- Probationary period
- Observing a survey by the assisted living/board & care regulatory agency
- Observing a survey by the nursing home regulatory agency

- Facility tour
- Mentoring or job shadowing (indicate in the comment box below how many hours)
- Written examination
- Oral examination
- Internship or training in a facility (indicate in the comment box below how many hours)
- Self-study assignments (indicate in the comment box below how many hours)
- Classroom training (indicate in the comment box below how many hours)
- Interviewing facility staff or listening to them explain their roles
- Pre-training orientation

Other:

- Network Meetings

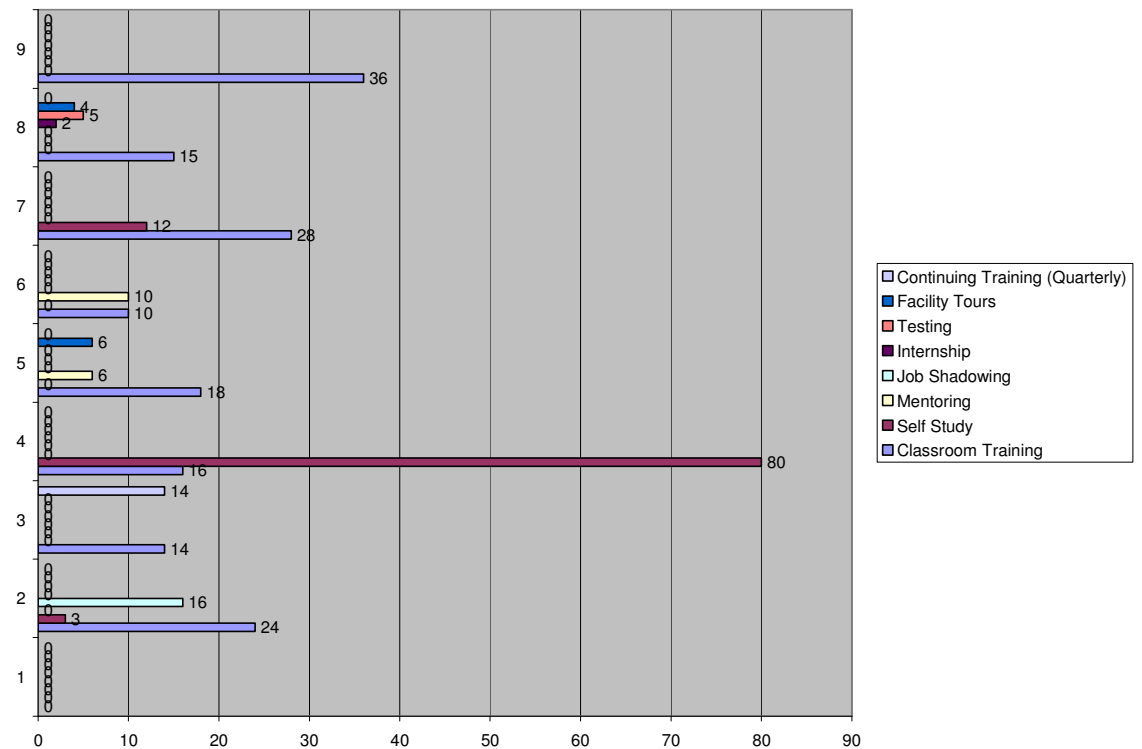
Additional Comments:

- At the local level, new staff may participate in additional activities as listed above. As mentioned above, our process is being updated.
- 24 hours classroom; 3 hours self-study; 16 hours job shadowing (Total : 43 hours)
- All initial volunteer training consists of two day (14 hours) training and then monthly training sessions. (monthly but must consist of a total of 18 hours per year by state law) (Total : 14 hours)
- Hours for classroom training--16 hrs.
Hours for self-study- 80 hrs.
Hours for mentoring or job shadowing- on-going (Total : 96+)
- The volunteer training is 18 hours of class time and 12 hours of facility tour, internship and mentoring. (Total : 30 hours)
- State law requires 20 hours of training which includes a combination of classroom and field training with a veteran ombudsman mentor (Total : 20 hours)
- Case examples; group exercises
- Classroom hours = 28
internship hours = 12
our fact staff interview is limited to the administrator, and is not really extensive enough. (Total : 40 hours)
- Alaska Certified Volunteer LTCO are trained to advocate and resolve issues before they elevate to the complaint level. Although they are not trained as investigators, the boxes checked above included training elements that are incorporated in our Volunteer Training.
20 hours classroom training
Chapter testing
4 hours ALH/Nursing home mentoring/facility tours (Total : 24 hours)
- Generally 36 hours of classroom time, although we are examining options that allow for certain modules to be done on-line or as self-study. (Total : 36 hours)
- 32 hours
- Mentoring or job shadowing - 40 hours
- 30 hours classroom 5 hours self study
6 hours of shadowing
- Iowa survey agency does not allow LTCO to accompany them on surveys. Oral and written exams are not allowed within our state HR policies. Self study and training in a facility is flexibility based on needs of new employee.
- The number of hours for these various activities is not specified. When our Policy and Procedure Manual is revised next year these requirements will be tightened up.
- SLTCOP Assists as requested (NC)
- Classroom training is required by law and regs and is 20 hours.
The probationary period is in regulation and it is three months.

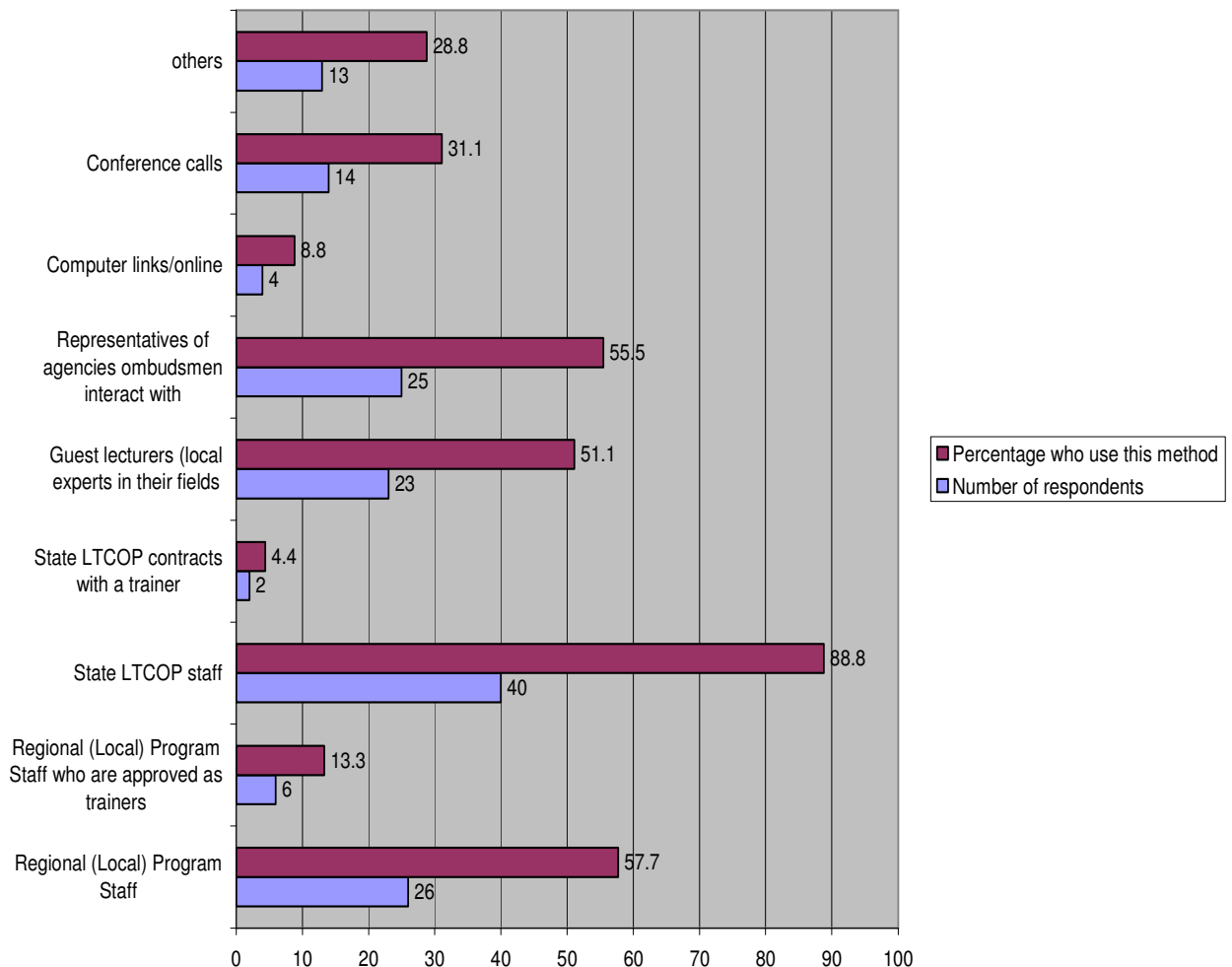
The mentoring period is policy and used only if it is applicable. The time period is up to the discretion of the local coordinator. Only paid staff does a written exam and that is the NORS quizzes for data entry.

- Our training is on-going for about six months through their probationary period. It is very intense and advocacy oriented.
- Job shadowing has become a valuable training tool. The length of time a volunteer spends in the process depends on the back ground of the individual. We have people that come from medical and long term care backgrounds that don't need as much shadowing; others without that kind of background will spend more time shadowing.
- We recommend that volunteers observe a survey or attend a resident council meeting before certification, but we expect that they will do both soon after certification.

Chart with Training Hours taken from comments:



**6. Delivery of Certification/Initial Training to PAID STAFF.
Training is delivered by: (check all that apply)**



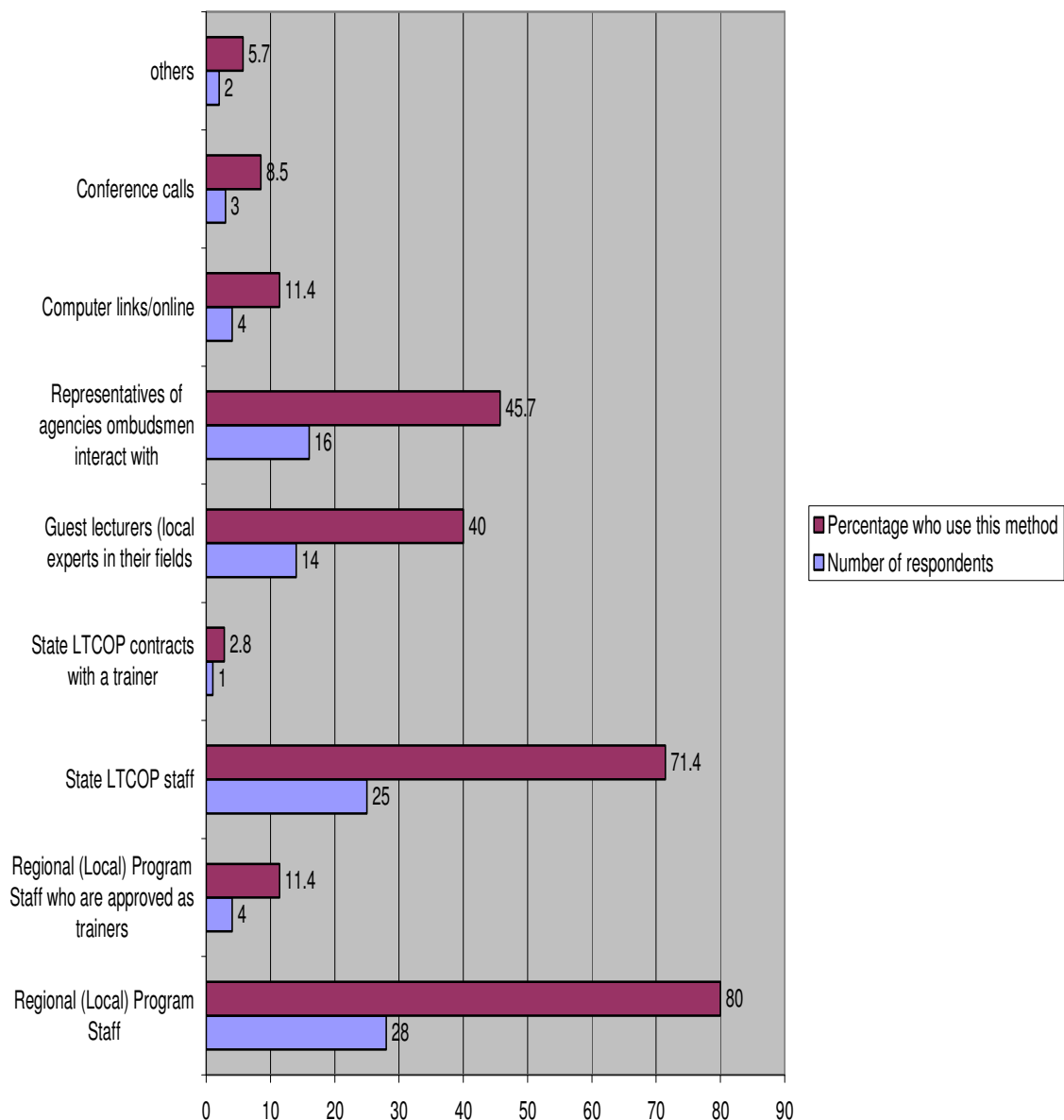
Other:

- Only the State LTC Ombudsman
- Network Meetings
- SLTCO Conferences
- Visit and discussion with facility staff (DE)
- All paid staff training is delivered by the Deputy state Ombudsman before certification and then continuing education is conducted quarterly by state LTCOP staff.
- Regional staff do the pre and post classroom training pieces. LTCOP staff or a contractor do the classroom part. The performance evaluation is done by regional staff and then again by SLTCO staff. We have on-line some computer modules that we hope to use pre-training as classroom preparation and then as reinforcement post training.
- Training is supplemented with on the job training at the regional (local level) staff between official training sessions offered by the SLTCOP. Effective August 2009, webinars are

heavily utilized to supplement training and reduce/eliminate several overnight visits to Columbus for training.

- We don't have an "approval" process for trainers - some staff ombudsmen have expertise in certain areas and participate in providing certification training.
- We have not hired new paid staff in at least 4 years.
- State LTCO staff coordinate the training. During classroom training, local ombudsman staff and representatives of agencies that ombudsmen interact with (including LTC regulatory agencies) present part of the training. During part of the in-facility training, facility staff provide the training (with SLTCO staff providing context and LTCO perspective). (GA)
- Rhode Island has only the state office and no local offices thus making us the main speakers and trainers, although we do use representatives of other agencies that we interact with to come in and speak. (RI)
- The actual certification training is 30 book hours plus in field work. (NV)
- This is not a formal training. They spend 6 to 8 hours in conversation with state office staff. (No manual or outline of content.) We do have them meet the staff in the survey agency in central office.
New staff go to the volunteer training held by one of the local programs. (MO)

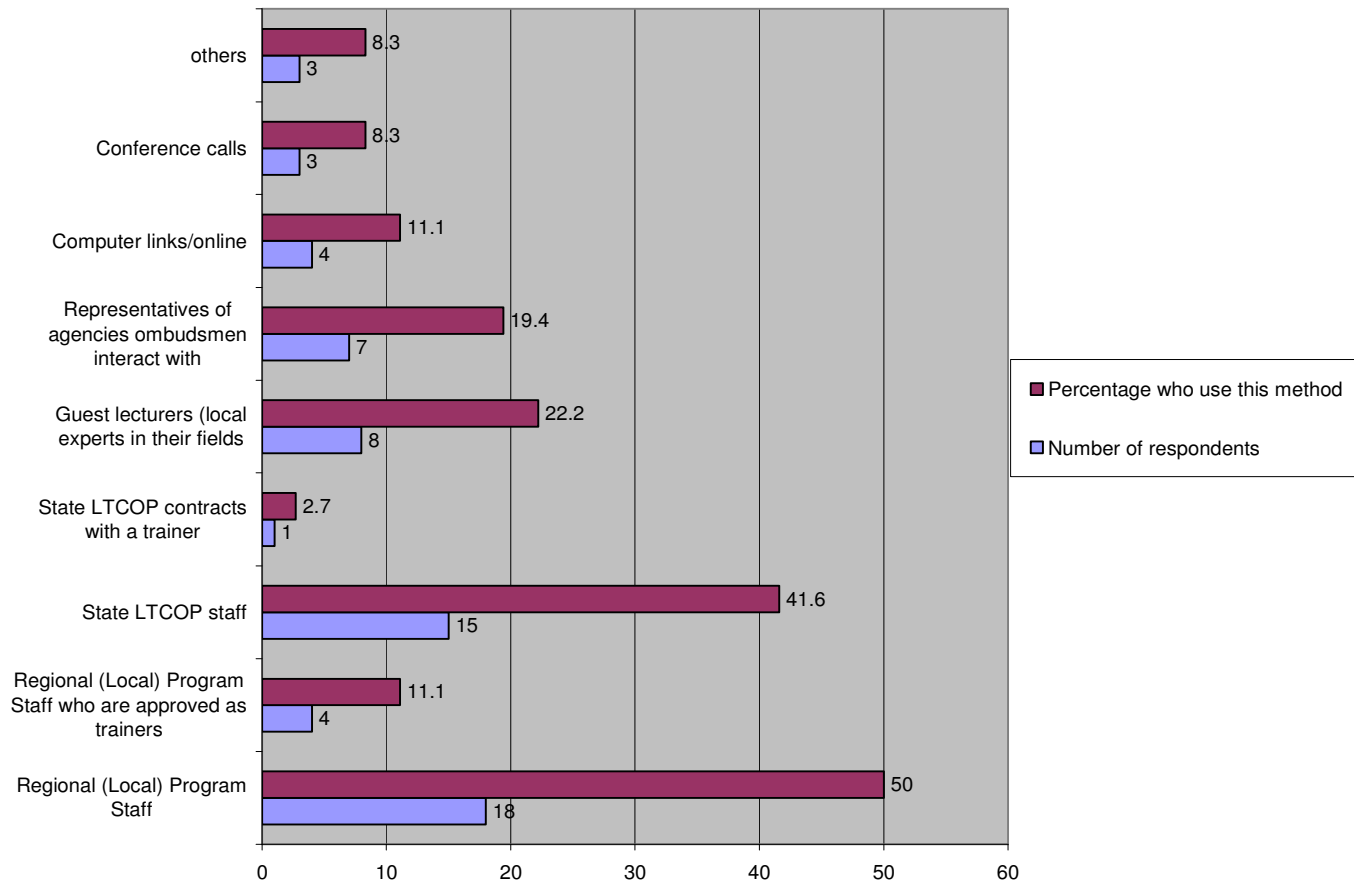
7. Delivery of Certification/Initial Training to VOLUNTEERS Who Resolve Complaints. Training is delivered by: (check all that apply)



Additional comments:

- Most volunteer training is delivered by paid program staff but State LTCOP staff conduct some volunteer training as a means to train the trainer for new program staff.
- As space is available, volunteers may participate in classroom training designed for staff. Otherwise, local program staff provide the classroom training. Local program staff oversee remaining training requirements except for the written and oral exams which are administered by SLTCO office.
- Guests and representative trainers may be used, but not required.
(patty.ducayet@dads.state.tx.us)
- We are in the process of trying to have the training done by state staff. (carol.scott@dhss.mo.gov)

8. Delivery of Certification/Initial Training to VOLUNTEERS Who Do NOT Resolve Complaints Training is delivered by: (check all that apply)



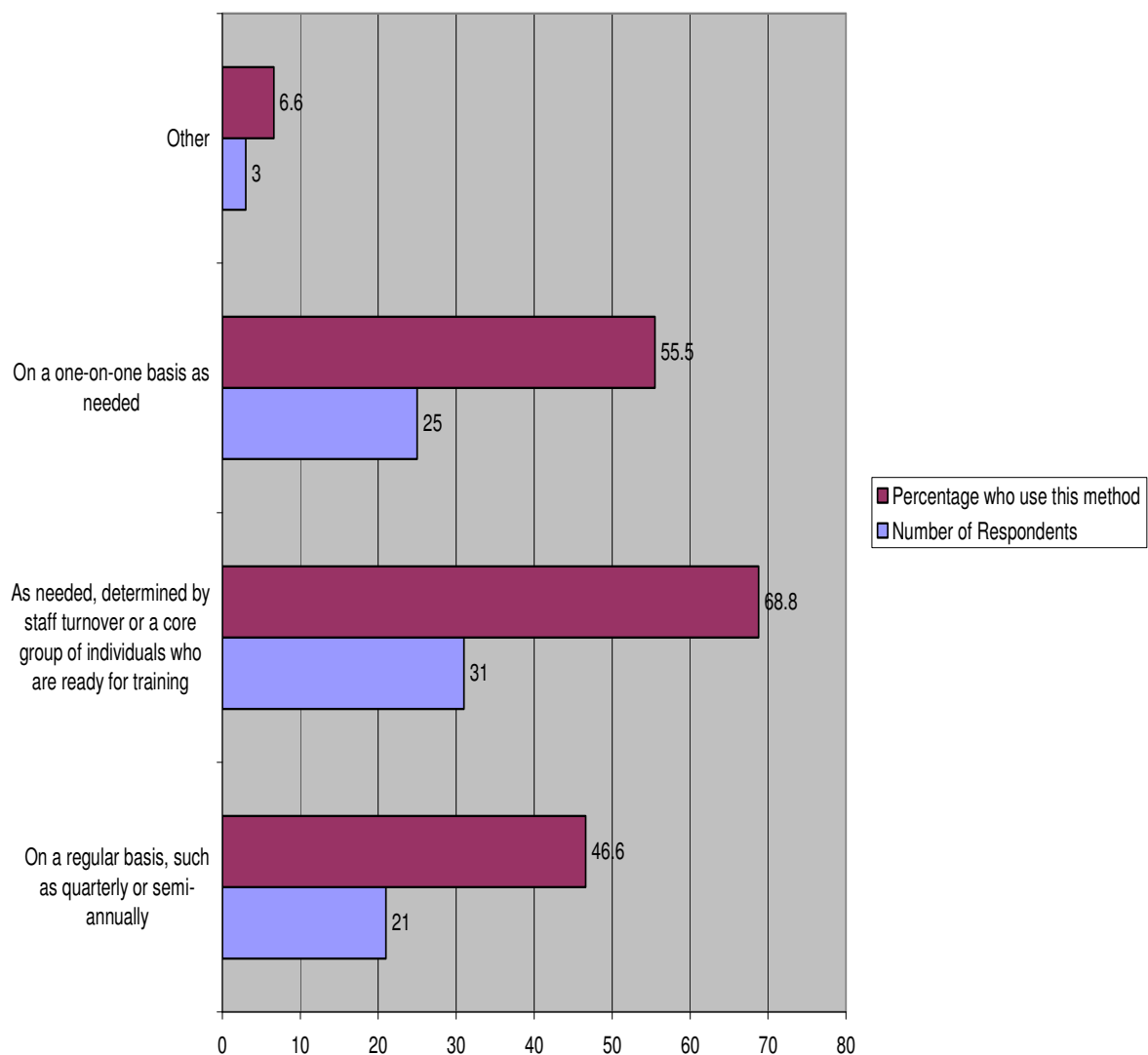
Other:

- Only the SLTCO & SCVOI's
- Network Meetings
- All Ombudsman, paid or volunteer, in Oklahoma investigate complaints (Oklahoma)

Additional Comments:

- There is no "certification" training for volunteers who do not resolve complaints. But "volunteer visitors" do receive training from local program staff. (bakurtz@dhr.state.ga.us)
- All volunteers resolve complaints. (patty.pierson@nebraska.gov)
- Per N.C. General Statute authorization, all appointed volunteers are trained in complaint management per policy and procedure. (sharon.wilder@ncmail.net)
- All volunteers resolve complaints. (carol.scott@dhss.mo.gov)

9. Frequency of Certification/Initial Training for PAID STAFF Training FOR PAID STAFF is conducted: (check all that apply)



Other:

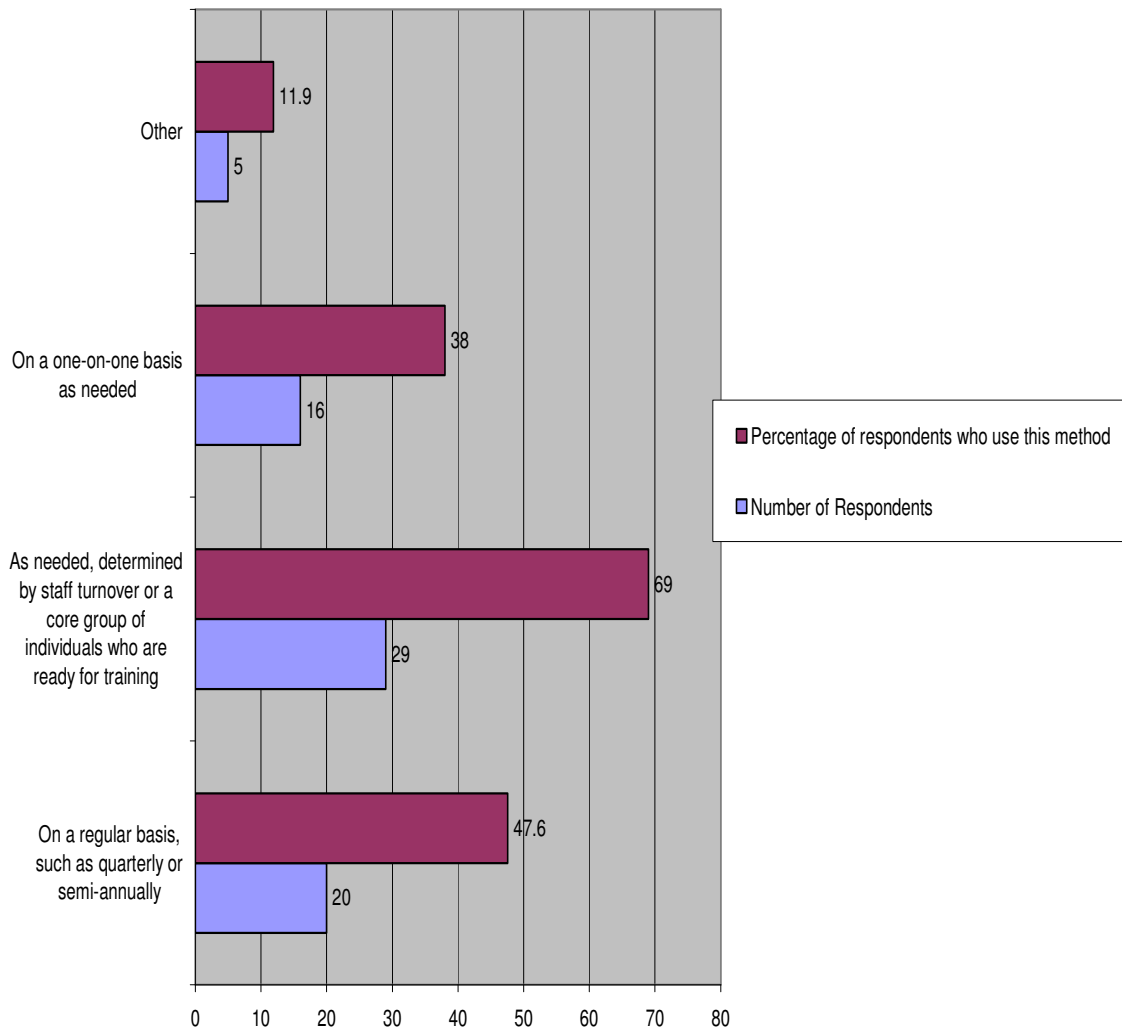
- Annual conference, network meetings
- LTCO National Conference
- Attending SLTCO Conference/Trainings

Additional Comments:

- We use all of the above methods.
- Regional Ombudsman training is quarterly via conference call, or in person meetings. Yearly recertification training for all Ombudsman
- The Office of the State Long-Term Care Ombudsman provides an initial 2-day orientation for new local ombudsman coordinators (paid staff). Certification is arranged for on an individual basis and is dependent on location and availability of a 36-hour training program.

- Option checked reflects current frequency (past two years). Previously, training was offered quarterly and adjusted as needed depending upon core group of individuals who were ready for training.
- We meet monthly and do some type of education.
- In addition to initial certification for any new ombudsman hired by a AAA, the State Office provides 20 hours ongoing certification training annually 5 hour segments each quarter. (NC)
- Our state agency provides for training on a quarterly basis provided via a contractor. In addition, staff attend other training as it is available. Bi-Weekly staff meetings are held where guest speakers from other agencies provide training also. (NV)
- Prefer to train in a group, but deliver one on one so that new staff are not left waiting. (TX)
- We have 8-9 in-services each month for both paid staff and volunteers. The paid staff receive supplemental training as needed throughout the year. (VT)

10. Frequency of Certification/Initial Training for VOLUNTEERS Training for VOLUNTEERS is conducted: (check all that apply)



Other:

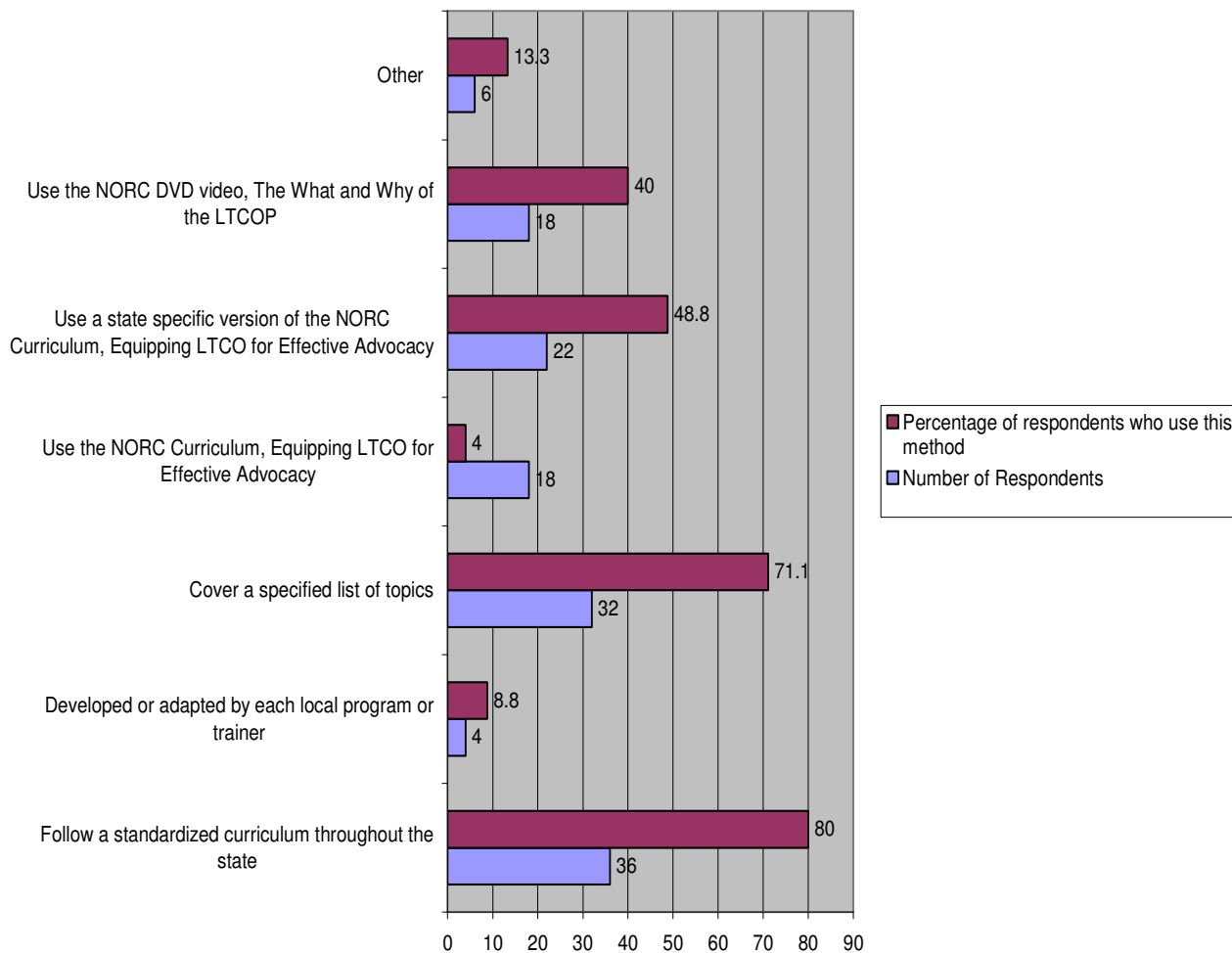
- initial training course
- annual conference, network meetings

- We require 20 hours per year as scheduled by the local, supervising ombudsman (DE)
- CT is currently redesigning its volunteer training program. It has been a 5 day training/4 hours per day, but we are developing a 1 day classroom experience with an 8 week internship with a trained Volunteer mentor. This training will have a prescribed course and will mostly take place in a skilled nursing facility with the mentor and at times the regional ombudsman.
- All initial volunteer training consists of a two day (14 hours) training and then monthly training sessions. (monthly but must consist of a total of 18 hours per year by state law)

Additional Comments:

- This is a hypothetical for us at this time. Our volunteer component has really become very inactive. While we will hold one-on-one for paid staff, it is likely that we would include volunteers in that class rather than arrange a separate one.
- With 41 local programs and about 1,000 volunteers training frequency varies. Depending on size and need, local certification training runs from annually to quarterly. We are encouraging regional training to ease the training burden on smaller programs whose coordinator are not full-time ombudsman staff in their respective agencies.
- This is done in 13 regional offices and depends on their needs. They are in charge of setting up and conducting their training.
- The Denver metro area program conducts training 3 times a year. All other programs conduct training as needed. (CO)
- They have the opportunity to attend the trainings conducted each year through the state office, but trainings are also offered by the local Ombudsman if that is best for their schedule (KY)
- If space is available in SLTCO-sponsored staff certification training class, volunteers may participate. Otherwise, local programs determine their own training schedule. (GA)
- Regional LTC Ombudsmen are charged through the LTCOP State Statute to provide training and consultation to the appointed volunteers. (NC)

11. Curriculum and Training Resources for Certification/Initial Training for PAID STAFF Training content and methodology for PAID STAFF: (check all that apply)



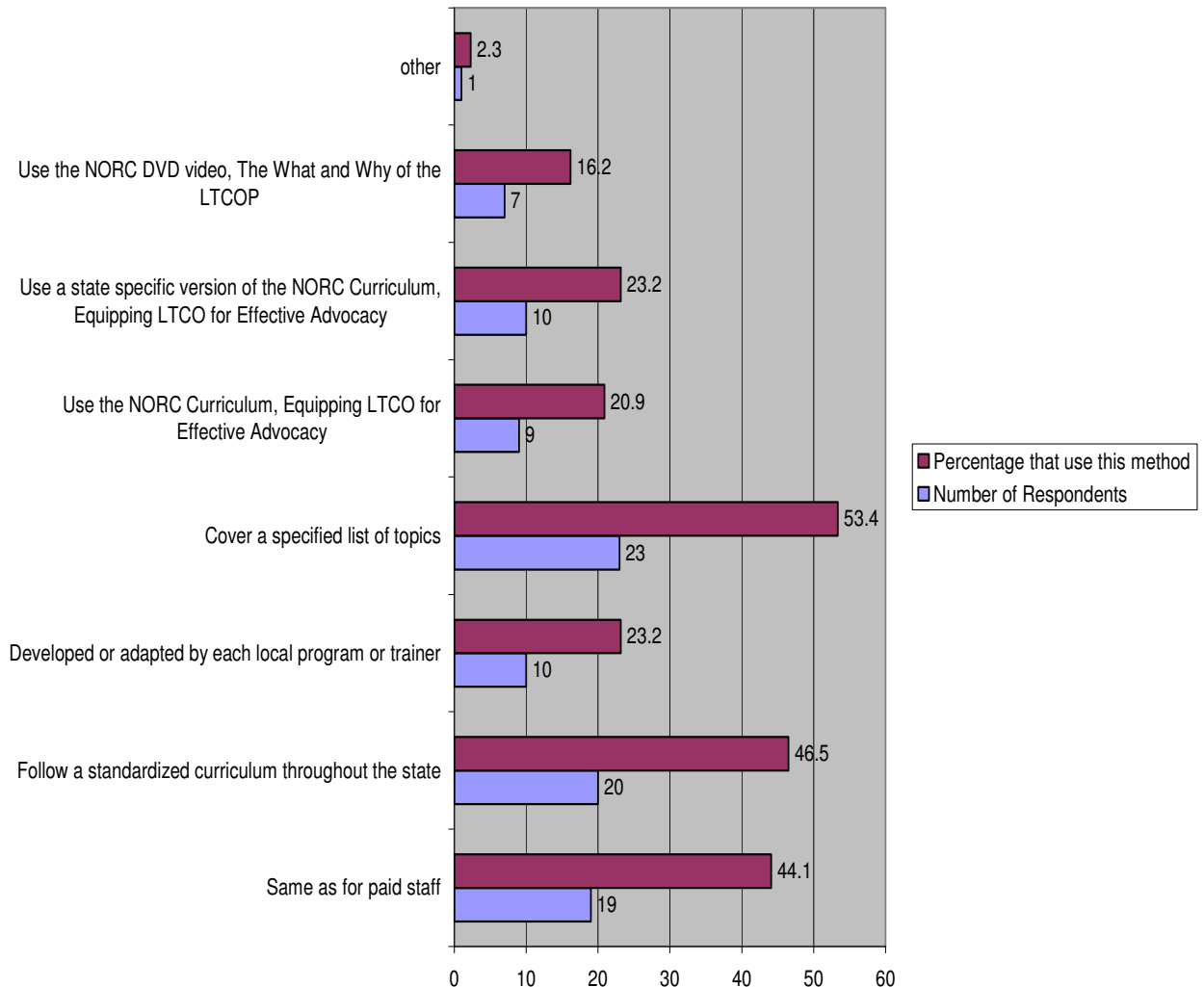
Other:

- MT Geriatric Education modules on Aging
- View appropriate DVD's on various topics at issue
- Mary the Ombudsman DVD (NE)
- Specific Wisconsin tools (WI)
- Use portions of the NORC curriculum but also use other resources specific to Oklahoma's program.
- Training materials are available for all trainings: manuals, various videos, Microsoft PowerPoint presentations

Additional Comments:

- A few pieces, sections of the NORC Curriculum were incorporated into our curriculum. Plus additional topics based upon our rules, ODIS (Ohio's documentation/reporting system), and current projects or focus (i.e. MFP demonstration project - HOME Choice). (OH)
- We will be using the Alaska version of the training manual by Sara H.
- A few modules are incorporated into the standardized N. C SLTCOP curriculum, but not all. The N. C. curriculum already included similar information in some of the modules. (NC)
- It depends on paid staff - Regional Ombudsmen get additional training beyond certification on a variety of topics. Paid staff get the same training as anyone going through certification training and then one: one from supervisor

12. Curriculum and Training Resources for Certification/Initial Training of VOLUNTEERS Training content and methodology for VOLUNTEERS: (check all that apply)



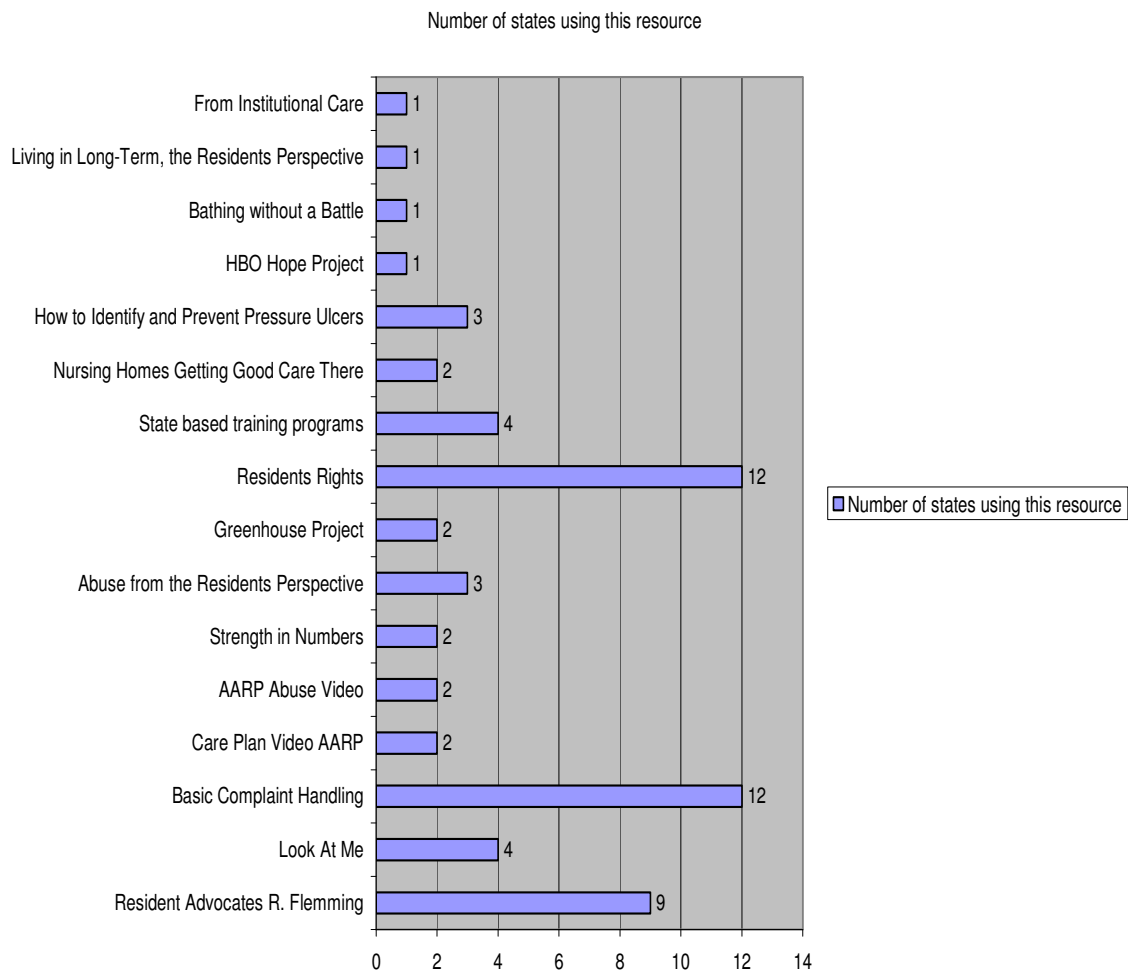
Other:

- Specific Wisconsin tools (WI)

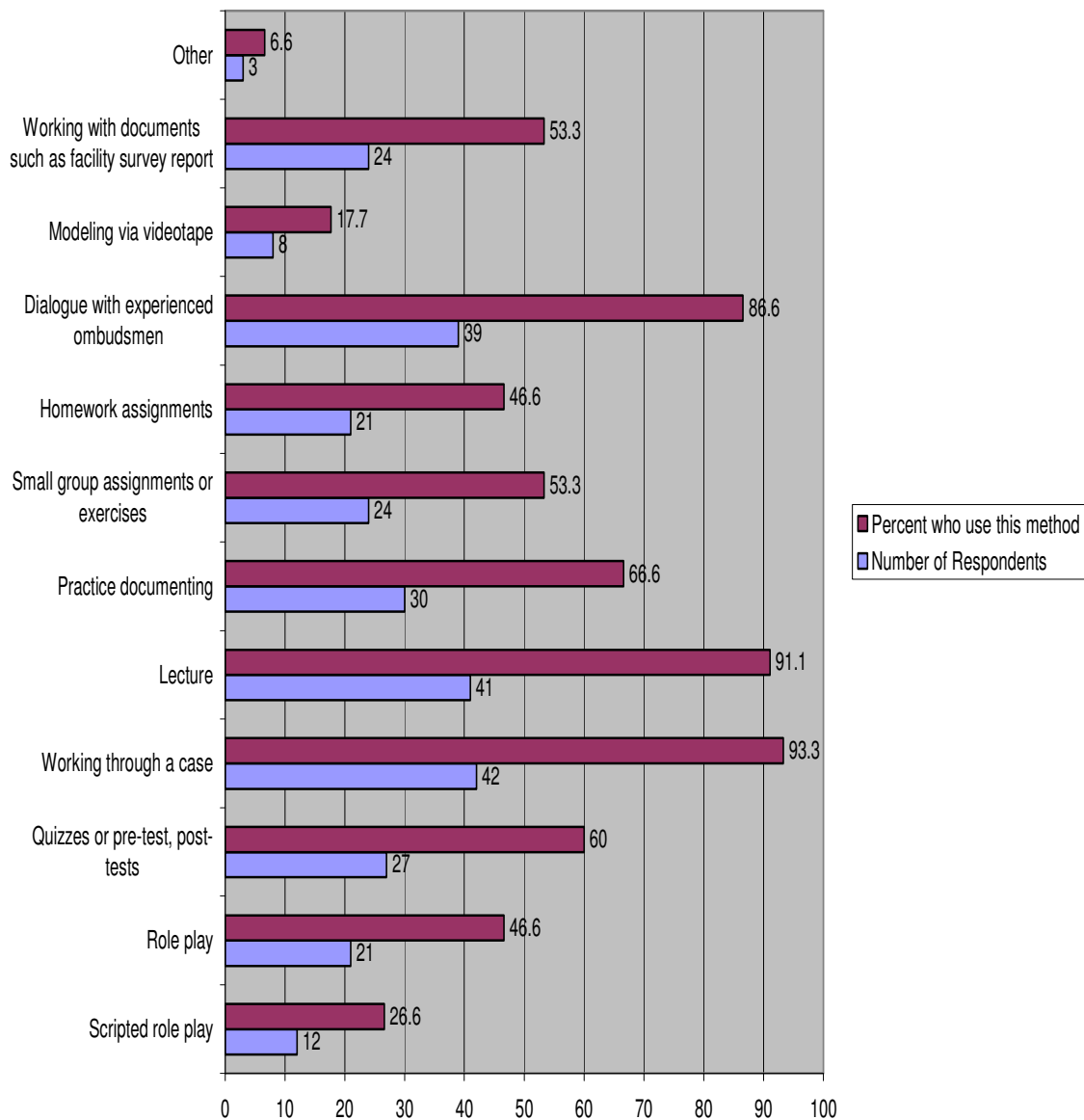
Additional Comments:

- Standard volunteer training under development.
- Training materials are available for all trainings: manuals, various videos, Microsoft PowerPoint presentations
- A few pieces, sections of the NORC Curriculum were incorporated into our curriculum.
- We do not have volunteers
- A long range goal is to standardize CAC training curriculums. Some aspects, such as updating Policy and Procedure are underway at this time. (NC)
- The NORC curriculum is used for the Associate level. (MN)

13. List the Videos that are used in Certification/Initial Training.



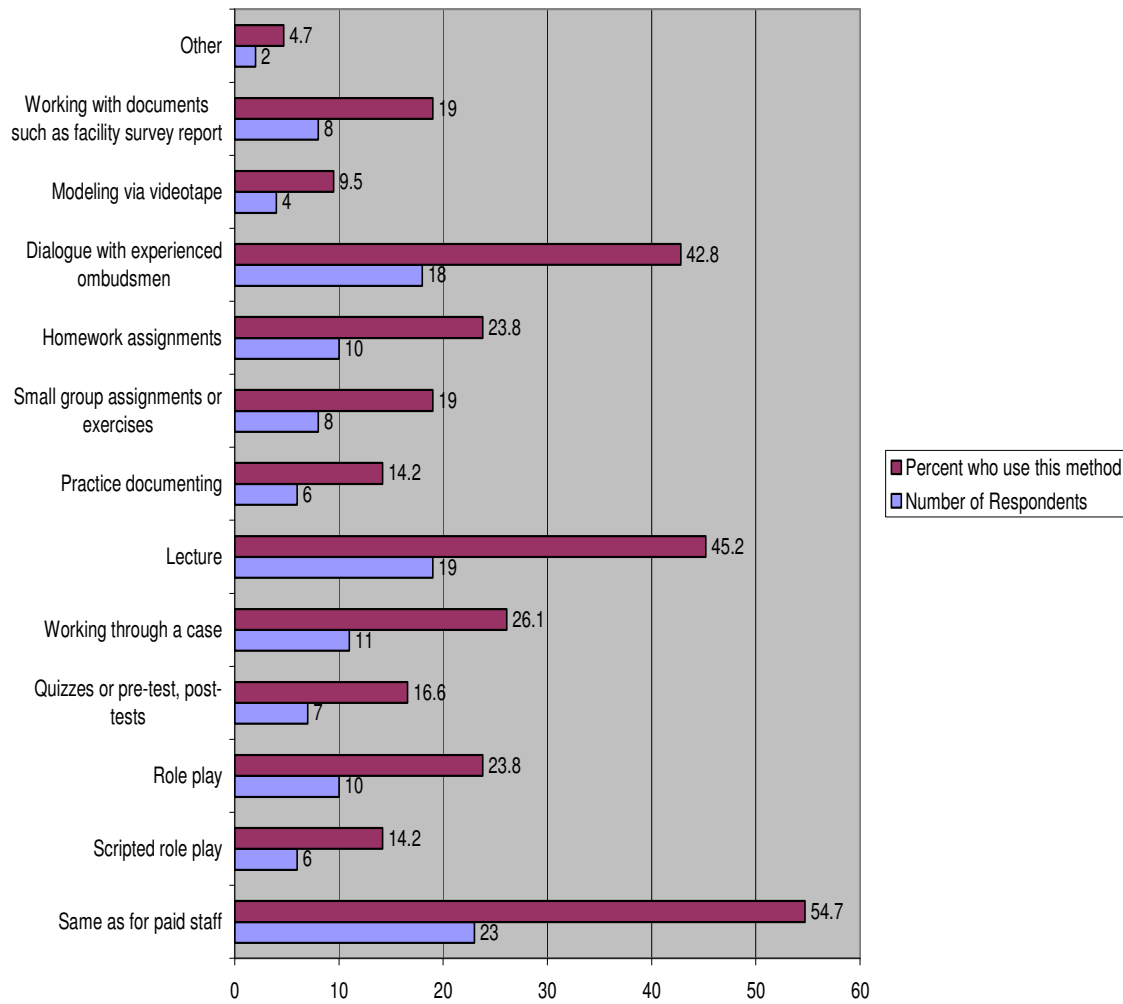
14. Training Methods for Certification/Initial Training for PAID STAFF Training for PAID STAFF includes: (check all that apply)



Other:

- shadowing experience with experienced ombudsman
- WI specific tools
- mentoring continues with the experienced ombudsman for an extended period (dependent on new paid staff's needs, experience, and comfort level)

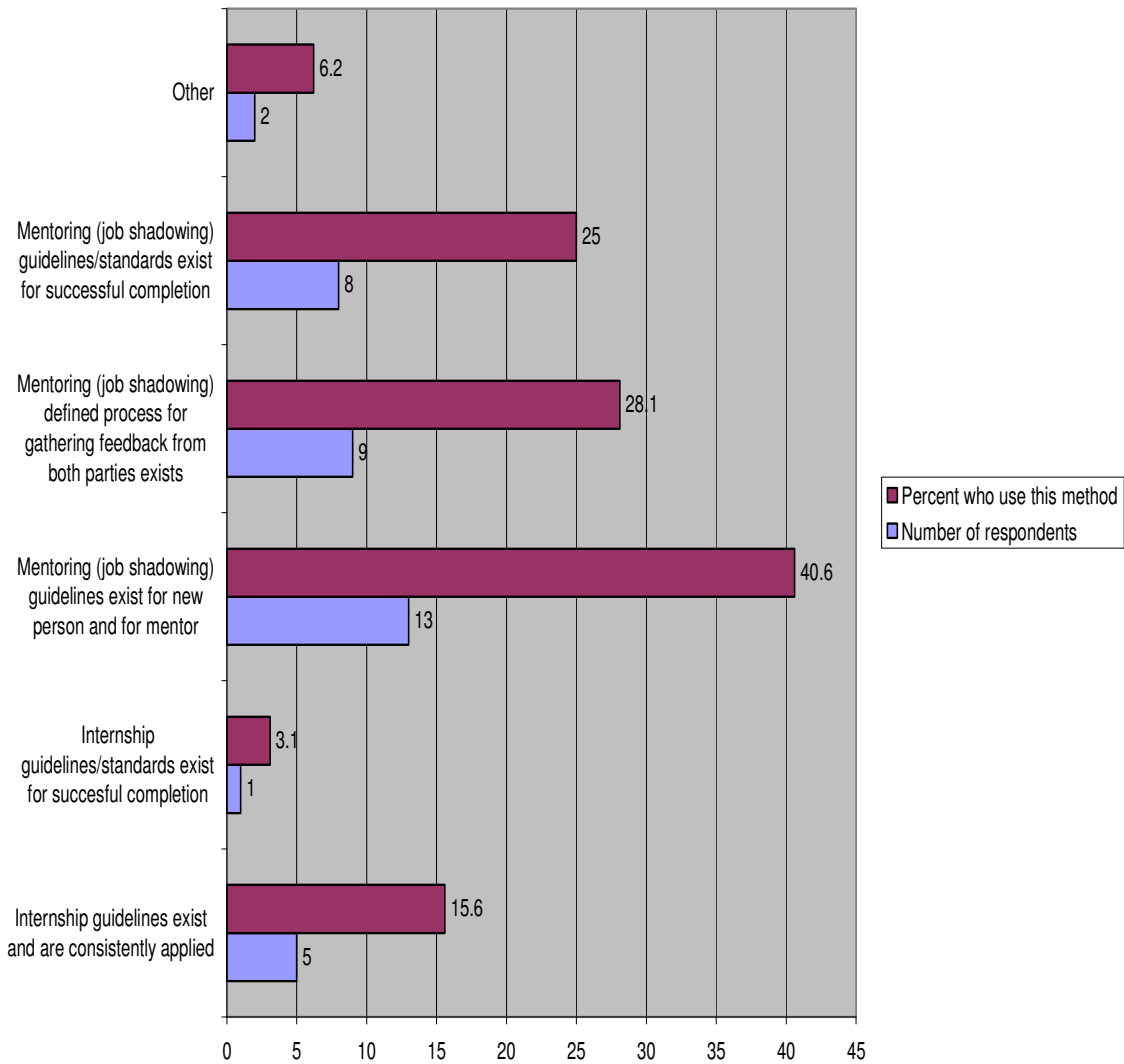
15. Training Methods for Certification/Initial Training for VOLUNTEERS **Training for VOLUNTEERS includes: (check all that apply)**



Other:

- At regional program's discretion, as long as training content is covered.
- Volunteer training program

16. Internship and/or Mentoring for Certification/Initial Training for PAID STAFF (check all that apply)



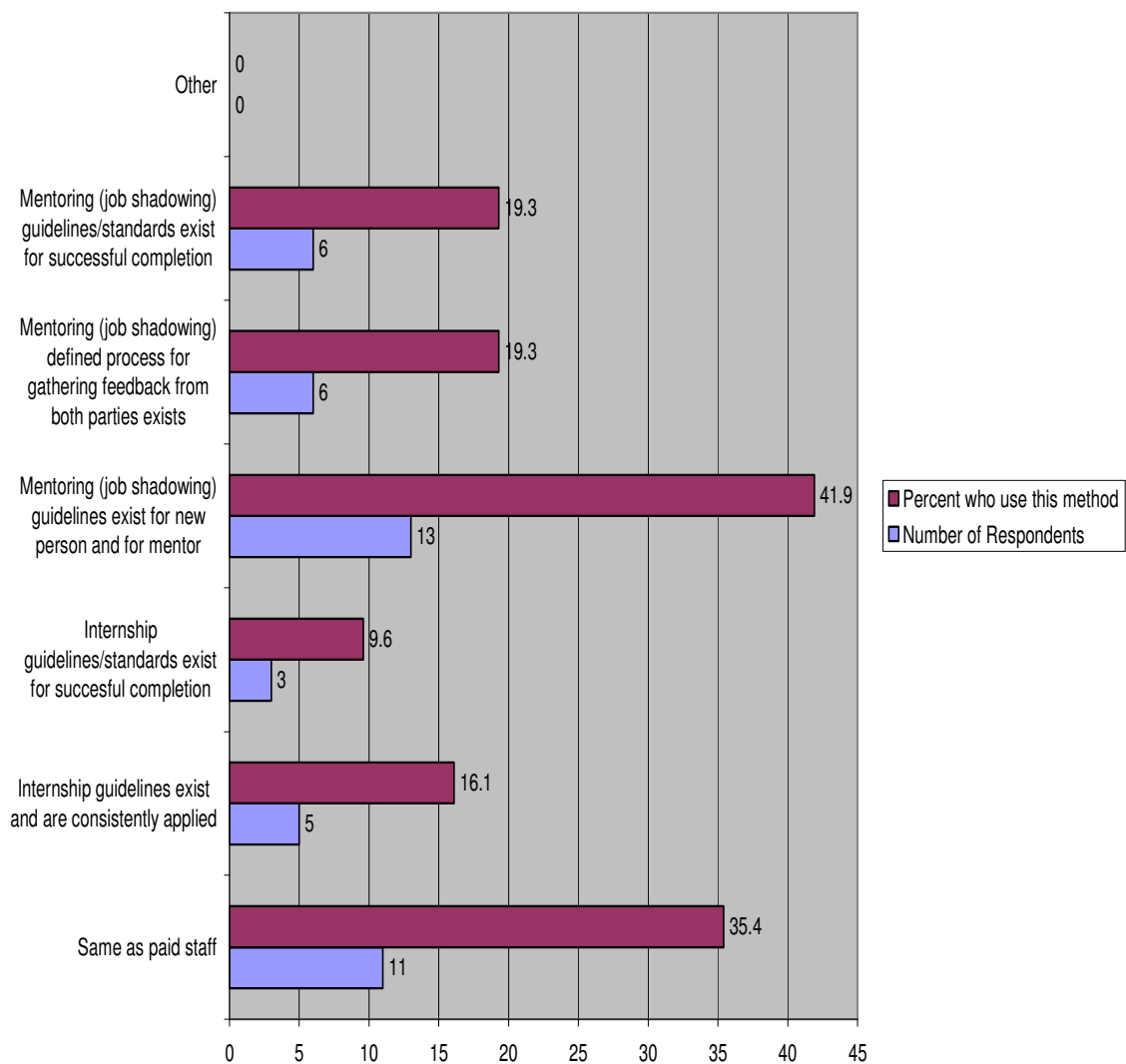
Other:

- We don't specifically mentor in WI. The supervisor works closely with the new employee and delegates the new employee to work with a variety of regional ombudsman for job shadowing purposes.
- Paid staff have a three month probationary period prior to certification.

Additional Comments:

- May be adopted in the future.
- All of the above are currently being developed and written into policy and procedures.
- Not a formal program

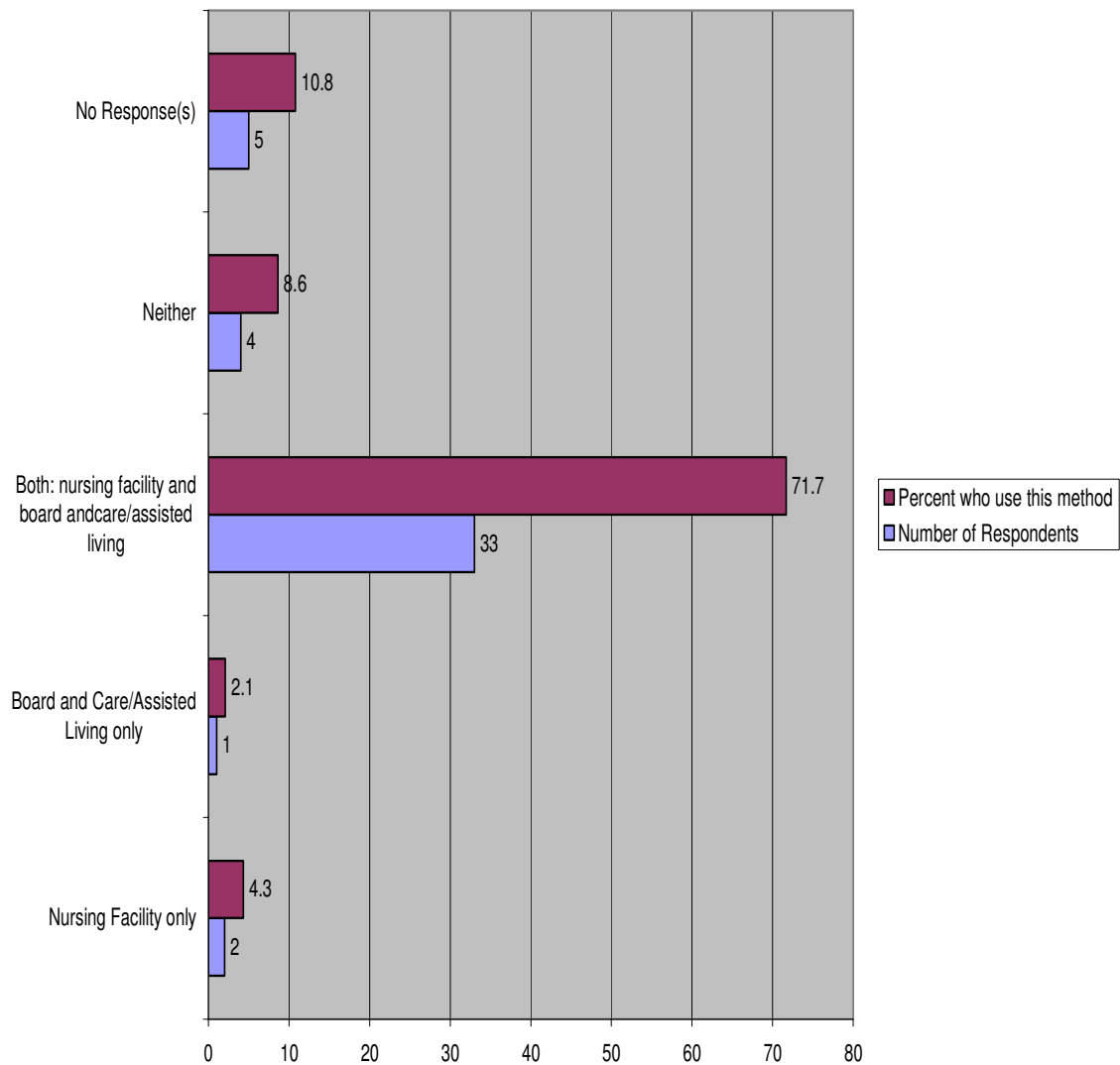
17. Internship and/or Mentoring for Certification/Initial Training for VOLUNTEERS (check all that apply)



Additional Comments:

- The volunteer ombudsman works with their regional coordinator when beginning their new role. the new volunteer may shadow another volunteer ombudsman with the coordination of the Volunteer ombudsman coordinator.
- This is only used when applicable.
- At regional ombudsman discretion

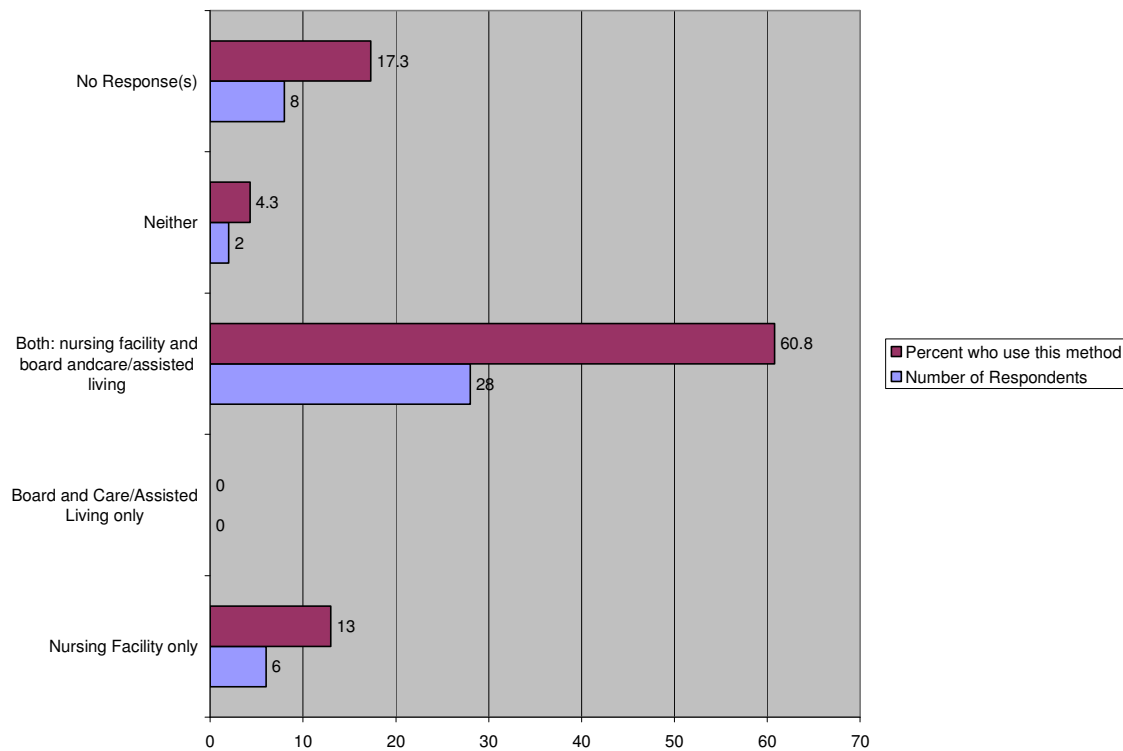
18. Types of facilities used for internship or mentoring for PAID STAFF



Additional Comments:

- Varies upon region and paid staff's previous experience.
- We also have access to home care under our Family Care program and Community Options Program.

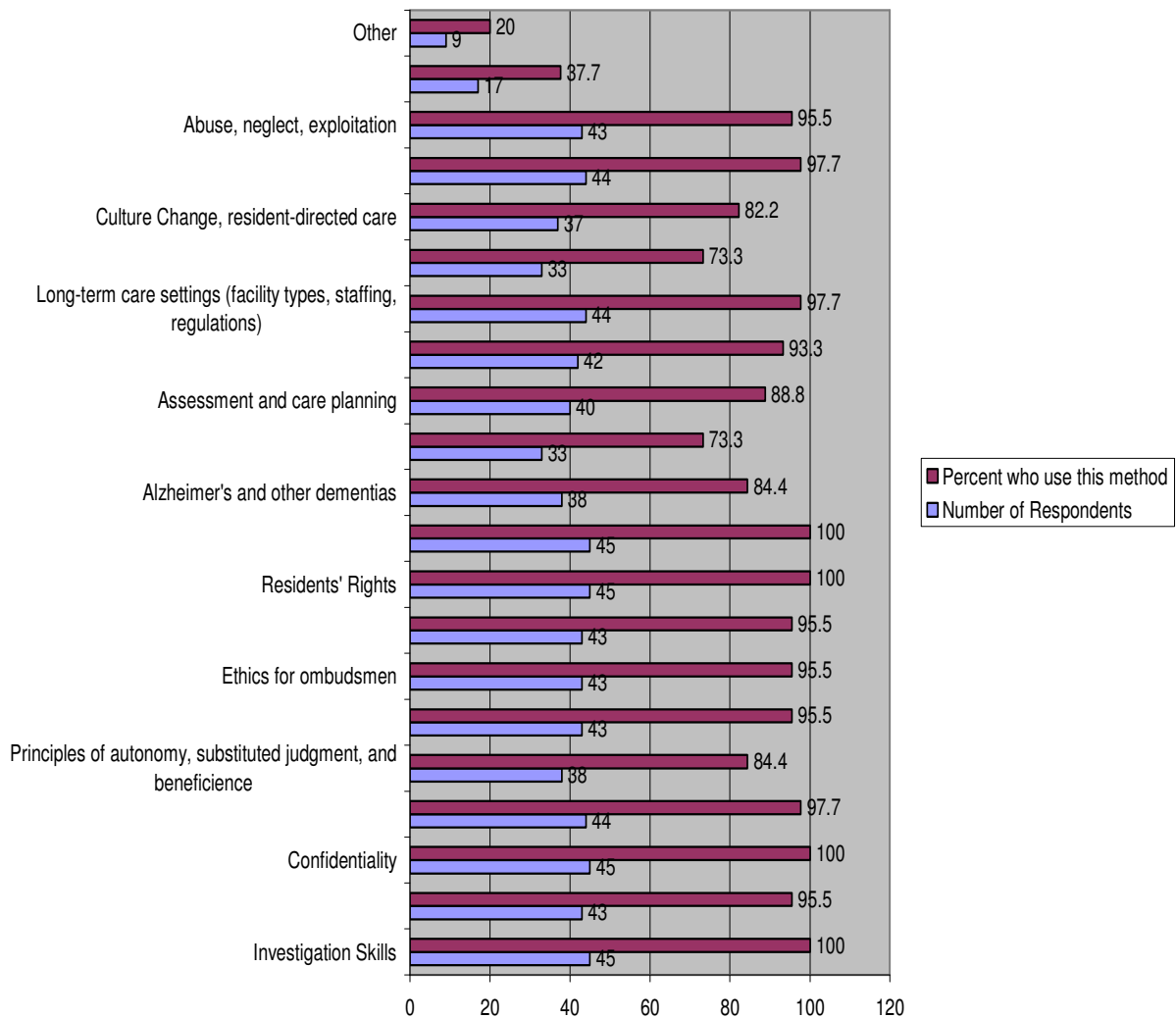
19. Types of facilities used for internship or mentoring for VOLUNTEERS



Additional Comments:

- Varies, based upon volunteer's facility assignment during the entire volunteer experience.
- We also do additional training on Adult family Home visiting at a later date.

20. Topics included in Certification/Initial Training of PAID STAFF: (check all that applies)



Categories

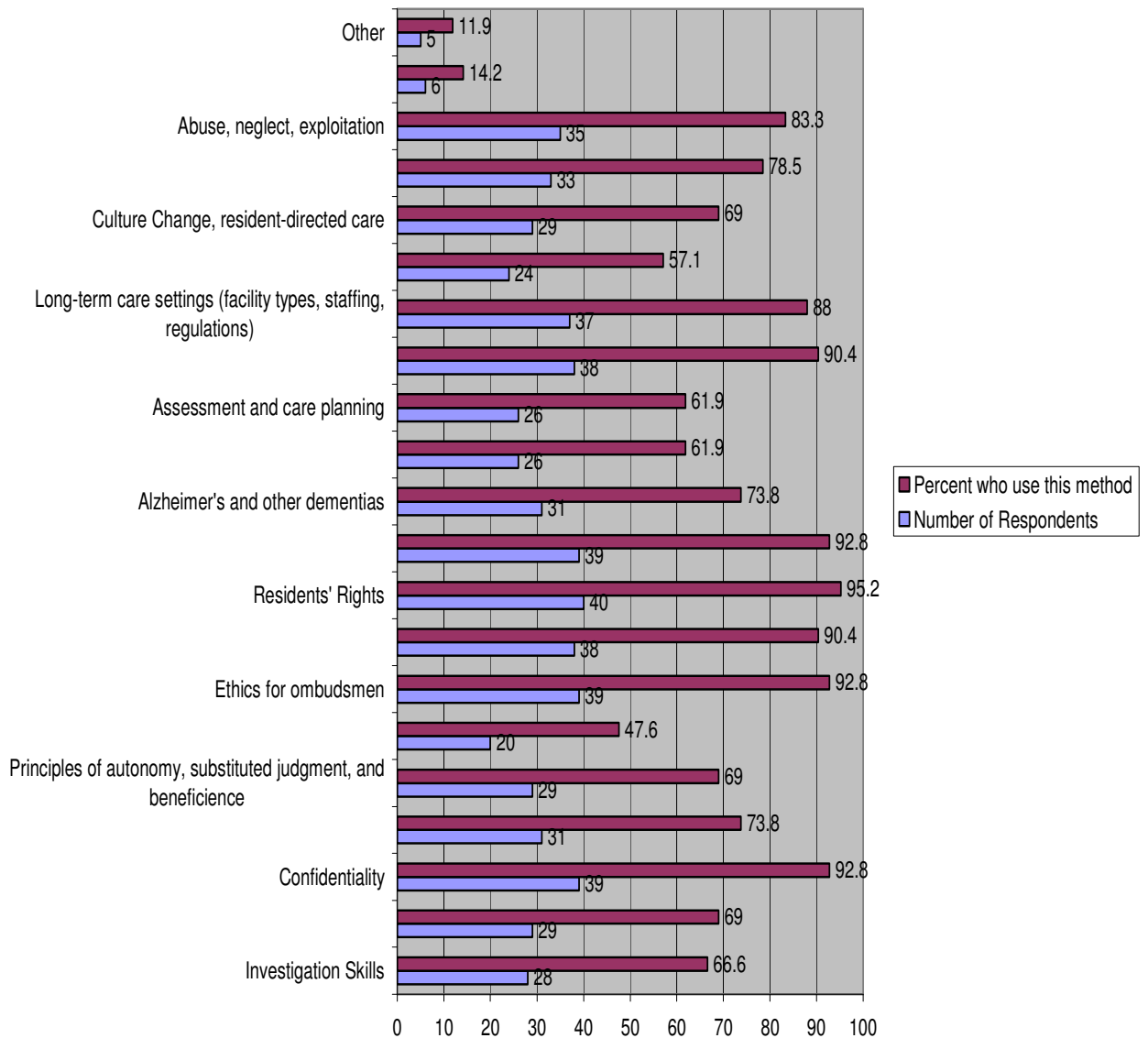
- Other
- Representing residents in administrative hearings
- Abuse, neglect, exploitation
- Documentation
- Culture Change, resident-directed care
- Long-term care financing
- Long-term care settings (facility types, staffing, regulations)
- Characteristics of residents/The process of aging
- Assessment and care planning
- Mental health issues
- Alzheimer's and other dementias
- Communication with residents, staff, and others
- Residents' Rights

- History & role of the LTCIP, state and federal laws
- Ethics for ombudsmen
- NORS reporting system
- Principles of autonomy, substituted judgment, and beneficence
- Access to records and facilities
- Confidentiality
- Problem Resolution Skills
- Investigation Skill

Others:

- facilities filing for bankruptcy
- Administrative Assessments
- Montana laws as applicable
- Attendance at SLTCO Conference
- regulatory agency background training
- Licensing (DPW and DOH) for NH and AL/PCHs
- Administrative Assessments are a Florida state requirement
- Add'l topics include:
 - Decision-making principles/Ombudsman Practice
 - Overview of advanced directives & PSDA
 - PASRR & HCBS
 - Program management, case consultation, quality assurance & supervision
 - Volunteer Program Mgt
 - Analysis of Systemic Issues
 - LTC Selection Assistance (incl. use of Ohio's LTC Consumer Guide)
 - Managing effective meetings
 - Designation Service & Review (DSR - monitoring process)
 - Ombudsman Documentation & Information Systems for Ohio (ODIS - Ohio's reporting/doc sys)
- WI specific rules and regulations and WI authority as an Ombudsman Program

21. Topics for Certification/Initial Training for VOLUNTEERS: (check all that apply)



Categories

- Other
- Representing residents in administrative hearings
- Abuse, neglect, exploitation
- Documentation
- Culture Change, resident-directed care
- Long-term care financing
- Long-term care settings (facility types, staffing, regulations)
- Characteristics of residents/The process of aging
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- Investigation Skill

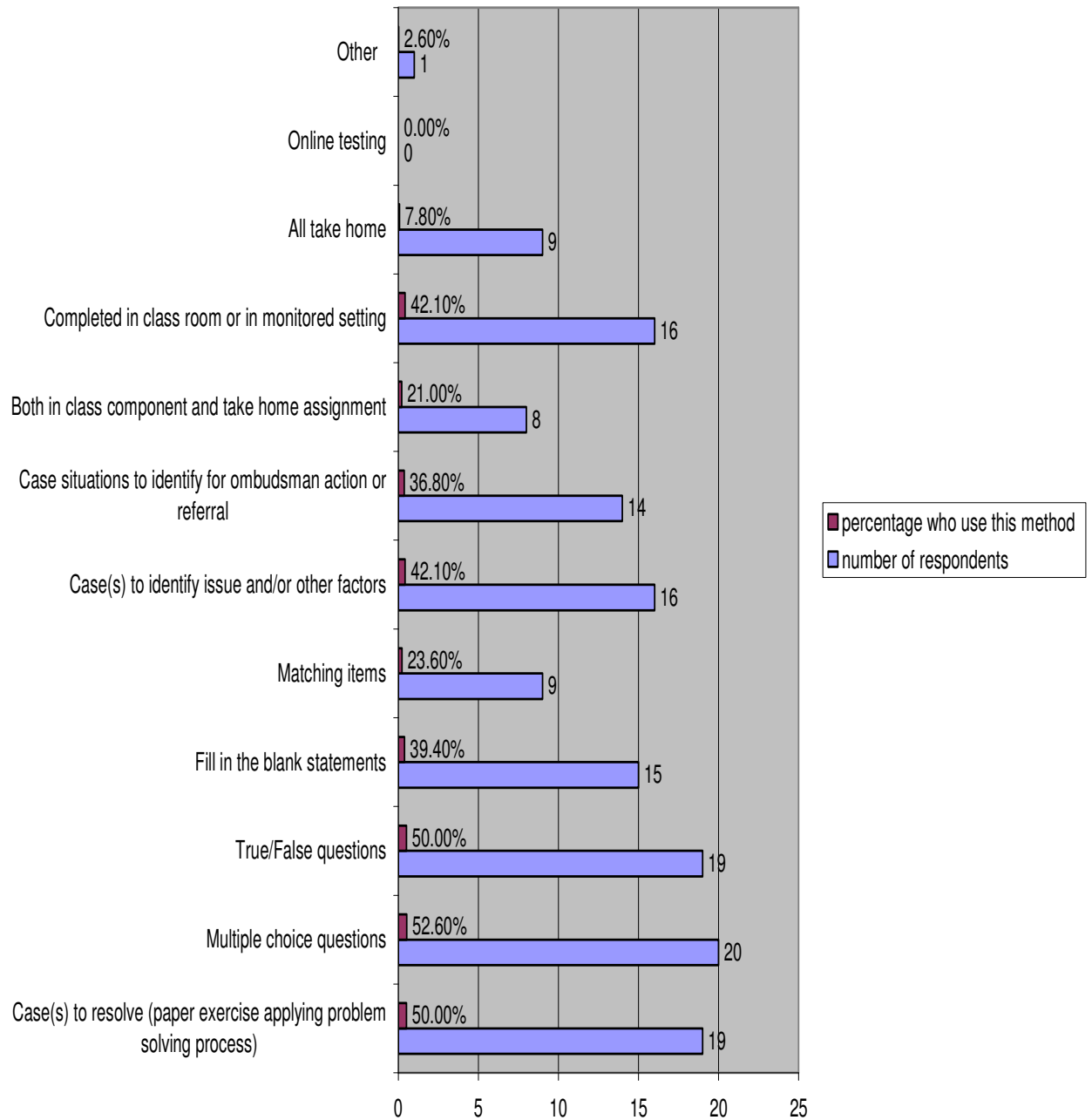
Comments:

- facilities filing for bankruptcy
- Administrative Assessments
- NORS training is mostly introductory (coding, disposition, verification, etc.) as volunteers do not have licenses to use the software
- Licensing (DPW and DOH) for NH and AL/PCHs
- Administrative Assessments are a Florida state requirement

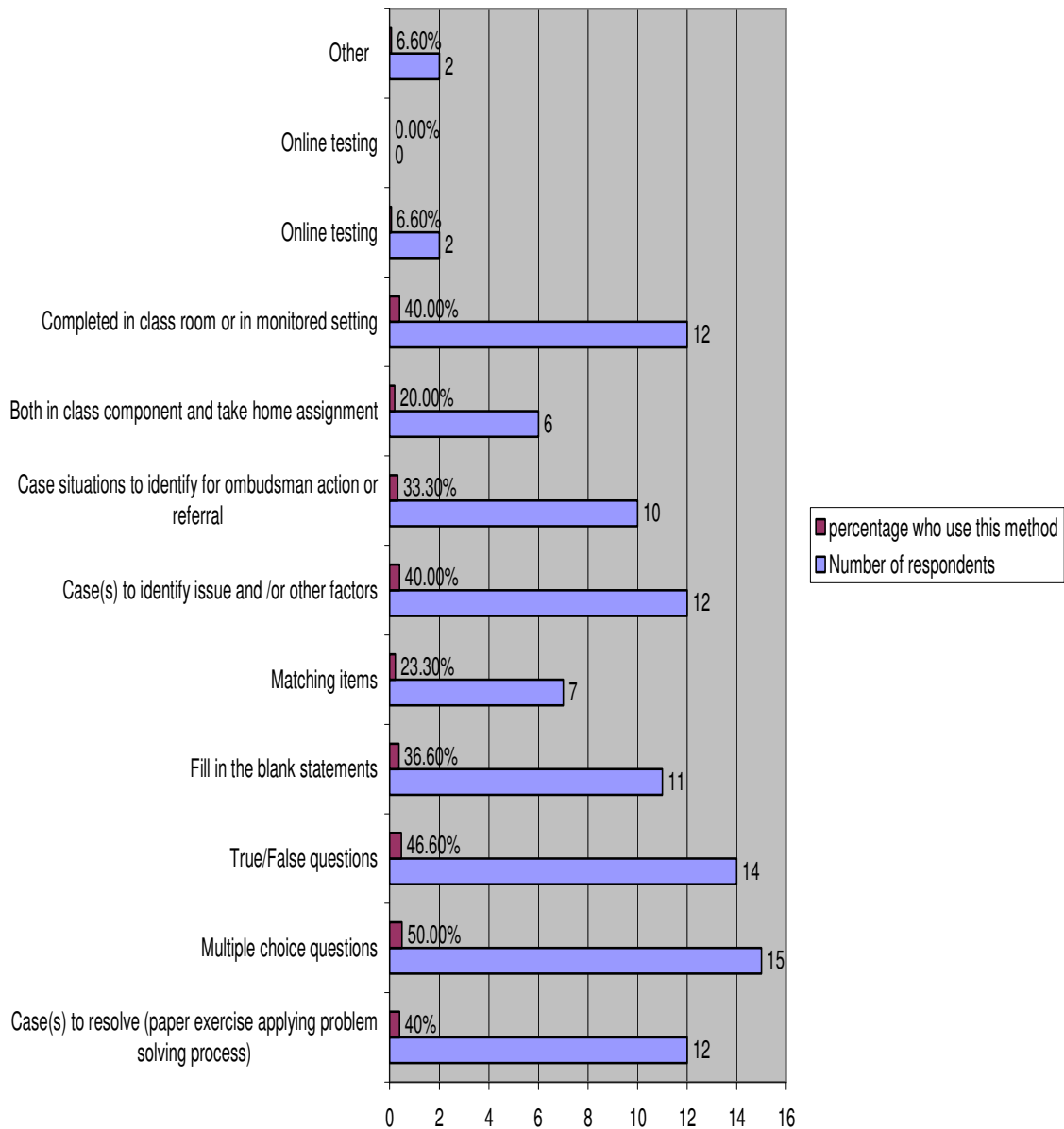
Additional Comments:

- Volunteers are our eyes and ears to Ohio's program. They are mainly utilized for advocacy visits, reporting problems/complaints to paid staff for investigation, and assisting paid staff with handling complaints. Therefore, some topics are taught without going into full details because it's not necessarily their role, but explained to provide an understanding of paid staff and volunteer dynamics.

**22. Examination for Certification/Initial Training for PAID
STAFF Examination methods for PAID STAFF include: (check all
that apply)**



23. Examination for Certification/Initial Training for VOLUNTEERS Examination methods for VOLUNTEERS include: (check all that apply)



Other:

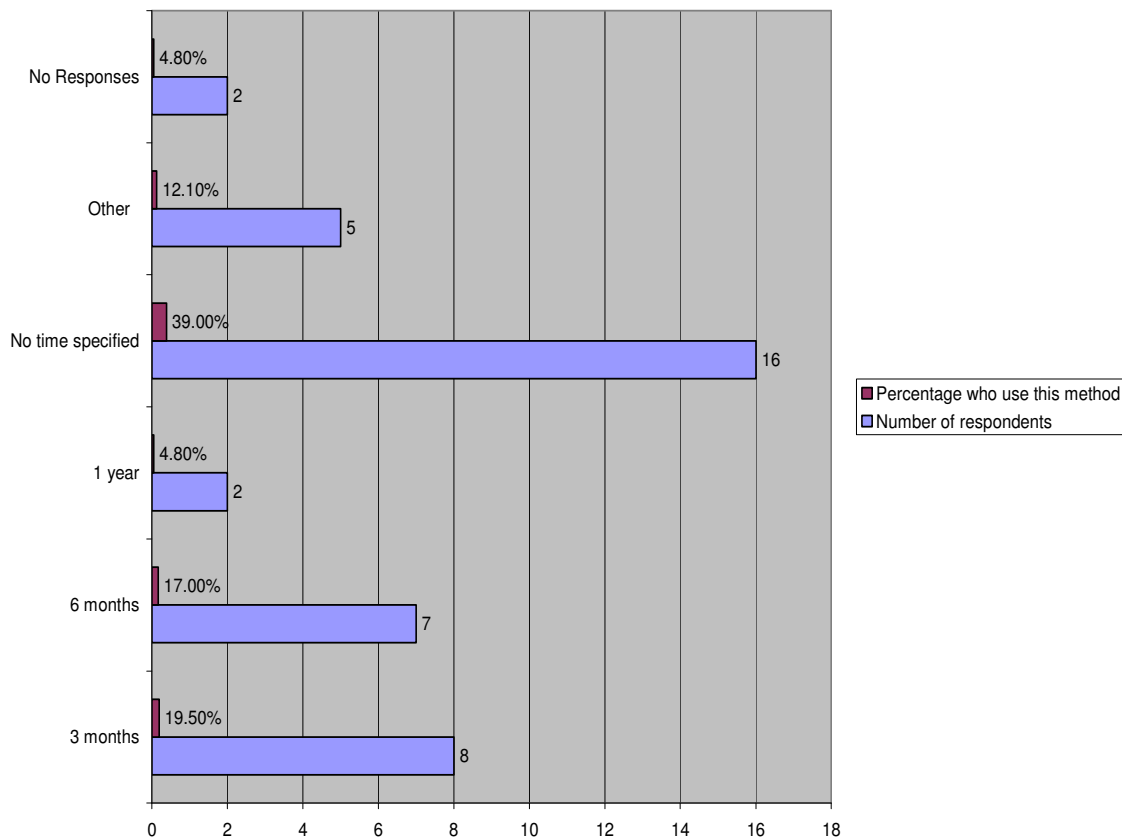
- Verbal testing and screening
- Developing criteria now

Additional Comments

- To be developed.

- All screening of volunteers is done through verbal discussion and exhibition of the potential volunteer that they understand the concept of the program and the laws and regulation that govern long-term care. There is not a written test that must be passed in order to be a volunteer in Oklahoma. The potential volunteer must pass the scrutiny of the screening process outlined in Ombudsman policy, be free from conflicts of interest and pass a criminal background check.
- No examination required. required 7 hour classroom training and criminal background check (heather.bruemmer@wisconsin.gov)
- See above (jmajoros@vtlegalaid.org)

24. Time frame for Completing Certification/Initial Training for PAID STAFF Certification/Initial training for PAID STAFF must be completed within:

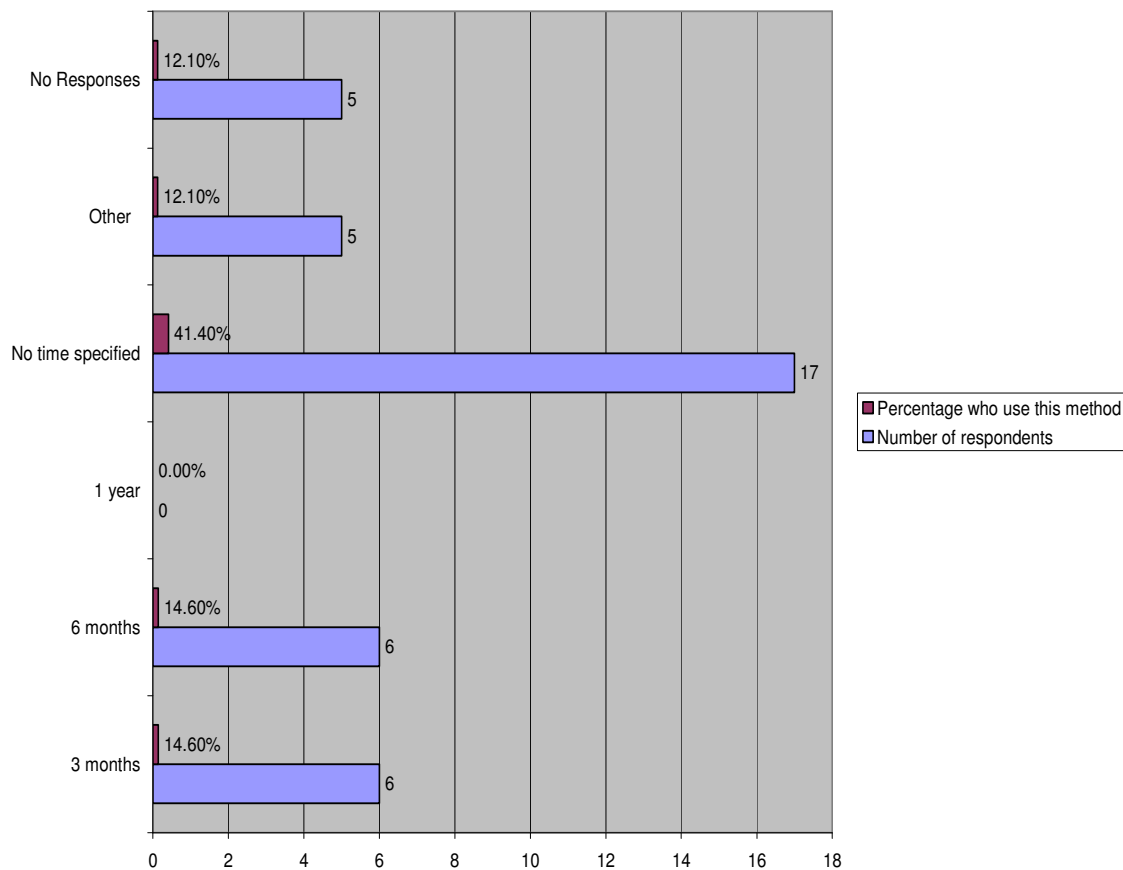


Additional Comments:

- Not decided yet
- There is no time frame specified in policy but it is the goal of the program that a new paid staff member will complete initial training within 3 months of their start date. No paid staff member is allowed to investigate complaints until the training has been completed.
- A goal is 3 months, however, this is an ongoing process
- Only the internship component has a specified time frame.

- On the job training on an ongoing basis for up to 3 months.
- Must be completed prior to duties as an ombudsman
- It truly takes at least two years for an Ombudsman to feel comfortable in the field.
(heather.bruemmer@wisconsin.gov)

25. Time Frame for Completing Certification/Initial Training for VOLUNTEERS Certification/Initial training for VOLUNTEERS must be completed within:



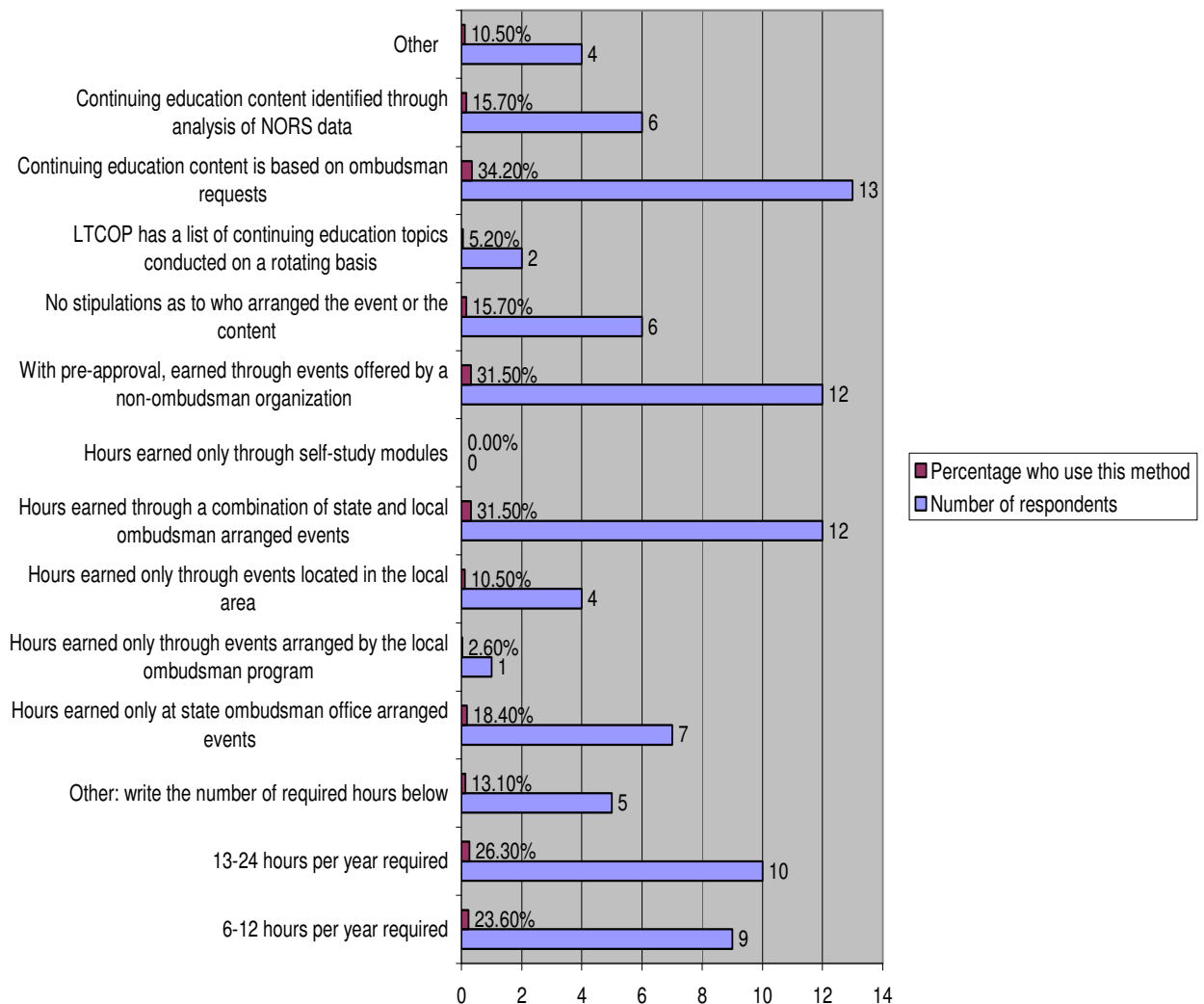
Other:

- 8 hrs. initial module training and 3 weeks of monitoring
- See List of Trainings and time periods
- Approximately one month
- See note below
- Associate Level I - 12 hours including 2 hour provider orientation.

Additional Comments:

- Volunteers complete initial training at one of the initial two day trainings that are held at least quarterly. No potential volunteer is allowed to investigate complaints or visit a facility as on Ombudsman until the training has been completed.
- A goal is 3 months, however, this is an ongoing process
- Associate Level II - 14 hours, plus observation of, and participation in, a complaint-handling experience.
- Must be completed prior to being an ombudsman and performing said duties.

26. Continuing Education Requirements for PAID STAFF to Maintain Certification/Ombudsman Designation: (check those that apply)



Other:

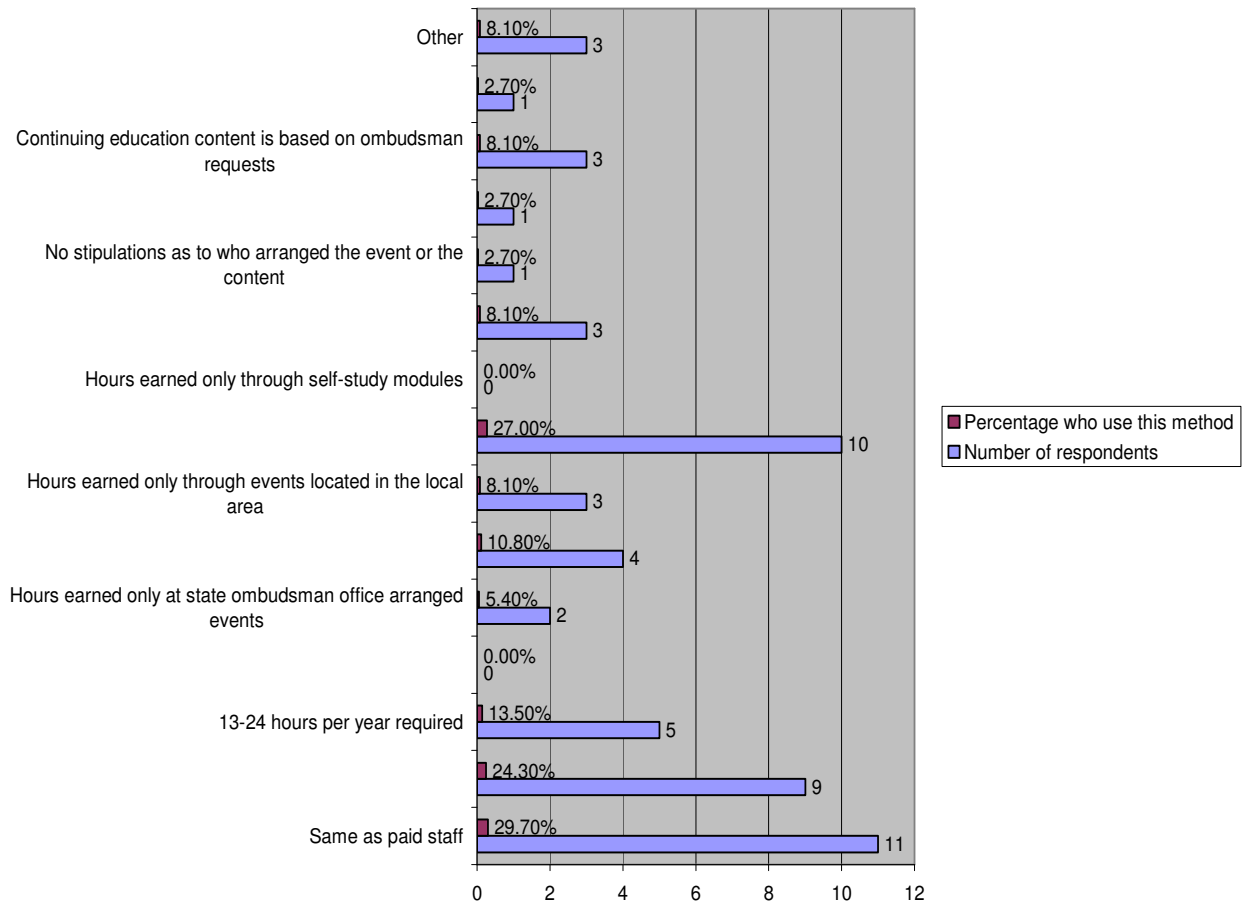
- Job Related Trainings on an ongoing basis
- Inservice training (heather.bruemmer@wisconsin.gov)
- Being revisited.

- There is not a specified requirement. Inservices and meetings are held 1-2x's per month with regional ombudsman as well as needed on certain topics of interest or program need

Additional Comments:

- Required 32 hours
- Ombudsman Enrichment Conference: 3 day training convened annually to provide ongoing training and support to the local ombudsman programs, also includes a 1-day recertification training for all tenured Ombudsmen to fulfill the requirement of recertification every 4 years. 21 Hours
- 32
- No current specified number of hours for continuing education of paid staff
- Ombudsman Specialist - 12 hours annually
Program Director - 18 hours annually
(prorated depending upon hire date)
Webinars and self studies are occasionally approved as well.
- I provide 14 hours per year. However, paid staff can attend other training opportunities in addition if they so choose. (patty.pierson@nebraska.gov)
- We meet quarterly and regionally as an entire Ombudsman program.
(heather.bruemmer@wisconsin.gov)

27. Continuing Education Requirements for VOLUNTEERS to Maintain Certification/Ombudsman Designation: (check all that apply)



Other:

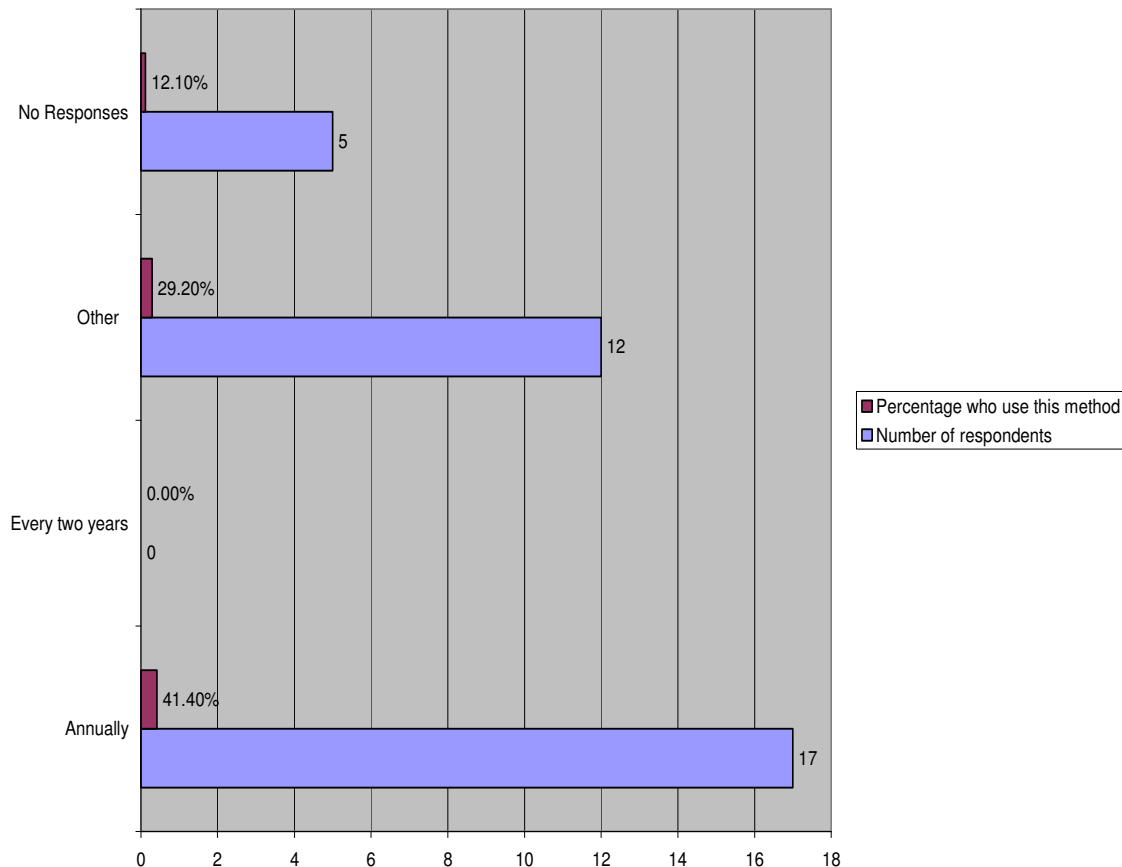
- Annual 2 day meeting/workshop
- Inservice training
- Being revised.

Additional Comments:

- Monthly local volunteer meetings, 1-2 statewide meetings per year
- 32 hours
- Ombudsman Enrichment Conference: 3 day training convened annually to provide ongoing training and support to the local ombudsman programs, also includes a 1-day recertification training for all tenured Ombudsmen to fulfill the requirement of recertification every 4 years. 21 Hours
- 10
- Associate Level 1 - 5 hours
Associate Level 2 - 6 hours
(prorated depending upon hire date)
- Webinars and self studies are occasionally approved as well.
- Local ombudsman provide continuing education at all their local meetings. All volunteers are invited to the Annual Training Conference. (patty.pierson@nebraska.gov)

- Quarterly Inservices for our Volunteer Ombudsman, no certification here in WI (heather.bruegger@wisconsin.gov)

28. Conflict of Interest Requirements to Maintain Certification/Ombudsman Designation for PAID STAFF Conflict of Interest Screens for PAID STAFF must be renewed:



Other:

- As reported by local staff.
- PRN
- Ongoing
- case by case basis
- Upon Hire
- Addressed as identified
- State Hr policies apply
- Time of certification (skhitt@thelegalcenter.org)
- Discussed yearly during their evaluation (heather.bruegger@wisconsin.gov)
- Being updated.
- State program does not require for paid staff other than State Ombudsman

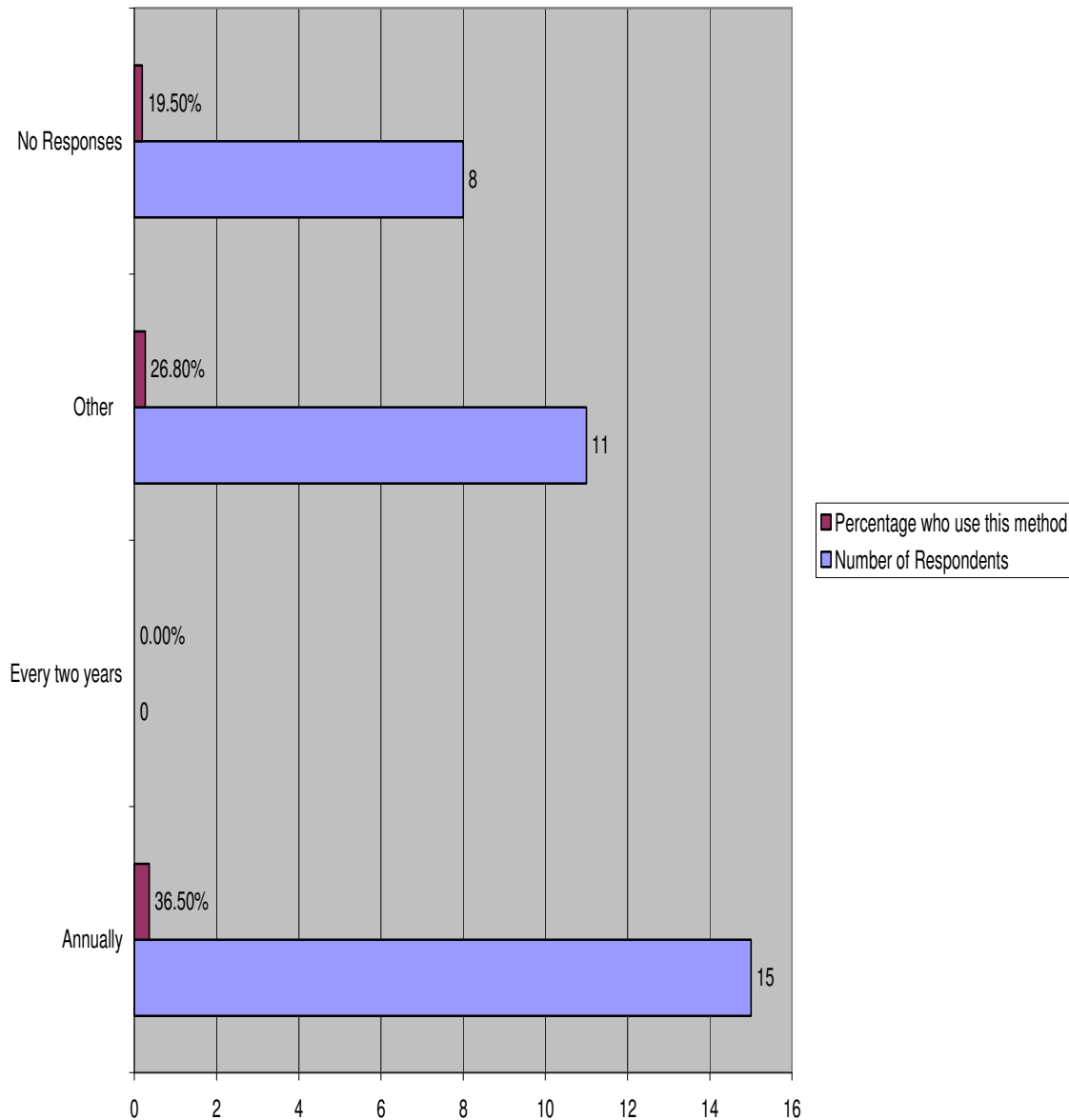
Additional Comments:

- We conduct bi-annual visits to local programs and includes conflict of interest questionnaire
- Additionally, whenever a new conflict arises, a COI screen is processed (could be frequently during one year).

- No formal review - they know what the conflicts are and would have to leave their position if one comes up.
- Only upon hire

29. Conflict of Interest Requirements to Maintain Certification/Ombudsman Designation for VOLUNTEERS

Conflict of Interest Screens for VOLUNTEERS must be renewed:



Other:

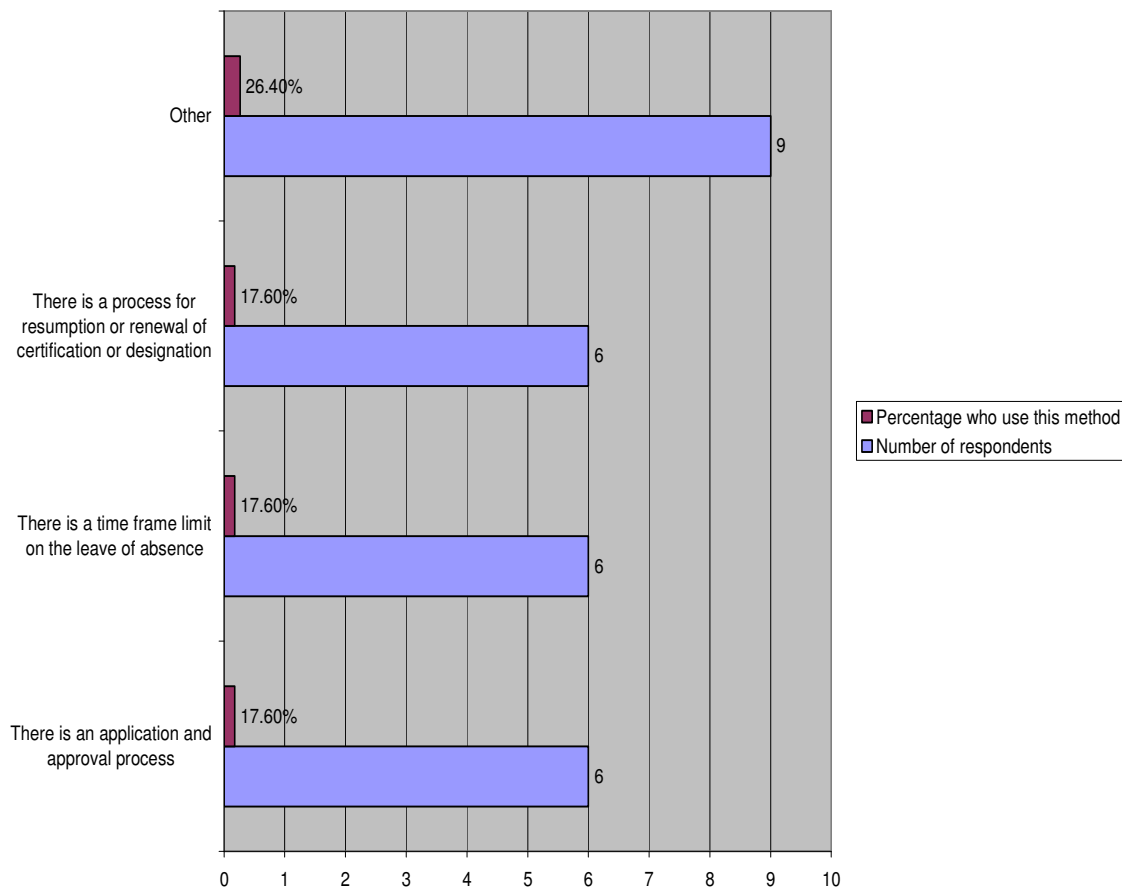
- As reported.
- At first training and when something changes
- PRN

- Case by case basis
- Upon Review of Application
- Addressed as identified (skhitt@thelegalcenter.org)
- Initially and as needed (jehrhardt@nd.gov)
- We conduct bi-annual visits to local programs and includes conflict of interest questionnaire
- Additionally, whenever a new conflict arises, a COI screen is processed (could be frequently during one year).

Additional Comments:

- Being updated.
- Same as paid staff

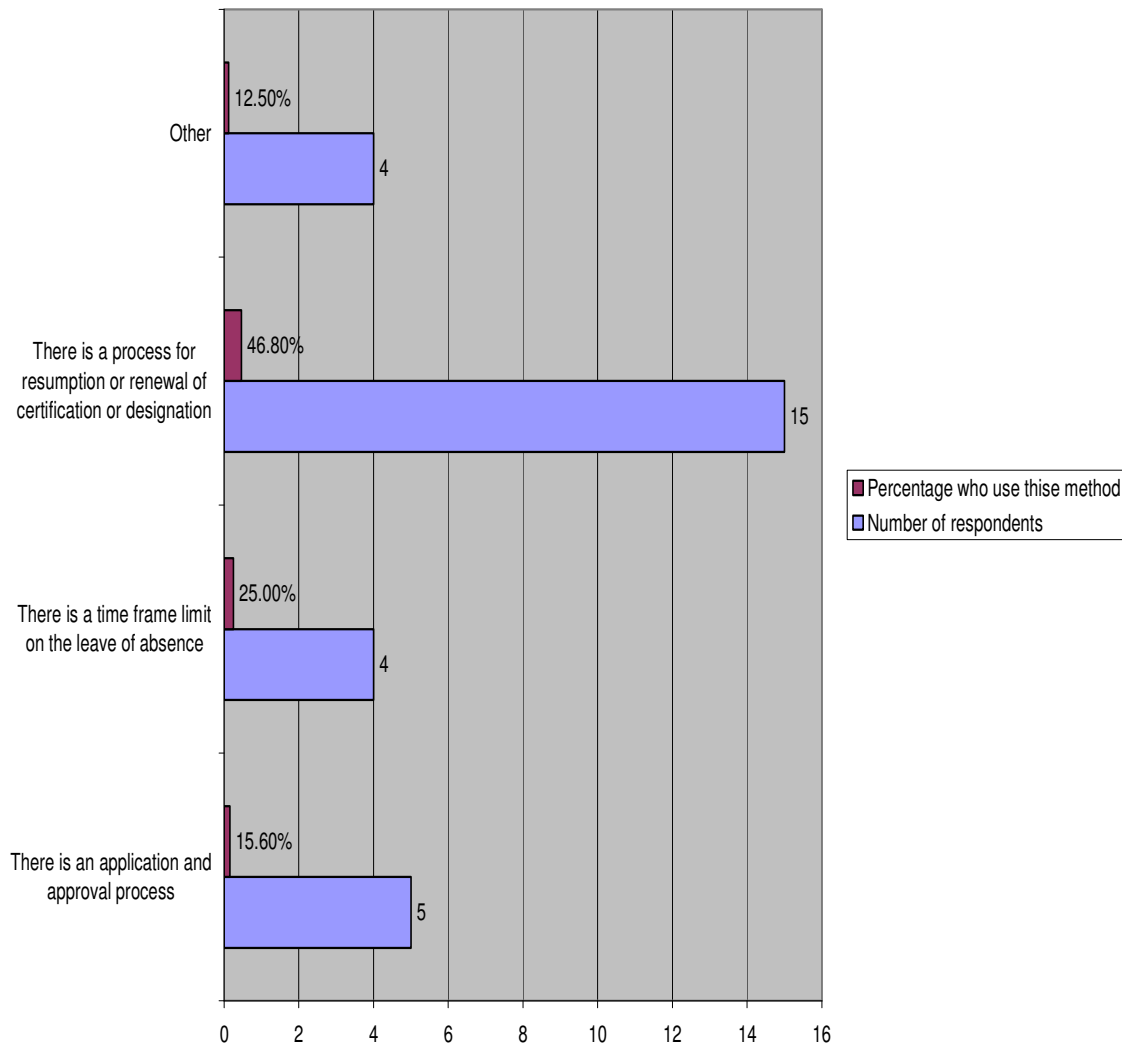
30. Leave of Absence and Resumption of Certification/Ombudsman Designation for PAID STAFF If a PAID STAFF ombudsman needs to take a leave of absence from certification/ombudsman designation responsibilities: (check all that apply)



Additional Comments:

- Being developed. Currently staff return to position after leave for medical or personal reasons. The experience to date has not been for long-term leave.
- case by case basis
- There is not an official leave of absence request for paid staff but all leave from duty must be approved by LTCOP state staff.
- Handled on the local level.
- There is no current policy or procedure which addresses these situations. Each case would be handled individually based on the circumstances of the absence.
- If a paid staff member was unable to meet their annual CEU requirement due to leave or other circumstances, a waiver request is submitted to the SLTCO for approval.
- It depends on their employer leave of absence guidelines. Anyone gone more than 6 months has to take certification training again.
- State Hr policies apply
- We are a state agency so depending what their union contract requires for their leave and the benefits they have accrued. (heather.bruemmer@wisconsin.gov)

31. Leave of Absence and Resumption of Certification/Ombudsman Designation for VOLUNTEERS If a VOLUNTEER ombudsman needs to take a leave of absence from certification/ombudsman designation responsibilities: (check all that apply)



Other:

- Inform Volunteer Coordinator (heather.bruemmer@wisconsin.gov)
- Case by case basis

Additional Comments:

- Is being developed.
- A volunteer can take a leave of absence for up to three months but if they do not return to duty within that time frame they will be decertified. If they return to duty after three months but before one year they do not have to take the initial training again but must complete all of the screening criteria again and be brought up to date on any changes that have occurred in the program. If it is after one year they must complete the initial training and all screening criteria again.
- Not currently specified in policy and procedures. In practice, persons who have been inactive for longer than one year must re-complete the 36-hour certification training. NY has numerous

- volunteers who are "snow birds" and take a leave of absence during the winter months. These individuals, while not considered active if gone for more than 3 months, may continue with the program upon return without having to become re-certified.
- Determinations are made by the end of the year if the volunteer will need to separate from the program or obtain additional training upon becoming active again. The decision is made by the regional program and reported to the SLTCO. This decision may include granting the volunteer a waiver for not meeting their annual CEU requirement.
 - 6 months and then must take certification training again.
 - Must have continuing hours to resume. (patty.pierson@nebraska.gov)

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Coordinated by the National Long-Term Care Ombudsman Resource Center,
The Consumer Voice for Quality Long-Term Care.