

Basic Writing Skills for Survey Staff Course Syllabus

Mission Statement

The mission of the Department of Health and Human Services (HHS) is to protect the health of all Americans and provide essential human services, especially for those who are least able to help themselves.

1.1 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 become an important part of subsequent legal proceedings arising out of the certification process.

Form CMS-2567 is the record of the survey where the surveyor documents and justifies the determination of compliance and informs the health care facility of its state of compliance for certification. This information will serve 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 be able to document their findings utilizing proper writing skills.

Regional Office (RO) representatives approached the Survey & Certification Group (SCG) Training Division with an identified training need for a surveyor writing course. As a result, the Survey & Certification Training Group, in conjunction with a Regional Office Technical Expert Panel and the Division of Nursing Homes, has developed the Basic Writing Skills for Survey Staff (BWS) online course.

The Basic Writing Skills for Survey Staff online course provides an opportunity for survey staff to review proper writing techniques and practice application of those skills while documenting statements that can be used in citations.

The course is beneficial for new surveyors to complete during their State Survey Agency (SA) orientation, as well as for experienced surveyors to review on an annual or as needed basis.

1.2 Course Goal

The goal of the Basic Writing Skills for Survey Staff online course is to improve the ability of survey staff to document findings using proper writing skills. The training provides survey staff with an opportunity to practice and demonstrate the proper use of grammar, punctuation, voice, and plain language consistent with the Principles of Documentation (POD).

1.3 Course Description

The Basic Writing Skills for Survey Staff online course provides an opportunity for surveyors to review and apply correct language and effective writing techniques when composing defensible statements in Form CMS-2567. The course is offered as self-paced, online web-based training.

The online course consists of a Pre-Test*, one learning module with lessons and knowledge check questions, a Post-Test**, and a course evaluation.

1.4 Audience

The Basic Writing Skills for Survey Staff is designed for all survey staff who complete potential legally defensible documentation. All surveyors, reviewers, and staff of all provider and supplier types who are responsible for composing Form CMS-2567 content are required to complete this course.

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

We encourage all surveyors and staff to review the training annually, on an as needed basis, or as directed by their State Survey Agency (SA) to refresh their knowledge.

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

1.5 Course Design

In order to successfully finish this course, learners must complete all of the required components within the module and pass the course Post-Test with a minimum score of 85 percent. The required course components are:

- Course Pre-Test
- Learning module with lesson and knowledge check questions
- Course Post-Test
- Course Evaluation

1.6 Course Objectives

At the conclusion of this training, the surveyor will be able to identify the proper use of grammar, punctuation, voice, and plain language consistent with the Principles of Documentation (POD) with 85 percent accuracy.

1.7 Pre-Test

From the Surveyor Training Website, learners will select the Basic Writing Skills for Survey Staff course and then select the Launch the Course button to begin. The first task before Module 1 is to complete the course Pre-Test.

Follow the guidelines below:

- Do not study for the Pre-Test.
- After completing the Pre-Test select the link for the course

1.8 Module and Lesson Outline

The Basic Writing Skills for Survey Staff online course has one learning module. The following provides an outline of the module and lesson that the learner will complete in this course.

Module 1: Basic Writing Skills for Survey Staff Online Course

Lesson 1—Basic Writing Skills for Survey Staff

After completing this module, you will be able to:

- Describe three methods of organizing documentation.
- Identify the difference between active voice and passive voice.
- Select appropriate punctuation, grammar, and spelling for sample sentences.

Recommended Course Prerequisites

New surveyors and staff will benefit from completing the following prerequisites prior to (or concurrent with) the Basic Writing Skills for Survey Staff online course, to provide them with an overview of the survey process and basic principles of documentation:

- Basic Health Facility Surveyor Online Course: Introduction to Surveying
- Principles of Documentation Online Course

Both prerequisites are available on demand on the [Surveyor Training Website](https://surveyortraining.cms.hhs.gov) at <https://surveyortraining.cms.hhs.gov>.

1.9 Knowledge Checks

In addition to reviewing the self-paced content in the course, learners will be prompted to participate in the instruction by responding to knowledge check questions, completing exercises, and accessing additional information through hyperlinks.

Knowledge check questions are a type of interaction presented throughout each lesson. They help learners assess whether or not they have met the learning objectives for that lesson. After answering a knowledge check question, learners will be provided with immediate feedback regarding the accuracy of their response.

For correct responses, learners will be told that the response is correct and given the reason why. For incorrect responses, learners will be told that the response is incorrect and will be given the correct answer(s).

1.10 Post-Test

Upon completion of the module content, learners will be able to take the course Post-Test. Details about the Post-Test are provided below:

- The Post-Test is an open-book exam.
- Learners are allowed three attempts to pass the exam.
- If the learner does not pass the exam with a minimum score of 85 percent on the first try, they may choose from the following options:
 - Take a break.
 - Review the lessons, knowledge check questions, and resource materials again.
 - Engage in additional self-study, as needed.

- Talk with their Training Coordinator or supervisor to arrange time to review the material.
- Retake the exam, when ready, up to two additional times.
- If learners do not successfully pass the Post-Test within three attempts, they may enroll again and repeat the entire course.

Learners should contact the [Help Desk](#) if they encounter any technical problems.

1.11 Continuing Education Units (CEU)

Estimated contact time (often referred to as “seat time”) refers to the amount of time the average learner would require to complete all of the course content and any other online activities. The estimated course completion time for the Basic Writing Skills for Survey Staff online course is about two hours. Course times vary, depending on level of experience and learning style.

CMS is authorized to issue 0.25 Continuing Education Units (CEU) for this course. You must:

- Take the Pre-Test.
- Complete all the learning modules.
- Pass the Post-Test with a score of 85 percent or higher.
- Complete the course evaluation.

You will be able to print your certificate from the LMS shortly following successful completion of the Post-Test.

1.12 Media and the Course

This course uses a number of media resources including web pages and Portable Document Format (PDF) documents. The minimum computer requirements section of this syllabus (section 1.15) identifies Adobe Acrobat Reader as required software for this course. This program is required to access the media in this course.

1.13 Recommended Minimum Configuration Requirements

The following computer configuration is required for access to the online classroom via the Surveyor Training Website learning environment. If your computer does not have the proper hardware, the course may run slowly or may not run at all. Prior to running the course on your computer, compare your current system configuration with the system requirements below:

Hardware Minimum Requirements

- 1.2 GHz CPU or greater with a minimum of 2 GB RAM
- Network adapter: Wired for network connectivity; wireless network cards must support WPA-2 level encryption
- DSL or cable broadband Internet (dial-up is not compatible)
- 3G and 4G connections are not recommended when taking tests
- CD/DVD drive and speakers may be required; refer to course requirements

Minimum Operating Systems Requirements

- Windows 7 (32-bit or 64-bit)

- MAC OSX 10.7 or later
- Android 4.2.2 (or later)

1.14 Browser Requirements

The following tables highlight the new platform and browser configurations tested using the following support terms:

- **Supported:** Supported by Surveyor Training Website
- **Unsupported:** Unsupported or not supported by Surveyor Training Website

Microsoft Windows Operating Systems

	Internet Explorer 11	Google Chrome (34 or later)
Windows 7 (32-bit)	Supported	Supported
Windows 7 (64-bit)	Supported	Supported
Windows 8 (32-bit)	Supported	Supported
Windows 8 (64-bit)	Supported	Supported

Apple Mac Operating Systems

	Safari 7.0.3	Safari 8	Google Chrome (34 or later)
Mac OSX 10.7	Unsupported by Apple	Unsupported by Apple	Supported
Mac OSX 10.8	Unsupported by Apple	Unsupported by Apple	Supported
Mac OSX 10.9	Supported	Unsupported by Apple	Supported
Mac OSX 10.10	Unsupported by Apple	Supported	Supported

Plug-ins for this course

Acrobat Reader is required for PDF files.

Computer Monitor Screen Resolution

This course is best viewed with a screen resolution of 1024x768. For help changing your monitor's resolution, contact the [Help Desk](#).

1.15 Copyright Warning

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1.17 Content Disclaimer

This course does not constitute official CMS regulations or policy, which may be found only in the Code of Federal Regulations and the State Operations Manual. The course includes material from other organizations and websites. Use of this material does not constitute any form of endorsement or approval from Centers for Medicare & Medicaid Services or the Department of Health and Human Services.

1.18 Accessibility Disclaimer

Every attempt has been made to make this course material accessible for the disabled. With that in mind, here are several resources to accommodate particular disabilities.

For Hearing Disabilities:

All course files that contain audio are also accompanied by Closed Captioning or another text alternative.

For Visual or Mobility Disabilities:

The course files are HTML5-based. For disabilities that require a screen reader, we have created a duplicate of the entire course in a PDF that works well with screen readers.

Please select the following link [Basic Writing Skills for Survey Staff Course.pdf](#).