This 3-day workshop will provide tools and resources for each key strategy to help you achieve a positive survey outcome. Attendees will learn how to apply Quality Assurance and Performance Improvement (QAPI) methods to monitor process and care outcomes across all departments/disciplines. Each Federal Rule (F-tag) will be reviewed with focus on the top 10 citations in your State/Nation. Survey management will include review of the survey process both Traditional OBRA and QIS, required forms, resident selection, techniques to manage surveyors during your survey, and methods to prepare your staff.

The entire team is responsible to ensure a successful State “Long Term Care (LTC) Licensing and Certification Survey.” Systems to ensure continuous compliance and methods to prepare for survey are essential for success and positive 5 Star Rating. Key strategies include understanding the survey process, knowing the rules, ability to monitor high risk areas/residents, staff prepared for surveyor questions, and ensuring your QA oversight is telling you what you need to know before the survey team does!

Attendees will receive a comprehensive training manual that can be used as a resource in your facility as well as forms and procedures on CD which allow customization to fit your operational needs.

Who should attend?

- Administrators/Executive Directors
- Assistant Administrator/Administrators in Training
- Directors of Nursing
- Activities Director
- Dietary Director
- Assistant Directors of Nursing
- Social Services Director
- Nurse Managers /MDS Coordinators
- Quality Improvement Staff/Risk Managers
- Staff Development
- Nurse Managers /MDS Coordinators
- Quality Improvement Staff/Risk Managers
- Staff Development

This workshop is designed to help attendees improve management of care delivery systems, QAPI implementation skills, and provides valuable information to prepare for your next survey. This is ideal training for new and seasoned department heads; and other staff responsible for compliance and QAPI oversight.

Why **THIS** training is one of the best investments you can make this year!!

- **Interactive learning format** — This workshop is designed to combine didactic instruction and open discussion to facilitate connection between the topic and real-world application of principles and practices. Participants are encouraged to actively engage in the learning process.
- **Small Class Size** — With a smaller group, more interactive activities are provided with all questions answered to ensure optimal learning experience.
- **Program manual and CD** — Each attendee receives a comprehensive program manual which includes all educational materials and small group activities with sample procedures and forms which can be implemented in your facility.
- **Polaris Group experience** — Polaris Group has been an established expert providing consulting and education to Long Term Care facilities for over 25 years.
Instructor:

Marty Pachciarz, RN, RAC-CT, Managing Director of Clinical Services
Marty Pachciarz, Managing Director of Clinical Services for Polaris Group for the past 16 years, worked as a DON early in her career, then as a consultant, educator, and author focused on Survey Compliance, Risk Management, Quality Improvement, and MDS/PPS/Medicare Reimbursement. With 42 years of experience in long term care, Marty has performed 100s of Mock Surveys, and assisted over 100 SNFs to achieve survey compliance. She is a frequent trainer to over 38 state associations, and has been a repeat speaker for AHCA, AAHSA, and ACHCA.

Dates & Locations/Continuing Education Credits:

- **April 7 – 9**: Las Vegas, NV
- **August 4 – 6**: Pittsburgh, PA

Continuing Education Credits:
- Administrators - 19 CECs
- Nurses - 19 CECs

Day of Training:
- Registrant to make own hotel reservations
- All class times are 8:30 a.m. to 5:00 p.m.
- Coffee or soda provided. Meals are on your own.
- Fee includes: Three (3) days of training, training manual and CD.

- **Course Fee**: $979/per person
  - $779/per person, if registered 30 days in advance
- **Refund/Cancellation Policy**: All refund requests required in writing.
- Please refer to our website for complete refund policy information.

Interested in a Group Training!? We can bring the Institute to you!

You will have the benefit of having your staff all hear the information at the same time; and access to our experts speakers and materials. Call 800-275-6252 ext. 237, Sales Department to learn more about our specialized group training!

Institute Questions: 1-800-275-6252 ext. 250
Click here to register: www.polaris-group.com
### DAY 1

**Module 1: Quality Management with QAPI**
- QAPI – Overview
  - What is the Quality Assurance Performance Improvement Initiative (QAPI)
  - Review of CMS Quality Initiatives
  - Understanding the 5 elements of a QAPI Program
  - How to evaluate your current program to QAPI expectations
- QAPI – Data gathering and Root Cause Analysis
  - Develop a QAPI Plan that demonstrates an ongoing program
  - Data monitoring systems
  - How to convert data to key indicators and create thresholds
  - Analyze and trend data over time
  - Apply root cause analysis to everyday problems
  - How to “walk-thru” a process to identify improvement opportunities
- QAPI – Process Improvement Projects and Teams
  - How to identify the need for a process improvement team (PIT)
  - Identify roadmap for Process Improvement Project
  - How to work a team through an improvement effort
  - Talking “QAPI Talk” with surveyors
  - Case Study using QAPI tools

**Module 2: Risk Management/Abuse Investigations**
- Reportable Events and Incident Reports
  - Focus on F323 Accidents/F223 Abuse
  - What should trigger an investigation
  - Potential abuse reporting

### Module 2, continued:

**Module 2: Risk Management/Abuse Investigations, continued**
- Effective Investigations
  - The Initial Investigation and Documentation
  - Summarize Findings and Document
  - Trending and Root Cause Analysis
  - Appropriate Reporting
- Effective Risk Team Oversight
  - Functioning Risk Teams – Best Practices
    - Weight loss/falls/restraints
    - Pressure Ulcers
    - Antipsychotic Drug use
    - Hospital transfers
    - Infections
    - Change in condition
- Module 3: Quality Measures, 5 Star, and CASPER Data
  - Understanding and using Quality Measures Reports
  - Review 5 Star Domains
  - CMS 802 Resident Roster
  - CASPER Data
    - CMS 672 Census and Conditions
    - CMS 671 Medicare Application

### Day Two

**Module 4: QIS versus Traditional Survey**
- Survey Tasks: Traditional Survey
  - Offsite Preparation
  - Entrance Conference
  - Facility Tour
  - Finalize Survey Sample
  - Information Gathering
- QIS Survey Tasks – Where is QIS different?
  - Offsite Preparation
  - Entrance Conference
  - Facility Tour for overview of facility only
  - Stage I: Preliminary Investigation
  - Stage II: In-depth - triggered in Phase I

### Day Two, continued:

**Module 4, continued:**
- Be Prepared
  - Using Surveyor Tools for QA
    - Interview tools
    - QIS audit Tools
    - Care Paths
    - SOM Guidance
  - Understanding Scope and Severity
  - Prepare Survey Book
  - Managing surveyors onsite
  - Staff preparation and training

**Module 5: Understanding the Rules Part 1**
- Each Federal Regulation (F-tag) will be reviewed for:
  - Intent of Rule
  - What Surveyors look for and how
  - How to mitigate risk of citation/Best Practices
  - Quality Oversight for continuous compliance
    - Resident Rights
    - Admission/Discharge/Transfer
    - Abuse Requirements
    - Quality of Life
    - Nursing Services
    - Physician Services
    - Dietary Services
    - Special Rehab Services
    - Dental Services
    - Pharmacy Services
    - Physical Environment
    - Administration

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Institute Questions: 1-800-275-6252 ext. 250  
Click here to register: www.polaris-group.com
Day Three
Module 6: Understanding the Rules Part 2
- Each Federal Regulation (F-tag) will be reviewed for:
  - Intent of Rule
  - What Surveyors look for and how
  - How to mitigate risk of citation/Best Practices
  - Quality Oversight for continuous compliance
    - Assessment
    - Care Planning
    - Professional Practices
    - Quality of Care
      - Pain/Other
      - ADL/ROM
      - Pressure Ulcers
      - Incontinence
      - Mental/Psychosocial
      - Preventing Accidents
        - Nutrition/Tube feeding
        - Special Needs
        - Unnecessary Drugs
      - Infection Control

Day Three
Module 7: CMS 2567 – Your Plan of Correction
- CMS 2567
  - Remedies and timeframes
  - Poor Performing Facilities/Special Focus List
- Writing your Plan of Correction
  - Four components of a POC
  - Writing a POC without admitting fault
  - Appeal Process/Informal Disputes
  - Oversight of your POC