

# National Administrator-in-Training Program Manual

## MODULE 3 - NHA

**Self-Assessment Instrument  
Professional Development Plan  
Hours Conversion**



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# Roles of the Administrator-in-Training (AIT), Preceptor/Mentor, and State Board/Jurisdiction.

Please read the below role descriptions of the Administrator-in-Training (AIT), the Preceptor/Mentor, and the State Board/Jurisdiction prior to beginning your self-assessment.

**Administrator-in-Training (AIT)** – The work of an Administrator-in-Training will be to learn how to do the job of an administrator, working with a Preceptor or experienced administrator, to meet the requirements of a state licensing board/ jurisdiction. It is incumbent upon the AIT to be an active learner and to ask questions of the Preceptor. If the AIT does not understand an area or feel that it was covered too quickly, it is best to ask questions of the Preceptor and department head. The AIT Preceptor toolkit should help the AIT be aware of the training they should receive in preparation to become a licensed administrator. The AIT will need to perform a self-assessment, contained within the toolkit, to help determine the hours and learning activities to be included in their Professional Development Plan.

**Preceptor/Mentor:** A Preceptor's role is to teach the AIT the job of being an administrator in preparation to become licensed. In some states Preceptors must be pre-approved by the state licensing board or agency and there could be a prescribed set of duties which must be covered within the AIT program. It may be a requirement of a jurisdiction to use the AIT Preceptor Toolkit, however it is available for use by any Preceptor/ AIT. If a Preceptor decides to use the toolkit, keep in mind that it is a tool to help design a plan of study for their AIT. Following the AIT's self-assessment, the Preceptor will need to analyze the results to determine the number of hours assigned in the various departments and on tasks and learning activities. The NAB recommended hours are listed within the Hours Conversion table, though a Preceptor can edit those to meet their jurisdiction's requirements. The Professional Development Plan is a tool for the Preceptor to communicate with the department heads what tasks or learning activities need to be covered within the AIT's learning plan.

**Jurisdiction:** The jurisdiction, or state licensing board / agency, is the entity which requires an AIT program and sets the total number of hours needed. The state licensing board may also require an AIT to work with a pre-approved preceptor or allow AITs to work with any licensed administrator as their preceptor. It is recommended that jurisdictions review this AIT Preceptor Toolkit and offer direction to Preceptors on any tasks, learning activities, etc. that they expect or recommend be covered with an AIT, which can help standardize the AIT experience within their jurisdiction. The AIT Preceptor Toolkit is a device to help Preceptors cover material in preparing the AIT. It allows for a varied approach by Preceptors based on their experience and the AITs skills.

# Self-Assessment

This tool is an instrument to use to help the Preceptor design a plan of study for the AIT. It will require the AIT to complete the self-assessment first and will assist the Preceptor to determine the areas in which the AIT would like to concentrate on and compare this to the NAB suggested times. The Preceptor can adjust the times as they see fit in any area.

**Step 1.** The AIT should complete the Self-Assessment table by rating themselves on each Knowledge Statement listed. To complete the self-assessment, the AIT will start in the self-perception column and select from the drop down arrow the rating of their knowledge in each area. Please save a personal copy of Module 3, which will allow the self-assessment data to be captured and be reflected in the Hours Conversion and Professional Development Plan (PDP) section of this module.

**Step 2.** Preceptors will analyze the AIT's self-assessment and its translation within the Hours Conversion section of the toolkit to determine the proposed hours to be allocated toward each Knowledge Statement. The self-assessment will be reflected in the Hours Conversion table, which lists the typical number of hours in an AIT program and how it is broken out by Knowledge Statement, based on weighting within the exam. Taking into consideration the AIT's self-assessment, the Preceptor can tailor the hours allocated to a Knowledge Statement based on the AIT's background, experience, and education, as well as the state board's required AIT hours. The Hours Conversion table and Professional Development Plan are divided into departments (Administration, Human Resources, Nursing Department/Health Care Services, etc.) to help with the plan of study.

**Step 3.** After the Preceptor has assigned the hours within the Hours Conversion table the amount is transferred to the Professional Development Plan section of the toolkit. The Preceptor and department heads should design learning activities for each of the areas listed. Any required items or hours a jurisdiction has prescribed should be accounted for when finalizing the PDP. Do not change the calculations within the Hours Conversion table as these formulas are based on the weight areas within the NAB Exams. To help create the Professional Development Plan, a list of task statements is listed in Module 2 of the toolkit and are noted in the PDP, as well as sample learning activities. This is not an all-inclusive list but meant to be a starting point for Preceptors to develop a set of activities which work for their facility and AIT. It is recommended to save a copy of the PDP, with added learning activities, which can be used for subsequent AITs. The number of hours and activities is expected to change with each AIT and the experience/education they bring, and the Preceptor may also want to edit the PDP as they learn how effective those activities are for AITs.

**Step 4.** Once the learning activities have been added, the Preceptor should print the final Professional Development Plan for the AIT and department heads to reference.

**Instructions:** Rate yourself on the following items. Please be candid - this assessment is for your use with your Preceptor only. The results are not intended to be shared with the Board or any other individuals. Read the statement and then select your perception of yourself in this area from the drop down menu on the right (**click in the box, then click the arrow to make your selection**).

SELF PERCEPTION - this will help your Preceptor to prepare an analysis of your strengths/weaknesses and will translate into helping define your needs for the number of hours in each AIT Program Module. Below is the scale you will use throughout the assessment.

**4** - I feel that I am fully competent in this area.

**AIT's NAME** \_\_\_\_\_

**3** - I am quite knowledgeable or skilled in this area.

**2** - My knowledge or skill level is about average in this area.

**1** - I believe that my knowledge or skill level is deficient here.

**0** - I know nothing about this, or do not have this skill.

## Domain 1: Care, Services, and Supports

Subdomain	Exam Content Outline Items	Self Perception	
<b>1A1</b>	<b>Medical and Nursing Care Practices.</b> Knowledge/Understanding of general medical terminology and standards of practice and guidance for nursing as relates to long-term care.		
<b>1A2</b>	<b>Medication Management and Administration.</b> Knowledge/Understanding of common LTC medications, requirements/limitations, interactions, record keeping, storage requirements, etc.		
<b>1A3</b>	<b>Disease Management (e.g., acute vs. chronic conditions).</b> Knowledge of care practices, interventions, complications, prevention efforts, etc.		
<b>1A4</b>	<b>Nutrition and Hydration (e.g., specialized diets).</b> Knowledge of the value of food and drink in maintaining health and well-being.		
<b>1A5</b>	<b>Activities of Daily Living (ADLs) and Independent Activities of Daily Living (IADLs).</b> Knowledge of daily self-care activities including feeding ourselves, bathing, dressing, grooming, work, homemaking, hygiene, leisure, hobbies. Includes knowledge of adaptive equipment and devices used to enhance and increase independence in performing these activities. Refers to some of the most basic functions of living.		
<b>1A6</b>	<b>Rehabilitation and Restorative Programs.</b> Knowledge of the proper roles of therapists (occupational, physical, speech...) and nursing staff.		
<b>1A7</b>	<b>Care Recipient Assessment and Interdisciplinary Care Planning.</b> Knowledge of the process and participants in the care planning processes and required timelines.		
<b>1A8</b>	<b>Clinical and Medical Records and Documentation Requirements (e.g., storage, retention, destruction).</b> Knowledge of the process, participants and required timelines in care planning.		
<b>1A9</b>	<b>Medical Director.</b> Knowledge of the role of the medical director, requirements, policies, etc.		
<b>1A10</b>	<b>Emergency Medical Services (e.g., CPR, first aid, Heimlich maneuver, AED).</b> Knowledge of EMS policies/procedures, equipment, requirements.		
<b>1A11</b>	<b>Transition of Care (e.g., admission, move-in, transfer, discharge, and move-out).</b> Knowledge of the movement of a resident from one setting of care (hospital, ambulatory primary or specialty care practice, long-term care, home health, rehabilitation facility) to another. More specifically, to and from long-term care.		

<b>1A12</b>	<b>Basic Healthcare Terminology.</b> Knowledge of basic (common) healthcare terms, and more specifically, those more common in the long-term care setting.		
<b>1B1</b>	<b>Psychosocial Needs (e.g., social, spiritual, community, cultural).</b> Knowledge relevant to a patient as well as their family's mental, social, cultural, spiritual, and developmental needs arising from emotional response to their diagnosis, social and role limitations, loss of physical and/or mental abilities and other complexities.		
<b>1B2</b>	<b>Person-Centered Care and Comprehensive Care Planning.</b> Knowledge relevant to empowering people to take charge of their own health rather than being passive recipients of services based on the patient views, input and experience help improve outcomes; knowledge of a plan of care that outlines goals of care, planned medical, nursing and allied health activities for a resident.		
<b>1B3</b>	<b>Care Recipient Bill of Rights and Responsibilities.</b> Knowledge of the federal Nursing Home Reform Law enacted in 1987 in the Social Security Act and the requirements to promote and protect the rights of each resident with a strong emphasis on individual dignity and self-determination.		
<b>1B4</b>	<b>Care Recipient Safety (e.g., fall prevention, elopement prevention, adverse events).</b> Knowledge of interventions, equipment, reporting requirements, investigation requirements, etc.		
<b>1B5</b>	<b>Care Recipient (and Representative) Grievance, Conflict, and Dispute Resolution.</b> Knowledge of processes for grievances, conflict resolution, dispute resolution, investigation, reporting requirements.		
<b>1B6</b>	<b>Care Recipient Advocacy (e.g., Ombudsman, resident and family council).</b> Knowledge of your role as residents' liaison between staff and doctors.		
<b>1B7</b>	<b>Care Recipient Decision-Making (e.g., capacity, power of attorney, guardianship, conservatorship, code status, advance directives, ethical decision-making).</b> Knowledge of legal requirements, definitions, limitations, ethics.		
<b>1B8</b>	<b>Care Recipient (and Representative) Satisfaction.</b> Knowledge of methods to understand and predict satisfaction and methods to improve.		
<b>1B9</b>	<b>Recognition of Maltreatment (e.g., abuse, neglect, exploitation).</b> Knowledge of legal definitions of abuse, neglect, exploitation; reporting requirements, investigation techniques, etc.		
<b>1B10</b>	<b>Mental and Behavioral Health (e.g., cognitive impairment, depression, social support systems).</b> Knowledge of the difference between the two; understanding issues related to depression, anxiety, diabetes management, weight loss, smoking cessation and drinking or drug problems; understanding the connection between behaviors and the health and well-being of the body, mind and spirit; relevance to preventing illness or promoting health.		
<b>1B11</b>	<b>Trauma-Informed Care (e.g., PTSD).</b> Knowledge of the principles of a trauma-informed care approach.		
<b>1B12</b>	<b>Pain Management.</b> Knowledge of interventional procedures, medication management, therapies, counseling and support, alternative therapies and how to refer to medical specialists.		
<b>1B13</b>	<b>Death, Dying, and Grief.</b> Knowledge of the processes and stages.		
<b>1B14</b>	<b>Restraint Usage and Reduction.</b> Knowledge of the proper use of restraints and what constitutes a restraint, knowledge of legal requirements if they are used and limitations and documentation requirements.		
<b>1B15</b>	<b>Foodservice (e.g., choice and menu planning, dietary management, food storage and handling, dining services).</b> Knowledge of culture change impacts on food service choices, requirements for staffing, requirements for storage, food handling requirements, illness prevention, risks of foodborne illnesses, etc.		
<b>1B16</b>	<b>Social Services Programs.</b> Knowledge of staffing requirements, state requirements for social work practice; role of the social worker in a long-term care setting.		
<b>1B17</b>	<b>Therapeutic Recreation and Activity Programs.</b> Knowledge of various therapy activities that offer benefits to support the health and well-being of Alzheimer's and Dementia.		

<b>1B18</b>	<b>Community Resources.</b> Knowledge of existing community resources available and how programs come to exist through legislation, who uses the resources, and how they are delivered.		
<b>1C1</b>	<b>Hospice and Palliative Care.</b> Knowledge of the differences, knowledge of pain management and psychosocial and spiritual needs, family needs, etc. Knowledge of legal limitations/guidance.		
<b>1C2</b>	<b>Specialized Medical Equipment (e.g., oxygen, durable medical equipment).</b> Knowledge of equipment and supplies to include devices, controls or appliances, specified in the care plan to enable individuals to increase their abilities to perform ADLs or to perceive, control or communicate with their environment. Also includes life support, ancillary supplies and equipment. Knowledge of limitations and costs, etc.		
<b>1C3</b>	<b>Transportation for Care Recipients.</b> Knowledge of requirements to transport.		
<b>1C4</b>	<b>Telemedicine (e.g., e-health).</b> Knowledge of CMS guidance - Telehealth and Telemedicine Tool Kit.		
<b>1C5</b>	<b>Diagnostics Services (e.g., radiology, lab services).</b> Knowledge of availability of various services within and near the facility; limitations and requirements, etc.		
<b>1C6</b>	<b>Dental and Oral Care Services.</b> Knowledge of availability of various services within and near the facility; limitations and requirements, etc.		
<b>1C7</b>	<b>Healthcare Partners and Clinical Providers (e.g., MD/DO, Nurse Practitioner, Psychiatrist, Podiatrist, Dentist).</b> Knowledge of availability of various services within and near the facility; limitations and requirements, etc.		
<b>1C8</b>	<b>Volunteer Programs.</b> Knowledge of volunteer programs, to include Ombudsman programs and others; limitations and regulations.		
		<b>Domain Total</b>	<i>or</i>

## Domain 2: Operations

Subdomain	Exam Content Outline Items	Self Perception	
2A1	<b>Budgeting and Forecasting.</b> <i>Knowledge of tools and purposes of budgeting, forecasting, generally accepted accounting principles.</i>		
2A2	<b>Financial Analysis (e.g., ratios, profitability, debt, revenue mix, depreciation, operating margin, cash flow).</b> <i>Knowledge of financial analysis tools and ability to calculate different indicators and understand what they mean.</i>		
2A3	<b>Revenue Cycle Management (e.g., billing, accounts receivable, accounts payable, collections).</b> <i>Comprehension of the revenue cycle and the administrator's role along the way.</i>		
2A4	<b>Financial Statements (e.g., income/revenue statement, balance sheet, statement of cash flows, cost reporting).</b> <i>Understand financial statements and interpret what they mean to the facility.</i>		
2A5	<b>Revenue and Reimbursement (e.g., PDPM, PDGM, ACOs, HMOs, Medicaid, private payors).</b> <i>Comprehension of the various revenue sources, calculations, implications, etc.</i>		
2A6	<b>Financial Reporting Requirements (e.g., requirements for not-for-profit, for-profit, and governmental providers).</b> <i>Knowledge of the financial reporting requirements for different facility types.</i>		
2A7	<b>Integration of Clinical and Financial Statements (e.g., EMR/HER, MDS).</b> <i>Knowledge of policies, procedures, practices; compliance implications, viability implications; planning methods, implementation methods.</i>		
2A8	<b>Internal Financial Management Controls (e.g., segregation of duties, access).</b> <i>Knowledge of policies, procedures, practices; compliance implications, viability implications; planning methods, implementation methods.</i>		
2A9	<b>Supply-Chain Management (e.g., inventory control).</b> <i>Knowledge of cost/time/waste minimization techniques.</i>		
2A10	<b>Resident Trust Accounts for Personal Funds.</b> <i>Knowledge of policies and procedures and requirements for maintaining trust accounts and reporting/spending requirements.</i>		
2B1	<b>OSHA Rules and Regulations.</b> <i>Knowledge of rules, regulations, policies, procedures for a safe environment for employees; training, equipment requirements.</i>		
2B2	<b>Workers Compensation.</b> <i>Knowledge of how to maintain a safe work environment; implications of not doing so.</i>		
2B3	<b>Ethical Conduct and Standards of Practice.</b> <i>Understand ethical concerns and standards of practice for various professions working within the facility.</i>		
2B4	<b>Compliance Programs.</b> <i>Knowledge of the plethora of regulations relating to diversity, safety, risk management, professional development, ethics, etc.</i>		
2B5	<b>Risk Management Process and Programs.</b> <i>Knowledge/Understanding of how to identify risks, analyze risks, evaluate/rank risks, risk treatment techniques, cycles, etc.</i>		
2B6	<b>Quality Improvement Processes (e.g., root cause analysis, PDCA/PDSA).</b> <i>Working knowledge of QAPI processes from risk management paradigm.</i>		
2B7	<b>Scope of Practice and legal Liability.</b> <i>Knowledge/Understanding of medical/professional liability issues (eg, changes in the PPACA); relative to increased use of PAs, NPs, etc.</i>		
2B8	<b>Internal Investigation Protocols and Techniques (e.g., incidents, adverse events).</b> <i>Working knowledge of investigation procedures and techniques.</i>		
2B9	<b>Mandatory Reporting Requirements (e.g., incidents, adverse events, abuse, neglect, financial exploitation, fraud).</b> <i>Thorough understanding of definitions of abuse, neglect, exploitation; working knowledge of reporting requirements.</i>		

<b>2B10</b>	<b>Insurance Coverage (e.g., liability, property).</b> <i>Knowledge/Understanding of insurance requirements relative to risk management.</i>		
<b>2B11</b>	<b>Healthcare Record Requirements (e.g., confidentiality, disclosure, safeguarding, HIPAA, HITECH).</b> <i>Working knowledge of HIPAA; working knowledge of record keeping requirements.</i>		
<b>2B12</b>	<b>Security (e.g., cameras, monitoring systems, locks, staff location reporting).</b> <i>Knowledge of technology available, limitations by law, etc.</i>		
<b>2B13</b>	<b>Contracted Services (e.g., roles, responsibilities, oversight, background checks).</b> <i>Knowledge/Understanding of implications of managed care, case management, reimbursement, benefits, structuring, etc.</i>		
<b>2C1</b>	<b>Federal Human Resources Laws, Rules, and Regulations (e.g., ADA, FMLA, Wage and Hour, FLSA).</b> <i>Knowledge/Understanding of federal HR laws, rules, regulations.</i>		
<b>2C2</b>	<b>Selection and Hiring Practices (e.g., EEOC, interviewing, adverse impact, protected classes, occupational qualifications).</b> <i>Working knowledge of valid hiring practices and what you can and cannot do/ask/say, etc.</i>		
<b>2C3</b>	<b>Compensation and Benefits Programs (e.g., time off, healthcare insurance, employee pay and payroll).</b> <i>Working knowledge of compensation and benefit programs.</i>		
<b>2C4</b>	<b>Organizational Staffing Requirement and Reporting (e.g., PBJ).</b> <i>Working knowledge of staffing/reporting requirements.</i>		
<b>2C5</b>	<b>Staff Certification and Licensure Requirements.</b> <i>Working knowledge of certification and licensure requirements of all professionals within the field of LTC.</i>		
<b>2C6</b>	<b>Professional Development (e.g., maintenance of credentials, continuing education).</b> <i>Knowledge of CE requirements for credential maintenance and professional development of staff (and self).</i>		
<b>2C7</b>	<b>Employee Training and Orientation.</b> <i>Knowledge of periodic training requirements to include orientation training.</i>		
<b>2C8</b>	<b>Performance Evaluation.</b> <i>Understanding of performance evaluation requirements.</i>		
<b>2C9</b>	<b>Human Resources Policies (e.g., drug-free workplace, discipline, job classifications, photography and video, social media usage, mobile phone usage).</b> <i>Knowledge/Understanding of HR Policies (reasons for, options to change, etc.).</i>		
<b>2C10</b>	<b>Employee Record-Keeping Requirements.</b> <i>Knowledge/Understanding of the lifecycle of records/disposition, safeguards, regulatory requirements.</i>		
<b>2C11</b>	<b>Employee Grievance, Conflict, and Dispute Resolution.</b> <i>Knowledge/Understanding of resolution strategies, documentation requirements, what constitutes a grievance (act/omission, situation, decision, perceptions...).</i>		
<b>2C12</b>	<b>Employee Satisfaction, Engagement, and Retention.</b> <i>Knowledge/Understanding of best practices in the field, current trends, how to respond, tools available, etc.</i>		
<b>2C13</b>	<b>Cultural Competence and Diversity Awareness.</b> <i>Knowledge/Understanding of the ongoing evolution of cultural competence, awareness, knowledge, understanding, sensitivity and skill.</i>		
<b>2C14</b>	<b>Labor Relations (e.g., union, collective bargaining [CBA], contract/pool staff).</b> <i>Knowledge/Understanding of various labor relation issues.</i>		
		<b>Domain Total</b>	<i>or</i>

## Domain 3: Environment and Quality

Subdomain	Exam Content Outline Items	Self Perception	
3A1	<b>Federal Codes and Regulations for Building Equipment, Maintenance and Grounds.</b> <i>Knowledge/Understanding/working knowledge of the Life Safety Code rules/regulations and the survey process.</i>		
3A2	<b>Person-Centered Environment (e.g., home-like environment).</b> <i>Knowledge/Understanding of role/importance of the environment in providing a home-like environment; dignity, coordination of care...; personalized care...; development of strengths and abilities for improved independence, etc.</i>		
3A3	<b>Safety and Accessibility (e.g., ADA, safety data sheets).</b> <i>Knowledge/Understanding of documentation required for chemicals/substances in building (SDSes); familiarity with requirements of ADA for private vs. government buildings (Titles I, II and III).</i>		
3A4	<b>Facility Management and Environmental Services.</b> <i>Knowledge/Understanding of available strategies/approaches commensurate with culture and other factors.</i>		
3A5	<b>Information Systems Infrastructure (e.g., configurations, data security, technical controls).</b> <i>Knowledge/Understanding of compliance issues (HIPAA, CMS, HITECH) and current best practices.</i>		
3A6	<b>Preventative and Routine Maintenance Programs (e.g., pest control, equipment, mechanical systems).</b> <i>Working knowledge of equipment, systems, maintenance requirements.</i>		
3A7	<b>Infection Control and Sanitation (e.g., linens, kitchen, hand washing, healthcare acquired infections, hazardous materials).</b> <i>Working knowledge of infection control issues relevant to environmental issues.</i>		
3A8	<b>Disaster and Emergency Planning, Preparedness, Response, and Recovery (e.g., Appendix Z).</b> <i>Working knowledge of the coordinated, cooperative process of preparing to match urgent needs with available resources; includes research, writing, disseminating, testing, updating. Emergency plans are living documents and adapt to changing circumstances - protocols, procedures, division of responsibilities... vary somewhat by geography and known risks in the area (tornadoes, hurricanes, earthquakes, etc.).</i>		
3B1	<b>Federal Healthcare Laws, Rules, and Regulations.</b> <i>Working knowledge of federal healthcare laws, rules and regulations as they pertain to facility and life safety code issues.</i>		
3B2	<b>Government Programs and Entities (e.g., Medicare, Medicaid, waivers).</b> <i>Working knowledge of QAPI for Medicare/Medicaid compliance relative to Requirements of Participation; F-Tag compliance.</i>		
3B3	<b>Certification and Licensure Requirements for the Organization.</b> <i>Working knowledge of licensure requirements; Requirements of Participation for re-certification standard surveys.</i>		
3B4	<b>Regulatory Survey and Inspection Process.</b> <i>Working knowledge of; ability to run a "mock" survey/inspection.</i>		
3B5	<b>Procedures for Informal Dispute Resolution (IDR).</b> <i>Working knowledge of the process.</i>		
3B6	<b>Centers for Medicare and Medicaid Services (CMS) Quality Measures.</b> <i>Working knowledge of the tools used to measure or quantify healthcare processes, outcomes, patient perceptions and organizational structure and/or systems that are associated with the ability to provide high-quality health care and/or that relate to one or more quality goals for health care. Goals include: effective, safe, efficient, patient-centered, equitable and timely care.</i>		
3B7	<b>Quality Assurance and Performance Improvement (QAPI).</b> <i>Working knowledge of QAPI, principles, processes, tools, purpose, elements of QAPI, QAPI F-Tags and federal requirements, etc.</i>		
3B8	<b>Bed-Hold Requirements.</b> <i>Working knowledge of Medicaid bed hold policies and requirements (Medicare restrictions)</i>		

<b>3B9</b>	<b>Pre-Admission Screening Annual Review (PASSR).</b> Working knowledge of federal pre-admission screening and annual review requirements (applicability and definitions)		
<b>3B10</b>	<b>Facility Assessment.</b> Working knowledge of the requirement and purpose of an annual facility assessment; familiarity with tools for conducting these assessments.		
		<b>Domain Total</b>	<i>or</i>

## Domain 4: Leadership and Strategy

Subdomain	Exam Content Outline Items	Self Perception	
4A1	<b>Organizational Structures (e.g., roles, responsibilities, functions, systemic processes).</b> <i>Understanding of the purpose of different organizational structures and different types of structures.</i>		
4A2	<b>Organizational Change Management.</b> <i>Understand methods and manners to describe and implement change within its internal and external processes; understand how to develop a structured approach to change; understand how to beneficially transition while mitigating disruption.</i>		
4A3	<b>Organizational Behavior (e.g., organizational culture, team building, group dynamics).</b> <i>Understand the behavioral dynamics of individuals and groups in organizational settings; working knowledge of what motivates employees and how they interact with each other to be better able to meet short- and long-term goals.</i>		
4A4	<b>Leadership Principles (e.g., communications, styles, mentoring, coaching, personal professional development).</b> <i>Working knowledge of numerous leadership principles, leadership styles, tools, techniques.</i>		
4A5	<b>Governance (e.g., board of directors, governing bodies, corporate entities, advisory boards).</b> <i>Working knowledge of the role and responsibilities of governance entities in LTC; legal framework, oversight responsibilities, reporting indicators for governing bodies, strategic role; concepts such as collaborative governance.</i>		
4A6	<b>Professional Advocacy and Governmental Relations.</b> <i>Understand the relationships of different organizations and the processes for impactful advocacy for strengthening LTC policies/procedures/rules/laws (meaningful public policy change).</i>		
4B1	<b>Mission, Vision, and Value Statements.</b> <i>Working knowledge; understand what mission, vision and value statements are about and how to write good ones. Able to translate into foundation for strategic planning.</i>		
4B2	<b>Strategic Business Planning (e.g., new lines of service, succession management, staffing pipeline).</b> <i>Working knowledge of the processes of strategic planning and execution of the plan.</i>		
4B3	<b>Business Analytics (e.g., evidence-based practice, data analytics).</b> <i>Working knowledge of technological tools to effectively process important data for improved outcomes.</i>		
4B4	<b>Business Development (e.g., sales, marketing, partnerships, ACOs, contracts and agreements, negotiations).</b> <i>Understanding of ideas, initiatives, and activities that yields desired growth; includes building strategic partnerships and making strategic business decisions.</i>		
4B5	<b>Public Relations and External Stakeholders (e.g., hospitals, referrals sources, local community, donors).</b> <i>Working knowledge of techniques to attract referrals, partnerships and to satisfy and retain residents.</i>		
		<b>Domain Total</b>	<i>or</i>

# Hours Conversion

**Preceptor/Mentor:** You can adjust the applicable reference column hours to what you think is actually typical for each of these topics for instructing your AIT...as another reference. Understand that the hours changed have a ripple effect on other hours.

The assessments will help you adjust the hours for each Module by individual task (in your column) based on the whole picture of strengths and weaknesses in the various domains. 0 or 1 may tell you they need more hours on something while a 4 may tell you they need less.

*\*NOTE: Some knowledge statements appear in multiple modules. Some tasks may have too much time allotted by this method. This is based on the 560 hour program and less time could be needed in some of these areas so adjust accordingly. For example, if it only takes an hour to show something (regardless of whether it's in a 560 or 1000 hour program), you would need to adjust and use that time better elsewhere.*

					PRECEPTORS: THIS IS YOUR COLUMN
					This column should be updated by the Preceptor to tailor the program to individual AITs.
					Self-Assessment
					Typical Program Hours in many states
					Variable
					Preceptor Assigned Hours
<b>1A12</b>	<b>Basic Healthcare Terminology.</b> Knowledge of basic (common) healthcare terms, and more specifically, those more common in the long-term care setting.				
<b>1B5</b>	<b>Care Recipient (and Representative) Grievance, Conflict, and Dispute Resolution.</b> Knowledge of processes for grievances, conflict resolution, dispute resolution, investigation, reporting requirements.				
<b>1B6</b>	<b>Care Recipient Advocacy (e.g., Ombudsman, resident and family council).</b> Knowledge of your role as residents' liaison between staff and doctors.				
<b>1B7</b>	<b>Care Recipient Decision-Making (e.g., capacity, power of attorney, guardianship, conservatorship, code status, advance directives, ethical decision-making).</b> Knowledge of legal requirements, definitions, limitations, ethics.				
<b>1B9</b>	<b>Recognition of Maltreatment (e.g., abuse, neglect, exploitation).</b> Knowledge of legal definitions of abuse, neglect, exploitation; reporting requirements, investigation techniques, etc.				
<b>1B18</b>	<b>Community Resources.</b> Knowledge of existing community resources available and how programs come to exist through legislation, who uses the resources, and how they are delivered				
<b>1C7</b>	<b>Healthcare Partners and Clinical Providers (e.g., MD/DO, Nurse Practitioner, Psychiatrist, Podiatrist, Dentist).</b> Knowledge of availability of various services within and near the facility; limitations and requirements, etc.				
<b>1C8</b>	<b>Volunteer Programs.</b> Knowledge of volunteer programs, to include Ombudsman programs and others; limitations and regulations.				

<b>2A7</b>	<b>Integration of Clinical and Financial Statements (e.g., EMR/HER, MDS).</b> <i>Knowledge of policies, procedures, practices; compliance implications, viability implications; planning methods, implementation methods.</i>				
<b>2A8</b>	<b>Internal Financial Management Controls (e.g., segregation of duties, access).</b> <i>Knowledge of policies, procedures, practices; compliance implications, viability implications; planning methods, implementation methods.</i>				
<b>2A9</b>	<b>Supply-Chain Management (e.g., inventory control).</b> <i>Knowledge of cost/time/waste minimization techniques.</i>				
<b>2A10</b>	<b>Resident Trust Accounts for Personal Funds.</b> <i>Knowledge of policies and procedures and requirements for maintaining trust accounts and reporting/spending requirements.</i>				
<b>2B6</b>	<b>Quality Improvement Processes (e.g., root cause analysis, PDCA/PDSA).</b> <i>Working knowledge of QAPI processes from risk management paradigm.</i>				
<b>2B8</b>	<b>Internal Investigation Protocols and Techniques (e.g., incidents, adverse events).</b> <i>Working knowledge of investigation procedures and techniques.</i>				
<b>2B9</b>	<b>Mandatory Reporting Requirements (e.g., incidents, adverse events, abuse, neglect, financial exploitation, fraud).</b> <i>Thorough understanding of definitions of abuse, neglect, exploitation; working knowledge of reporting requirements.</i>				
<b>2B10</b>	<b>Insurance Coverage (e.g., liability, property).</b> <i>Knowledge/Understanding of insurance requirements relative to risk management.</i>				
<b>2B11</b>	<b>Healthcare Record Requirements (e.g., confidentiality, disclosure, safeguarding, HIPAA, HITECH).</b> <i>Working knowledge of HIPAA; working knowledge of record keeping requirements.</i>				
<b>2B12</b>	<b>Security (e.g., cameras, monitoring systems, locks, staff location reporting).</b> <i>Knowledge of technology available, limitations by law, etc.</i>				
<b>2B13</b>	<b>Contracted Services (e.g., roles, responsibilities, oversight, background checks).</b> <i>Knowledge/Understanding of implications of managed care, case management, reimbursement, benefits, structuring, etc.</i>				
<b>2C1</b>	<b>Federal Human Resources Laws, Rules, and Regulations (e.g., ADA, FMLA, Wage and Hour, FLSA).</b> <i>Knowledge/Understanding of federal HR laws, rules, regulations.</i>				
<b>2C6</b>	<b>Professional Development (e.g., maintenance of credentials, continuing education).</b> <i>Knowledge of CE requirements for credential maintenance and professional development of staff (and self).</i>				
<b>2C7</b>	<b>Employee Training and Orientation.</b> <i>Knowledge of periodic training requirements to include orientation training.</i>				
<b>2C8</b>	<b>Performance Evaluation.</b> <i>Understanding of performance evaluation requirements</i>				
<b>2C13</b>	<b>Cultural Competence and Diversity Awareness.</b> <i>Knowledge/Understanding of the ongoing evolution of cultural competence, awareness, knowledge, understanding, sensitivity and skill.</i>				

<b>3A8</b>	<b>Disaster and Emergency Planning, Preparedness, Response, and Recovery (e.g., Appendix Z).</b> Working knowledge of the coordinated, cooperative process of preparing to match urgent needs with available resources; includes research, writing, disseminating, testing, updating. Emergency plans are living documents and adapt to changing circumstances - protocols, procedures, division of responsibilities...vary somewhat by geography and known risks in the area (tornadoes, hurricanes, earthquakes, etc.).				
<b>3B1</b>	<b>Federal Healthcare Laws, Rules, and Regulations.</b> Working knowledge of federal healthcare laws, rules and regulations as they pertain to facility and life safety code issues.				
<b>3B2</b>	<b>Government Programs and Entities (e.g., Medicare, Medicaid, waivers).</b> Working knowledge of QAPI for Medicare/Medicaid compliance relative to Requirements of Participation; F-Tag compliance.				
<b>3B3</b>	<b>Certification and Licensure Requirements for the Organization.</b> Working knowledge of licensure requirements; Requirements of Participation for re-certification standard surveys.				
<b>3B4</b>	<b>Regulatory Survey and Inspection Process.</b> Working knowledge of; ability to run a "mock" survey/inspection.				
<b>3B5</b>	<b>Procedures for Informal Dispute Resolution (IDR).</b> Working knowledge of the process.				
<b>3B6</b>	<b>Centers for Medicare and Medicaid Services (CMS) Quality Measures.</b> Working knowledge of the tools used to measure or quantify healthcare processes, outcomes, patient perceptions and organizational structure and/or systems that are associated with the ability to provide high-quality health care and/or that relate to one or more quality goals for health care. Goals include: effective, safe, efficient, patient-centered, equitable and timely care.				
<b>3B7</b>	<b>Quality Assurance and Performance Improvement (QAPI).</b> Working knowledge of QAPI, principles, processes, tools, purpose, elements of QAPI, QAPI F-Tags and federal requirements, etc.				
<b>3B8</b>	<b>Bed-Hold Requirements.</b> Working knowledge of Medicaid bed hold policies and requirements (Medicare restrictions)				
<b>3B10</b>	<b>Facility Assessment.</b> Working knowledge of the requirement and purpose of an annual facility assessment; familiarity with tools for conducting these assessments.				
<b>4A1</b>	<b>Organizational Structures (e.g., roles, responsibilities, functions, systemic processes).</b> Understanding of the purpose of different organizational structures and different types of structures.				
<b>4A2</b>	<b>Organizational Change Management.</b> Understand methods and manners to describe and implement change within its internal and external processes; understand how to develop a structured approach to change; understand how to beneficially transition while mitigating disruption.				
<b>4A3</b>	<b>Organizational Behavior (e.g., organizational culture, team building, group dynamics).</b> Understand the behavioral dynamics of individuals and groups in organizational settings; working knowledge of what motivates employees and how they interact with each other to be better able to meet short- and long-term goals.				

<b>4A4</b>	<b>Leadership Principles (e.g., communications, styles, mentoring, coaching, personal professional development).</b> <i>Working knowledge of numerous leadership principles, leadership styles, tools, techniques.</i>				
<b>4A5</b>	<b>Governance (e.g., board of directors, governing bodies, corporate entities, advisory boards).</b> <i>Working knowledge of the role and responsibilities of governance entities in LTC; legal framework, oversight responsibilities, reporting indicators for governing bodies, strategic role; concepts such as collaborative governance.</i>				
<b>4A6</b>	<b>Professional Advocacy and Governmental Relations.</b> <i>Understand the relationships of different organizations and the processes for impactful advocacy for strengthening LTC policies/procedures/rules/laws (meaningful public policy change).</i>				
<b>4B1</b>	<b>Mission, Vision, and Value Statements.</b> <i>Working knowledge; understand what mission, vision and value statements are about and how to write good ones. Able to translate into foundation for strategic planning.</i>				
<b>4B2</b>	<b>Strategic Business Planning (e.g., new lines of service, succession management, staffing pipeline).</b> <i>Working knowledge of the processes of strategic planning and execution of the plan.</i>				
<b>4B3</b>	<b>Business Analytics (e.g., evidence-based practice, data analytics).</b> <i>Working knowledge of technological tools to effectively process important data for improved outcomes.</i>				
<b>4B4</b>	<b>Business Development (e.g., sales, marketing, partnerships, ACOs, contracts and agreements, negotiations).</b> <i>Understanding of ideas, initiatives, and activities that yields desired growth; includes building strategic partnerships and making strategic business decisions.</i>				
<b>4B5</b>	<b>Public Relations and External Stakeholders (e.g., hospitals, referrals sources, local community, donors).</b> <i>Working knowledge of techniques to attract referrals, partnerships and to satisfy and retain residents.</i>				
<b>Module Total</b>					

<b>HUMAN RESOURCES</b>		Self-Assessment	Typical Program Hours in many states	Variable	Preceptor Assigned Hours
<b>2B1</b>	<b>OSHA Rules and Regulations.</b> <i>Knowledge of rules, regulations, policies, procedures for a safe environment for employees; training, equipment requirements.</i>				
<b>2B2</b>	<b>Workers Compensation.</b> <i>Knowledge of how to maintain a safe work environment; implications of not doing so.</i>				
<b>2B3</b>	<b>Ethical Conduct and Standards of Practice.</b> <i>Understand ethical concerns and standards of practice for various professions working within the facility.</i>				
<b>2B4</b>	<b>Compliance Programs.</b> <i>Knowledge of the plethora of regulations relating to diversity, safety, risk management, professional development, ethics, etc.</i>				
<b>2B5</b>	<b>Risk Management Process and Programs.</b> <i>Knowledge/Understanding of how to identify risks, analyze risks, evaluate/rank risks, risk treatment techniques, cycles, etc.</i>				
<b>2B6</b>	<b>Quality Improvement Processes (e.g., root cause analysis, PDCA/PDSA).</b> <i>Working knowledge of QAPI processes from risk management paradigm.</i>				
<b>2B7</b>	<b>Scope of Practice and legal Liability.</b> <i>Knowledge/Understanding of medical/professional liability issues (eg, changes in the PPACA); relative to increased use of PAs, NPs, etc.</i>				
<b>2B8</b>	<b>Internal Investigation Protocols and Techniques (e.g., incidents, adverse events).</b> <i>Working knowledge of investigation procedures and techniques.</i>				
<b>2C1</b>	<b>Federal Human Resources Laws, Rules, and Regulations (e.g., ADA, FMLA, Wage and Hour, FLSA).</b> <i>Knowledge/Understanding of federal HR laws, rules, regulations.</i>				
<b>2C2</b>	<b>Selection and Hiring Practices (e.g., EEOC, interviewing, adverse impact, protected classes, occupational qualifications).</b> <i>Working knowledge of valid hiring practices and what you can and cannot do/ask/say, etc.</i>				
<b>2C3</b>	<b>Compensation and Benefits Programs (e.g., time off, healthcare insurance, employee pay and payroll).</b> <i>Working knowledge of compensation and benefit programs.</i>				
<b>2C4</b>	<b>Organizational Staffing Requirement and Reporting (e.g., PBJ).</b> <i>Working knowledge of staffing/reporting requirements.</i>				
<b>2C5</b>	<b>Staff Certification and Licensure Requirements.</b> <i>Working knowledge of certification and licensure requirements of all professionals within the field of LTC.</i>				
<b>2C7</b>	<b>Employee Training and Orientation.</b> <i>Knowledge of periodic training requirements to include orientation training.</i>				
<b>2C8</b>	<b>Performance Evaluation.</b> <i>Understanding of performance evaluation requirements.</i>				
<b>2C9</b>	<b>Human Resources Policies (e.g., drug-free workplace, discipline, job classifications, photography and video, social media usage, mobile phone usage).</b> <i>Knowledge/Understanding of HR Policies (reasons for, options to change, etc.).</i>				

<b>2C10</b>	<b>Employee Record-Keeping Requirements.</b> <i>Knowledge/Understanding of the lifecycle of records/disposition, safeguards, regulatory requirements.</i>				
<b>2C11</b>	<b>Employee Grievance, Conflict, and Dispute Resolution.</b> <i>Knowledge/Understanding of resolution strategies, documentation requirements, what constitutes a grievance (act/omission, situation, decision, perceptions...).</i>				
<b>2C12</b>	<b>Employee Satisfaction, Engagement, and Retention.</b> <i>Knowledge/Understanding of best practices in the field, current trends, how to respond, tools available, etc.</i>				
<b>2C13</b>	<b>Cultural Competence and Diversity Awareness.</b> <i>Knowledge/Understanding of the ongoing evolution of cultural competence, awareness, knowledge, understanding, sensitivity and skill.</i>				
<b>2C14</b>	<b>Labor Relations (e.g., union, collective bargaining [CBA], contract/pool staff).</b> <i>Knowledge/Understanding of various labor relation issues.</i>				
<b>4B2</b>	<b>Strategic Business Planning (e.g., new lines of service, succession management, staffing pipeline).</b> <i>Working knowledge of the processes of strategic planning and execution of the plan.</i>				
<b>Module Total</b>					

<b>NURSING DEPARTMENT/ HEALTH CARE SERVICES</b>		Self- Assessment	Typical Pro- gram Hours in many states	Variable	<b>Preceptor Assigned Hours</b>
<b>1A1</b>	<b>Medical and Nursing Care Practices.</b> <i>Knowledge/ Understanding of general medical terminology and standards of practice and guidance for nursing as relates to long-term care.</i>				
<b>1A2</b>	<b>Medication Management and Administration.</b> <i>Knowledge/ Understanding of common LTC medications, requirements/ limitations, interactions, record keeping, storage requirements, etc.</i>				
<b>1A3</b>	<b>Disease Management (e.g., acute vs. chronic conditions).</b> <i>Knowledge of care practices, interventions, complications, prevention efforts, etc.</i>				
<b>1A4</b>	<b>Nutrition and Hydration (e.g., specialized diets).</b> <i>Knowledge of the value of food and drink in maintaining health and well-being.</i>				
<b>1A5</b>	<b>Activities of Daily Living (ADLs) and Independent Activities of Daily Living (IADLs).</b> <i>Knowledge of daily self-care activities including feeding ourselves, bathing, dressing, grooming, work, homemaking, hygiene, leisure, hobbies. Includes knowledge of adaptive equipment and devices used to enhance and increase independence in performing these activities. Refers to some of the most basic functions of living.</i>				
<b>1A9</b>	<b>Medical Director.</b> <i>Knowledge of the role of the medical director, requirements, policies, etc.</i>				
<b>1A10</b>	<b>Emergency Medical Services (e.g., CPR, first aid, Heimlich maneuver, AED).</b> <i>Knowledge of EMS policies/ procedures, equipment, requirements.</i>				
<b>1A11</b>	<b>Transition of Care (e.g., admission, move-in, transfer, discharge, and move-out).</b> <i>Knowledge of the movement of a resident from one setting of care (hospital, ambulatory primary or specialty care practice, long-term care, home health, rehabilitation facility) to another. More specifically, to and from long-term care.</i>				
<b>1A12</b>	<b>Basic Healthcare Terminology.</b> <i>Knowledge of basic (common) healthcare terms, and more specifically, those more common in the long-term care setting.</i>				
<b>1B1</b>	<b>Psychosocial Needs (e.g., social, spiritual, community, cultural).</b> <i>Knowledge relevant to a patient as well as their family's mental, social, cultural, spiritual, and developmental needs arising from emotional response to their diagnosis, social and role limitations, loss of physical and/or mental abilities and other complexities.</i>				
<b>1B2</b>	<b>Person-Centered Care and Comprehensive Care Planning.</b> <i>Knowledge relevant to empowering people to take charge of their own health rather than being passive recipients of services based on the patient views, input and experience help improve outcomes; knowledge of a plan of care that outlines goals of care, planned medical, nursing and allied health activities for a resident.</i>				
<b>1B3</b>	<b>Care Recipient Bill of Rights and Responsibilities.</b> <i>Knowledge of the federal Nursing Home Reform Law enacted in 1987 in the Social Security Act and the requirements to promote and protect the rights of each resident with a strong emphasis on individual dignity and self-determination.</i>				
<b>1B4</b>	<b>Care Recipient Safety (e.g., fall prevention, elopement prevention, adverse events).</b> <i>Knowledge of interventions, equipment, reporting requirements, investigation requirements, etc.</i>				
<b>1B8</b>	<b>Care Recipient (and Representative) Satisfaction.</b> <i>Knowledge of methods to understand and predict satisfaction and methods to improve.</i>				

<b>1B9</b>	<b>Recognition of Maltreatment (e.g., abuse, neglect, exploitation).</b> Knowledge of legal definitions of abuse, neglect, exploitation; reporting requirements, investigation techniques, etc.				
<b>1B10</b>	<b>Mental and Behavioral Health (e.g., cognitive impairment, depression, social support systems).</b> Knowledge of the difference between the two; understanding issues related to depression, anxiety, diabetes management, weight loss, smoking cessation and drinking or drug problems; understanding the connection between behaviors and the health and well-being of the body, mind and spirit; relevance to preventing illness or promoting health.				
<b>1B11</b>	<b>Trauma-Informed Care (e.g., PTSD).</b> Knowledge of the principles of a trauma-informed care approach.				
<b>1B12</b>	<b>Pain Management.</b> Knowledge of interventional procedures, medication management, therapies, counseling and support, alternative therapies and how to refer to medical specialists.				
<b>1B13</b>	<b>Death, Dying, and Grief.</b> Knowledge of the processes and stages.				
<b>1B14</b>	<b>Restraint Usage and Reduction.</b> Knowledge of the proper use of restraints and what constitutes a restraint, knowledge of legal requirements if they are used and limitations and documentation requirements.				
<b>1C1</b>	<b>Hospice and Palliative Care.</b> Knowledge of the differences, knowledge of pain management and psychosocial and spiritual needs, family needs, etc. Knowledge of legal limitations/guidance.				
<b>1C2</b>	<b>Specialized Medical Equipment (e.g., oxygen, durable medical equipment).</b> Knowledge of equipment and supplies to include devices, controls or appliances, specified in the care plan to enable individuals to increase their abilities to perform ADLs or to perceive, control or communicate with their environment. Also includes life support, ancillary supplies and equipment. Knowledge of limitations and costs, etc.				
<b>1C4</b>	<b>Telemedicine (e.g., e-health).</b> Knowledge of CMS guidance - Telehealth and Telemedicine Tool Kit.				
<b>1C5</b>	<b>Diagnostics Services (e.g., radiology, lab services).</b> Knowledge of availability of various services within and near the facility; limitations and requirements, etc.				
<b>1C6</b>	<b>Dental and Oral Care Services.</b> Knowledge of availability of various services within and near the facility; limitations and requirements, etc.				
<b>1C7</b>	<b>Healthcare Partners and Clinical Providers (e.g., MD/DO, Nurse Practitioner, Psychiatrist, Podiatrist, Dentist).</b> Knowledge of availability of various services within and near the facility; limitations and requirements, etc.				
<b>1C8</b>	<b>Volunteer Programs.</b> Knowledge of volunteer programs, to include Ombudsman programs and others; limitations and regulations.				
<b>3A2</b>	<b>Person-Centered Environment (e.g., home-like environment).</b> Knowledge/Understanding of role/importance of the environment in providing a home-like environment; dignity, coordination of care...; personalized care...; development of strengths and abilities for improved independence, etc.				
<b>3A3</b>	<b>Safety and Accessibility (e.g., ADA, safety data sheets).</b> Knowledge/Understanding of documentation required for chemicals/substances in building (SDSes); familiarity with requirements of ADA for private vs. government buildings (Titles I, II and III).				

<b>3A7</b>	<b>Infection Control and Sanitation (e.g., linens, kitchen, hand washing, healthcare acquired infections, hazardous materials).</b> <i>Working knowledge of infection control issues relevant to environmental issues.</i>				
<b>3B4</b>	<b>Regulatory Survey and Inspection Process.</b> <i>Working knowledge of; ability to run a "mock" survey/inspection.</i>				
<b>3B6</b>	<b>Centers for Medicare and Medicaid Services (CMS) Quality Measures.</b> <i>Working knowledge of the tools used to measure or quantify healthcare processes, outcomes, patient perceptions and organizational structure and/or systems that are associated with the ability to provide high-quality health care and/or that relate to one or more quality goals for health care. Goals include: effective, safe, efficient, patient-centered, equitable and timely care.</i>				
<b>3B7</b>	<b>Quality Assurance and Performance Improvement (QAPI).</b> <i>Working knowledge of QAPI, principles, processes, tools, purpose, elements of QAPI, QAPI F-Tags and federal requirements, etc.</i>				
<b>3B8</b>	<b>Bed-Hold Requirements.</b> <i>Working knowledge of Medicaid bed hold policies and requirements (Medicare restrictions)</i>				
<b>Module Total</b>					

<b>REHABILITATION DEPARTMENT</b>		Self-Assessment	Typical Program Hours in many states	Variable	<b>Preceptor Assigned Hours</b>
<b>1A6</b>	<b>Rehabilitation and Restorative Programs.</b> <i>Knowledge of the proper roles of therapists (occupational, physical, speech...) and nursing staff.</i>				
<b>Module Total</b>					

<b>MEDICAL/RESIDENT RECORDS</b>		Self-Assessment	Typical Program Hours in many states	Variable	<b>Preceptor Assigned Hours</b>
<b>1A8</b>	<b>Clinical and Medical Records and Documentation Requirements (e.g., storage, retention, destruction).</b> <i>Knowledge of the process, participants and required timelines in care planning.</i>				
<b>Module Total</b>					

<b>ACTIVITIES DEPARTMENT</b>		Self-Assessment	Typical Program Hours in many states	Variable	<b>Preceptor Assigned Hours</b>
<b>1A5</b>	<b>Activities of Daily Living (ADLs) and Independent Activities of Daily Living (IADLs).</b> <i>Knowledge of daily self-care activities including feeding ourselves, bathing, dressing, grooming, work, homemaking, hygiene, leisure, hobbies. Includes knowledge of adaptive equipment and devices used to enhance and increase independence in performing these activities. Refers to some of the most basic functions of living.</i>				
<b>1B17</b>	<b>Therapeutic Recreation and Activity Programs.</b> <i>Knowledge of various therapy activities that offer benefits to support the health and well-being of residents; knowledge of similar activities specific to seniors with Alzheimer's and Dementia.</i>				
<b>Module Total</b>					

<b>SOCIAL SERVICES/ ADMISSIONS DEPARTMENT</b>		Self- Assessment	Typical Pro- gram Hours in many states	Variable	<b>Preceptor Assigned Hours</b>
<b>1A11</b>	<b>Transition of Care (e.g., admission, move-in, transfer, discharge, and move-out).</b> <i>Knowledge of the movement of a resident from one setting of care (hospital, ambulatory primary or specialty care practice, long-term care, home health, rehabilitation facility) to another. More specifically, to and from long-term care.</i>				
<b>1B16</b>	<b>Social Services Programs.</b> <i>Knowledge of staffing requirements, state requirements for social work practice; role of the social worker in a long-term care setting.</i>				
<b>1B18</b>	<b>Community Resources.</b> <i>Knowledge of existing community resources available and how programs come to exist through legislation, who uses the resources, and how they are delivered.</i>				
<b>1C3</b>	<b>Transportation for Care Recipients.</b> <i>Knowledge of requirements to transport.</i>				
<b>3B8</b>	<b>Bed-Hold Requirements.</b> <i>Working knowledge of Medicaid bed hold policies and requirements (Medicare restrictions)</i>				
<b>3B9</b>	<b>Pre-Admission Screening Annual Review (PASSR).</b> <i>Working knowledge of federal pre-admission screening and annual review requirements (applicability and definitions)</i>				
<b>Module Total</b>					

<b>BUSINESS OFFICE/ FINANCIAL MANAGEMENT</b>		Self- Assessment	Typical Pro- gram Hours in many states	Variable	<b>Preceptor Assigned Hours</b>
<b>2A1</b>	<b>Budgeting and Forecasting.</b> <i>Knowledge of tools and purposes of budgeting, forecasting, generally accepted accounting principles.</i>				
<b>2A2</b>	<b>Financial Analysis (e.g., ratios, profitability, debt, revenue mix, depreciation, operating margin, cash flow).</b> <i>Knowledge of financial analysis tools and ability to calculate different indicators and understand what they mean.</i>				
<b>2A3</b>	<b>Revenue Cycle Management (e.g., billing, accounts receivable, accounts payable, collections).</b> <i>Comprehension of the revenue cycle and the administrator's role along the way.</i>				
<b>2A4</b>	<b>Financial Statements (e.g., income/revenue statement, balance sheet, statement of cash flows, cost reporting).</b> <i>Understand financial statements and interpret what they mean to the facility.</i>				
<b>2A5</b>	<b>Revenue and Reimbursement (e.g., PDPM, PDGM, ACOs, HMOs, Medicaid, private payors).</b> <i>Comprehension of the various revenue sources, calculations, implications, etc.</i>				
<b>2A6</b>	<b>Financial Reporting Requirements (e.g., requirements for not-for-profit, for-profit, and governmental providers).</b> <i>Knowledge of the financial reporting requirements for different facility types.</i>				
<b>2A7</b>	<b>Integration of Clinical and Financial Statements (e.g., EMR/HER, MDS).</b> <i>Knowledge of policies, procedures, practices; compliance implications, viability implications; planning methods, implementation methods.</i>				
<b>3A5</b>	<b>Information Systems Infrastructure (e.g., configurations, data security, technical controls).</b> <i>Knowledge/Understanding of compliance issues (HIPAA, CMS, HITECH) and current best practices.</i>				
<b>3B3</b>	<b>Certification and Licensure Requirements for the Organization.</b> <i>Working knowledge of licensure requirements; Requirements of Participation for re-certification standard surveys.</i>				
<b>4B2</b>	<b>Strategic Business Planning (e.g., new lines of service, succession management, staffing pipeline).</b> <i>Working knowledge of the processes of strategic planning and execution of the plan.</i>				
<b>4B3</b>	<b>Business Analytics (e.g., evidence-based practice, data analytics).</b> <i>Working knowledge of technological tools to effectively process important data for improved outcomes.</i>				
<b>4B4</b>	<b>Business Development (e.g., sales, marketing, partnerships, ACOs, contracts and agreements, negotiations).</b> <i>Understanding of ideas, initiatives, and activities that yields desired growth; includes building strategic partnerships and making strategic business decisions.</i>				
<b>Module Total</b>					

<b>DIETARY DEPARTMENT</b>		Self-Assessment	Typical Program Hours in many states	Variable	Preceptor Assigned Hours
<b>1B15</b>	<b>Foodservice (e.g., choice and menu planning, dietary management, food storage and handling, dining services).</b> <i>Knowledge of culture change impacts on food service choices, requirements for staffing, requirements for storage, food handling requirements, illness prevention, risks of foodborne illnesses, etc.</i>				
<b>3A7</b>	<b>Infection Control and Sanitation (e.g., linens, kitchen, hand washing, healthcare acquired infections, hazardous materials).</b> <i>Working knowledge of infection control issues relevant to environmental issues.</i>				
<b>Module Total</b>					

<b>HOUSEKEEPING/ LAUNDRY DEPARTMENT</b>		Self-Assessment	Typical Program Hours in many states	Variable	Preceptor Assigned Hours
<b>3A7</b>	<b>Infection Control and Sanitation (e.g., linens, kitchen, hand washing, healthcare acquired infections, hazardous materials).</b> <i>Working knowledge of infection control issues relevant to environmental issues.</i>				
<b>Module Total</b>					

<b>ENVIRONMENTAL MANAGEMENT/ MAINTENANCE DEPARTMENT</b>		Self- Assessment	Typical Pro- gram Hours in many states	Variable	<b>Preceptor Assigned Hours</b>
<b>2B12</b>	<b>Security (e.g., cameras, monitoring systems, locks, staff location reporting).</b> <i>Knowledge of technology available, limitations by law, etc.</i>				
<b>3A1</b>	<b>Federal Codes and Regulations for Building Equipment, Maintenance and Grounds.</b> <i>Knowledge/Understanding/working knowledge of the Life Safety Code rules/regulations and the survey process.</i>				
<b>3A2</b>	<b>Person-Centered Environment (e.g., home-like environment).</b> <i>Knowledge/Understanding of role/importance of the environment in providing a home-like environment; dignity, coordination of care...; personalized care...; development of strengths and abilities for improved independence etc.</i>				
<b>3A3</b>	<b>Safety and Accessibility (e.g., ADA, safety data sheets).</b> <i>Knowledge/Understanding of documentation required for chemicals/substances in building (SDSes); familiarity with requirements of ADA for private vs. government buildings (Titles I, II and III).</i>				
<b>3A4</b>	<b>Facility Management and Environmental Services.</b> <i>Knowledge/Understanding of available strategies/approaches commensurate with culture and other factors.</i>				
<b>3A6</b>	<b>Preventative and Routine Maintenance Programs (e.g., pest control, equipment, mechanical systems).</b> <i>Working knowledge of equipment, systems, maintenance requirements.</i>				
<b>3A7</b>	<b>Infection Control and Sanitation (e.g., linens, kitchen, hand washing, healthcare acquired infections, hazardous materials).</b> <i>Working knowledge of infection control issues relevant to environmental issues.</i>				
<b>Module Total</b>					

	Self-Assessment	Typical Program Hours in many states	Variable	Preceptor Assigned Hours
As required/desired - shore up weaker than assessed areas (aka "slop factor"?)				
<b>-01</b> <i>For jurisdiction use (optional)</i> We've added Additional "rows" for jurisdiction use primarily, to require certain items with perhaps a "set" amount of time devoted to those items that are not necessarily NAB Domain related, but defined here as a Jurisdiction requirement (Not all jurisdictions will want to use this area so the Preceptor would make use of it as necessary or leave blank and just use the top line).				
<b>-02</b> For jurisdiction use (optional)				
<b>-03</b> For jurisdiction use (optional)				
<b>-04</b> For jurisdiction use (optional)				
<b>-05</b> For jurisdiction use (optional)				
<b>-06</b> For jurisdiction use (optional)				
<b>-07</b> For jurisdiction use (optional)				
<b>-08</b> For jurisdiction use (optional)				
<b>-09</b> For jurisdiction use (optional)				
<b>-10</b> For jurisdiction use (optional)				
<b>-11</b> For jurisdiction use (optional)				
<b>-12</b> For jurisdiction use (optional)				
<b>-13</b> For jurisdiction use (optional)				
<b>-14</b> For jurisdiction use (optional)				
<b>-15</b> For jurisdiction use (optional)				
<b>-16</b> For jurisdiction use (optional)				
<b>-17</b> For jurisdiction use (optional)				
<b>-18</b> For jurisdiction use (optional)				
<b>-19</b> For jurisdiction use (optional)				
<b>-20</b> For jurisdiction use (optional)				

	Recommended Above					
<b>CROSS-CHECK OF TYPICAL AGAINST NAB PERCENTAGES</b>			Domain%	<b>YOUR HOURS for this AIT</b>	Your Do-main %s for this AIT	<b>PPA % (NAB - NHA)</b>
<b>Domain 1 Hours</b>						<b>41.25%</b>
<b>Domain 2 Hours</b>						<b>33.75%</b>
<b>Domain 3 Hours</b>						<b>18.13%</b>
<b>Domain 4 Hours</b>						<b>6.88%</b>
<b>Other/Optional Use</b>						<b>NA</b>
<b>Total</b>						<b>100%</b>
(does not include "Other" module in percentage)	Compare and Consider self-assessment. Is it logical for this AIT?					

# Professional Development Plan

Please reference Module 2 for ideas of learning activities for each subdomain.

Module/ Department	Sub-Domain	Exam Content Outline Items	Proposed Hours	Learning Activities
<b>Administration</b>				(list as many/few as necessary for the hours proposed)
See Tasks 3 & 7	<b>1A12</b>	<b>Psychosocial Needs (e.g., social, spiritual, community, cultural).</b> Knowledge relevant to a patient as well as their family's mental, social, cultural, spiritual, and developmental needs arising from emotional response to their diagnosis, social and role limitations, loss of physical and/or mental abilities and other complexities.		
See Tasks, 2, 3, 5, 12, 13, 25 & 38	<b>1B5</b>	<b>Care Recipient (and Representative) Grievance, Conflict, and Dispute Resolution.</b> Knowledge of processes for grievances, conflict resolution, dispute resolution, investigation, reporting requirements.		
See Tasks 1, 2, 3, 12, 13 & 25	<b>1B6</b>	<b>Care Recipient Advocacy (e.g., Ombudsman, resident and family council).</b> Knowledge of your role as residents' liaison between staff and doctors.		
See Tasks 1, 2, 5, 12, 25 & 38	<b>1B9</b>	<b>Recognition of Maltreatment (e.g., abuse, neglect, exploitation).</b> Knowledge of legal definitions of abuse, neglect, exploitation; reporting requirements; investigation techniques, etc.		
See Tasks 2-4, 9, 12 & 14	<b>1B18</b>	<b>Community Resources.</b> Knowledge of existing community resources available and how programs come to exist through legislation, who uses the resources, and how they are delivered.		
See Tasks 1-4, 9, 12 & 14	<b>1C7</b>	<b>Healthcare Partners and Clinical Providers (e.g., MD/DO, Nurse Practitioner, Psychiatrist, Podiatrist, Dentist).</b> Knowledge of availability of various services within and near the facility; limitations and requirements, etc.		
See Tasks 2, 3, 5 & 14	<b>1C8</b>	<b>Volunteer Programs.</b> Knowledge of volunteer programs, to include Ombudsman programs and others; limitations and regulations.		
See Tasks 26-28	<b>2A7</b>	<b>Integration of Clinical and Financial Statements (e.g., EMR/HER, MDS).</b> Knowledge of policies, procedures, practices; compliance implications, viability implications; planning methods, implementation methods.		

See Tasks 26 & 27	<b>2A10</b>	<b>Resident Trust Accounts for Personal Funds.</b> <i>Knowledge of policies and procedures and requirements for maintaining trust accounts and reporting/spending requirements.</i>		
See Tasks 2, 20 & 22	<b>2B6</b>	<b>Quality Improvement Processes (e.g., root cause analysis, PDCA/PDSA).</b> <i>Working knowledge of QAPI processes from risk management paradigm.</i>		
See Tasks 18, 20 & 38	<b>2B8</b>	<b>Internal Investigation Protocols and Techniques (e.g., incidents, adverse events).</b> <i>Working knowledge of investigation procedures and techniques.</i>		
See Tasks 20 & 38	<b>2B9</b>	<b>Mandatory Reporting Requirements (e.g., incidents, adverse events, abuse, neglect, financial exploitation, fraud).</b> <i>Thorough understanding of definitions of abuse, neglect, exploitation; working knowledge of reporting requirements.</i>		
See Task 20	<b>2B10</b>	<b>Insurance Coverage (e.g., liability, property).</b> <i>Knowledge/Understanding of insurance requirements relative to risk management.</i>		
See Tasks 6, 16, 20 & 35	<b>2B11</b>	<b>Healthcare Record Requirements (e.g., confidentiality, disclosure, safeguarding, HIPAA, HITECH).</b> <i>Working knowledge of HIPAA; working knowledge of record keeping requirements.</i>		
See Tasks 16, 18, 20 & 35	<b>2B12</b>	<b>Security (e.g., cameras, monitoring systems, locks, staff location reporting).</b> <i>Knowledge of technology available, limitations by law, etc.</i>		
See Tasks 9, 20 & 29	<b>2B13</b>	<b>Contracted Services (e.g., roles, responsibilities, oversight, background checks).</b> <i>Knowledge/Understanding of implications of managed care, case management, reimbursement, benefits, structuring, etc.</i>		
See Tasks 15, 16 & 20	<b>2C1</b>	<b>Federal Human Resources Laws, Rules, and Regulations (e.g., ADA, FMLA, Wage and Hour, FLSA).</b> <i>Knowledge/Understanding of federal HR laws, rules, regulations.</i>		
See Tasks 15-17	<b>2C8</b>	<b>Performance Evaluation.</b> <i>Understanding of performance evaluation requirements.</i>		
See Tasks 2-4, 7 & 8	<b>2C13</b>	<b>Cultural Competence and Diversity Awareness.</b> <i>Knowledge/Understanding of the ongoing evolution of cultural competence, awareness, knowledge, understanding, sensitivity and skill.</i>		
See Tasks 1-8 & 11-14	<b>3A8</b>	<b>Disaster and Emergency Planning, Preparedness, Response, and Recovery (e.g., Appendix Z).</b> <i>Working knowledge of the coordinated, cooperative process of preparing to match urgent needs with available resources; includes research, writing, disseminating, testing, updating. Emergency plans are living documents and adapt to changing circumstances - protocols, procedures, division of responsibilities...vary somewhat by geography and known risks in the area (tornadoes, hurricanes, earthquakes, etc.).</i>		
See Tasks 1-6, 9-15, 20, 30, 32, 34 & 37	<b>3B1</b>	<b>Federal Healthcare Laws, Rules, and Regulations.</b> <i>Working knowledge of federal healthcare laws, rules and regulations as they pertain to facility and life safety code issues.</i>		
See Tasks 1 & 4	<b>3B2</b>	<b>Government Programs and Entities (e.g., Medicare, Medicaid, waivers).</b> <i>Working knowledge of QAPI for Medicare/Medicaid compliance relative to Requirements of Participation; F-Tag compliance.</i>		

See Tasks 1, 30 & 37	<b>3B3</b>	<b>Certification and Licensure Requirements for the Organization.</b> <i>Working knowledge of licensure requirements; Requirements of Participation for re-certification standard surveys.</i>		
See Tasks 1, 6,9-11, 22, 30, 33 & 34	<b>3B4</b>	<b>Regulatory Survey and Inspection Process.</b> <i>Working knowledge of; ability to run a “mock” survey/inspection.</i>		
See Task 37	<b>3B5</b>	<b>Procedures for Informal Dispute Resolution (IDR).</b> <i>Working knowledge of the process.</i>		
See Tasks 1, 2, 22, 37	<b>3B6</b>	<b>Centers for Medicare and Medicaid Services (CMS) Quality Measures.</b> <i>Working knowledge of the tools used to measure or quantify healthcare processes, outcomes, patient perceptions and organizational structure and/or systems that are associated with the ability to provide high-quality health care and/or that relate to one or more quality goals for health care. Goals include: effective, safe, efficient, patient-centered, equitable and timely care.</i>		
See Tasks, 1, 2 & 22	<b>3B7</b>	<b>Quality Assurance and Performance Improvement (QAPI).</b> <i>Working knowledge of QAPI, principles, processes, tools, purpose, elements of QAPI, QAPI F-Tags and federal requirements, etc.</i>		
See Tasks 1 & 4	<b>3B8</b>	<b>Bed-Hold Requirements.</b> <i>Working knowledge of Medicaid bed hold policies and requirements (Medicare restrictions)</i>		
See Tasks 1, 18 & 37	<b>3B10</b>	<b>Facility Assessment.</b> <i>Working knowledge of the requirement and purpose of an annual facility assessment; familiarity with tools for conducting these assessments.</i>		
See Tasks 15-17, 19, & 22-24	<b>4A1</b>	<b>Organizational Structures (e.g., roles, responsibilities, functions, systemic processes).</b> <i>Understanding of the purpose of different organizational structures and different types of structures.</i>		
See Tasks 1-5, 8 & 9	<b>4A2</b>	<b>Organizational Change Management.</b> <i>Understand methods and manners to describe and implement change within its internal and external processes; understand how to develop a structured approach to change; understand how to beneficially transition while mitigating disruption.</i>		
See Tasks 15-17, 19 & 23	<b>4A3</b>	<b>Organizational Behavior (e.g., organizational culture, team building, group dynamics).</b> <i>Understand the behavioral dynamics of individuals and groups in organizational settings; working knowledge of what motivates employees and how they interact with each other to be better able to meet short- and long-term goals.</i>		
See Tasks 17, 19, 21 & 23	<b>4A4</b>	<b>Leadership Principles (e.g., communications, styles, mentoring, coaching, personal professional development).</b> <i>Working knowledge of numerous leadership principles, leadership styles, tools, techniques.</i>		
See Tasks 23, 24 & 36	<b>4A5</b>	<b>Governance (e.g., board of directors, governing bodies, corporate entities, advisory boards).</b> <i>Working knowledge of the role and responsibilities of governance entities in LTC; legal framework, oversight responsibilities, reporting indicators for governing bodies, strategic role; concepts such as collaborative governance.</i>		
See Tasks 21, 24 & 36	<b>4A6</b>	<b>Professional Advocacy and Governmental Relations.</b> <i>Understand the relationships of different organizations and the processes for impactful advocacy for strengthening LTC policies/procedures/rules/laws (meaningful public policy change).</i>		

See Tasks 2, 17, 21, 23 & 24	<b>4B1</b>	<b>Mission, Vision, and Value Statements.</b> <i>Working knowledge; understand what mission, vision and value statements are about and how to write good ones. Able to translate into foundation for strategic planning.</i>		
See Tasks 21, 23 & 24	<b>4B2</b>	<b>Strategic Business Planning (e.g., new lines of service, succession management, staffing pipeline).</b> <i>Working knowledge of the processes of strategic planning and execution of the plan.</i>		
See Tasks 21 & 23	<b>4B3</b>	<b>Business Analytics (e.g., evidence-based practice, data analytics).</b> <i>Working knowledge of technological tools to effectively process important data for improved outcomes.</i>		
See Tasks 9, 21, 23 & 28	<b>4B4</b>	<b>Business Development (e.g., sales, marketing, partnerships, ACOs, contracts and agreements, negotiations).</b> <i>Understanding of ideas, initiatives, and activities that yields desired growth; includes building strategic partnerships and making strategic business decisions.</i>		
See Tasks 1-38 (all)	<b>4B5</b>	<b>Public Relations and External Stakeholders (e.g., hospitals, referrals sources, local community, donors).</b> <i>Working knowledge of techniques to attract referrals, partnerships and to satisfy and retain residents.</i>		
<b>Human Resources</b>				
See Tasks 15, 16, 18, 20 & 34	<b>2B1</b>	<b>OSHA Rules and Regulations.</b> <i>Knowledge of rules, regulations, policies, procedures for a safe environment for employees; training, equipment requirements.</i>		
See Tasks 15, 16 & 18	<b>2B2</b>	<b>Workers Compensation.</b> <i>Knowledge of how to maintain a safe work environment; implications of not doing so.</i>		
See Tasks 12, 15-17, & 20	<b>2B3</b>	<b>Ethical Conduct and Standards of Practice.</b> <i>Understand ethical concerns and standards of practice for various professions working within the facility.</i>		
See Tasks 15-18, & 20	<b>2B4</b>	<b>Compliance Programs.</b> <i>Knowledge of the plethora of regulations relating to diversity, safety, risk management, professional development, ethics, etc.</i>		
See Tasks 15-18, 20 & 38	<b>2B5</b>	<b>Risk Management Process and Programs.</b> <i>Knowledge/Understanding of how to identify risks, analyze risks, evaluate/rank risks, risk treatment techniques, cycles, etc.</i>		
See Tasks 2, 20 & 22	<b>2B6</b>	<b>Quality Improvement Processes (e.g., root cause analysis, PDCA/PDSA).</b> <i>Working knowledge of QAPI processes from risk management paradigm.</i>		
See Tasks 1-5, 8 & 14	<b>2B7</b>	<b>Scope of Practice and legal Liability.</b> <i>Knowledge/Understanding of medical/professional liability issues (eg. changes in the PPACA); relative to increased use of PAs, NPs, etc.</i>		
See Tasks 18, 20 & 38	<b>2B8</b>	<b>Internal Investigation Protocols and Techniques (e.g., incidents, adverse events).</b> <i>Working knowledge of investigation procedures and techniques.</i>		
See Tasks 15, 16 & 20	<b>2C1</b>	<b>Federal Human Resources Laws, Rules, and Regulations (e.g., ADA, FMLA, Wage and Hour, FLSA).</b> <i>Knowledge/Understanding of federal HR laws, rules, regulations.</i>		

See Tasks 15-17 & 20	<b>2C2</b>	<b>Selection and Hiring Practices (e.g., EEOC, interviewing, adverse impact, protected classes, occupational qualifications).</b> <i>Working knowledge of valid hiring practices and what you can and cannot do/ask/say, etc.</i>		
See Tasks 1-4 & 7	<b>2C3</b>	<b>Compensation and Benefits Programs (e.g., time off, healthcare insurance, employee pay and payroll).</b> <i>Working knowledge of compensation and benefit programs.</i>		
See Tasks 15 & 16	<b>2C4</b>	<b>Organizational Staffing Requirement and Reporting (e.g., PBJ).</b> <i>Working knowledge of staffing/reporting requirements.</i>		
See Tasks 15, 16 & 37	<b>2C5</b>	<b>Staff Certification and Licensure Requirements.</b> <i>Working knowledge of certification and licensure requirements of all professionals within the field of LTC.</i>		
See Tasks 2 & 15-19	<b>2C7</b>	<b>Employee Training and Orientation.</b> <i>Knowledge of periodic training requirements to include orientation training.</i>		
See Tasks 15-17	<b>2C8</b>	<b>Performance Evaluation.</b> <i>Understanding of performance evaluation requirements.</i>		
See Tasks 15-18	<b>2C9</b>	<b>Human Resources Policies (e.g., drug-free workplace, discipline, job classifications, photography and video, social media usage, mobile phone usage).</b> <i>Knowledge/Understanding of HR Policies (reasons for, options to change, etc.).</i>		
See Tasks 15, 16, 20 & 35	<b>2C10</b>	<b>Employee Record-Keeping Requirements.</b> <i>Knowledge/Understanding of the lifecycle of records/disposition, safeguards, regulatory requirements.</i>		
See Tasks 15-17	<b>2C11</b>	<b>Employee Grievance, Conflict, and Dispute Resolution.</b> <i>Knowledge/Understanding of resolution strategies, documentation requirements, what constitutes a grievance (act/omission, situation, decision, perceptions...).</i>		
See Tasks 15-19	<b>2C12</b>	<b>Employee Satisfaction, Engagement, and Retention.</b> <i>Knowledge/Understanding of best practices in the field, current trends, how to respond, tools available, etc.</i>		
See Tasks 2-4, 7 & 8	<b>2C13</b>	<b>Cultural Competence and Diversity Awareness.</b> <i>Knowledge/Understanding of the ongoing evolution of cultural competence, awareness, knowledge, understanding, sensitivity and skill.</i>		
See Tasks 15-17, 19 & 20	<b>2C14</b>	<b>Labor Relations (e.g., union, collective bargaining [CBA], contract/pool staff).</b> <i>Knowledge/Understanding of various labor relation issues.</i>		
See Tasks 21, 23 & 24	<b>4B2</b>	<b>Strategic Business Planning (e.g., new lines of service, succession management, staffing pipeline).</b> <i>Working knowledge of the processes of strategic planning and execution of the plan.</i>		

### Nursing Department/Health Care Services

See Tasks 1-4, 7-9	<b>1A1</b>	<b>Medical and Nursing Care Practices.</b> <i>Knowledge/Understanding of general medical terminology and standards of practice and guidance for nursing as relates to long-term care.</i>		
See Tasks 1-4, 7	<b>1A2</b>	<b>Medication Management and Administration.</b> <i>Knowledge/Understanding of common LTC medications, requirements/limitations, interactions, record keeping, storage requirements, etc.</i>		

See Tasks 2-4, 7 & 8	<b>1A3</b>	<b>Disease Management (e.g., acute vs. chronic conditions).</b> Knowledge of care practices, interventions, complications, prevention efforts, etc.		
See Tasks 1-4 & 11	<b>1A4</b>	<b>Nutrition and Hydration (e.g., specialized diets).</b> Knowledge of the value of food and drink in maintaining health and well-being.		
See Tasks 1-5, 8 & 14	<b>1A5</b>	<b>Activities of Daily Living (ADLs) and Independent Activities of Daily Living (IADLs).</b> Knowledge of daily self-care activities including feeding ourselves, bathing, dressing, grooming, work, homemaking, hygiene, leisure, hobbies. Includes knowledge of adaptive equipment and devices used to enhance and increase independence in performing these activities. Refers to some of the most basic functions of living.		
See Tasks -13, 7-8 & 14	<b>1A9</b>	<b>Medical Director.</b> Knowledge of the role of the medical director, requirements, policies, etc.		
See Tasks 1-3	<b>1A10</b>	<b>Emergency Medical Services (e.g., CPR, first aid, Heimlich maneuver, AED).</b> Knowledge of EMS policies/procedures, equipment, requirements.		
See Tasks 1-5 & 13	<b>1A11</b>	<b>Transition of Care (e.g., admission, move-in, transfer, discharge, and move-out).</b> Knowledge of the movement of a resident from one setting of care (hospital, ambulatory primary or specialty care practice, long-term care, home health, rehabilitation facility) to another. More specifically, to and from long-term care.		
See Tasks 3 & 7	<b>1A12</b>	<b>Basic Healthcare Terminology.</b> Knowledge of basic (common) healthcare terms, and more specifically, those more common in the long-term care setting.		
See Tasks 1-5, 11-13 & 25	<b>1B1</b>	<b>Psychosocial Needs (e.g., social, spiritual, community, cultural).</b> Knowledge relevant to a patient as well as their family's mental, social, cultural, spiritual, and developmental needs arising from emotional response to their diagnosis, social and role limitations, loss of physical and/or mental abilities and other complexities.		
See Tasks 1-3, 5 & 13	<b>1B2</b>	<b>Person-Centered Care and Comprehensive Care Planning.</b> Knowledge relevant to empowering people to take charge of their own health rather than being passive recipients of services based on the patient views, input and experience help improve outcomes; knowledge of a plan of care that outlines goals of care, planned medical, nursing and allied health activities for a resident.		
See Tasks 1-3, 5, 11-13, & 25	<b>1B3</b>	<b>Care Recipient Bill of Rights and Responsibilities.</b> Knowledge of the federal Nursing Home Reform Law enacted in 1987 in the Social Security Act and the requirements to promote and protect the rights of each resident with a strong emphasis on individual dignity and self-determination.		
See Tasks 1-4, 7-8, & 33	<b>1B4</b>	<b>Care Recipient Safety (e.g., fall prevention, elopement prevention, adverse events).</b> Knowledge of interventions, equipment, reporting requirements, investigation requirements, etc.		
See Tasks 2,3, 5, 7, 10-13, & 25	<b>1B8</b>	<b>Care Recipient (and Representative) Satisfaction.</b> Knowledge of methods to understand and predict satisfaction and methods to improve.		

See Tasks 1, 2, 5, 12, 25 & 38	<b>1B9</b>	<b>Recognition of Maltreatment (e.g., abuse, neglect, exploitation).</b> Knowledge of legal definitions of abuse, neglect, exploitation; reporting requirements, investigation techniques, etc.		
See Tasks 1-5, 7 & 12	<b>1B10</b>	<b>Mental and Behavioral Health (e.g., cognitive impairment, depression, social support systems).</b> Knowledge of the difference between the two; understanding issues related to depression, anxiety, diabetes management, weight loss, smoking cessation and drinking or drug problems; understanding the connection between behaviors and the health and well-being of the body, mind and spirit; relevance to preventing illness or promoting health.		
See Tasks 1-5 & 12	<b>1B11</b>	<b>Trauma-Informed Care (e.g., PTSD).</b> Knowledge of the principles of a trauma-informed care approach.		
See Tasks 3, 8 & 9	<b>1B12</b>	<b>Pain Management.</b> Knowledge of interventional procedures, medication management, therapies, counseling and support, alternative therapies and how to refer to medical specialists.		
See Tasks 1-5	<b>1B13</b>	<b>Death, Dying, and Grief.</b> Knowledge of the processes and stages.		
See Tasks 1-5, 7 & 12	<b>1B14</b>	<b>Restraint Usage and Reduction.</b> Knowledge of the proper use of restraints and what constitutes a restraint, knowledge of legal requirements if they are used and limitations and documentation requirements.		
See Tasks 2, 3, 9 & 14	<b>1C4</b>	<b>Telemedicine (e.g., e-health).</b> Knowledge of CMS guidance - Telehealth and Telemedicine Tool Kit.		
See Tasks 1-3, 9 & 14	<b>1C5</b>	<b>Diagnostics Services (e.g., radiology, lab services).</b> Knowledge of availability of various services within and near the facility; limitations and requirements, etc.		
See Tasks 1-4, 9 & 14	<b>1C6</b>	<b>Dental and Oral Care Services.</b> Knowledge of availability of various services within and near the facility; limitations and requirements, etc.		
See Tasks 1-4, 9, 12 & 14	<b>1C7</b>	<b>Healthcare Partners and Clinical Providers (e.g., MD/DO, Nurse Practitioner, Psychiatrist, Podiatrist, Dentist).</b> Knowledge of availability of various services within and near the facility; limitations and requirements, etc.		
See Tasks 2, 3, 5, 7, 10-13 & 25	<b>1C8</b>	<b>Volunteer Programs.</b> Knowledge of volunteer programs, to include Ombudsman programs and others; limitations and regulations.		
See Tasks 1-3, 7-9 & 14	<b>3A2</b>	<b>Person-Centered Environment (e.g., home-like environment).</b> Knowledge/Understanding of role/importance of the environment in providing a home-like environment; dignity, coordination of care...; personalized care...; development of strengths and abilities for improved independence etc.		
See Tasks 1-3	<b>3A3</b>	<b>Safety and Accessibility (e.g., ADA, safety data sheets).</b> Knowledge/Understanding of documentation required for chemicals/substances in building (SDSes); familiarity with requirements of ADA for private vs. government buildings (Titles I, II and III).		
See Tasks 1-5, 11-13, & 25	<b>3A7</b>	<b>Infection Control and Sanitation (e.g., linens, kitchen, hand washing, healthcare acquired infections, hazardous materials).</b> Working knowledge of infection control issues relevant to environmental issues.		
See Tasks 1, 6, 9-11, 22, 33, 34 & 37	<b>3B4</b>	<b>Regulatory Survey and Inspection Process.</b> Working knowledge of; ability to run a "mock" survey/inspection.		

See Tasks 1, 2, 22, 37	<b>3B6</b>	<b>Centers for Medicare and Medicaid Services (CMS) Quality Measures.</b> Working knowledge of the tools used to measure or quantify healthcare processes, outcomes, patient perceptions and organizational structure and/or systems that are associated with the ability to provide high-quality health care and/or that relate to one or more quality goals for health care. Goals include: effective, safe, efficient, patient-centered, equitable and timely care.		
See Tasks 1, 2 & 22	<b>3B7</b>	<b>Quality Assurance and Performance Improvement (QAPI).</b> Working knowledge of QAPI, principles, processes, tools, purpose, elements of QAPI, QAPI F-Tags and federal requirements, etc.		
See Tasks 1 & 4	<b>3B8</b>	<b>Bed-Hold Requirements.</b> Working knowledge of Medicaid bed hold policies and requirements (Medicare restrictions)		
<b>Rehabilitation Department</b>				
See Tasks 1-5, 8, 9 & 14	<b>1A6</b>	<b>Rehabilitation and Restorative Programs.</b> Knowledge of the proper roles of therapists (occupational, physical, speech...) and nursing staff.		
<b>Medical/Resident Records</b>				
See Tasks 1 & 6	<b>1A8</b>	<b>Clinical and Medical Records and Documentation Requirements (e.g., storage, retention, destruction).</b> Knowledge of the process, participants and required timelines in care planning.		
<b>Activities Department</b>				
See Tasks 1-5, 8 & 14	<b>1A5</b>	<b>Activities of Daily Living (ADLs) and Independent Activities of Daily Living (IADLs).</b> Knowledge of daily self-care activities including feeding ourselves, bathing, dressing, grooming, work, homemaking, hygiene, leisure, hobbies. Includes knowledge of adaptive equipment and devices used to enhance and increase independence in performing these activities. Refers to some of the most basic functions of living.		
See Tasks 1-5, 8, 12 & 14	<b>1B17</b>	<b>Therapeutic Recreation and Activity Programs.</b> Knowledge of various therapy activities that offer benefits to support the health and well-being of residents; knowledge of similar activities specific to seniors with Alzheimer's and Dementia.		
<b>Social Services/Admissions Department</b>				
See Tasks 1-5 & 13	<b>1A11</b>	<b>Transition of Care (e.g., admission, move-in, transfer, discharge, and move-out).</b> Knowledge of the movement of a resident from one setting of care (hospital, ambulatory primary or specialty care practice, long-term care, home health, rehabilitation facility) to another. More specifically, to and from long-term care.		
See Tasks 1-5, 12 & 13	<b>1B16</b>	<b>Social Services Programs.</b> Knowledge of staffing requirements, state requirements for social work practice; role of the social worker in a long-term care setting.		
See Tasks 2-4, 9, 12 & 14	<b>1B18</b>	<b>Community Resources.</b> Knowledge of existing community resources available and how programs come to exist through legislation, who uses the resources, and how they are delivered.		

See Tasks 1-4, & 7-9	<b>1C3</b>	<b>Transportation for Care Recipients.</b> <i>Knowledge of requirements to transport.</i>		
See Tasks 1 & 4	<b>3B8</b>	<b>Bed-Hold Requirements.</b> <i>Working knowledge of Medicaid bed hold policies and requirements (Medicare restrictions)</i>		
See Tasks 1-9 & 11-14	<b>3B9</b>	<b>Pre-Admission Screening Annual Review (PASSR).</b> <i>Working knowledge of federal pre-admission screening and annual review requirements (applicability and definitions)</i>		
<b>Business Office/Financial Management</b>				
See Tasks 26-28	<b>2A1</b>	<b>Budgeting and Forecasting.</b> <i>Knowledge of tools and purposes of budgeting, forecasting, generally accepted accounting principles.</i>		
See Tasks 26-28	<b>2A2</b>	<b>Financial Analysis (e.g., ratios, profitability, debt, revenue mix, depreciation, operating margin, cash flow).</b> <i>Knowledge of financial analysis tools and ability to calculate different indicators and understand what they mean.</i>		
See Tasks 26-28	<b>2A3</b>	<b>Revenue Cycle Management (e.g., billing, accounts receivable, accounts payable, collections).</b> <i>Comprehension of the revenue cycle and the administrator's role along the way.</i>		
See Tasks 26-28	<b>2A4</b>	<b>Financial Statements (e.g., income/revenue statement, balance sheet, statement of cash flows, cost reporting).</b> <i>Understand financial statements and interpret what they mean to the facility.</i>		
See Tasks 26-29	<b>2A5</b>	<b>Revenue and Reimbursement (e.g., PDPM, PDGM, ACOs, HMOs, Medicaid, private payors).</b> <i>Comprehension of the various revenue sources, calculations, implications, etc.</i>		
See Tasks 26-28	<b>2A6</b>	<b>Financial Reporting Requirements (e.g., requirements for not-for-profit, for-profit, and governmental providers).</b> <i>Knowledge of the financial reporting requirements for different facility types.</i>		
See Tasks 26-28	<b>2A7</b>	<b>Financial Reporting Requirements (e.g., requirements for not-for-profit, for-profit, and governmental providers).</b> <i>Knowledge of the financial reporting requirements for different facility types.</i>		
See Task 7	<b>3A5</b>	<b>Information Systems Infrastructure (e.g., configurations, data security, technical controls).</b> <i>Knowledge/Understanding of compliance issues (HIPAA, CMS, HITECH) and current best practices.</i>		
See Tasks 1, 30 & 37	<b>3B3</b>	<b>Certification and Licensure Requirements for the Organization.</b> <i>Working knowledge of licensure requirements; Requirements of Participation for re-certification standard surveys.</i>		
See Tasks 21, 23 & 24	<b>4B2</b>	<b>Strategic Business Planning (e.g., new lines of service, succession management, staffing pipeline).</b> <i>Working knowledge of the processes of strategic planning and execution of the plan.</i>		
See Tasks 21 & 23	<b>4B3</b>	<b>Business Analytics (e.g., evidence-based practice, data analytics).</b> <i>Working knowledge of technological tools to effectively process important data for improved outcomes.</i>		
See Tasks 9, 21, 23 & 28	<b>4B4</b>	<b>Business Development (e.g., sales, marketing, partnerships, ACOs, contracts and agreements, negotiations).</b> <i>Understanding of ideas, initiatives, and activities that yields desired growth; includes building strategic partnerships and making strategic business decisions.</i>		

<b>Dietary Department</b>				
See Tasks 1-4, 11 & 12	<b>1B15</b>	<b>Foodservice (e.g., choice and menu planning, dietary management, food storage and handling, dining services).</b> <i>Knowledge of culture change impacts on food service choices, requirements for staffing, requirements for storage, food handling requirements, illness prevention, risks of foodborne illnesses, etc.</i>		
See Tasks 1-5, 11-13 & 25	<b>3A7</b>	<b>Infection Control and Sanitation (e.g., linens, kitchen, hand washing, healthcare acquired infections, hazardous materials).</b> <i>Working knowledge of infection control issues relevant to environmental issues.</i>		
<b>Housekeeping/Laundry Department</b>				
See Tasks 1-5, 11-13 & 25	<b>3A7</b>	<b>Infection Control and Sanitation (e.g., linens, kitchen, hand washing, healthcare acquired infections, hazardous materials).</b> <i>Working knowledge of infection control issues relevant to environmental issues.</i>		
<b>Environmental Management/Maintenance Department</b>				
See Tasks 16, 18, 20 & 35	<b>2B12</b>	<b>Security (e.g., cameras, monitoring systems, locks, staff location reporting).</b> <i>Knowledge of technology available, limitations by law, etc.</i>		
See Tasks 2 & 6	<b>3A1</b>	<b>Federal Codes and Regulations for Building Equipment, Maintenance and Grounds.</b> <i>Knowledge/Understanding/working knowledge of the Life Safety Code rules/regulations and the survey process.</i>		
See Tasks 1-3, 7-9 & 14	<b>3A2</b>	<b>Person-Centered Environment (e.g., home-like environment).</b> <i>Knowledge/Understanding of role/importance of the environment in providing a home-like environment; dignity, coordination of care...; personalized care...; development of strengths and abilities for improved independence etc.</i>		
See Tasks 1-3	<b>3A3</b>	<b>Safety and Accessibility (e.g., ADA, safety data sheets).</b> <i>Knowledge/Understanding of documentation required for chemicals/substances in building (SDSes); familiarity with requirements of ADA for private vs. government buildings (Titles I, II and III).</i>		
See Tasks 1-5, 13, 33 & 34	<b>3A4</b>	<b>Facility Management and Environmental Services.</b> <i>Knowledge/Understanding of available strategies/approaches commensurate with culture and other factors.</i>		
See Tasks 31-34	<b>3A6</b>	<b>Preventative and Routine Maintenance Programs (e.g., pest control, equipment, mechanical systems).</b> <i>Working knowledge of equipment, systems, maintenance requirements.</i>		
See Tasks 1-5, 11-13 & 25	<b>3A7</b>	<b>Infection Control and Sanitation (e.g., linens, kitchen, hand washing, healthcare acquired infections, hazardous materials).</b> <i>Working knowledge of infection control issues relevant to environmental issues.</i>		

<b>Other</b>	NOTE: The "Other" module was created as a "clean up" module, to provide the flexibility to address discovered weaknesses or to get extra hands-on experience in areas that simply cannot be classified into a specific subdomain. Just as the Preceptor/Mentor can tailor the number of hours to fit the experience/education of various interns/AITs, a state/ jurisdiction could delineate specific tasks and activities to be conducted and this module COULD be used for that purpose as well (more of the tool's ability to be tailored to the intern/AIT, Preceptor/Mentor and even state/jurisdictional uses). Jurisdictions can also prescribe such activities as part of the AIT/Internship experience in one of the subdomain areas where it naturally belongs as well. The "other" module hours can be ignored entirely by setting "0" (zero) hours in this module.			
<b>-01</b> For jurisdiction use (optional)				
<b>-02</b> For jurisdiction use (optional)				
<b>-03</b> For jurisdiction use (optional)				
<b>-04</b> For jurisdiction use (optional)				
<b>-05</b> For jurisdiction use (optional)				
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