

# Customer Service

## A Person-Centered Approach

Ohio Department of Health (ODH)  
Bureau of Survey and Certification (BOSC)  
Provider Resources and Education Program (PREP)

**Chris Meinke LSW, LNHA**

**Kim Hineline RN**

**May 2024**

# Agenda

- Person-centered approach to complaints.
- Tips to enhance person-centered care.
- Action steps to reduce complaints.
- Available resources.

# Learning Objectives

After completing this training, the learner will be able to:

- Describe the value of a person-centered customer service program.
- Describe how a person-centered approach has the potential to improve resident and family satisfaction.
- Identify opportunities to apply person-centered customer service in your facility.

# Continuing Education Requirements

To earn continuing education hours, the learner must:

- Attend 100% of presentation.
- Score 80% on knowledge check.
- Complete evaluation.

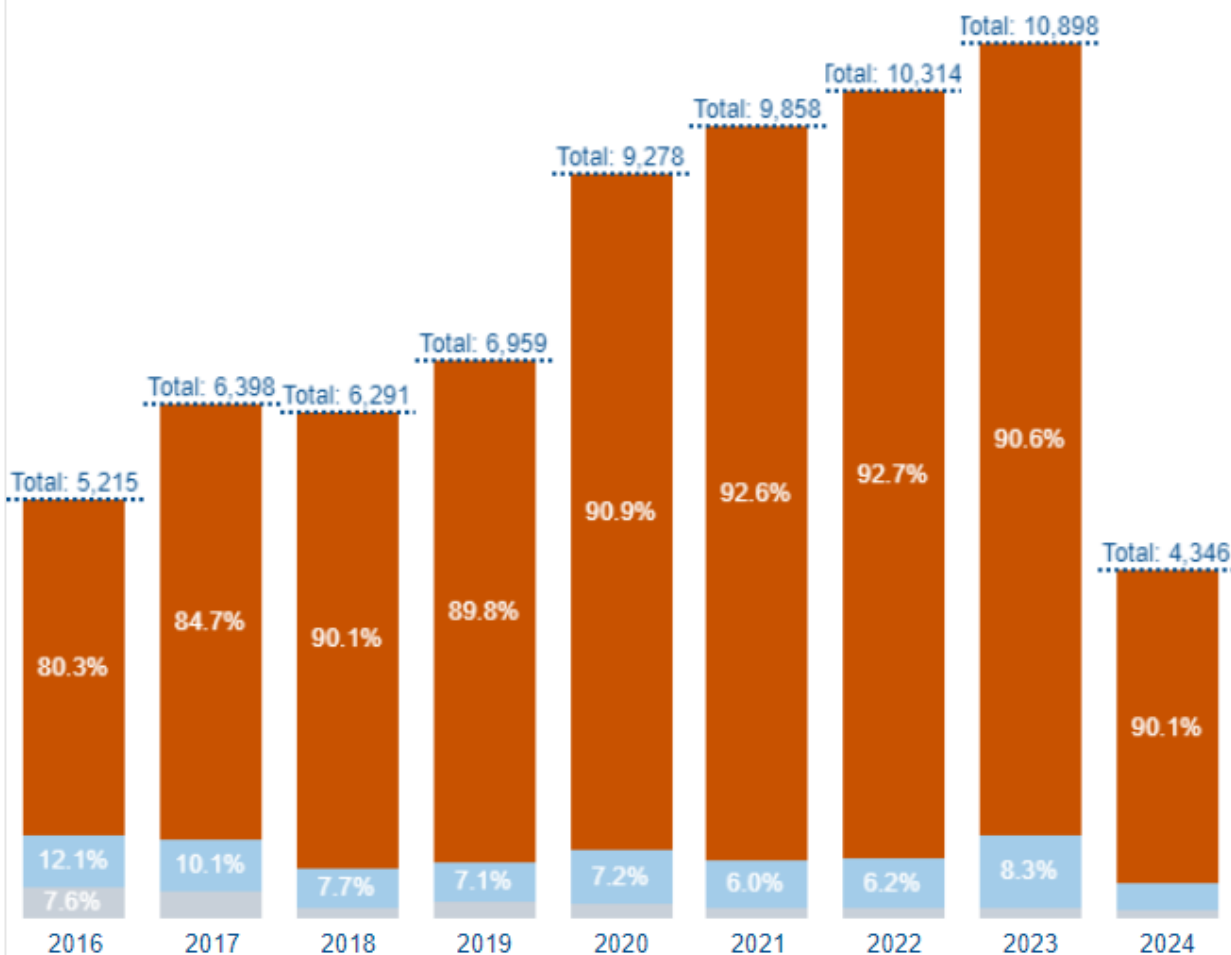
# Disclosure Statement

- The Ohio Department of Health is approved as a provider of nursing continuing professional development by the Pennsylvania State Nurses Association, an accredited approver by the American Nurses Credentialing Center's Commission on Accreditation.
- The Ohio Department of Health is an approved provider of continuing education for Social Workers by the Ohio Counselor, Social Worker, and Marriage and Family Therapist Board.
- The Ohio Department of Health (ODH) is an approved provider of continuing education for Registered Environmental Health Specialists & Environmental Health Specialists in Training by the ODH Bureau of Environmental Health and Radiation Protection.

## Ohio Department of Health Complaint Tracking System

LTC / NLTC

Year



LTC or not LTC

LTC  
NLTC  
OTHER

Hover on the bar chart for more information.

\*Data refreshed on '5/16/2024'

# Complaints

Complaints to ODH have steadily increased since 2016.

Source: [Data.ohio.gov](https://data.ohio.gov)

# Weblinks

**Note:** All weblinks referenced in this presentation can be found in the grey description box on the YouTube page for this video.

Clickable weblinks can also be found in the pdf of this presentation, which can be found in the PREP section of the ODH website. Search under Education Resources.




## Ohio Department of Health

@OhioDepartmentofHealth1 · 3.71K subscribers · 219 videos

More about this channel >

Customize channel

Manage videos



Nursing  
Homes/Facilities

### Provider Resources & Education Program

The Provider Resources and Education Program (PREP) supports nursing homes and other long-term care providers with education, training, and other resources designed to improve and protect the safety, health, and quality of life for residents and others in their care. PREP works collaboratively with facilities and industry stakeholders to enhance knowledge and skills in delivering person-centered, competent, and compassionate care.

WELCOME

PROVIDER RESOURCES & EDUCATION PROGRAM


RESOURCES

NURSING HOMES/FACILITIES FORMS

REGIONAL OFFICE MAP


Filter the content below by keyword or date.

[FILTER](#) [RESET FILTERS](#)




#### Education Resources

Resources to assist providers with survey readiness, regulations, correction plans, and other topics.



#### Nursing Home Regulations

Access to federal regulations and state licensure requirements for nursing homes.



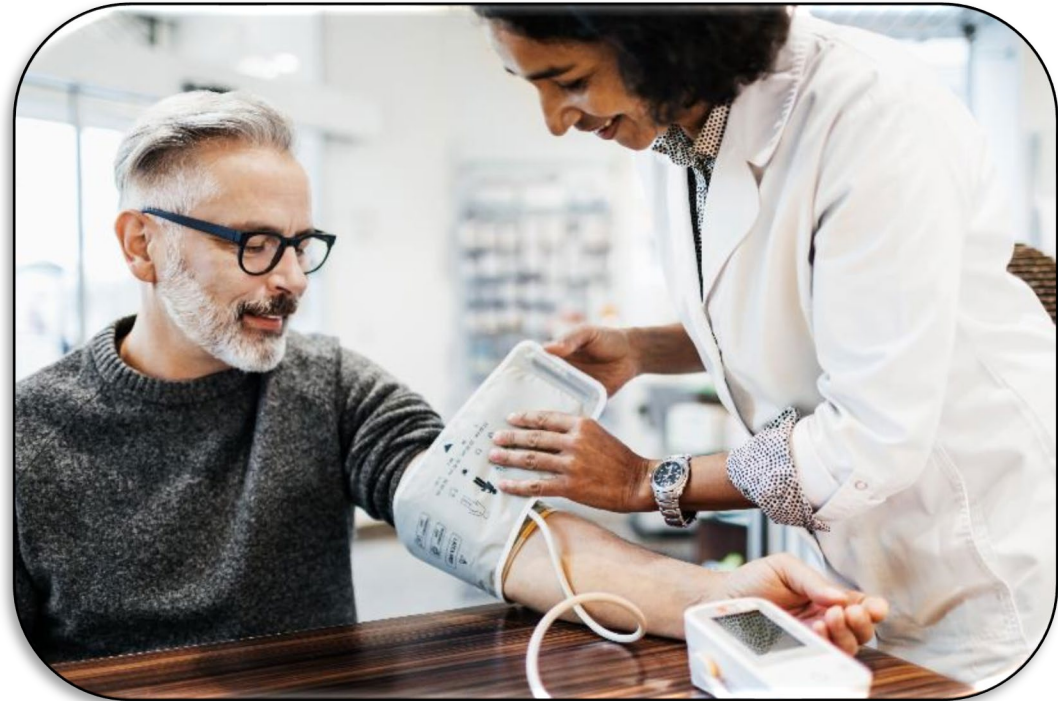
#### Useful Links

Federal, state, and industry links concerning topics important to long-term care providers, including survey and enforcement, quality measures

# Think about.....

---

- Who is complaining?
  - Representatives.
  - Residents.
  - Facility staff.
- These are people in your building. Did they talk to you first?



Microsoft Stock Image



# Complaints are Opportunities!

---

- Complaints are INEVITABLE but how we treat the complainant will determine the outcome.
- Having someone speak to us about a concern is an opportunity to turn a negative into a positive.
- Create a person-centered care process to handle the complaint the first time and hopefully avoid a complaint survey.

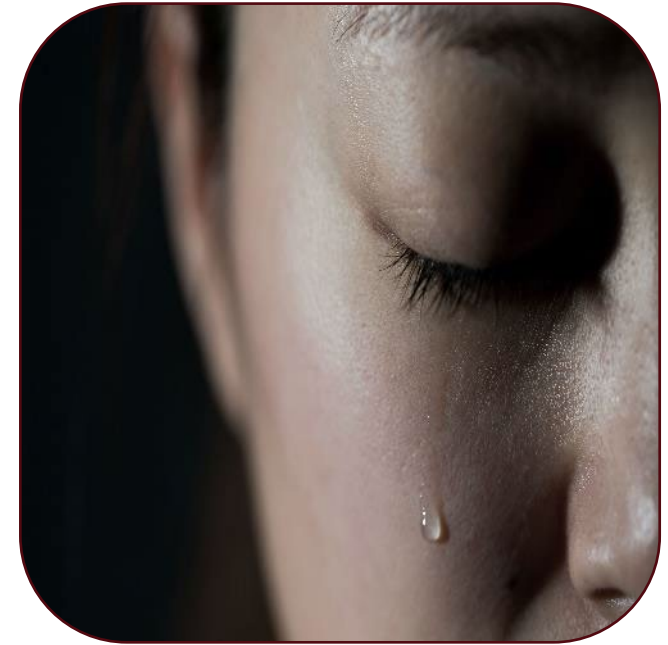


# Maya Angelou

“People will forget what you said,  
people will forget what you did, but  
people will never forget how you  
made them feel.”

# Person-Centered Care and Services

---



Microsoft Stock Images

# Person-Centered Care and Services

---

- Ease anxiety.
- Create welcoming atmosphere.
- Ensure wellbeing.



Microsoft Stock Image



# Person-Centered Care and Services

---

- Positive.
- Consistent.
- Proactive.
- Person-centered.



Microsoft Stock Image

# Direct Care Staff

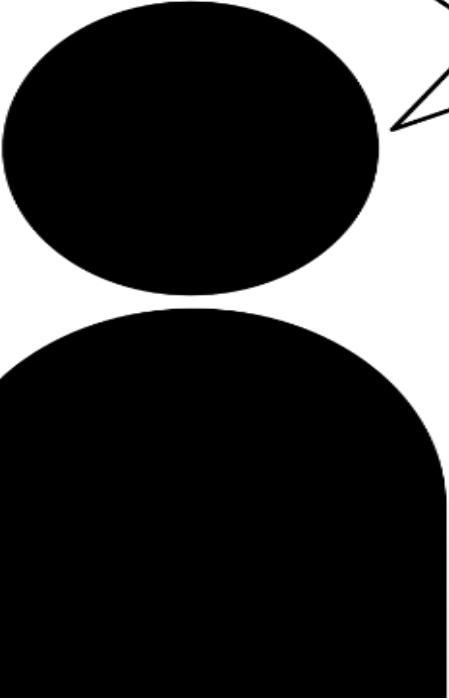
---

- Must be knowledgeable.
- Equipped with necessary skills.
- Positive attitude.

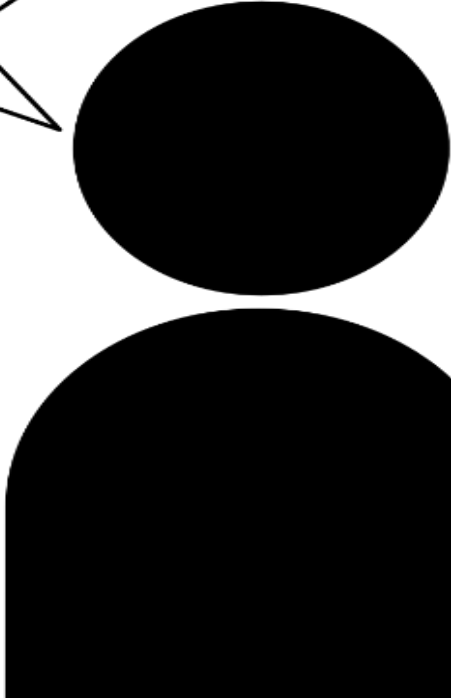


Microsoft Stock Image

# Direct Care Staff

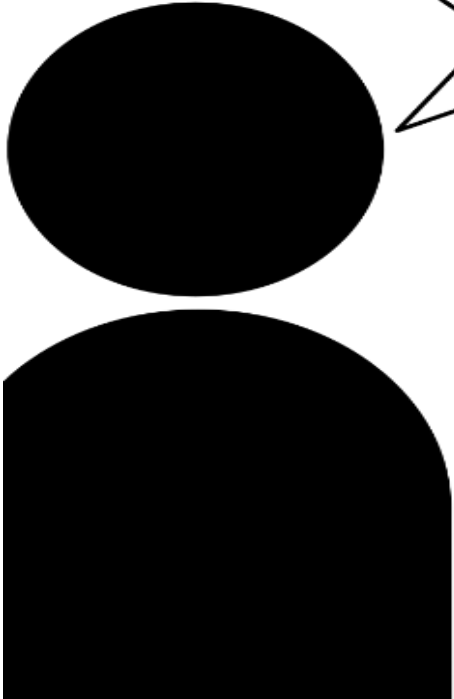


I would like to  
speak to the  
social worker.

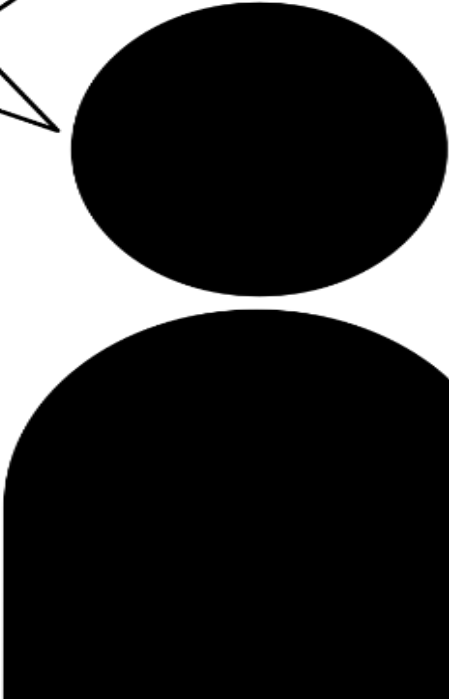


Sorry, but she won't be  
here until  
tomorrow. You'll need  
to call her then.

# Direct Care Staff



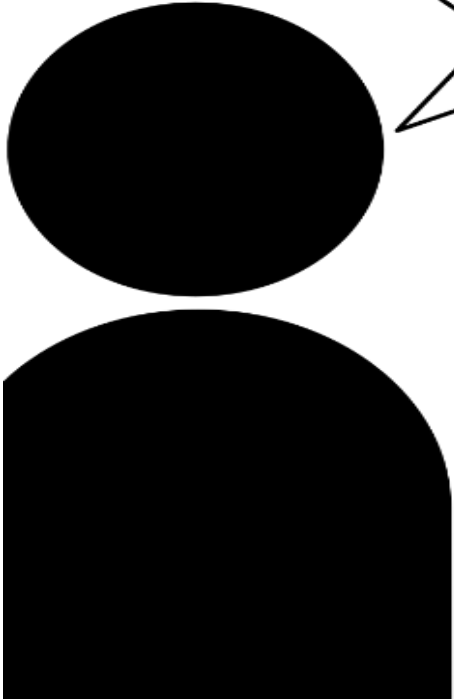
I would like to  
speak to the  
social worker.



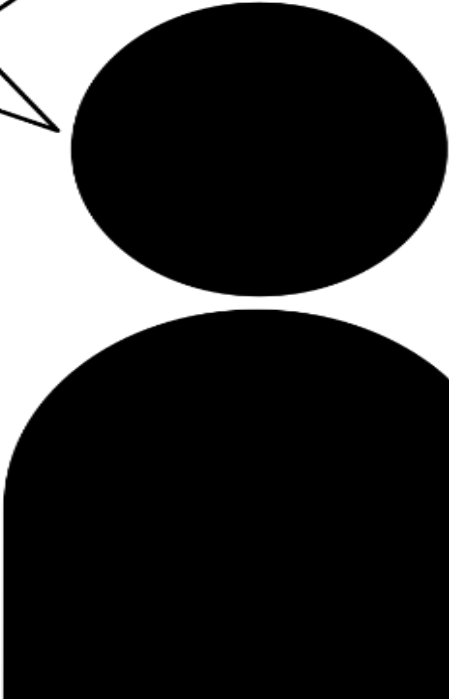
I'm sorry, our social worker,  
isn't available until tomorrow. I  
can have her call you. How can  
I help in the meantime?



# Direct Care Staff

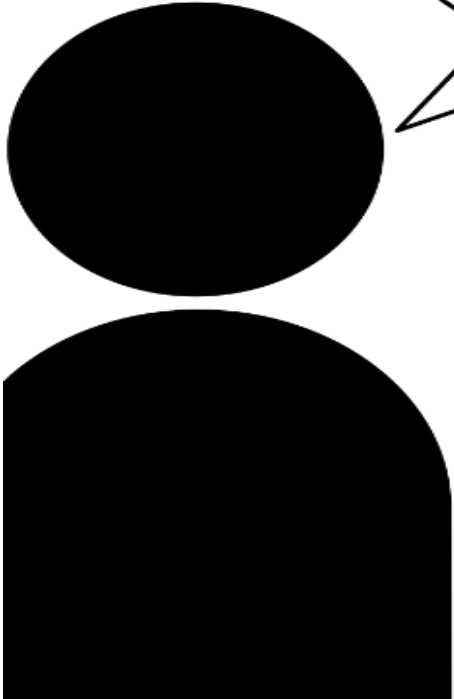


I would like to  
speak to the  
social worker.

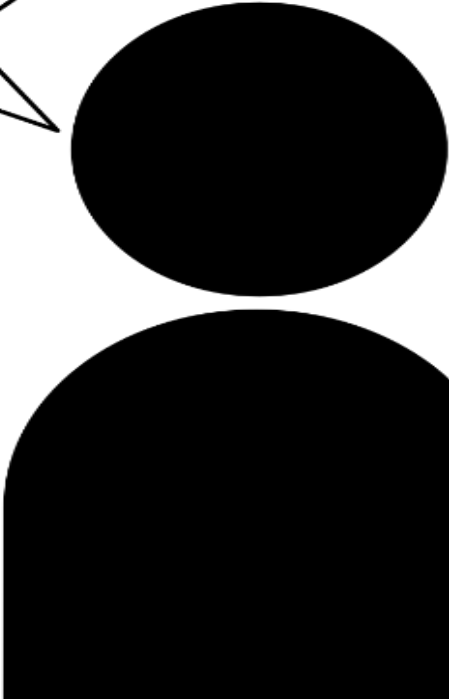


I just started last week. I'm  
not sure who the social  
worker is.

# Direct Care Staff



I would like to  
speak to the  
social worker.



Slide a note under her  
door. It's the last door on the  
left in the main hall.

# Direct Care Staff

---



Microsoft Stock Image

**“Sorry, but she won’t be here until tomorrow. You’ll need to call her then.”**

**“I just started last week, I do not know who the social worker is.”**

**“Slide a note under the door it’s the last door on the left in the main hallway.”**

# Tips for Enhancing a Person-Centered Approach

Be proactive

Anticipate  
needs

Listen without  
interrupting

Avoid  
becoming  
defensive

Rephrase

Ask questions

# Tips for Enhancing a Person-Centered Approach

Acknowledge  
individual &  
concern

Empathize

Offer action steps  
& reasonable  
timelines

Troubleshoot  
together

Follow-up

Encourage  
feedback

# How Customer Service Impacts Complaint Surveys

# Customer Service – Example 1

---

- Residents voiced concerns at resident council.
- Concerns were not addressed.
- Resulted in complaint survey with several complaints.
- Facility received three citations regarding concern.

# Customer Service – Example 2

---

- Resident representative completed request for medical records.
- Records were not provided.
- Resident representative filed complaint survey.
- Facility cited F 573.



# Customer Service Example 3

---

- Resident voiced concerns and filed a grievance.
- Grievances were not followed up and a complaint was filed.
- ODH responded with a complaint investigation.
- F585 cited for not following up on resident grievances.
- Received additional citation.

# Common Complaints Resulting in Surveys

---

- Facility not answering the phones.
- Voice mails not being returned.
- Heating and cooling systems not being checked.
- Staff being rude or curt.
- Not addressing resident council or grievance concerns.

# Action Steps

# Action Steps to Consider

---

- Create an ambassador program.
- Develop channels for reporting concerns.
- Emphasize grievance procedure.
- Promote ombudsman program.
- Solicit input.
- Start a customer service team.



Microsoft Stock Image

# Ideas to Enhance Customer Service

- Encourage participation in care conferences.
- Create an informative website.
- Gather feedback from the resident council group.
- Organize a family council.
- Incorporate customer service in QAPI.



Microsoft Stock Image

# Action Steps to Consider

---

- Arrange for key personnel to visit residents.
- Display staff bios.
- Encourage a leadership presence.



Microsoft Stock Image

# Action Steps to Consider

---

- Provide learning opportunities during staff meetings/trainings.
- Train staff on telephone customer service etiquette, including timely answering of phones.
- Create interactive staff training.



Microsoft Stock Image

# Resources for Your Next Action Steps



# Facility Survey

## Long Term Care Survey Process (LTCSP) Procedure Guide *Effective October 23, 2023*

### OFFSITE PREP.....

STEP 1: CREATE SURVEY SHELL IN ASPEN CENTRAL OFFICE (ACO) .....

*LTCSP Application HELP* .....

STEP 2: EXPORT SHELL FROM ACO.....

STEP 3: IMPORT SHELL INTO ASPEN SURVEY EXPLORER (ASE-Q).....

STEP 4: ADD TEAM MEMBERS IN ASE-Q (IF TEAM COMPOSITION CHANGES) .....

STEP 5: ACCESS THE SURVEY .....

STEP 6: TC COMPLETES OFFSITE PREP SCREEN.....

- - -

- Various parts of a survey.
- Sample selection.
- In-depth investigations.
- Survey tasks.
- Potential citations.

# LTCSP Initial Pool Care Areas – Sample Resident Interview Probes

---

- Medical treatment decisions.
- Correct assistive devices.
- Food choices and assistance.
- Refusal of care.
- Daily care choices
- Activities of interest.
- Privacy.
- Room Set up.
- Personal space.

# LTCSP Initial Pool Care Areas – Sample Resident Interview Probes

---

- Care Planning involvement.
- Pain Management.
- Lighting.
- Knocking.
- Providing care and services.
- Explanation.
- Interactions.
- Communication.

# QSEP website

---



## Driving Healthcare Quality

Welcome to the Quality, Safety & Education Portal (QSEP)

Login

Sign Up

[Select here for public access to the Training Catalog](#)

- Navigating CMS resources.
- Health survey.
- Life-safety code survey.
- Emergency preparedness survey.
- Complaint and incident intake.
- Immediate jeopardy.

[CMS Quality, Safety, and Education Portal](#)

# CMS.gov

---

The logo for CMS.gov, featuring the text "CMS.gov" in a bold, blue, sans-serif font. The "CMS" is in a larger, bolder font than ".gov".

[Centers for Medicare and Medicaid Services](https://www.cms.gov)

- State Operations Manual.
- Survey forms.
- Investigation pathways.
- Procedure guide.

# Operations Manual

---

## **State Operations Manual Appendix PP - Guidance to Surveyors for Long Term Care Facilities**

**Table of Contents**  
*(Rev. 211, 02-03-23)*

**[CMS State Operations Manual](#)**

# CMS Nursing Home Downloadable Resources

---

- [Exhibit 358 - Sample Form for Facility Reported Incidents \(cms.gov\)](#)
- [Exhibit 359 - Follow-up Investigation Report \(cms.gov\)](#)
- [CMS 802 Matrix for Providers](#)
- [Nursing Homes | CMS](#)
- [ltcsp-interim-revisit-instructions.pdf \(cms.gov\)](#)
- [Revision History for LTC Survey process documents and files \(cms.gov\)](#)

# LTCSP Survey Pathways

DEPARTMENT OF HEALTH AND HUMAN SERVICES  
CENTERS FOR MEDICARE & MEDICAID SERVICES

## Activities Critical Element Pathway

Use this pathway if there are activity concerns for a resident to determine if the facility is meeting the resident's activity needs.

### Review the Following in Advance to Guide Observations and Interviews:

- ☐ The most current comprehensive and most recent quarterly (if the comprehensive isn't the most recent) MDS/CAAs for Sections C, F, and GG.
- ☐ Pertinent diagnoses.
- ☐ Care plan (e.g., activity plan in the facility and community, continuation of life roles consistent with preferences and functional capacity, adaptations needed for activity participation, needed transportation assistance, and who is to provide the assistance to attend preferred activities).

[Long-term Care Pathways](#)



# ODH Nursing Homes Publications Website



Nursing  
Homes/Facilities

WELCOME

RESOURCES

FORMS

## Nursing Homes Publications

Expand All Sections

### Publications ^

ODH publishes various documents relating to the operation of nursing homes in Ohio, including guidance, rule interpretations, reports (annual and quarterly) and a listing of resident right's advocates.

### Guidance v

### Life Safety Code v

### Annual and Quarterly Reports v

### Resident's Rights Advocates v

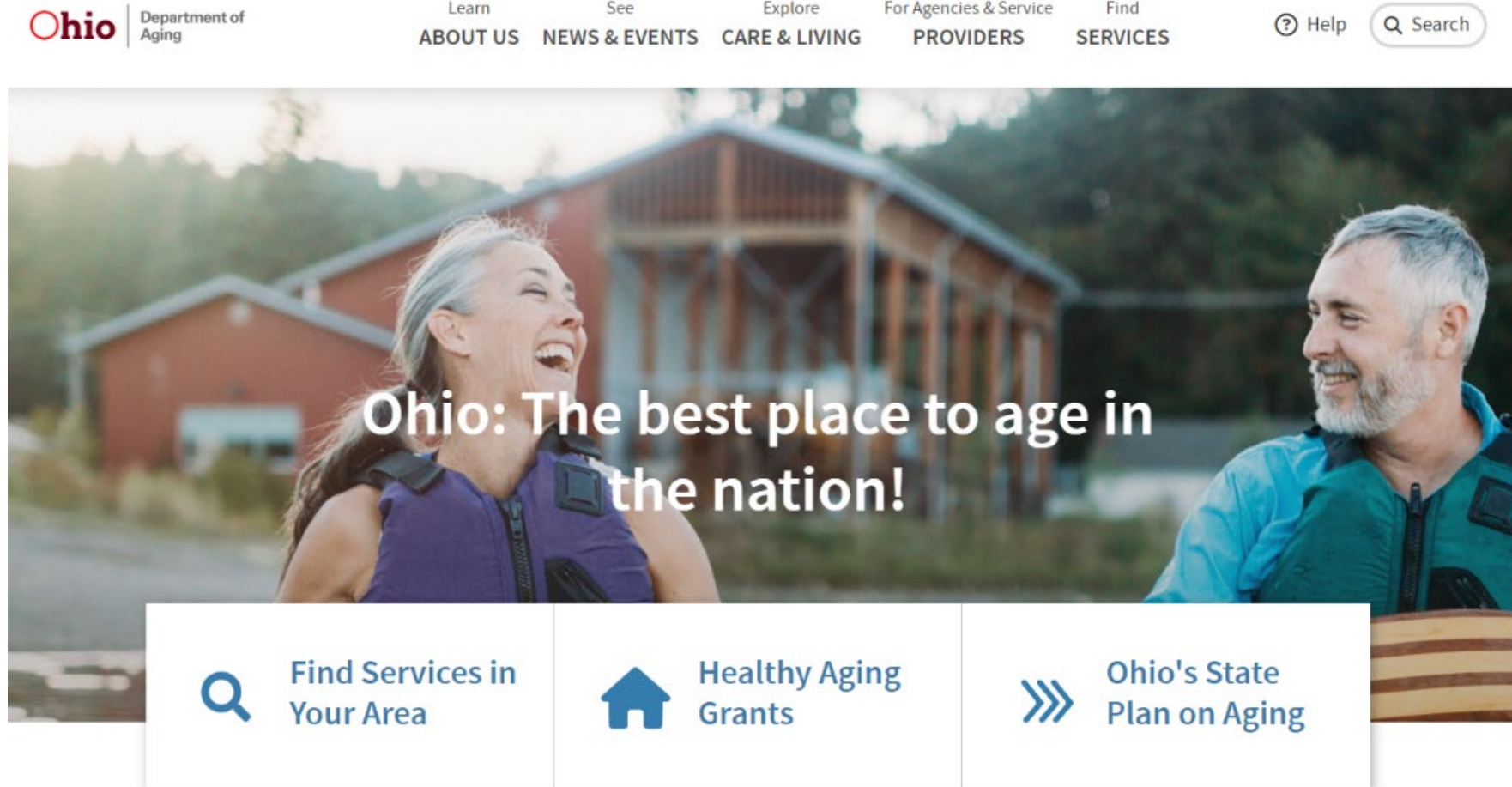
### User Guides v

[Ohio Department of Health Nursing Home Publications](#)



Department of  
Health

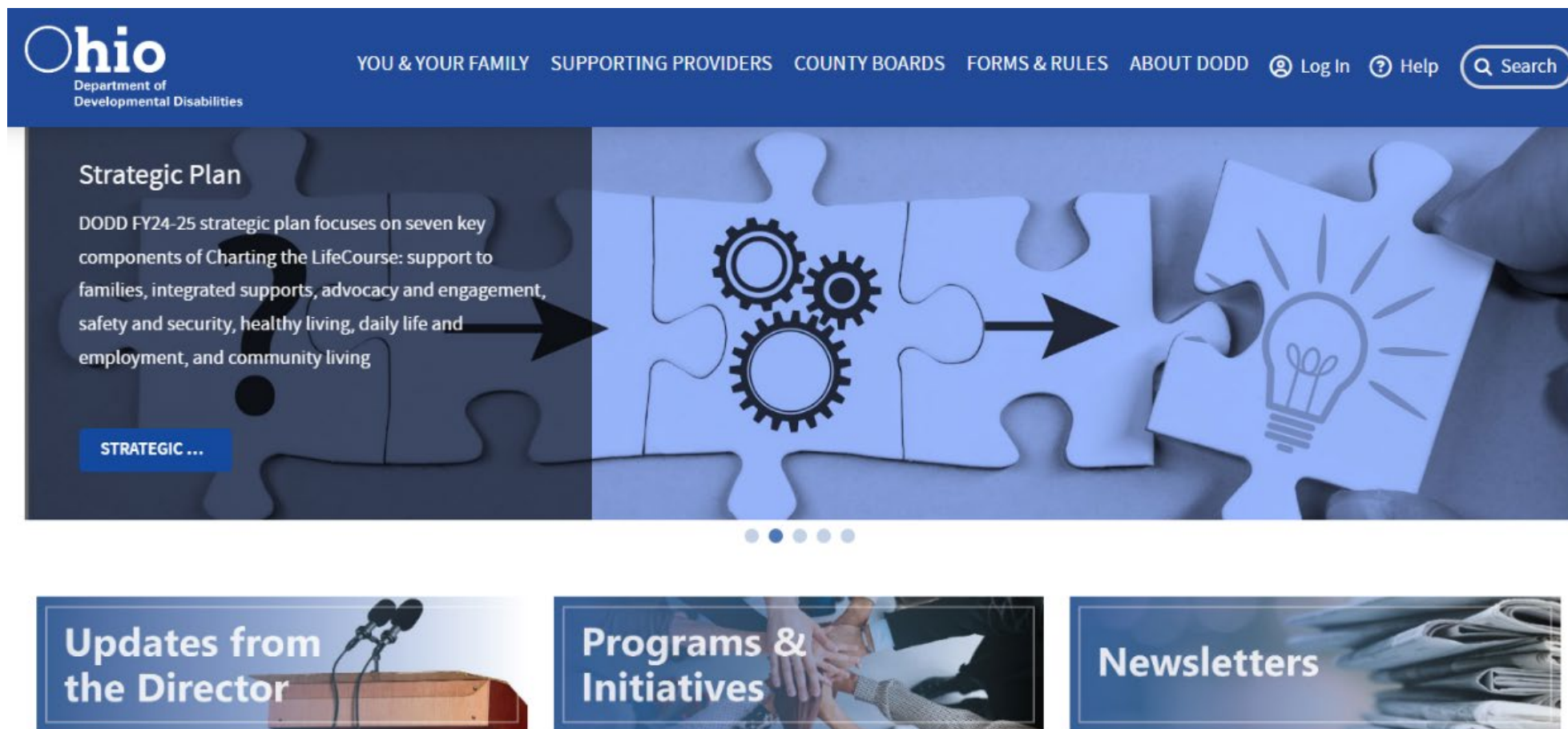
# Ohio Department of Aging Website



The Ohio Department of Aging fosters sound public policy, research, and initiatives that benefit older Ohioans.

[Ohio Department of Aging](https://www.ohio.gov/aging)

# Ohio Department of Developmental Disabilities



[Ohio Department of Developmental Disabilities](https://dodd.ohio.gov/)





“True empathy requires that you step outside your own emotions to view things entirely from the perspective of the other person.”

Anonymous



Department of  
Health

# Scenarios

# Let's consider some more scenarios . . .

- **What is the best response?**

- “Lucy, our social worker, coordinates transportation to doctor’s appointments. She’ll probably be helping in the dining room at lunch time today. If you see her down there, ask her, because I’m not sure how you’re getting to your appointment.”
- “I don’t really have time to check on this because I’m passing medications right now. Let’s worry about that later anyway. Your appointment isn’t for another week.”
- “Lucy, our social worker coordinates transportation to appointments. How about if I go find her and see if she’ll stop down to fill you in on the details? If she’s not available today, I’ll stop back myself, to let you know that.”
- “No one here has missed an appointment because of transportation issues. I’m sure everything will be just fine. How about if I help you down to Bingo

# Let's consider some more scenarios . . .

---



Microsoft Stock Image

**“I have concerns with housekeeping in my room.”**

# Let's consider some more scenarios . . .

## Which is the best-case scenario?



Microsoft Stock Image

- Mr. Gilbert's ambassador, the activity director, stops by to see if he has any questions or concerns, during one of her weekly visits. He tells her about it, and she reports it to the housekeeping manager. During her next interaction with Mr. Gilbert, she follows up and asks if he is satisfied.
- A surveyor asks Mr. Gilbert if he's comfortable in his room and he reports the housekeeping concern he's had for months. The survey team initiates an investigation into housekeeping and ultimately determines the facility is not honoring Mr. Gilbert's right to a clean, safe, comfortable, homelike environment.
- Mr. Gilbert apologizes to his daughter for his messy room when she comes to visit. His daughter tells the aide on duty who tells her housekeeping has been an ongoing issue because of staffing levels. Mr. Gilbert's daughter calls the Ohio Department of Health Complaint Hotline and files a formal complaint about the facility's housekeeping practices and staffing shortages.
- Mr. Gilbert, who is unsure of how to go about reporting this housekeeping concern, keeps it to himself.



# Let's consider some more scenarios . . .

---



Microsoft Stock Image

Mr. Gilbert's ambassador, the activity director, stops by to see if he has any questions or concerns, during one of her weekly visits. He tells her about it, and she reports it to the housekeeping manager. During her next interaction with Mr. Gilbert, she follows up and asks if he is satisfied.

# Let's consider some more scenarios . . .

---



Microsoft Stock Image

**“Tell me about call-light response times.”**

# Let's consider some more scenarios . . .

## Which is the best-case scenario?



Microsoft Stock Image

- Two residents tell the surveyor they are unable to use the call light due to fine motor skill deficits. When asked by the surveyor, each denies anyone has discussed with them or offered an alternate type of button or push pad.
- All eight residents tell the surveyor they are satisfied with response times. They tell the surveyor that managers have been monitoring this after it was discussed during a resident council meeting last month, and response times have improved.
- Four of the eight residents report concerns. They report staff will often enter the room, deactivate the alert, say they'll be back soon, but then often fail to return. The four each tell the surveyor it's been discussed during Resident Council meetings, but nothing has changed.
- Three of the residents report prolonged response times. When asked by the surveyor if it was reported to anyone, each resident denies this and states s/he is unfamiliar with the process for reporting concerns.

# Let's consider some more scenarios . . .

---



Microsoft Stock Image

All eight residents tell the surveyor they are satisfied with response times. They tell the surveyor that managers have been monitoring this after it was discussed during a resident council meeting last month, and response times have improved.

# Key Points to Remember

---

- Be proactive.
- Be person-centered.
- Use available tools and resources.
- Each complaint is an opportunity.

# Summary of Helpful Resources

---

- [Long-Term Care Ombudsman | Ohio.gov | Official Website of the State of Ohio](#)
- [Department of Aging | Ohio.gov](#)
- [Department of Developmental Disabilities | Ohio.gov](#)
- [Bureau of Survey & Certification | Ohio Department of Health](#)





“Be somebody who  
makes everybody feel  
like somebody.”

Anonymous



Department of  
Health

# Continuing Education Requirements

To earn continuing education hours, the learner must:

- Attend 100% of presentation.
- Score 80% on knowledge check.
- Complete evaluation.



# QUESTIONS?

**Contact the Bureau of Survey and Certification:**

(614) 466-3543

ODH.OHIO.GOV

Chris Meinke, LSW, LNHA

Provider Resources Education Program (PREP) Supervisor

Email: [Christine.Meinke@odh.ohio.gov](mailto:Christine.Meinke@odh.ohio.gov)