



### Committee Visits Summary

Type	Required members	Steps in the Visit	Ending the visit	Reports
<b>Official Quarterly Visits</b>	A majority of the members	<ol style="list-style-type: none"><li>1. Enter and notify the staff the reason for your visit</li><li>2. Observe the physical environment</li><li>3. Interview residents, staff, and family about the quality of life.</li><li>4. Ask open ended questions: <i>Who, What, Where, When, Why and How</i></li></ol>	<ol style="list-style-type: none"><li>1. Request time with the person in charge (Administrator or Supervisor in Charge)</li><li>2. Report both positive and negative aspects of the visit</li><li>3. Include specifics ONLY if permission has been given by the resident, or if you observed them yourself.</li></ol>	Complete the Quarterly visit worksheet. <ul style="list-style-type: none"><li>• use blue or black ink</li><li>• include positive and negative aspects of the visit</li><li>• get input from all members who made the visit</li><li>• Complete the Committee Member Activity Record</li></ul>
<b>Friendly Visits</b>	Any individual member	Facility staff may be able to identify those residents who do not have a regular visitor.	Follow the facility visitation policy about signing in and out.	Committee Member Activity Record (if used in the county where you serve)
<b>Activity Visit</b>	Any individual or group of committee members	Work with the facility staff to participate in and/or sponsor activities of a social, educational, religious, political, cultural etc. nature for the residents.	Notify your facility contact person when the event is completed to get help with residents.	Committee Member Activity Record (if used in the county where you serve)

#### ALL FACILITY VISITS, PLEASE

1. Remember to wear your name-tag.
2. Establish a meeting place for committee members.
3. Set a good example for respecting the rights of residents. Knock on doors etc.
4. Visit as many residents as possible.
5. Talk with staff and family members as well.
6. Take a copy of the resident rights with you to share.
7. Leave your business card at the bedside of any resident not home or not able to communicate.



### SPEAK LIKE AN ADVOCATE

1. Help me understand...
2. What can you share with me about...
3. Can you explain more...
4. Is it reasonable to expect...
5. When can I expect this to be addressed?
6. Can we agree...

### DEVELOP A SPECIFIC ACTION PLAN

1. Acknowledge the concern.
2. Identify strategies that might alleviate the concern.
3. Indicate who is responsible to implement the plan.
4. Explain the timeframe for the plan to be executed.
5. Outline how the Administrator will monitor progress.
6. Identify how the CAC will follow-up on the issue (and then be sure to do what you say you'll do!)
7. Take notice of your effectiveness and celebrate!

### TIPS FOR AN EFFECTIVE QUARTERLY VISIT REPORT

1. Remember this report is **public record** and cannot contain resident names, room numbers, or any other identifying information.
2. Be aware that this report **does not initiate complaints for follow-up by the Ombudsman** or other agencies, but the information in the report may be useful in the complaint process.
3. CACs should **review prior quarterly reports** to know what issues existed in the past and may use past reports to advocate for timely resolution of ongoing issues.
4. The report should provide a **clear picture** of what was found on the visit, and what was shared during the exit meeting.
5. Completed reports are to be returned to the Regional Ombudsman, who will **share the report** with the facility, public consumers, and regulatory agencies.

### TIPS FOR A SUCCESSFUL EXIT MEETING

1. Have a **quick team huddle** to decide what aspects of the visit will be shared during the exit meeting. Allow everyone to contribute.
2. Determine who will write the report before the exit meeting, so that person can **take good notes**.
3. **Mention positive observations** – this helps establish to the facility administration that you notice and appreciate the efforts and improvements that the facility makes for residents.
4. **Mention negative issues** – a primary reason your committee exists is to advocate for the rights of residents. If no one on your CAC feels comfortable mentioning negative issues, ask your Regional Ombudsman to accompany your next visit, or strategize some additional advocacy training.
5. If the Administrator is not in the building, ask to exit with the “SIC” or supervisor-in-charge. If there is no one who can exit with you, a designated CAC member should **call the next day** to discuss the visit.
6. **Be always courteous**. Set an example of how to treat others with professionalism and respect.
7. **Use an** action plan to identify follow-up steps (for both the CAC and facility) and increase effectiveness.

