



Center for Clinical Standards and Quality

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DATE: September 8, 2023

TO: State Survey Agency Directors

FROM: Directors, Quality, Safety & Oversight Group (QSOG) and Survey & Operations Group (SOG)

SUBJECT: Annual Surveyor Skill Review (SSR) Competency Assessment Completion Requirements

Memorandum Summary

- The SSR measures the **competency and knowledge** surveyors need for consistent and effective survey processes.
- Surveyors eligible for the SSR competency will be **automatically enrolled** for the assessment every year on October 1st.
- Every year, **beginning October 1st and through September 30th of the following year**, eligible surveyors must complete their assigned SSR with a passing score of 85% or higher.
- Surveyors must log into the [Quality, Safety, and Education Portal \(QSEP\)](#) to make sure their primary survey type is the provider type they most often surveyed in the previous calendar year (January – December).

Background:

CMS is responsible for providing comprehensive training to surveyors (see: Article IV (B)(2) of the 1864 Agreement and 42 CFR 488.314(b)). We're exercising this responsibility through the SSR competency assessment. The SSR competency assessment is a **yearly measure of competency and knowledge** surveyors need for consistent and effective survey processes.

Overview:

Each year, beginning on **October 1st and closing on September 30th of the following year**, [eligible](#) surveyors must log into the QSEP and complete their assigned SSR competency assessment.

Beginning October 1st, 2023, a total of 14 SSR competency assessments will be available for [eligible](#) surveyors:

- Intermediate Care Facilities for Individuals with Intellectual Disabilities
- Life Safety Code
- Psychiatric Residential Treatment Facilities
- Psychiatric Hospitals
- Ambulatory Surgical Center
- Community Mental Health Center
- Clinical Laboratory Improvement Amendments of 1988
- Emergency Medical Treatment and Labor Act
- Emergency Preparedness
- End-Stage Renal Disease
- Home Health Agency
- Hospitals
- Long-Term Care
- Transplant

Eligibility for the SSR assessment:

Surveyors are **automatically registered** to take the SSR assessment if they:

- Designate in QSEP 1 of the 14 provider types listed above as their primary survey type.
- Complete all prerequisite and basic training courses listed in the [QSEP](#) training plan for their primary survey type.
- Have at least 1 year of experience surveying health facilities. This year starts with the last basics course completion date recorded on the surveyor's Primary Training Plan in QSEP.

Format:

The SSR is a scenario-based assessment that measures surveyors' ability to identify situations encountered during a survey accurately. Each SSR is specific to the primary provider/supplier type the surveyor selected in QSEP. Each assessment has 20 brief scenarios with 2 questions.

Once started, surveyors will have up to 3 hours to complete the SSR. The assessment can't be paused.

Passing requirements

Surveyors must earn a **passing score of 85%** on the SSR competency assessment. Surveyors get immediate feedback when they complete the SSR to learn if they passed or failed.

Surveyors may attempt the SSR competency assessment 3 times. If surveyors fail on the third try, the SSR is locked. The surveyor's Regional Training Administrators (RTAs) or State Training Coordinators (STCs) will then provide a remediation plan that may include retaking training from the corresponding training plan. Once the surveyor has completed the approved remediation plan, the RTA or STC may unlock the competency assessment, and the surveyor may take the assessment again.

Primary survey type:

The SSR is automatically assigned based on the primary survey type the surveyor selected in QSEP. Surveyors should select the provider type they surveyed most often in the previous calendar year (January – December).

For example, a surveyor who surveyed 70% Psychiatric Hospitals and 30% Psychiatric Residential Treatment Facilities in the previous year will complete the Psychiatric Hospitals SSR competency assessment when available in October.

Surveyors should update their primary survey type **once a year using the [Primary Survey Type Update Instructions](#)**. It is recommended to update the QSEP profile and primary survey type during the first log-in of the year. The last day to update the primary survey type is September 30th. A surveyor assigned a SSR competency assessment must pass the exam before they can update their primary survey type.

Emergency Preparedness SSR:

Surveyors with a primary survey type who also survey for Emergency Preparedness (EP) need to take a second, shorter SSR to assess EP survey competency.

The EP SSR assessment has 5 scenarios and 10 questions. Surveyors will need to click on each SSR separately to start their exam session. Eligible surveyors must pass both their primary survey type and EP SSRs and will receive a separate pass/fail score for each assessment. If surveyors fail 1 or both of the SSRs, they’ll follow the remediation plan outlined in the [passing requirements](#) section.

Surveyors will have up to 1 hour to complete the EP assessment. If there’s any time left from the primary survey type SSR, it **cannot** be added to the 1-hour surveyors have to take the EP SSR.

SSR	# Of Scenarios	# Of Questions	Testing Time
Primary survey type SSR	20	40	Up to 3 hours
EP SSR	5	10	Up to 1 hour

Action needed:

- Every year, **beginning October 1st and through September 30th of the following year**, eligible surveyors must complete their assigned SSR with a passing score of 85% or higher.
- Surveyors must log into the [Quality, Safety, and Education Portal \(QSEP\)](#) to make sure their primary survey type is the provider type they most often surveyed in the previous calendar year (January – December).

Contact:

For questions or concerns relating to this memorandum, please contact QSOG_QSED@cms.hhs.gov.

Effective date:

Immediately. Please communicate to all appropriate staff, including RTAs and STCs, as soon as possible.

/s/

Karen L. Tritz
Director, Survey & Operations Group

David R. Wright
Director, Quality, Safety & Oversight Group

Attachment(s)-

Surveyor Skill Review (SSR) Assessment Fact Sheet

Frequently Asked Questions: Surveyor Skills Review (SSR) Competency Assessment

Infographic: Annual Surveyor Skill Review Assessments

Resources to Improve Quality of Care:

Check out CMS's new Quality in Focus interactive video series. The series of 10–15 minute videos are tailored to provider types and aim to reduce the deficiencies most commonly cited during the CMS survey process, like infection control and accident prevention. Reducing these common deficiencies increases the quality of care for people with Medicare and Medicaid.

Learn to:

- *Understand surveyor evaluation criteria*
- *Recognize deficiencies*
- *Incorporate solutions into your facility's standards of care*

See the [Quality, Safety, & Education Portal Training Catalog](#), and select Quality in Focus

Surveyor Skills Review Assessment Fact Sheet- Fiscal Year 2024

October 2023

What's the Surveyor Skills Review Assessment?

The Surveyor Skills Review (SSR) Assessment:

- Is an annual scenario-based test
- Measures surveyors' ability to accurately identify situations they'll encounter during surveys
- Based on content from the basic training

The SSR has 20 brief scenarios, each followed by 2 questions surveyors must complete using the information given. Scenarios are specific to provider type and have randomly selected corresponding questions.

Surveyors must **achieve a score of 85% or greater to pass** the SSR.

The SSR is explained in a brief, 3 minute [introduction video](#).

When Do Surveyors Take the SSR?

Surveyors can take the SSR assessment after they complete all the prerequisite and basic training courses listed on the Training Plan for their primary provider survey type.

SSRs will be **available October 1st each year and will close September 30th the following year**.

If surveyors don't successfully complete the SSR assessment by the September 30th due date, their SSRs are marked as incomplete, and their Regional Training Administrators (RTAs) and State Training Coordinators (STCs) are notified that the due date was missed.

Who's Eligible to Take the SSR?

Surveyors are **eligible for and automatically registered on October 1 each year** to take the SSR if they've:

- Designated their primary survey type in the [Quality, Safety, and Education Portal \(QSEP\)](#). Surveyors should update their primary survey type **once a year using the [Primary Survey Type Update Instructions](#)**.
- Completed all prerequisite and basic training courses listed in the QSEP training plan for their primary survey type.
- Have at least 1 year of experience surveying health facilities; this year starts with the last basics course completion date recorded on the Primary Training Plan in QSEP. For example, surveyors who completed the last basic training in August 2023 would be eligible to take the SSR when it's available in October 2024.

If you're not automatically registered for the SSR, you don't have to take it.

Which SSR Assessment Should be Completed?

The SSR is automatically assigned based on the primary survey type the surveyor selected in QSEP. Surveyors should select the provider type they surveyed most often in the previous calendar year (January – December).

For example, a surveyor who surveyed 70% Psychiatric Hospitals and 30% Psychiatric Residential Treatment Facilities between October 2023 and September 2024 will complete the Psychiatric

Hospitals SSR when it's available in October 2024.

Surveyors with a primary survey type who also survey for Emergency Preparedness (EP) need to take and pass a second, shorter SSR to assess their EP survey competency.

What's the SSR Format?

The SSR is a scenario-based assessment that measures surveyors' ability to accurately identify situations encountered while on a survey. Each SSR is specific to the primary provider survey type the surveyor identified in QSEP. Each assessment has 20 brief scenarios with 2 questions the surveyor must complete.

Surveyors have up to **3 hours to complete the primary SSR**, which **must be done in 1 session and can't be paused**. SSRs that aren't completed in 3 hours are marked as failed.

What's the SSR Format for Emergency Preparedness?

Surveyors with a primary survey type who also survey for Emergency Preparedness (EP) need to take a second, shorter SSR to assess EP survey competency.

The EP SSR assessment has 5 scenarios and 10 questions. Surveyors will need to click on their primary survey type and EP SSRs separately to start each exam sessions. Eligible surveyors must pass both their primary survey type and EP SSRs and will receive a separate pass/fail score for each assessment. If surveyors fail 1 or both SSRs, they'll follow the remediation plan outlined in the passing requirements section.

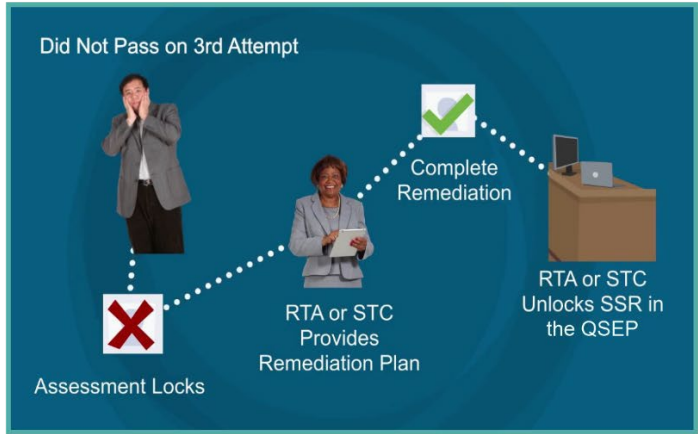
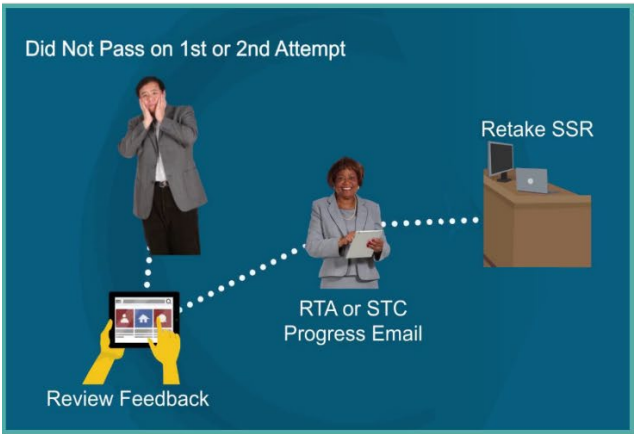
Surveyors will have up to 1 hour to complete the EP assessment. If there's any time left from the primary survey type SSR, it can't be added to the 1 hour surveyors have to take the EP SSR.

What Are the SSR's Passing Requirements?

Surveyors must receive a **passing score of 85%** on the SSR. They get immediate feedback when they complete the SSR to learn if they passed or failed. The feedback can be accessed at any time through QSEP using the My Training tab. Whether the surveyor passed or failed the SSR, the feedback will include recommendations on trainings or sections of the State Operations Manual to review related to each scenario the surveyor completed.

Surveyors may attempt the SSR competency assessment 3 times. If they fail on the first or second try, they may immediately try again. If they fail on the third try, the competency assessment is locked.

After a failed third try, the surveyor's RTAs or STCs will provide a remediation plan that may include retaking training from the surveyor's Training Plan. Once a surveyor has completed the remediation plan, the RTA or STC may unlock the SSR, and the surveyor may attempt the assessment again.



Frequently Asked Questions
Fiscal Year 2024 Surveyor Skills Review Competency Assessment
October 2023

These Frequently Asked Questions (FAQs) will help prepare surveyors, State Training Coordinators (STC), and Regional Training Administrators (RTA) for the required Surveyor Skills Review (SSR) competency assessment that will be released in the Quality, Safety and Education Portal (QSEP) in October at the beginning of each federal fiscal year.

What's the SSR?

The SSR measures surveyors' competencies and knowledge needed for consistent and effective survey processes. The SSR is explained in a brief, 3 minute [introduction video](#).

Surveyors are **automatically registered** to take the SSR if they've:

- Designated their primary survey type in QSEP
- Completed all prerequisite and basic training courses listed in the [QSEP](#) training plan for their primary survey type
- Have at least 1 year of experience surveying health facilities

The SSR includes simulated scenarios and scenario-specific questions that measure surveyors' ability to identify situations encountered during a survey accurately.

Surveyors must achieve a score of 85% or greater to pass the SSR assessment.

FAQs for Surveyors

Q: Where can I find the SSR?

A: SSRs are on QSEP in the Surveyor Skills Review (SSR) section of your primary Training Plan.

Q: Who's required to take the SSR?

A: You're eligible for the SSR after completing all required training on your QSEP Training Plan and after at least 1 year has passed since you completed the last training in the corresponding QSEP Training Plan.

Q: Will I be automatically registered to take the SSR?

A: If you're eligible for the SSR, you'll be automatically registered. If you're not automatically registered, you don't have to take it.

Q: Do I need to take more than 1 SSR if I survey for more than 1 provider type?

A: You'll only be required to take the SSR for your primary provider type in QSEP unless you also survey for Emergency Preparedness (EP). If you survey for EP, you'll also be required to take a shorter EP SSR, which includes 5 scenarios with 2 questions each.

Q: Are SSRs required?

A: Yes, you must take the SSR.

Q: When will I be required to take the SSR?

A: Starting on October 1, 2023, SSRs will be available for all provider types. You'll need to complete your SSR by September 30, 2024.

Q: How will I know when I have a mandatory SSR coming up?

A: Once you're eligible to take your SSR, you'll get email notifications on this schedule:

SSR Notifications	Delivery Timeline
1 st notification	30 days before the SSR's available
2 nd notification	On the same day the SSR's available
3 rd notification	2 months before the SSR's completion due date
4 th notification	1 month before the SSR's completion due date
5 th notification	3 weeks before the SSR's completion due date
6 th notification	2 weeks before the SSR's completion due date
7 th notification	1 week before the SSR's completion due date

Q: Will QSEP automatically restrict the SSR from surveyors who haven't completed all prerequisite and basic training?

A: Yes, all surveyors' Training Plans will be automatically reviewed for completion of all prerequisite and basic trainings before the SSR is made available.

Q: Will all provider and supplier Training Plans have SSRs?

A: Yes, all provider and supplier type Training Plans will have SSR assessments.

Q: How long do I have to successfully complete the SSR?

A: Once you're eligible to take the SSR, you have until September 30th to successfully complete it.

Q: Is the SSR timed?

A: Yes. You must complete the SSR in 1 session and you have up to 3 hours to complete it. You must also complete a separate, shorter SSR if you survey for EP, which you'll have up to 1 hour to complete.

Q: What happens if I can't complete the SSR within 3 hours (or 1 hour for EP)?

A: The SSR will be marked as "failed."

Q: What happens if I can't successfully complete the SSR?

A: After a first failed attempt, you'll have 2 more attempts to successfully complete the SSR. After a third failed attempt, your SSR will be locked and your supervisor, STC, or RTA will be notified and give you a remediation plan. Once you've completed the remediation plan, the RTA or STC can unlock the SSR, and you can take it again.

Q: Will I get feedback on how I did on the SSR?

A: Yes, you'll get a feedback report after you completion the SSR that shows your score, feedback on how to approach the scenario, resources, and training material you should reference to help answer the questions.

Q: Do STCs and RTAs have access to my feedback report?

A: Yes, STCs and RTAs have access to your feedback report and will lock your SSR after a third failed attempt.

Q: What happens if I miss the SSR completion due date?

A: You must successfully complete the SSR assessment by the September 30th due date or your SSR will be marked as incomplete and your STC and/or RTA will be notified that you missed the due date.

Q: Will I be able to print a certificate of completion for the SSR?

A: Yes, you can print a certificate of completion.

Q: Are there any CEUs related to the SSR?

A: No, there are no CEUs for the SSR.

Q: I completed a reading or observational activity that's marked incomplete in my Training Plan. How do I correct it?

A: You may enter the completion date on your Training Plan.

Q: I completed a training that shows as incomplete in QSEP. How do I correct it?

A: Contact the QSEP Help Desk and give them the training name, your completion date, and your certificate of completion.

Q: What should I do about Training Plans on my record that don't apply to me?

A: You can remove an unwanted Training Plan from your "My Training" page by checking the plan you want to remove and then selecting "Remove from My Training." Completed courses from this Training Plan will still show on your completion reports.

Q: If I remove a Training Plan, can I reactivate it later?

A: Yes. You can add a Training Plan to "My Training" page at any time.

Q: If I remove a Training Plan and reactivate it later will QSEP keep my completions on that Training Plan?

A: Yes, QSEP will keep completions on reactivated Training Plans.

FAQs for RTAs & STCS

Q: What should I do if 1 of my surveyors has left?

A: Notify the QSEP Help Desk of the surveyor's name and Learner ID.

Q: Can I generate the SSR status report?

A: Yes, you'll be able to generate the SSR status report. In the QSEP Reports section, you can access the "Find By SSR Assessment" report that shows your surveyors' completion statuses and dates. You can also filter the report by SSR assessment status (In Progress, Completed, Not Started).

Q: Where can I find remediation plans to help my surveyors successfully complete the SSR?

A: The SSR Remediation Plan Guide can be found in QSEP by selecting your name in the blue navigation bar and then selecting the SSR Remediation Plan Guide in the drop-down menu. You can also download them.

ANNUAL SURVEYOR SKILLS REVIEW ASSESSMENTS

WHAT IS THE SURVEYOR SKILLS REVIEW (SSR) ASSESSMENT?

The Surveyor Skills Review (SSR) is an annual assessment that measures the competency and knowledge surveyors need for consistent and effective survey processes.

The SSR assessment measures a surveyor's ability to accurately identify situations encountered on actual surveys and is based on content from the basic training.

The competency assessment comprises 20 brief scenarios.

Surveyors who survey for Emergency Preparedness (EP) requirements will also take a shorter EP SSR with 5 scenarios.

Each scenario is followed by 2 questions the surveyor must complete with the given information. Scenarios are specific to provider type, with randomly selected corresponding questions.

WHO NEEDS TO TAKE THE SSR?

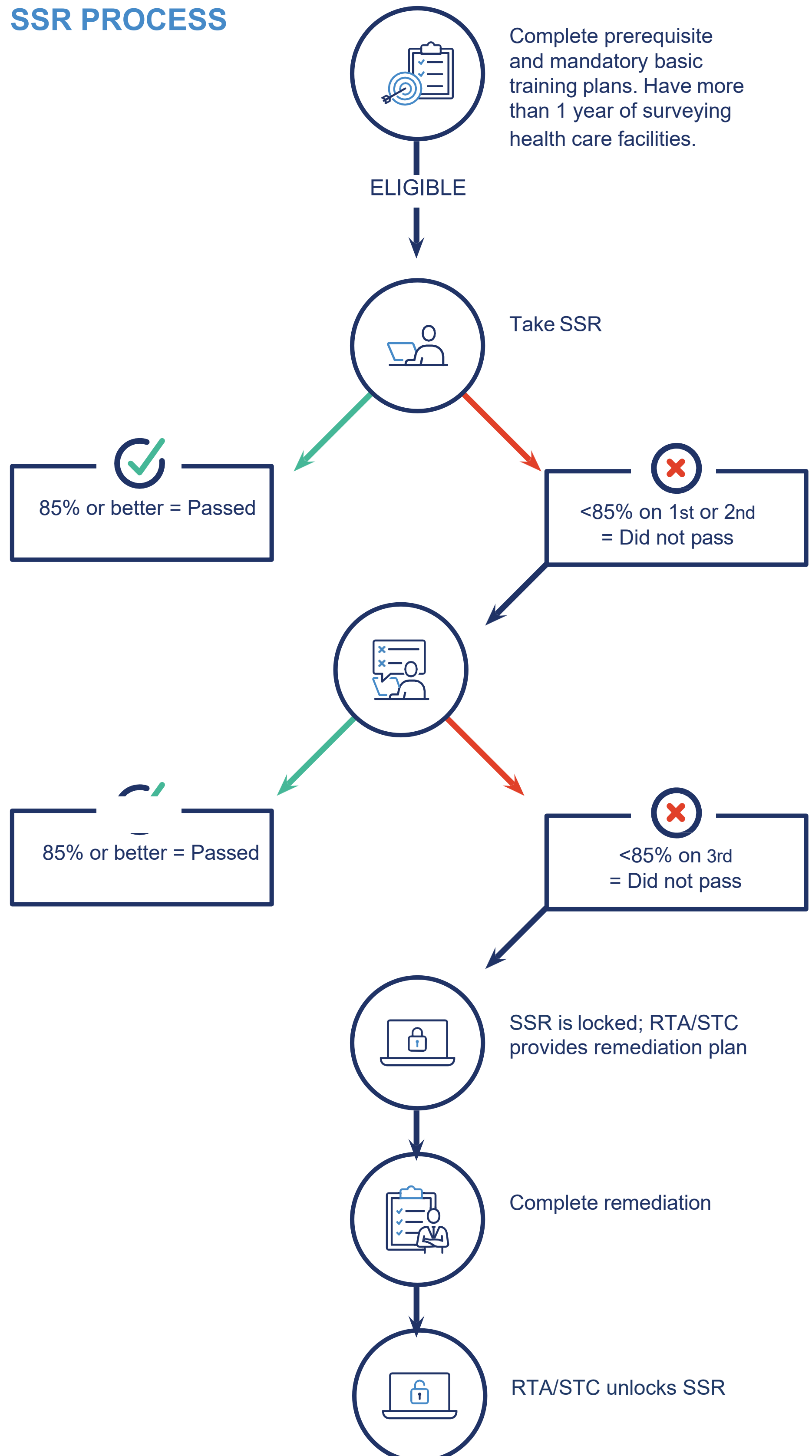
To attempt a given SSR assessment, a surveyor must have:

- Successfully completed all prerequisite and basic trainings listed on their primary Training Plan.
- More than 1 year of experience surveying health care facilities. This year is counted starting from the last basics course completion date recorded in the Quality, Safety & Education Portal (QSEP) on the surveyor's primary Training Plan.

WHEN IS THE SSR ASSESSMENT COMING?

The SSR competency assessment becomes available on October 1 and closes on September 30 of the following year.

SSR PROCESS



* Regional Training Administrator/
State Training Coordinator