

Site Visit Preparation – Lynne Meyer, PhD, MPH

Fall 2022

Learning Objectives

- Describe information needed for ADS Updates
- Compare and contrast documents types needed for the RC vs the Site Visitor

ADS

DOCUMENTATION NEEDED

- **Update ADS** –
 - demonstrates compliance with common program requirements (CPR)
 - bolded text in program requirements

Tip: Do ADS updates real-time, not just once a year

Uploads for Site Visitor and Review Committee (RC)

- Block Diagram
- Current PLAs for each participating site
- Progressive Goals and Objectives
 - i.e. for a rotation done over multiple years of training
 - Template to use: [Curriculum Basics: Tutorials and Information » Curriculum Basics » Graduate Medical Education » College of Medicine » University of Florida \(ufl.edu\)](#)
 - different G&O for different years of training
 - e.g. 1st year learning expectations are different than a 3rd year

Uploads for Site Visitor and Review Committee (RC)

- Specialty Specific Application
- Program-Level Policies for Upload
 - Supervision of Residents/Fellows
 - Clinical and Educational Work Hours including Moonlighting
 - Faculty and Resident/Fellow Well-being

Note: Other types of program-level policies mentioned in program requirements

- Record Retention: timely documentation within 30 days of program completion/exit
- Ensuring coverage of patient care
- Recruitment and retention of minorities underrepresented in medicine and medical leadership aligned with sponsoring institution's mission and aims

Uploads for Site Visitor and Review Committee (RC)

- **Blank** Evaluation Forms – what you plan to evaluate
 - Six Month Evaluations – summary statement must include statement indicating whether or not....
 - Semi-Annual Evaluation (Mid-Year) -- “**.... progressing as expected.**”
 - Summative Evaluation (End of Year) -- “**....demonstrated readiness to progress to the next year of the program.**”
 - Final Evaluation (Graduation or Exit from program) – “**...demonstrated the knowledge, skills, and behaviors necessary to enter autonomous practice.**”

Reference: [Types and Timing of GME Training Program Evaluation Forms » Graduate Medical Education » College of Medicine » University of Florida \(ufl.edu\)](#)

Uploads for Site Visitor and Review Committee (RC)

- **Blank Evaluation Forms** -- what you plan to evaluate
 - 360 or Multi-Source Evaluations
 - Professional **Staff** Evaluation of Resident/Fellow (*at least twice a year – before CCC meetings*)
 - **Patient** Evaluation of Resident/Fellow (*at least twice a year – before CCC meetings*)
 - **Peer** Evaluation of Resident/Fellow (*at least twice a year – before CCC meetings*)
 - **Self-Evaluation** (*at least twice a year – before CCC meetings*)
 - **Faculty** Evaluation of Resident/Fellow (*at end of each Rotation/Experience Type*)
 - e.g. if **2 week long rotations**, then documented evaluation at the **end of the 2 weeks**;
 - e.g. if rotations are **GREATER than 3 months** in length, ACGME requires documented evaluation every 3 months; **UF GME office recommends** at least **every 2 months** for increased data points for CCC consideration)
 - e.g. **Longitudinal experiences** such as continuity clinics, if applicable (ACGME requires every 3 months per ACGME requirement AND at completion)

Reference: [Types and Timing of GME Training Program Evaluation Forms » Graduate Medical Education » College of Medicine » University of Florida \(ufl.edu\)](#)

Uploads for Site Visitor and Review Committee (RC)

- **Blank Evaluation Forms** -- what you plan to evaluate
 - Resident/Fellow Evaluation **of Faculty**
 - Resident/Fellow Evaluation **of Rotation**
 - may be included in annual evaluation of program, or as part of faculty evaluation
 - Evaluation of the Program
 - Resident/Fellow Annually
 - Faculty Annually
 - Graduate Evaluation - typically 1 year and 5 years after graduation
 - Strengths-Weaknesses-Opportunities-Threats (SWOT) Annually
 - usually included in resident/fellow and faculty annual evaluation of program and graduate evaluation of program

Reference: [Types and Timing of GME Training Program Evaluation Forms » Graduate Medical Education » College of Medicine » University of Florida \(ufl.edu\)](#)

Uploads for Site Visitor only

Sample of a Completed Annual Evaluation of a Faculty Member by Residents/Fellows

- Sample of a completed annual confidential evaluation of a faculty member by residents/fellows. Programs using an electronic evaluation system may provide a summary report for a faculty member (Common Program Requirement V.B.1.). The evaluation should be for a specific faculty member and not a blank template. The evaluation may be from individual evaluators and/or in an aggregated format.

Uploads for Site Visitor only

Schedule of Didactics, Conferences, and Other Educational Activities

- Conference schedule for the current academic year that includes didactics, conferences, other educational activities, and the faculty member or resident/fellow assigned to lead or present each didactic session. The materials provided for the accreditation or recognition site visit should include those educational experiences provided to all residents/fellows together, as well as PGY-level-specific educational activities/schedules. Didactic activities may include, but are not limited to, lectures, conferences, interdepartmental conferences, courses, labs, asynchronous learning, simulations, drills, case discussions, grand rounds, morbidity and mortality conferences, journal clubs, didactic teaching, and education in critical appraisal of medical evidence. (IV.A.4.) Be sure the conference schedule addresses any specialty-specific requirements for didactics.

Uploads for Site Visitor only

Program-Specific Policies and Guidelines

- Guidelines for circumstances and events that require residents/fellows to communicate with appropriate supervising faculty members (Common Program Requirement VI.A.2.e)). It is possible these guidelines exist elsewhere, and this upload request may be duplicative. Please upload these guidelines even if they exist elsewhere in ADS.
- Policies and procedures to ensure coverage and continuity of patient care in circumstances in which residents/fellows are unable to attend work, including but not limited to fatigue, illness, family emergencies, and parental leave (VI.C.2., VI.C.2.a), and VI.D.2.). It is possible these policies and procedures exist elsewhere, and this upload request may be duplicative. Please upload these guidelines even if they exist elsewhere in ADS.

Uploads for Site Visitor only

Documents Demonstrating Resident/Fellow Participation in Quality Improvement Activities

- A list of up to 10 activities and opportunities in which residents/fellows participated in patient safety and interprofessional quality improvement activities (Common Program Requirement VI.A.) in the past 12 months (if applicable).

Uploads for Site Visitor only

Sample of Work Hour Report Data

- Sample of work hour report data demonstrating the program's work hour monitoring system (minimum six months). The upload should be in the same format used for monitoring by the designated institutional official, Graduate Medical Education Committee, or other individual(s) with oversight (Common Program Requirement VI.F.1.).

Uploads for Site Visitor only

Resident/Fellow Files:

- Upload items from each resident/fellow file in a combined PDF. The evaluations should be for specific residents/fellows and not blank templates. The evaluations may be from individual evaluators and/or in aggregated format.
- **Current (if applicable)**
Include the following selected items from **two** current resident/fellow files **for each year of the educational program**:
 - Completed rotation evaluations of the residents/fellows **by faculty members**
 - Completed multi-source evaluations of current residents/fellows (examples: **peer, self, nurses, non-physician staff member(s)**)
 - Completed **semiannual evaluations** of current residents/fellows
- *Example: In a three-year program, the ACGME will review six resident/fellow files, with two from each year.*

Uploads for Site Visitor only

Resident/Fellow Files:

- **Graduates (if applicable)**
 - Completed *final evaluations* of program graduates in the ***last three years*** (evaluation forms from two residents/fellows from each of the past three years; a total of six evaluation forms)
- *Example: If a program graduates two or more residents per year, upload two resident files from each of the past three years for a total six completed evaluations. If the program graduates one resident per year, upload that graduate's evaluations.*

Uploads for Site Visitor only

Resident/Fellow Files:

- **All Residents/Fellows that Have Left the Program without Completing Education in the Program (if applicable)**
 - *Completed semi/annual evaluations* of all residents/fellows in the last three years who *did not complete the program*
- **Transferred (if applicable)**
 - Documentation of prior education and training for residents/fellows who have transferred *into the program* in the past three years
 - Verification of Training
 - Summative competency-based performance evaluation prior to acceptance
 - Case/Procedure logs (if applicable)
 - All rotations – start date, end date, rotation name, PGY/PRG level, passing status
 - Last Semi-annual/Exit Evaluation
 - Milestones *Tip: obtain through ADS as soon as possible*