

The ACGME Site Visit

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Director and Designated Institutional Official
Regional Undergraduate & Graduate Medical Education

Kaiser Permanente Northern California Graduate Medical Education

Residency Programs

Adult Psychiatry-East Bay
Adult Psychiatry-SJO & SCL
Emergency Medicine - MOD
Family Medicine - GSV
Family Medicine-SJO
Family Medicine-SRO
Family Medicine-VAL
Internal Medicine – East Bay
Internal Medicine - SCL
Internal Medicine – SFO
OB/Gyn – East Bay
OB/Gyn - SFO
OB/Gyn - SCL
Optometry - SRO
Otolaryngology – East Bay
Pediatrics – East Bay
Podiatry - VAL, SRO, SRF
Podiatry - SCL, SLN, FRE
Podiatry – SAC & ROS

Fellowship Programs

Addiction Medicine
Bariatric Surgery
Cardiovascular Disease
Community Medicine
Emergency Psychiatry
Female Pelvic Med & Recon. Surgery
Gastroenterology
Hematology/Oncology
Patient Safety
Pediatric Hospitalist
Spinal Surgery

Kaiser Permanente Northern California

Undergraduate & Graduate Medical Education



Objectives

Identify

Identify process utilized by the ACGME for conducting virtual site visits for initial and continued accreditation for programs and institutions

Establish

Establish appropriate timeline for virtual site visit preparation

Prepare

Prepare documentation and personnel for virtual site visits

The Timeline

- 30+ days from your site visit date, you will receive an announcement from the Department of Field Activities
- The letter announcing the site visit is applicable to the type of site visit you are having
- Documentation requirements that are required for your type of site visit, with due dates for documentation upload
- Announcement of the number of site visitors you will have for your program site visit

Instructions from site visitor:

Updating ADS

During an accreditation site visit, the Accreditation Field Representative(s) will describe compliance with all common and specialty-specific program requirements. Programs must update their Accreditation Data System (ADS) record for the Accreditation Field Representative(s) to review. Failure to update ADS information may result in a postponement of the accreditation site visit, and assessment of a \$3,200.00 fine.

Use the instructions below to update ADS.

• Answer all questions relating to the following topics:

- Mission and Aims (found in the Program Information section)
- Diversity (found in the Program Information section)
- Independent Practice (if applicable)
- Overall Evaluation Methods
- Program Resources (found in the Common Program Requirement Questions section)
- Resident/Fellow Education and Experience (found in the Common Program Requirement Questions section)
- Faculty Development (found in the Common Program Requirement Questions section)
- COVID-19 Pandemic Questions

• Review and update all information in ADS previously entered to ensure it is accurate and current. Pay close attention to the instructions on each ADS data entry page as some pages require data from specific date ranges.

- Faculty Scholarly Activity
- Resident/Fellow Scholarly Activity
- Physician and Non-Physician Faculty Roster

• Ensure the appropriate Specialty Certification section is updated, including the certification type and status

- Resident/Fellow Roster
- Responses to citations (Under the Program tab)
- Major Changes and Other Updates (Under the Program tab)

• Prepare and upload supporting documents as follows:

- From the program page in ADS, open the “Updated Application” tab
- Select “View/Change Uploaded Documents”

• Complete and upload all 13 documents:

(1) Specialty-Specific Application Questions;

- Download a new Specialty-Specific Application Questions document. Update responses from the original application document to the new application form. Ensure that the document represents the program as it is today.

(2) Block Diagram; Provide a block diagram for each year of training in the program.

- The number of block rotation months should align with the list of participating sites in ADS. Specialty-specific instructions may also be available.

(3) Program Letters of Agreement;

(4) Goals and Objectives;

(5) Policy for Supervision of Residents/Fellows;

(6) Forms Used for Evaluation of Faculty Member;

(7) Semiannual and Final Evaluations;

(8) Policy for Clinical and Educational Work Hours;

(9) Forms Used for Resident/Fellow Evaluation of Program;

(10) Forms Used for Faculty Evaluation of Program;

(11) Evaluation of Resident/Fellow by Faculty Member;

(12) Multi-source Evaluation of Resident/Fellow;

(13) Policy for Resident/Fellow and Faculty Member Well-Being

Next in the timeline

- Your (lead) site visitor will then contact you to discuss some specifics about YOUR site visit and YOUR program, prior to receiving their Letter of Instruction
 - You will then receive the Letter of Instruction from your Site Visitor(s)
 - This will be very specific to THEIR desired documentation and logistics (e.g., de-identifying residents and faculty, for example, in completed evaluation documents)
 - You'll receive a spreadsheet for the schedule for the day.
 - Identifies:
 - How many residents?
 - How many faculty?
 - Will there be simultaneous or only sequential sessions?
 - How long will the sessions be?
 - Will the APD be required to meet with the PD and PC? Or do you have a choice?
 - Do you have a Department Chief or Chairman?
- Signature of attestation and return to the site visitor

Attestation Statement

- **Remote Investigation Attestation Statement**
- The ACGME is conducting a remote accreditation site visit of the following Sponsoring Institution and/or program:
- Because of the current COVID-19 pandemic, all interactions between ACGME personnel and Sponsoring Institution/program personnel will occur remotely, i.e., by audio, visual, and/or audio-visual means, and will not include on-site in-person visits by ACGME personnel.
- The purpose of this attestation is to ensure the privacy and confidentiality of the remote interview sessions. The signatures below affirm that all program and institutional personnel included in the interview sessions have been informed of this requirement and will not record any of the remote communications with the ACGME personnel conducting the site visit.
- With this attestation, Sponsoring Institution and program participants in the site visit are also assured that ACGME personnel will not disclose the name of any resident/fellow (1) in any written Site Visit Report, or (2) in discussion or other communications with any Sponsoring Institution or program personnel, unless the resident/fellow consents to such disclosure.
- The ACGME expects that Sponsoring Institution and program personnel, including the residents and fellows, faculty members, and others, will be cooperative and candid with the ACGME Accreditation Field Representatives. The Sponsoring Institution and program must not retaliate in any way against any resident/fellow for participation in the site visit or for any statements made by a resident/fellow to the ACGME relating to this site visit.

Designated Institutional Official

Signature: _____

Printed Name: _____

Date: _____

Program Director

Signature: _____

Printed Name: _____

Date: _____

Program for Continued Accreditation – Site Visit Schedule Instruction

- You will receive a spreadsheet of the schedule for the day.
- Identifies:
 - How many residents?
 - How many faculty?
 - Will there be simultaneous or only sequential sessions?
 - How long will the sessions be?
 - Will the APD be required to meet with the PD and PC? Or do you have a choice?
 - Do you have a Department Chief?

Very specific instructions: Please follow them!

Please update ADS by **October 7th** as described in the site visit announcement letter.

a. Special Instruction regarding the Block Diagram:

- **Please put the Block Diagram for all three years on one page. The rotation abbreviation definitions, key to participating sites, and elective rotation options should be on a separate page.**
- **Enlarge the font as much as possible while maintaining the Block Diagram on one page.**

Site Visitor A:

Required items from the resident files should be **de-identified** prior to sending. Additional documents may be requested prior to the site visit, or at the time of the site visit to be viewed by sharing screens or submitted immediately after the site visit.



Site Visitor B:

The resident's **names do not need to be removed**. I will delete the files once we have completed the remote site visit.

PLEASE FOLLOW SPECIFIC INSTRUCTIONS AROUND BLOCK DIAGRAM!

PLEASE FOLLOW BLOCK DIAGRAM INSTRUCTIONS

Obstetrics and Gynecology Residency Block Diagram: Instructions and Example Review Committee for Obstetrics and Gynecology ACGME

To create a block diagram for an obstetrics and gynecology residency program, start by reviewing the guidelines and examples provided in the "Guide to Construction of a Block Diagram" available in the Accreditation Data System (ADS) [Site Tab>Block Diagram Upload>Block Diagram Instructions/Sample]. The Review Committee for Obstetrics and Gynecology requests that the block diagram for residency programs include information about continuity clinic sessions, family planning and contraception, and abortion training to better understand the program's educational experience. Use the example and tips below to complete the fillable block diagram template available on the Documents and Resources page of the Obstetrics and Gynecology section of the ACGME website (link below).

[Link to Documents and Resources](#)

Example Year:

If the name of the rotation does not clearly indicate the nature of the educational experience, provide clarifying information in notes below.

PGY-1	1	2	3	4	5	Total Count
Block	1	2	3	4	5	
Site	1	1	1	2	2	N/A
Rotation Name	OB	OB	Benign Gyn	OB Gyn	Gyn Onc	N/A
Half-day continuity clinic sessions (Number)	10	9	9	9	10	47
Does rotation address family planning and contraception? (Yes/No)	Yes	Yes	Yes	Yes	Yes	N/A
Does rotation provide training/access to training in provision of abortions? (Yes/No)	No	No	No	Yes	No	N/A

Add the number of sessions

Include these three rows instead of % outpatient and % research in the ADS samples. For the half-day continuity clinic sessions, enter the number of sessions per block.

Area Below Block Diagram:

Vacation: Indicate how much vacation time is given per academic year (if not included in block diagram).

Sites
List site numbers and names. Site numbers must match the site numbers in the ADS Program Summary. To check: ADS>Summary Tab>View Summary and scroll down to the Participating Sites section. (Note that the order of sites can be changed by going to ADS>Sites Tab>Reorder).

Abbreviations
List abbreviations used in the block diagram.

Note: If the program has elective rotations, this should be indicated in block diagram but it is NOT necessary to list elective options below.

Notes
Add any additional information that will help the Review Committee better understand the block diagram and resident educational experience.

Logistics

- Zoom is the platform for virtual site visits
 - You will have a Zoom practice session with your site visitor(s)
 - S/he will have already read your documentation, and will have some questions
 - Instructions will include:
 - Individual audio and video connections for each participant
 - Very personal conversations and questions: by name/each screen with a name (residents/faculty)
 - Not in same room
 - Zoom only
 - Even after 8 months using Zoom/Webex/other remote connections, people are NOT good at it!
 - Perhaps if you are meeting with them to prepare them...use Zoom for a trial run!

Logistics

- Zoom is the platform for virtual site visits

Please make these necessary arrangements: a. The remote visit will be conducted using video calls via Zoom. Each interviewee should have a computer, laptop or iPad equipped with a camera, or a smartphone with the free Zoom app to use in a private location for the call. A suggested schedule for the visit is included with this letter as Attachment #1. Please complete the schedule with the names, email addresses, and cell phone numbers for those being interviewed. Please also ensure the email addresses are the appropriate ones for the device that interviewees will be utilizing during the interviews. Participants in the site visit will receive individual invitations to the Zoom interview sessions. The interviewees should “accept” the invitation, or indicate “yes”, and access Zoom through the link on the invitation at least five minutes before the designated time for the interview. The password for the session will be included in the invitation. The interviewees will be placed in a waiting room and may have to wait a brief period of time to be admitted to the meeting by the Field Staff Representative(s).

Documentation

- **VERY IMPORTANT**
 - webADS update
 - Block diagram (same deadlines as above)
 - Specialty-Specific Application (PRESENT TENSE! ACCURATE! UPDATED! COMPLIANT!)
 - Attachments:
 - PLAs (with attached goals and objectives)
 - Policies
 - Goals and Objectives (representing each level of training)
 - Evaluations of faculty, by faculty, of residents, by residents, of program, semiannual, multisource, self-assessments, final summative evaluation
- **Check, review and ask others to review it**

Preparation



Review your
Documentation



Read about your site
visitor



Prepare residents (use
Zoom)



Prepare faculty (use
Zoom)



Prepare leadership

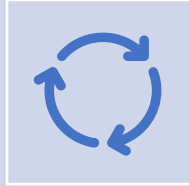


Share documents with
each group (after in
final form)



“Updated Application”
in webADS gathers all
of these in one PDF

Preparation Areas



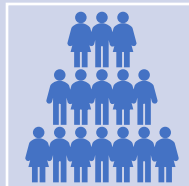
ACGME Survey – what did you do about it?

Annual Program Evaluation?
APE Action Plan?
Progress?
Longitudinal progress on last year's Action Plan?



Impact of COVID-19 on your program

Clinical?
Didactics?
Scholarly activity?
Telemedicine?



Diversity/recruitment questions

Residents?
Faculty and staff?

Preparation Areas



Faculty Development

What have you (each faculty member) done in the past three months?

Was it remote/virtual or in-person?

Active? Passive?

Variety of Topics covered across different faculty development sessions?



Scholarly Activity

Patient Safety?

Quality Improvement?

Presentations?

Publications?

Committees?

Mentorship of/by the faculty?



Citations

Preparation Areas

- Current, signed Program Letters of Agreement (PLAs) for participating sites with required rotations (CPR I.B.2.)
- Selected items from Resident/Fellow Files:
 - Completed final evaluation forms from program graduates in the last three years (of 1-2 trainees from each of the past three years)
 - Completed rotation evaluations by faculty and semiannual evaluations from current residents/fellows (of 1- 2 trainees in each year of training)
 - Completed multi-source evaluations of current residents/fellows (of 1-2 trainees in each year of training)
 - Documentation of prior training for residents/fellows who have transferred into the program in the past three years
 - Final documentation of training of residents/fellows who have resigned or been dismissed from the program in the past three years

Preparation Areas

- Conference schedule for the current academic year that includes dates, topics, and speakers.
- 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 of a faculty member (CPR V.B.1). The evaluation should be from a specific resident/fellow and not a blank template. The evaluation may be from individual evaluators and/or in an aggregated format
- Program-specific (not institutional) policies (Inst. Req. IV.I.2) for supervision of residents/fellows (addressing progressive responsibilities for patient care and faculty member responsibility for supervision), including guidelines for circumstances and events that require residents/fellows to communicate with appropriate supervising faculty members (CPR VI.A.2.)
- Program policies and procedures for resident/fellow clinical and educational work hours. Please include data demonstrating the program's monitoring system (CPR VI.F.1)
- Sample documents demonstrating resident/fellow participation in patient safety and quality improvement activities (CPR VI.A)

Important

- Site Visitors are Not “finished” after the site visit
- Questions from the site visitors as they are writing their reports
- Don’t take these lightly:
 - Be thoughtful
 - Ensure they “tie back” to documentation you’ve already given them and what they’ve already learned about your program
 - More of a conversation/relationship than previous site visits

Sample Follow Up Questions from Site Visitor

I have completed a draft of my report and do have a few follow-up questions noted below:

1. I have a question about the faculty roster... Is this an error?
2. Can you clarify how didactics were impacted by COVID-19?
3. I have a question about resident research time.
4. I have a question about the percentage of residents involved in scholarly activity.
5. I have a question about feedback to faculty about their performance.

Thank you for your time and assistance.

Upon review of the requirements, the faculty need to be represented by other disciplines in hospice and palliative medicine.

Can you please work on a list of physicians who represent these areas? I will need a document with names and board information.

Thanks again for the privilege of having the opportunity to meet your colleagues, residents, and evaluate your program. I hope you find some of my suggestions for program improvement helpful. One oversight that I failed to discuss at our concluding meeting (upon review of my notes) was related to duty hours.

Timeline: Virtual Site Visit



Site Visit References and Resources

1. Power point contains information shared publicly on various list serves and websites
2. Wills, Charolette (2019), Rock the Site Visit, <https://www.cordem.org/globalassets/files/academic-assembly/2019-aa/handouts/day-1/the-acgme-site-visit-knock-it-out-of-the-park.pdf>
3. ACGME Common Program Requirements, <https://www.acgme.org/What-We-Do/Accreditation/Common-Program-Requirements>
4. ACGME Understanding Accreditation: <https://www.acgme.org/program-directors-and-coordinators/welcome/accreditation/>
5. ACGME Site Visit: <https://www.acgme.org/what-we-do/accreditation/site-visit/>
6. ACGME COVID-19 Guidebook for promoting resident/fellow wellness: <https://dl.acgme.org/courses/guidebook-for-promoting-well-being-during-the-covid-19-pandemic>
7. ACGME Online Learning Portal: <https://dl.acgme.org/>
8. ACGME Specialty Requirements: <https://www.acgme.org/specialties/>
9. KP Northern California Current Residents Regional Website: <https://residency-ncal.kaiserpermanente.org/current-residents/>
10. KPNC UME/GME Regional Technology updates: <https://sp-cloud.kp.org/sites/KPNCUMEGMEQuarterlyNewsletter>