HELP! The ACGME is Coming!

10 Steps for a Successful Accreditation Site Visit

Angela Masters, MA, C-TAGME
November 17, 2021
Disclosures

- I have no direct financial relationship with the ACGME
- I work for the MSUCOM Statewide Campus System
- We offer ACGME consulting services for a fee
Goals and Objectives

- My goal is to demystify the process of undergoing a successful ACGME site visit.
- I hope to help you to create a timeline and a plan to optimize your ability to showcase your program or institution.
The Notice

IMPORTANT NOTICE: [8000000000] ACGME Accreditation Site Visit Scheduled [07/14/2021]

Dear Dr. Doe:

A site visit by a Field Representative from the Accreditation Council for Graduate Medical Education (ACGME) has been scheduled:

Sponsor: 8000000000 - Institutional Review

Date(s) of Survey: 07/14/2021

Approximate Starting Time: Exact start time will be determined in coordination with the Sponsoring Institution/program and the assigned Accreditation Field Representative(s). The length of time of the site visit will depend on the interview schedule.

Field Representative: Jane Smith, MD
8888888888
jsmith@acgme.org

This message provides notice of your upcoming ACGME accreditation site visit. The detailed announcement letter (attached) has been posted in your program’s folder in the Accreditation Data System (ADS). Please review it carefully and follow the instructions, which will assist you in preparing for your site visit.

The site visitor will contact you by email to arrange the schedule for the site visit day. You may contact the Field Representative at the email address above.

We look forward to working with you in preparing for this visit.

Sincerely,

Department of Field Activities
Accreditation Council for Graduate Medical Education
And so, it begins ...
Step 1 - Breathe

• Seriously.
• Breathe in.
• Breathe out.
• Repeat as necessary.
• You’ve got this.
Step 2 – Carefully read the letter

The LON has several important details that you need to carve into a rock, ASAP:

• Date of visit

• **Due Date for ADS updates/uploads and detailed instructions**

• Site Visitor/Field Staff info and link to bio

• Hints, guidelines, and links to FAQs
Step 3 – Save the Dates

Send notices to critical personnel as soon as dates have been identified

- PDs, GMEC members, CEO (and assistants) need to block off time well in advance
- Send notices to residents who are GMEC members and copy their PD and Program Manager, so they have protected time for the visit
Step 4 – Go to ADS
Step 5 – Make a checklist
<table>
<thead>
<tr>
<th>Task/Document</th>
<th>Done?</th>
<th>Where it Lives</th>
<th>Who</th>
<th>Actual Deadline</th>
<th>My Deadline</th>
<th>Follow up Notes</th>
<th>Where to?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinate Zoom technical meeting - send Zoom invite</td>
<td>Y</td>
<td>Zoom account</td>
<td>me</td>
<td>5/26/2021</td>
<td>5/25/2021</td>
<td>Make sure everyone has Zoom capabilities and sufficient bandwidth</td>
<td>PD, Site Visitor, me</td>
</tr>
<tr>
<td>Site visit agenda</td>
<td>Y</td>
<td>Shared Drive</td>
<td>me</td>
<td>6/7/2021</td>
<td>6/1/2021</td>
<td>Send three versions to site visitor and pdf copies to all interviewees and office managers/MD/executive assistants</td>
<td>Site Visitor and all participants including assistants</td>
</tr>
<tr>
<td>Contact number</td>
<td>Y</td>
<td>On the site visit agenda (Word) document in the shared drive</td>
<td>me</td>
<td>6/7/2021</td>
<td>5/31/2021</td>
<td>Include cell numbers for me, PD, DIO in case of emergency Also include relevant info for all participants on the agenda</td>
<td>Site Visitor</td>
</tr>
<tr>
<td>1. Documentation of accreditation of participating hospital sites</td>
<td>Y</td>
<td>Shared Drive</td>
<td>me</td>
<td>6/22/2021</td>
<td>6/15/2021</td>
<td>Only hospitals - no clinics go to <a href="https://www.qualitycheck.org">https://www.qualitycheck.org</a> for verification and upload pdf to shared drive in Accreditation folder</td>
<td>Site Visitor</td>
</tr>
<tr>
<td>2. Policies</td>
<td>Y</td>
<td>Shared Drive</td>
<td>me and GMEC if one is missing</td>
<td>6/22/2021</td>
<td>6/15/2021</td>
<td>Any missing/outdated policy must be renewed by the GMEC. If no GMEC meeting is scheduled prior to site visit, send to GMEC members via email and ask for an email vote to be ratified at a later GMEC meeting</td>
<td>Site Visitor</td>
</tr>
<tr>
<td>Resident/fellow eligibility and salutation</td>
<td>Y</td>
<td>Shared Drive</td>
<td>me</td>
<td>6/22/2021</td>
<td>6/15/2021</td>
<td></td>
<td>Site Visitor</td>
</tr>
<tr>
<td>Criteria for promotion and/or renewal of a resident/fellow’s appointment</td>
<td>Y</td>
<td>Shared Drive</td>
<td>me</td>
<td>6/22/2021</td>
<td>6/15/2021</td>
<td></td>
<td>Site Visitor</td>
</tr>
<tr>
<td>Due process in instances where actions of suspension, nonrenewal, nonpromotion, or</td>
<td>Y</td>
<td>Shared Drive</td>
<td>me</td>
<td>6/22/2021</td>
<td>6/15/2021</td>
<td></td>
<td>Site Visitor</td>
</tr>
</tbody>
</table>
Step 6 – Gather all your information

- Create a **living document** in a folder on your desktop
- Name documents according to the ACGME convention
- Add a suffix of the expiration dates to the name (e.g., Moonlighting Policy – 2022-11-31)
- When you prepare to upload the document, combine all policies in a *pdf* with bookmarks and delete the expiration dates
Step 6 – Gather all your information (esp. for Institutional Accreditation)

www.qualitycheck.org
JCAHO accreditation for hospitals

www.hfap.org/search-facilities.org
ACHC (formerly HFAP) accreditation for hospitals that are historically osteopathic
Step 7 – Revise and Edit – “Phone a Friend”

- Have the PD and DIO review all material prior to submission
- Every GME Department has someone who provides great review
  - Grammar/spelling police
  - “Fearless red pen”
- Enlist his/her help to make any required corrections
Step 8 – Press the Big Red Button

- Once you have verified all your information, it is a good idea to get it out of your way and off your plate. You can then focus on logistics for the actual event.
Step 9 – Logistics

- Contact your IT department for help with Zoom logistics
- Make sure all attendees have access to Zoom and appropriate bandwidth
- Avoid frozen screens and robot voices
- Check visible area on monitor ("Pants")
- Practice with attendees
Mock Site Visit – Optional but Useful

• Dress rehearsal to de-stress
• Assess your readiness
  • Ensure everyone understands the reason for the site visit
  • Showcase your program
  • Promote solidarity
  • Opportunity to educate participants
• Address concerns in advance
Step 10 – Event

- Log in a few minutes early to ensure that you have access
- Be pleasant and confident
- Ask if you may circle back
- You support the BEST team in the world and are excited to showcase them
How to Mitigate the Odds of Having a Site Visit
Best Defense is a Good Offense

<table>
<thead>
<tr>
<th>Factor</th>
<th>% Program Compliant</th>
<th>Program Mean</th>
<th>% National Compliant</th>
<th>National Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty and staff create environment of inquiry</td>
<td>79%</td>
<td>4.1</td>
<td>80%</td>
<td>4.2</td>
</tr>
<tr>
<td>Able to access evaluations</td>
<td>99%</td>
<td>5.0</td>
<td>99%</td>
<td>5.0</td>
</tr>
<tr>
<td>Opportunity to evaluate faculty members</td>
<td>99%</td>
<td>5.0</td>
<td>99%</td>
<td>5.0</td>
</tr>
<tr>
<td>Satisfied that evaluations of faculty are confidential</td>
<td>90%</td>
<td>4.4</td>
<td>86%</td>
<td>4.3</td>
</tr>
<tr>
<td>Opportunity to evaluate program</td>
<td>98%</td>
<td>4.9</td>
<td>98%</td>
<td>4.9</td>
</tr>
<tr>
<td>Satisfied that evaluations of program are confidential</td>
<td>90%</td>
<td>4.5</td>
<td>88%</td>
<td>4.4</td>
</tr>
<tr>
<td>Satisfied that program uses evaluations to improve</td>
<td>81%</td>
<td>4.2</td>
<td>76%</td>
<td>4.1</td>
</tr>
<tr>
<td>Satisfied with feedback after assignments</td>
<td>75%</td>
<td>4.0</td>
<td>73%</td>
<td>4.0</td>
</tr>
<tr>
<td>Provided goals and objectives for assignments</td>
<td>93%</td>
<td>4.7</td>
<td>94%</td>
<td>4.8</td>
</tr>
<tr>
<td>Instructed how to manage fatigue</td>
<td>93%</td>
<td>4.7</td>
<td>91%</td>
<td>4.6</td>
</tr>
<tr>
<td>Satisfied with opportunities for scholarly activities</td>
<td>74%</td>
<td>4.0</td>
<td>77%</td>
<td>4.1</td>
</tr>
</tbody>
</table>
Best Defense is a Good Offense

Downward trend would cause concern

Not as concerning, even though it is a very low number
Best Defense is a Good Offense

• What if my site visit is prompted by a report to the Office of Complaints or a notice to the Ombudsperson?
<table>
<thead>
<tr>
<th>GMEC Special Review Protocol</th>
<th>Policy should be updated and complete protocol delineated to include QI goals, corrective actions, and process for GMEC monitoring outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special Review Reports</td>
<td>If available</td>
</tr>
</tbody>
</table>
When the visit is over ... (best view of a site visit is in the rear-view mirror)
Review – 10 Steps to Success

• Breathe
• Carefully read the LON
• Save the dates – emails, phone calls to all participants and their admin personnel
• Go to ADS for uploads and instructions
• Make a CHECKLIST

• Gather all your documentation – create a “living document” folder
• Revise and edit – “phone a friend”
• Press “Submit”
• Logistics – get IT to assist
• Run the event like a pro
Other Considerations

- Mock site visit
- Mitigate risk preemptively
  - Annual Update
  - Major Changes
  - Special Review