The Virtual ACGME Site Visit: Our Experience…so far

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Objectives for Today:

At the conclusion of the session, learners should be able to:

• Identify new process utilized by the ACGME for conducting virtual site visits for initial and continued accreditation for programs and institutions
• Establish appropriate timeline for virtual site visit preparation
• Compare traditional accreditation process to new virtual accreditation information, communication and site visit experience
• Prepare documentation and personnel for virtual site visits
• Summarize key deliverables for program and institutional success in virtual accreditation process

Zoom Poll Questions!

• How many have responsibility for a program?
• How many have responsibility for an institution?
• How many have had a virtual site visit?
• How many are anticipating a virtual site visit?
HCA Healthcare GME

- 300 programs sponsored
- 4500+ residents and fellows in our programs
- 58 teaching hospitals
- 1280+ graduates in June 2020
- If all had gone as planned, we would have had 100 site visits in 2020!
- Still catching up, but have had 17 virtual site visits since August 5, 2020 (with 7 more scheduled before November 18, 2020)
  - One Institutional Accreditation site visit
  - 3 Site Visits for Initial Accreditation/New Program Applications
  - 13 Site Visits for Programs in Initial Accreditation seeking Continued Accreditation

The Virtual Site Visit – How Different is it?

Program Accreditation

- When do you review your program accreditation documentation?
  a. When you receive notice of a site visit.
  b. Far in advance of webADS update deadline.
  c. Prior to each GMEC (whether monthly, bimonthly or quarterly)
  d. Monthly updates to Faculty Development and Scholarly Activity
  e. All of the above
Prioritized Site Visits

“When will my site visit be?”
“We originally anticipated a July 2020 site visit”

With approximately 100 site visits “due” by 12/31/20…prioritized are:
- New program applications
- Those Postponed from March/April 2020
- Programs for which a Letter of Concern received by ACGME

Example of the timeline

- October 1, 2020:
  - You receive an email requesting blackout dates for which your program director/DIO will be unavailable
  - [IF YOU HAVEN’T ALREADY…START ON YOUR DOCUMENTATION AS SOON AS YOU RECEIVE THIS EMAIL]
  - You will likely be asked for the time period November 1 – December 31 2020
  - Don’t “blackout date” your way out of a 2021 program start!
  - Choose fewer to have site visit sooner
  - Be aware of your agenda close dates for your Review Committee

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 generically 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 or institutional site visit
    - We have seen two site visitors in ~40% of the site visits
    - Sometimes new site visitors in training
    - Sometimes so there can be simultaneous interviews during the site visit
Instructions from Dr. Andrews’ Office:

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
  o You will then receive the Letter of Instruction from your Site Visitor(s)
  o This will be very specific to THEIR desired documentation and logistics (e.g., de-identifying residents and faculty, for example, in completed evaluation documents)
  o 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 Chairman?

• You will sign an 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 Seeking Continued Accreditation – Site Visit Schedule Instruction

- You’ll 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 Chairman?

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Interviewers</th>
<th>Email address (for Zoom invite)</th>
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<tbody>
<tr>
<td>8:00</td>
<td>PD and PC Interview</td>
<td>Drs. Yu-Yahiro &amp; Tang</td>
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<tr>
<td>9:00</td>
<td>Communication Break</td>
<td>Drs. Yu-Yahiro &amp; Tang</td>
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<tr>
<td>10:00</td>
<td>Communication Break</td>
<td>Drs. Tang &amp; Yu-Yahiro</td>
<td></td>
</tr>
<tr>
<td>11:00</td>
<td>Concluding Meeting</td>
<td>Drs. Yu-Yahiro &amp; Tang</td>
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New Program – Site Visit Schedule Instruction

- You’ll receive a spreadsheet of the schedule for the day.
- Identifies:
  - 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 Chairman?

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</thead>
<tbody>
<tr>
<td>08-20-20</td>
<td>8:00 – 9:30</td>
<td>PD and PC Interview</td>
<td>Drs. Yu-Yahiro &amp; Tang</td>
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<tr>
<td>09-21-20</td>
<td>9:30 – 9:45</td>
<td>Communication Break</td>
<td>Drs. Yu-Yahiro &amp; Tang</td>
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<tr>
<td>09-22-20</td>
<td>9:45 – 10:30</td>
<td>Faculty Interview</td>
<td>Drs. Tang &amp; Yu-Yahiro</td>
<td></td>
</tr>
<tr>
<td>11-25-20</td>
<td>11:00 – 11:45</td>
<td>Concluding Meeting</td>
<td>Drs. Yu-Yahiro &amp; Tang</td>
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</tbody>
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Institutional Site Visit Schedule Instruction

- You’ll 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?
  - Who is your senior institutional leadership at your SI?
  - And if you have multiple hospitals in your consortium, who will you include?
  - Coordinators also typically added
Very specific instructions: 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!
Zero points for creativity!

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

2. 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

• SO IMPORTANT
  o webADS update (August 7, August 28 and September 25 deadlines just passed)
  o Block diagram (same deadlines as above)
  o Specialty-Specific Application (PRESENT TENSE! ACCURATE! UPDATED! COMPLIANT!)
  o 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

• HAVE SOMEONE ELSE 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
How do you prepare? Make no assumptions

- 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?

How do you prepare? Make no assumptions

- 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

Major Differences

- Many documents…that you previously would have shared across the table and then retrieved…are to be sent to the site visitor or stored in a OneDrive location they will identify for you

- Many site visitors are now engaging in what feels like a “relationship” with you prior to (and even after) your site visit

- We have found them to be helpful and to be more in the role of a “coach” than a “critic”

- Important to connect with each other during the site visit day so you can offer some explanation(s) during DIO and last PD/PC sessions
**Documents that previously were shared “at the visit”**

1. Current, signed Program Letters of Agreement (PLAs) for participating sites with required rotations (CPR I.B.2.)

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

   Click here to view ACGME’s expectations for content of resident/fellow files. The evaluations should be for specific residents/fellows and not blank templates. The evaluations may be from individual evaluators and/or in aggregated formats.

**Documents that previously were shared “at the visit”**

3. Conference schedule for the current academic year that includes dates, topics, and speakers.

4. 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

5. 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.)

6. 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)

7. Sample documents demonstrating resident/fellow participation in patient safety and quality improvement activities (CPR VI.A)

**Another Major Difference**

- 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
  - In a way, these are the “capstone”
  - More of a conversation/relationship than they previously established
Follow Up 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.

Some last reminders

- Documentation has to be completed 2 weeks prior to Site Visit (Midnight Central Time)
- Zoom practice with initial questions
- Looooooong sessions – record so far?
  - 8-10:30am for Program Director/Program Coordinator session…
- Make a positive visual impact…
  - This is a virtual interview, as we enter virtual interview season
  - It really does matter what you wear and/or how you present to the site visitor(s)?
- KNOW YOUR PROGRAM! They certainly will!
- Practice with Zoom!!!

Summary of Timeline – the Virtual Site Visit!
Thank You!
Questions? Join us at the “Ask the Experts” session in one hour!

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