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**Site Visit Checklist and Documents List**

Tools and information to keep organized while planning an ACGME-I site visit.

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| --- | --- | --- |
| **Task** | **Completed** | **Due Date** |
| Provide blackout dates. |  |  |
| Confirm that all holidays and special events have been included in blackout dates. |  |  |
| **When reviewing possible dates for program site visits, confirm that the following people are available.** | | |
|  | **YES** | **NO** |
| Designated institutional official (DIO) or designee |  |  |
| Program director |  |  |
| Program coordinator |  |  |
| Residents or fellows |  |  |
| Faculty members, core faculty members |  |  |
| Department or division chair |  |  |
| **When reviewing possible dates for Sponsoring Institution site visits, confirm that the following people are available.** | | |
|  | **YES** | **NO** |
| DIO |  |  |
| Institutional coordinator |  |  |
| GMEC members; program directors |  |  |
| Residents or fellows from a variety of programs and education levels |  |  |
| Program coordinator representatives |  |  |
| Senior-leader representatives of Sponsoring Institution’s governing body |  |  |
| Faculty members (if requested) |  |  |
| **Task** | **Completed** | **Due Date** |
| Accept site visit date within two business days of receiving the first Site Visit Announcement Letter. |  |  |
| Acknowledge receipt of the second Letter of Instruction from the Field Representative who will be conducting the visit. |  |  |
| Determine the site visit schedule and send it to the Field Representative, including names and titles of participants. |  |  |
| Once the schedule has been finalized, inform all participants of the time and place of their interviews. |  |  |
| For program visits, request a list from residents/fellows of strengths and areas for improvement |  |  |
| For program visits, request a list from faculty members of program strengths and areas for improvement. |  |  |
| For in-person visits, reserve a private, quiet room for meetings with a waiting area outside of the interview room. |  |  |
| For in-person visits, contact the Field Representative to provide the address and meeting room for the visit or to help arrange transportation to the site. |  |  |
| For remote visits, make sure all those being interviewed have access to an individual device. |  |  |
| For remote visits, make sure all those being interviewed have access information for the remote meeting. |  |  |
| For remote visits, schedule a pre-visit remote meeting to check technology with the Field Representative. |  |  |
| Two to three days before the visit, send reminders to all participants of the time and place of their interviews. |  |  |
| After the visit, complete and submit the Site Visit Feedback Form received via the Accreditation Data System (ADS). |  |  |
| **For program visits, confirm the following information been updated in ADS at least two weeks before the date of the site visit.** | | |
|  | **YES** | **NO** |
| Program director information |  |  |
| Program coordinator information |  |  |
| Faculty member information |  |  |
| Core faculty designation |  |  |
| Current resident/fellow information |  |  |
| Faculty scholarly activity |  |  |
| Resident/fellow scholarly activity |  |  |
| Response to citations, if applicable |  |  |
| Major change information, if applicable |  |  |
| Participating site information |  |  |
| Does the block diagram accurately reflect the current rotation schedule? |  |  |
| Are all required uploads completed, correct, and in English? |  |  |
| **For Sponsoring Institution visits, confirm the following information been updated in ADS at least two weeks before the date of the site visit.** | | |
|  | **YES** | **NO** |
| DIO information |  |  |
| Institutional coordinator information |  |  |
| Response to citations, if applicable |  |  |
| Major change information, if applicable |  |  |
| Are all required uploads completed, correct and in English? |  |  |

**Documents List**

The documents that Field Representatives will request prior to the site visit for programs moving from Initial to Continued Accreditation are:

* + Program letters of agreement (PLAs)
  + Didactics schedule
  + Example of goals and objectives
  + Completed evaluation of faculty members by residents/fellows
  + Program-specific policies (e.g., supervision)
  + Sample of work hour report data
  + Resident/fellow participation in quality improvement activity documentation
  + Elements from resident/fellow files (specifics in letter of instruction from Field Representative)
  + Completed rotation evaluations
  + Multi-source evaluations
  + Semi-annual evaluations (mid-year and end-of-year)
  + Summative evaluations
  + Final evaluations (from graduate files)
  + Possibly – documents from files of transfers in, residents/fellows on remediation/probation/terminated

**Case Studies**

Below are some practical scenarios to illustrate best practices during an in-person site visit.

**Case Study 1***The Problem*

For an in-person visit, a large office with a desk and several chairs was chosen for the meeting with residents and faculty members. The Field Representative was asked to sit behind a large desk while those being interviewed were all on the other side of the desk.

How does this arrangement impact the interview?

*The Solution*

Choose a private, quiet room that is large enough to accommodate most members around a table or a series of tables. This is the best way to encourage discussion and enable the Field Representative to get the most accurate picture of the institution or program.

**Case Study 2** *The Problem*

During one interview, the Field Representative discovered that several attendees were not proficient in English, making it difficult to get feedback from everyone in the meeting. Several members tried translating for others, but long, detailed responses in the native language were interpreted as “The doctor says ‘Yes.’”

How could this impact the site visit?

*The Solution*

Be honest and forthcoming about the English proficiency of all those in the meeting. If an interpreter is needed, ACGME-I can help, both for in-person and virtual visits.

Discuss the need for an interpreter with your Field Representative, or email Associate Executive Director Mr. William Hart ([whart@acgme-i.org](mailto:whart@acgme-i.org)) for ACGME-I’s assistance.