



Preparing for CLER Visit

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CLER Site Visit Instructions and Notes

Selecting the Site:

In this first cycle of CLER visits, we will visit one participating site per Sponsoring Institution (SI). However, the site visitors may elect to go to more than one location at that site – especially if there are ambulatory clinics or specialty facilities (such as a Children’s Hospital or Cancer Center) on campus and within walking distance.

Pre-Visit Background Materials (Optional):

The following information, while not required, will be helpful in providing the site visitors with background on the site’s clinical learning environment. **Please forward the information to cler@acgme.org by the date indicated on the announcement letter.** Please **do not** email these materials directly to the site visitors.

- Organizational charts: sponsoring institution, the participating site that is being visited, and quality and safety departments within the participating site (if not included in site chart)
- Sponsoring Institution’s supervision policy (and participating site’s policy if different)
- Sponsoring Institution’s duty hour policy (and participating site’s policy if different)
- Sponsoring Institution’s care transitions policy (and participating site’s policy if different)
- Participating Site’s patient safety protocol/strategy (approved by their Board)
- Participating Site’s quality strategy (approved by their Board)
- Participating Site’s quality and safety committee membership roster(s) (identifying resident members, if relevant)
- Designated Institutional Official’s most recent annual report to the Sponsoring Institution’s governance (or minutes of the meeting if the report was given orally)

Scheduling the Group Meetings:

The CLER visitors attempt to cover a lot of ground in a very short amount of time. Our experience to date has shown that the meetings are most productive when participation is limited to certain key stakeholders. For each type of meeting listed below, we’ve tried to be as specific as possible in outlining the participants and other logistical instructions. If you have additional questions, the lead site visitor will be happy to discuss them with you when you are contacted to schedule the visit.

Please forward a roster of the names and titles of the senior leadership and safety and quality improvement leadership meeting attendees to the lead site visitor several days in advance of the site visit. It is also helpful to have a complete list of all of the meeting participants one day in advance of the visit.

The following individuals should be available for various meetings in accordance with the schedule that will be sent to you at the time the CLER site visit is confirmed:

Senior Leadership Meetings: We request the following individuals attend both the initial and exit meetings:

- Chief Executive Officer (required)
- DIO (required)
- Chief Medical Officer
- Chief Nursing Officer
- Chair, Graduate Medical Education Committee (if different from the DIO)
- Resident Member of GMEC
- Chief Operating Officer (optional)
- Chief Financial Officer (optional)
- Dean of affiliated Medical School (optional)

Note:

- The CEO and DIO must be present for the entire duration of both the initial and exit meeting. If the CEO or DIO becomes unavailable prior to or during the course of the site visit, the visit will likely be canceled.
- For those other than the CEO and DIO listed above, attendance is strongly recommended, but not required. If necessary, these individuals may elect to send a designee on their behalf.
- We realize that some clinical sites are part of larger health systems or consortiums, and that lead positions have varying titles (e.g. CEO, President, Executive Director) – sometimes making identification of the “CEO” more complicated. In these circumstances, please focus on the individual who has responsibility for both the strategic and financial decisions for the participating site. If there are questions regarding which CEO to invite, please discuss the issue with the lead site visitor at the time of scheduling.
- Please do not invite any other individuals to attend the senior leadership meetings. Attendance is limited to those listed above.

DIO meetings:

The site visit agenda has built in touch points with the DIO at the beginning and end of each day. The agendas for these meetings are somewhat less formal, providing opportunity for open discussion.

Note:

- Other GME leadership (e.g. Associate DIOs, GME directors, coordinators) are welcome to attend these meetings at the discretion of the DIO.

Quality and Patient Safety Leadership Meetings:

We request the following individuals to attend these meetings:

- Chief Quality Officer
- Chief Patient Safety Officer
- Chief Medical Information Officer

Director, Risk Management (potential attendee—see note below)

Note:

- Often the Chief Medical Officer serves the dual role of Chief Safety or Quality Officer. In these situations, as the CMO is part of the senior leadership meetings, please identify alternate individuals to attend the quality and safety leadership meetings—the CMO should not attend both sets of meetings.
- In these meetings it is helpful to include the individual who tracks patient safety event reporting for the selected hospital or medical center. In some organizations, this activity is the responsibility of the Chief Patient Safety Officer. In others, it is a function of the Office of Risk Management. If the latter is true, please include someone from Risk Management.
- Many organizations have multiple Patient Safety Officers or Quality Officers – often assigned at the department level. In these situations, please limit the invitation to the one or two individuals to whom these various officers report.
- With regard to quality leadership, it is recommended that the most appropriate person to represent the hospital or medical center is the individual who is most closely associated with quality indicators and data reporting--working with physicians on measuring, monitoring and improving system processes.

Group Meetings:

- The discussions occurring in the group meetings focus solely on the hospital or medical center being visited. As such, please invite only individuals who spend time and are familiar with the resident experience at that particular site.
- The number of meetings will vary by the size of the sponsoring institution (SI). In general, if the SI has 30 programs or less, we will request one meeting each of residents/fellows, faculty members and program directors. If the SI has between 31-60 programs, we will request two separate meetings for each group. Those SI's with more than 60 programs will have two or more meetings for each group. The exact number of meetings will be worked out during the call to schedule the visit.
- Each meeting will be capped at 30 attendees.
- While we realize that not everyone may be able to turn off or surrender pagers for the duration of the meeting, we would appreciate any assistance you may be able to provide to minimize disruptions.

Resident and Fellow Group Meetings:

Please invite residents and fellows who will provide broad representation of the programs at the selected participating clinical site.

Note:

- With the exception of Transitional Year residents, please limit attendance to those PGY2 or higher.
- The attendees should be peer-selected. ACGME defines “peer-selected” as residents voted on by their peers [other residents/fellows] and not chosen by a chief resident or other program representative.
- We would like to aim for broad representation across all of the SI's programs rotating at the selected participating clinical site. It is also appropriate to include proportionally more individuals from the larger programs.
- Please select residents and fellows for the group meetings who are not attending other CLER activities such as the senior leadership meeting and the walking rounds.

Faculty Member Group Meetings:

Please invite core faculty members who will provide broad representation of the residency and fellowship programs at the selected participating clinical site.

Note:

- Program directors will be asked to attend a separate meeting and should not attend the faculty member meetings.
- While we would like broad representation of all the site's programs, it is also appropriate to include proportionally more individuals from the larger programs.

Program Director Group Meetings:

Please invite the Program Director of each ACGME-accredited core and fellowship programs at the selected participating clinical site.

Note:

- If the Program Director is unavailable, he/she may send an associate program director as a designee.
- In cases where the DIO is also a Program Director, please have the Associate Program Director or other designee attend the group meeting.

Walking Rounds:

Please select one chief or senior resident (PGY3 or higher) to guide each of the walking rounds on the floors — a different individual for each of the walking rounds. Preferably each of these should be from a different specialty.

Note:

- If possible, please select residents and fellows who have not participated in the group meeting.
- Please select residents who are not participating in the meetings with senior leadership.