**SAMPLE - Initial Site Visit Timeline - DATE**

|  |  |  |  |
| --- | --- | --- | --- |
| **Task** | **Responsible Person** | **Due** | **Completed** |
| Letter Received; submit blackout dates |  |  |  |
| Date of Site Visit sent |  |  |  |
| Nominate fellow to send 5 strengths & 5 weaknesses |  |  |  |
| Nominate faculty to send 5 strengths & 5 weaknesses |  |  |  |
| Schedule Committee Meetings |  |  |  |
| Update Excel schedule worksheet & email to site visitor |  |  |  |
| Send Calendar Invitations to all participants to hold time |  |  |  |
| Schedule fellow prep meeting-include DIO |  |  |  |
| Schedule faculty prep meeting-include DIO |  |  |  |
| Document Review meeting 1 with GME office |  |  |  |
| Update Resident files folder   1. Completed final evaluation forms from program graduates 2. Completed rotation evaluations by faculty 3. Semiannual evaluations of current fellows 4. Completed multi-source evaluations of current fellows |  |  |  |
| Prepare Documents to upload to One Drive  A. Completed End of rotation evaluation for 2 (current)  B. Completed multi source evaluation for 2 (current} -separate by fellow  C. Completed semi-annual for 2 (current)  D. Completed Final for 2 PAST 3 years  E. Completed evaluations 2 faculty past AY  F. Didactic Curriculum  G. QI & patient safety activities  H. Program Specific Supervision Policy (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  I. Work Hours Data-add page on what we do  J. Transferred/Resigned Dismissed |  |  |  |
| Final document review meeting with GME office |  |  |  |
| Update ADS   1. Mission & Aims 2. Diversity 3. Overall evaluation methods 4. Program resources 5. Fellow education & Experience 6. Faculty Development 7. Covid 19 8. Fac Scholarly activity 9. Fellow scholarly activity 10. Roster- ensure specialty certification is up to date 11. PD CV 12. Major Changes and other updates |  |  |  |
| Upload documents to ADs   1. Update supervision policy- must include guidelines for circumstances and events that require the fellow to communicate with the faculty member 2. Update Block diagram-this is one of the most important documents they review 3. Update Specialty Specific Questions 4. PLAs 5. Goals & Objectives 6. Forms used to evaluate faculty 7. Forms for semiannual and final evaluations 8. Policy for clinical and work hours 9. Fellow eval of program 10. Fac eval of program 11. Forms for eval of fellow 12. Multi source eval 13. Wellbeing policy 14. Remote site visit attestation |  |  |  |
| Draft ADS review |  |  |  |
| Submit ADS and supporting documents |  |  |  |
| Create binder with documents for all participants (ADs, Block schedule, Citations, Survey responses) |  |  |  |
| Fellow submits strengths & weaknesses |  |  |  |
| Faculty submits strengths & weaknesses |  |  |  |
| Upload documents to Microsoft OneDrive |  |  |  |
| Fellow prep meeting |  |  |  |
| Faculty prep meeting |  |  |  |
| Let clinics know who will miss sessions |  |  |  |
| Confirm participants have Zoom link & will be in a private quiet location day of meeting. |  |  |  |
| Remind faculty and residents what the acronyms are, site visit schedule, etc. |  |  |  |
| SITE VISIT DATE | | | |

Thank you to Boston University Program Manage Linda Neville

for sharing their resource: Site Visit Timeline Checklist with ACAAM.