



USER'S GUIDE

TO THE STFM RESIDENCY

ACCREDITATION TOOLKIT

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INTRODUCTION

With the launch of the Accreditation Council for Graduate Medical Education (ACGME) Milestones Projects, residency programs faced new challenges in meeting the needs of their learners and fulfilling accreditation requirements. The current assessment paradigm has shifted the focus from a checklist-driven system to one that emphasizes the role of formative feedback in professional development. This system facilitates meaningful conversations with residents as they navigate an increasingly complex healthcare landscape.

The Society of Teachers of Family Medicine (STFM) assembled a task force of medical educators to create a single resource for information regarding accreditation and resident assessment for family medicine residency programs. The STFM Residency Accreditation Toolkit represents the culmination of these efforts. This resource includes ready-to-use tools, faculty development goals, and “best practices” that can be shared between programs. The toolkit is now under the supervision of the STFM Graduate Medical Education Committee and is updated regularly.

This user’s guide serves as an introduction and roadmap for programs looking to optimize their experience with the toolkit. We hope that the toolkit and this guide serve you well as you train the future of family medicine.

-STFM Graduate Medical Education Committee



CRACKING OPEN THE TOOLKIT



Nestled within the STFM website is an evolving accreditation resource for family medicine educators. The [main menu](#) of the toolkit is divided into subheadings that include Milestones/ Resident Assessment, Program Accreditation, Institutional Accreditation, Faculty Development, Coordinator Timeline, and General Accreditation Resources. These subheadings will guide you and your colleagues to the areas of the toolkit that are most applicable to you.

When beginning to use the toolkit in your program, we recommend that you take a few minutes to explore the toolkit. After that orientation, it will be easier to go directly to the right section at the right time.

The next several chapters will walk you through the toolkit and provide strategies for using the resources for your own program. Although not a comprehensive overview of the site, this guide will orient you to some of the hidden gems within the content and highlight some of the most immediately useful sections and tools for your program.



INTRODUCING YOUR CORE FACULTY TO THE MILESTONES



Medical educators need varying levels of familiarity with the Milestones depending on their roles and responsibilities. Your faculty need the appropriate education and resources to understand the accreditation system.

We will start with the core faculty, as they have the most consistent interactions with residents. Core faculty also provide the bulk of resident assessment on Milestone progression.

The following sections of the toolkit are recommended for review by core faculty:

- **Milestones Background:** Information about why and how the Milestones were developed
- **Milestones Design and Content:** An overview of Milestones structure and level interpretation
- **Assessment Methods and Tools:** A repository of tools that can be used in resident assessment, many of which can be used and modified
- **Direct Observation:** How are the Milestones measured? This is an introduction to the cornerstone of assessing resident performance relative to the Milestones



INTRODUCING YOUR COMMUNITY PRECEPTORS TO THE MILESTONES



Community preceptors are an integral component of resident assessment and can provide valuable insight into how residents are progressing through the Milestones. However, providing too much information about the Milestones to community preceptors could potentially overwhelm them and actually be counterproductive. A general understanding of the basics of the competencies and subcompetencies can enhance and broaden the types of feedback they provide. You may want to print out and share the following sections with your community preceptors:

- **Milestones Background:** Information about why and how the Milestones were developed
- **Milestones Design and Content:** An overview of Milestones structure and level interpretation



INTRODUCING YOUR RESIDENTS TO THE MILESTONES



Residents are another important stakeholder in assessment. The Milestones are markers along the educational path of residents, and it is crucial that residents are equipped with the proper skills to read the trail map. Navigating the subcompetencies and the Milestones can be challenging for residents without some orientation.

The following resources within the toolkit may be beneficial to share with your residents to better prepare them for their own assessments:

- **Milestones Background:** An introduction to why and how the Milestones were developed
- **Milestones Design and Content:** An overview of Milestones structure and level interpretation
- **Clinical Competency Committee:** An overview of Clinical Competency Committee structure and function
- **Individualized Learning Plan:** Information about how Milestone assessments can be used to guide professional development



PREPARING FOR AND CONDUCTING MILESTONE ASSESSMENTS



After establishing what the Milestones are, there is still the major task of assessing each resident relative to the Milestones. Each program has set requirements for how Milestone determinations are carried out, such as the general structure of a Clinical Competency Committee (CCC) and reporting periods. However, programs are given latitude for many of the details of the actual assessments. Every program has different ways of monitoring resident performance and evaluating progression along the Milestones continuum.

Reviewing the following sections in the toolkit may be helpful as you create and refine your CCC and work through the resident assessment process:

- **Clinical Competency Committee:** Information and resources for faculty and residents regarding the structure and purpose of this committee
- **Program Accreditation Timeline:** Key dates and instructions for Milestones reporting to the ACGME
- **Identify Gaps in Curriculum, Tools, and Processes:** Tools and resources to help with the performance of a gap analysis



FINDING THE RIGHT ASSESSMENT TOOLS



Now that you understand what the Milestones are and how they are to be reviewed, the next pressing question is how to gather the necessary data. As with all projects, success often relies on having the right tools.

Historically, residency programs have used many different assessment tools. The good news is that most tools will remain appropriate and can be adjusted to better align with the Milestones. Adjustment of the tools does not necessarily imply changing the verbiage of the form to the language of the Milestones. Your program may simply want to take an inventory of its own assessment and program evaluation toolbox. Some programs have mapped assessment tools to the subcompetencies and Milestones.

These toolkit sections may be helpful as you determine what assessment tools you need for your program:

- **Use/Modify Existing Tools:** Information about how you can modify the tools you are already using at your institution to better assess Milestone progress
- **Assessment Methods and Tools:** Resources available for use or modification for your program



UNDERSTANDING PROGRAM REQUIREMENTS



The program director and program coordinator should be well-versed in the specifics of the program requirements for accreditation from ACGME, while core faculty should be familiar with the overall requirements. Many faculty members act in advisor roles with some of the residents and their knowledge about these requirements is important to adequately guide residents along their educational paths.

The following sections will be useful for review by your faculty and program coordinator:

- **Program Accreditation Overview:** The requirements for self-assessment and quality improvement
- **New Program Requirements:** A chart comparison of the former family medicine requirements with the current requirements
- **Annual Program Evaluation:** Resources and information about the APE
- **10-Year Self Study:** Information about the goals and process for conducting the 10-Year Self Study
- **Accreditation Data System (Web ADS or ADS):** Recommendations and resources for data reporting



PROMOTING SCHOLARLY ACTIVITY



Scholarship is an important component of medical education. Establishing a culture that encourages and cultivates scholarly activity at your program is important not only to meet the ACGME requirements, but also to promote lifelong learning and improvement.

The toolkit has several resources that can assist you with creating a culture of scholarly activity. The toolkit walks you and your faculty members through Boyer's Model of Scholarship and expands the definition of scholarly activities beyond just bench or clinical research.

The following sections may be beneficial for your residents and faculty to review:

- **Scholarly Activity:** Overview of the accreditation requirements for scholarly activity by residents and faculty
- **How to Get Started:** Helpful hints on how to begin this educational journey
- **Examples of Scholarly Activity:** Options for completing this requirement including non-research options



UNDERSTANDING THE RESIDENT AND FACULTY SURVEYS



Resident and faculty surveys are an important requirement in the accreditation process, yet there can be a lack of consensus about the purpose of these surveys and the interpretation of the questions. Misinterpretation of the surveys can lead to inaccurate information being submitted to the ACGME when standards are actually being met. Your program will want to make sure that everyone understands the survey content to allow for useful, honest responses.

The following sections provide educators and residents information about how to approach the surveys:

- **Faculty Survey Overview:** This section provides information about the purpose of the survey and links to faculty development materials and resources relevant to survey completion
- **Faculty Survey Content Areas:** A breakdown of the various content areas addressed in the faculty survey. This is useful in understanding the survey scope
- **Resident Survey:** An overview of the content areas of the resident survey and links to helpful ACGME resources related to this survey. This also contains a faculty development presentation about the resident survey



RESOURCES FOR PROGRAM COORDINATORS



Program coordinators serve a critical role in the accreditation process. They should have a global view of the steps necessary for resident assessment and program review so they can ensure that timelines are met.

Often program coordinators must assemble all of the information necessary for the accurate and timely assessment of resident performance by the Clinical Competency Committee as well as ACGME reporting. They typically also oversee the Accreditation Data System (ADS) completion, Annual Program Evaluation coordination, and 10-Year Self Study preparation. Keeping all of the necessary deadlines and requirements straight can be overwhelming, so the toolkit provides timelines and suggestions for navigating these complex responsibilities.

The following sections may be beneficial for program coordinators to review:

- **Program Accreditation Timeline:** This section contains an introduction and intuitive graphic timeline of key dates in the accreditation process, including timing of ADS updates and milestone reports
- **Accreditation Data System (ADS):** The often complex ADS process is simplified with helpful hints and links to resources to facilitate navigation



PREPARING FOR INSTITUTIONAL REVIEW



The process of institutional review has many facets including the Annual Institutional Review (AIR), the Clinical Learning Environment Review (CLER), and Periodic Institutional Review. The requirements and scope of these reviews are significant, but the following resources will guide you through the process:

- **Annual Institutional Review (AIR):** This review process is clearly defined in this section highlighting the key ACGME requirements
- **Clinical Learning Environment Review (CLER):** The multiple components and areas of concentration of this review are outlined in this section. This section also includes links to valuable resources such as CLER checklists, handouts, and flash cards to simplify the process
- **Periodic Institutional Review:** A brief introduction to this process



FACULTY DEVELOPMENT



Faculty development is a crucial consideration for program accreditation. Time and effort must be invested to help your faculty to achieve comfort and proficiency with the accreditation process.

The following sections provide suggestions and resources to use for faculty education about accreditation:

- **Faculty Development Overview:** An approach for determining what different faculty need to know to be effective in assessing residents
- **Developing a Work Plan:** Guidelines for how to start communicating with your faculty about the accreditation requirements
- **Faculty Development Resources:** Resources to adapt and use at your own institution to provide your faculty with the necessary tools to meet the demands of their roles



THE MOVE TOWARD A SINGLE ACCREDITATION SYSTEM



Beginning in 2015, a major shift in medical education began. Osteopathic programs have started to obtain their accreditation status from the ACGME.

As with any major change, stakeholders may have a degree of uncertainty about the transition. As the change is ongoing, this section will be regularly revised to ensure that the most accurate and up-to-date information is available to help educate your faculty, residents, and students about the transition.

The following resources contained within the toolkit provide information and clarifications regarding this transition and links to documents and content from ACGME and AOA:

- **History of the Move Toward a Single Accreditation System:** This section provides background for your faculty and residents about this structural shift
- **Differences Between the Two Accreditation Systems:** This chart compares the ACGME and AOA program requirements
- **Pathways to Accreditation:** This section outlines the various paths to ACGME accreditation for AOA programs
- **Application Process:** A timeline for the application process as well as the application form itself



CONCLUSION

The STFM Residency Accreditation Toolkit provides a valuable roadmap for navigating the complexities of resident assessment and program accreditation. By using this resource strategically, your program can more easily meet the challenges of accreditation at the individual, program, and institutional levels. You will find tips, techniques, and tools to streamline processes, educate staff, and create a culture of meaningful feedback for your residents.

