

# Instructions for Annual Program Evaluation (APE) Meeting

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## I. Background

ACGME (Accreditation Council for Graduate Medical Education)'s **Common Program Requirements** states that:

V.C.1. The program director must appoint the Program Evaluation Committee <sup>(Core)</sup>

V.C.1.a) The Program Evaluation Committee:

V.C.1.a).(1) must be composed of at least two program faculty members and should include at least one resident; <sup>(Core)</sup>

V.C.1.a).(2) must have a written description of its responsibilities; and, <sup>(Core)</sup>

V.C.1.a).(3) should participate actively in:

V.C.1.a).(3).(a) planning, developing, implementing, and evaluating educational activities of the program; <sup>(Detail)</sup>

V.C.1.a).(3).(b) reviewing and making recommendations for revision of competency-based curriculum goals and objectives; <sup>(Detail)</sup>

V.C.1.a).(3).(c) addressing areas of non-compliance with ACGME standards; and, <sup>(Detail)</sup>

V.C.1.a).(3).(d) reviewing the program annually using evaluations of faculty, residents, and others, as specified below. <sup>(Detail)</sup>

V.C.2. The program, through the PEC, must document formal, systematic evaluation of the curriculum at least annually, and is responsible for rendering a written and Annual Program Evaluation. <sup>(Core)</sup> The program must monitor and track each of the following areas:

V.C.2.a) resident performance; <sup>(Core)</sup>

V.C.2.b) faculty development; <sup>(Core)</sup>

V.C.2.c) graduate performance, including performance of program graduates on the certification examination; <sup>(Core)</sup>

V.C.2.d) program quality; <sup>(Core)</sup>

V.C.2.d).(1) Residents and faculty must have the opportunity to evaluate the program confidentially and in writing at least annually, and <sup>(Detail)</sup>

V.C.2.d).(2) The program must use the results of residents' and faculty members' assessments of the program together with other program evaluation results to improve the program. <sup>(Detail)</sup>

V.C.2.e) progress on the previous year's action plan(s). <sup>(Core)</sup>

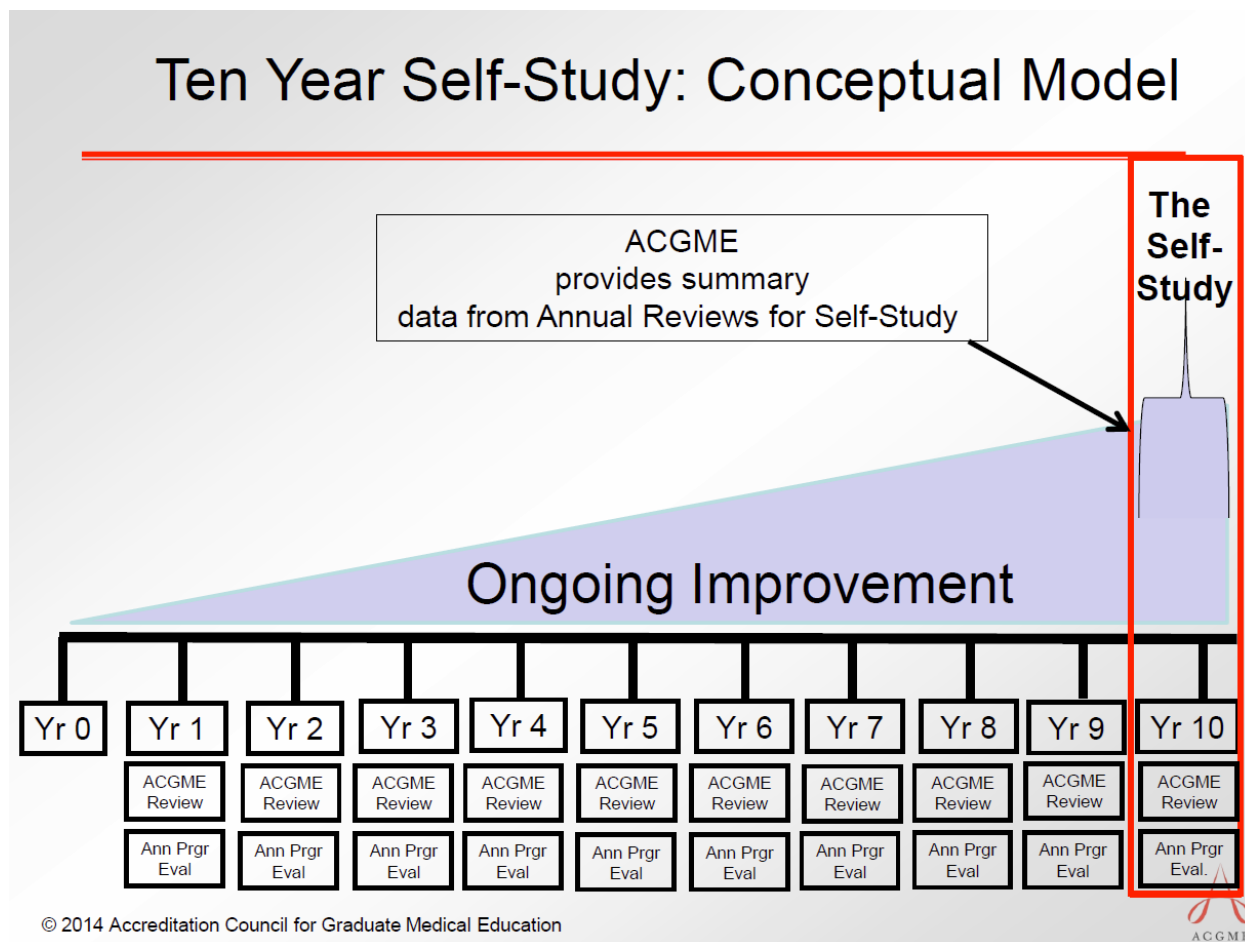
V.C.3. The PEC must prepare a written plan of action to document initiatives to improve performance in one or more of the areas listed in section V.C.2., as well as delineate how they will be measured and monitored. <sup>(Core)</sup>

V.C.3.a) The action plan should be reviewed and approved by the teaching faculty and documented in meeting minutes. <sup>(Detail)</sup>

### Annual Program Evaluation and 10-Year Self-Study

The 10-Year Self-Study is a comprehensive and longitudinal assessment of program performance and ongoing improvement effort. It reviews improvement activities, successes achieved, and areas in need of improvement based on:

- **Annual Program Evaluation data;**
- ACGME Resident and Faculty Survey data;
- and other relevant information, and stakeholder input.



**Objectives of the 10-Year Self-Study:**

- Assess ongoing compliance and improvement in all dimensions
- Focus on: Program **Strengths** and Program **Weaknesses** (Areas for Improvement)
- Track ongoing improvements and the success of action taken
- Consider
  - Program **Aims**
  - The program External Environment: **Opportunities** and **Threats**

**Aim:**

- A way to differentiate programs
- Self-study will ultimately evaluate program effectiveness in meeting these aims
- Moves beyond improvement solely based on compliance with minimum standards
- Assessment of relevant initiatives and their outcomes

**Strength:**

- Important to acknowledge and celebrate
- What should definitely be continued (important question in an environment of limited resources)

**Weakness:**

- Citation, areas for improvement and other information from ACGME
- The Annual Program Evaluation and other program/institutional data sources

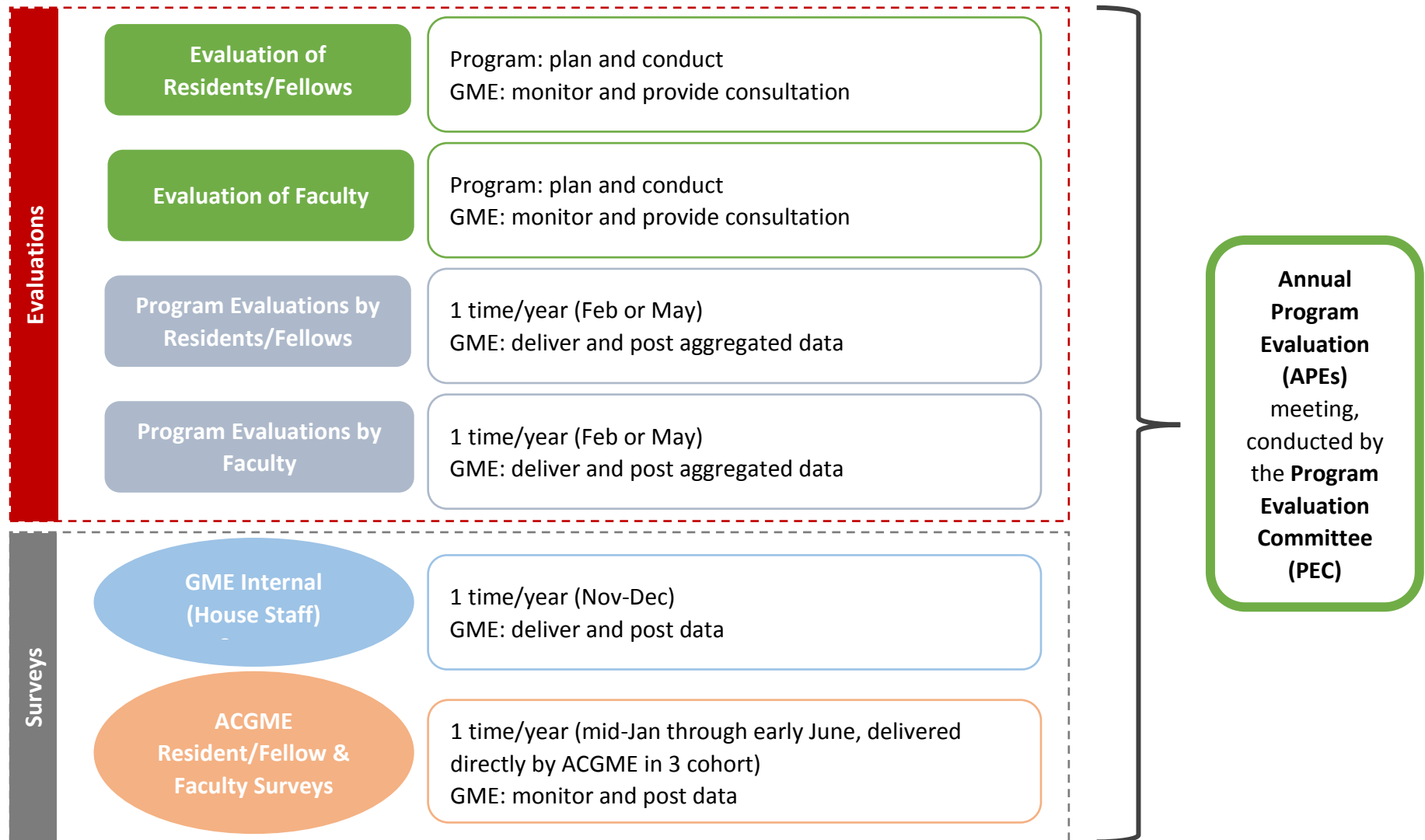
**Opportunities:**

- Are external attractive factors that, if acted upon, will contribute to the program flourishing
  - What are capabilities for future evolving the program; how can the program capitalize on them?
  - Has there been recent change in the program's context that creates an opportunity?
  - Are these opportunities ongoing, or is there a narrow window for them? How critical is the timing?

**Threats:**

- Are external factors that affect the program
- While the program cannot fully control them, beneficial to have plans to mitigate their effect:
  - What external factors may place the program at risk?
  - What are changes in resident's specialty choice, regulation, financing, or other factors that may affect the future success of the program?
  - Are there challenges or unfavorable trends in immediate context that may affect the program?

## Overview of the Educational Activities Involved in the APE Meeting



## II. Pre APE Meeting Checklist:



### First things first:

- Schedule a date and time for your program's APE meeting;
- Once the date is set, update it in Medhub.

*Instructions: Log into Medhub, select "Program Accreditation" under "Site Management" in myHome, choose "Annual Program Evaluations" tab, choose your program for the current year, update the "Review Dates", and click "Submit".*



### Next:

Follow the checklist in the next two pages and collect items that are applicable for your program.



## Pre Annual Program Evaluation (APE) Checklist

Area	Item	Responsibility	Source & Path
<b>RESIDENT PERFORMANCE</b>			
<input type="checkbox"/>	Scholarly Activity of Residents	Program	WebADS
<input type="checkbox"/>	In-Training Exam Scores*	Program	Program Coordinator
<input type="checkbox"/>	Aggregated Resident Performance Report	Program	<a href="#">Medhub - Resident/Faculty/Service Ranking under Evaluation Reports</a>
<input type="checkbox"/>	Procedure Logs*	Program	Varies for each program
<input type="checkbox"/>	OSCEs (Objective Structured Clinical Examinations)*	Program	Program Coordinator
<b>FACULTY DEVELOPMENT</b>			
<input type="checkbox"/>	Scholarly Activity of Faculty	Program	WebADS
<input type="checkbox"/>	ABMS Certification Status	Program	<a href="#">Board Certification Verification Websites</a>
<input type="checkbox"/>	Faculty Attendance in Grand Rounds and Conferences	Program	<a href="#">Medhub - "Reports" tab - Faculty Conference Attendance</a>
<input type="checkbox"/>	Faculty Professional Development Courses	Program	Program Coordinator
<b>GRADUATE PERFORMANCE</b>			
<input type="checkbox"/>	Aggregated Board Exam Pass Rates From Each of the Past 5 Years	Program	Program Coordinator/Program Director
<input type="checkbox"/>	Alumni Survey*	Program	Program Coordinator/Program Director
<input type="checkbox"/>	Graduate Placement	Program	Program Coordinator/Program Director

PROGRAM QUALITY			
<input type="checkbox"/>	2014-2015 Action Plan	Program	Program Coordinator/PEC
<input type="checkbox"/>	2015 Annual Evaluation of Program by Residents/Fellows	GME	<a href="#">Medhub - "Program Accreditation" under "Site Management" in "myHome" - "Annual Program Evaluations" tab</a>
<input type="checkbox"/>	2015 Annual Evaluation of Program by Faculty	GME	<a href="#">Medhub - "Program Accreditation" under "Site Management" in "myHome" - "Annual Program Evaluations" tab</a>
<input type="checkbox"/>	2014-2015 GME House Staff Survey	GME	<a href="#">Medhub - "Program Accreditation" under "Site Management" in "myHome" - "Annual Program Evaluations" tab</a>
<input type="checkbox"/>	2015 Trend Analysis*	GME	<a href="#">Medhub - "Program Accreditation" under "Site Management" in "myHome" - "Annual Program Evaluations" tab</a>
<input type="checkbox"/>	2014 ACGME Faculty and Resident Surveys*	GME	<a href="#">Medhub - "Program Accreditation" under "Site Management" in "myHome" - "Annual Program Evaluations" tab</a>
<input type="checkbox"/>	Feedback from RRC (ACGME Letters of Notification and ACGME citations)	GME	<a href="#">Medhub - "Program Accreditation" under "Site Management" in "myHome" - "Site Visits/Self-Study" tab or "Correspondance" tab/WebADS</a>
<input type="checkbox"/>	Overview of the Curriculum and Rotations	Program	<a href="#">Medhub - "Curriculum Objectives/Goals" under "Portal Management" in "myHome"</a>
<input type="checkbox"/>	Exit Summative Evaluation/Interview*	Program	Program Records

\* Items in blue are included if applicable for each specific program.

### III. Instructions on Data Gathering

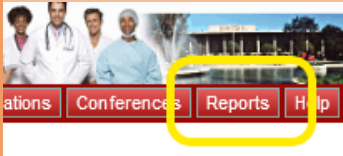
#### Resident Performance

#### Aggregated Resident Performance Report

(Path: MedHub > Reports (tab) > under Evaluation Reports > Resident/Faculty/Service Ranking)

**Step 1.** Login to MedHub.

**Step 2.** Click on the **Reports** tab.

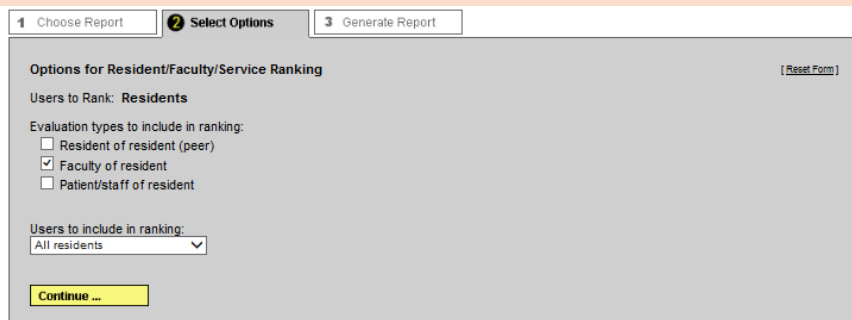


**Step 3.** Scroll down and click on **Resident/Faculty/Service Ranking**.

- [Evaluator Scoring Averages by Milestones](#)
- [Locked Questions Summary](#)
- [Milestones Achievement by Level](#)
- [Milestones NAS Summary Report](#)
- [Milestones Summary Report](#)
- [Resident/Faculty/Service Ranking](#)
- [NAS Completion Summary](#)

**Step 4.** Select the **Targets to Rank: Residents**.

**Step 5.** Select **Faculty of Resident**. Discuss with your Program Director if you'd like to include Resident of resident (peer) evaluation types.

A screenshot of the 'Options for Resident/Faculty/Service Ranking' form. The form has three tabs: '1 Choose Report', '2 Select Options' (which is active), and '3 Generate Report'. Under the '2 Select Options' tab, the 'Users to Rank' is set to 'Residents'. There are three checkboxes for 'Evaluation types to include in ranking': 'Resident of resident (peer)' (unchecked), 'Faculty of resident' (checked), and 'Patient/staff of resident' (unchecked). Below these, there is a dropdown menu for 'Users to include in ranking' set to 'All residents'. A 'Continue ...' button is at the bottom left, and a '[ Reset Form ]' link is at the top right.

<b>Step 6.</b>	Click on <b>Continue ...</b>
<b>Step 7.</b>	Select all relevant forms you'd like to include (keep a record which ones you use). Use this current academic year. Select Display Averages/Totals.
<b>Step 8.</b>	Select <b>Output Format: XLS - MS Excel or XLSX - MS Excel 2010.</b>
<b>Step 9.</b>	<p>Open the exported Excel data file. Process the data by removing the following columns:</p> <ul style="list-style-type: none"> <li>- remove resident/fellow names ---&gt; replace with the alphabet A, B, C</li> <li>- remove Rank, Z-Score, and Z-Score rank</li> </ul> <p><b>NOTE:</b> Before you process the exported file, remove the duplicate names and data by doing the following:</p> <ol style="list-style-type: none"> <li>(1) Select the row of the cells with the duplicate names</li> <li>(2) On the ribbon (on top), select the Data tab.</li> <li>(3) Select Remove Duplicates.</li> <li>(4) When a window pops up, select Unselect All.</li> <li>(5) Check Resident.</li> <li>(6) Click OK.</li> </ol>
<b>Step 10.</b>	De-identify the ranks by deleting names of residents/fellows.
<b>Step 11.</b>	Stylize and process the exported Excel data file further for your program needs.
<b>Step 12.</b>	Organize the information for your program's needs for your Program Evaluation Committee (PEC) and APE meetings.

[Go Back to the Checklist](#)

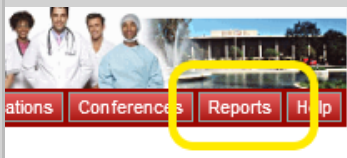
Program	Link	Notes
Anesthesia	<a href="http://www.theaba.org/">http://www.theaba.org/</a>	
Internal Medicine	<a href="http://www.abim.org/">http://www.abim.org/</a>	
Neurosurgery	<a href="http://www.abns.org/en/Verify%20a%20Neurosurgeon.aspx/">http://www.abns.org/en/Verify%20a%20Neurosurgeon.aspx/</a>	
Obstetrics & Gynecology	<a href="https://www.abog.org/new/default.aspx">https://www.abog.org/new/default.aspx</a>	Click on "Is Your OB/GYN Certified?"
Orthopedic Surgery	<a href="https://www.abos.org/find-a-certified-orthopaedic-surgeon.aspx">https://www.abos.org/find-a-certified-orthopaedic-surgeon.aspx</a>	
Otolaryngology	<a href="http://www.aboto.org/ABOInternet/VerifyPhysicianCertification">http://www.aboto.org/ABOInternet/VerifyPhysicianCertification</a>	
Pediatrics	<a href="https://www.abp.org/content/verification-certification">https://www.abp.org/content/verification-certification</a>	
PM&R	<a href="https://www.abpmr.org/physician_search.html">https://www.abpmr.org/physician_search.html</a>	
Plastic Surgery	<a href="https://www.abplsurg.org/ModDefault.aspx?section=SurgeonSearch">https://www.abplsurg.org/ModDefault.aspx?section=SurgeonSearch</a>	
Psychiatry & Neurology	<a href="https://application.abpn.com/verifycert/verifycert.asp">https://application.abpn.com/verifycert/verifycert.asp</a>	
Radiology	<a href="http://www.theabr.org/">http://www.theabr.org/</a>	Enter name on "Check Board Certification"
Thoracic Surgery	<a href="https://www.abts.org/root/home/verification.aspx">https://www.abts.org/root/home/verification.aspx</a>	
Surgery	<a href="http://www.absurgery.org/app.jsp?type=vc&amp;id=27">http://www.absurgery.org/app.jsp?type=vc&amp;id=27</a>	
<b>Use Certification Matters for all others that do not have online search tools available.</b> <a href="https://www.certificationmatters.org/is-your-doctor-board-certified/search-now.aspx">https://www.certificationmatters.org/is-your-doctor-board-certified/search-now.aspx</a>		

[Go Back to the Checklist](#)

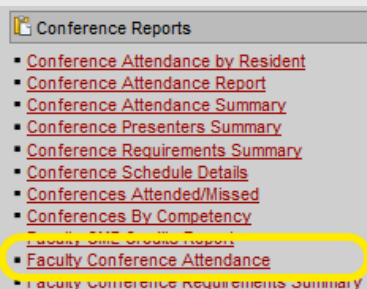
(Path: MedHub > Reports (tab) > under Conference Reports > Faculty Conference Attendance)

**Step 1.** Login to MedHub.

**Step 2.** Click on the **Reports** tab.



**Step 3.** Click on **Faculty Conference Attendance** under **Conference Reports**.



**Step 4.**

1 Choose Report   2 Select Options   3 Generate Report

Options for Faculty Conference Attendance [Reset Form]

Program:\*  
Graduate Medical Education Administration

Date Range:\*  
07/01/2014 to 6/30/2015  
(MM/DD/YYYY)

1. Choose Program.   2. Chose academic year.

Options:\*  
☐ Display Archived Conference Groups  
☐ Display Conferences Attended in Other Programs

Go to Step 3 ...

Enter this academic year's Date Range (7/1/YYYY to 6/30/YYYY).  
Check the Options available as below.

<b>Step 5.</b>	Select <b>Output Format: XLS - MS Excel or XLSX - MS Excel 2010.</b>
<b>Step 6.</b>	In Excel, organize the information to your program's needs.
<b>Step 7.</b>	Save this file to your <b>Annual Program Evaluations</b> (APEs) tab on MedHub.
<b>Step 8.</b>	Use the file for your Program Evaluation Committee (PEC) and APE meeting to review.

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2015 Annual Evaluation of Program by Residents/Fellows

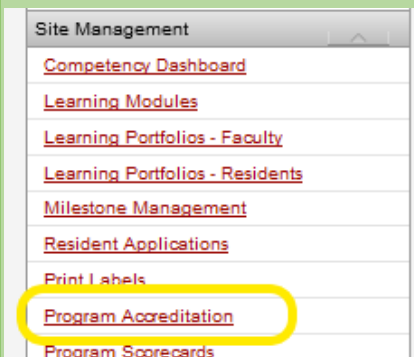
2015 Annual Evaluation of Program by Faculty

2014-2015 GME House Staff Survey

Trend Analysis

### 2014 ACGME Faculty and Resident Surveys

The above 5 items can be found by following the same path: MedHub > under Site Management > Program Accreditation > Annual Program Evaluation

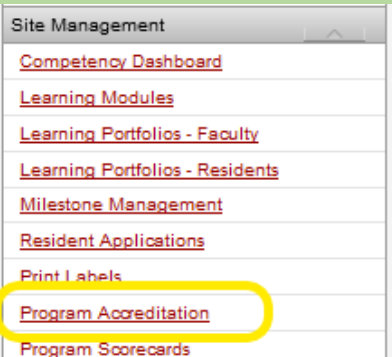
<b>Step 1.</b>	Login to MedHub.
<b>Step 2.</b>	<p>In the MyHome tab, scroll down to <b>Site Management</b>. Click on <b>Program Accreditation</b>.</p> 
<b>Step 3.</b>	Click on the <b>Annual Program Evaluations</b> tab.
<b>Step 4.</b>	In your program Annual Program Evaluations tab, scroll down to <b>Attached Files</b> .
<b>Step 5.</b>	Under Attached Files, <b>Program Evaluations by Resident/Fellows</b> , <b>Program Evaluations by Faculty</b> , <b>GME House Staff Survey</b> , <b>Trend Analysis</b> , and the <b>ACGME Faculty and Resident Surveys</b> are uploaded by GME.

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**Program Quality****Feedback from RRC (Letters of Notification from ACGME and WebADS citations)**

(Path: MedHub > under Accreditation> Program Accreditation > Site Visits or Correspondence)

<b>Step 1.</b>	Login to MedHub.
<b>Step 2.</b>	<div>In the MyHome tab, scroll down to <b>Site Management</b>. Click on <b>Program Accreditation</b>.</div> 
<b>Step 3.</b>	Retrieve and organize the information for your program's needs for your Program Evaluation Committee (PEC) and APE meetings.

[Go Back to the Checklist](#)

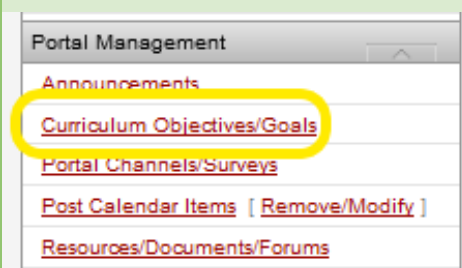
There are instructions for looking up Curriculum and Rotations, respectively. Please refer below.

## Curriculum

(path: MedHub > under Program Management > Curriculum Objectives)

**Step 1.** Login to MedHub.

**Step 2.** On MyHome, scroll down to **Portal Management**. Click on **Curriculum Objectives**.



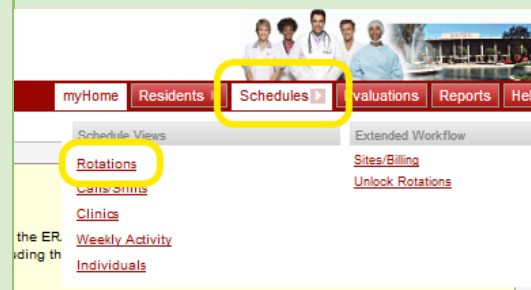
**Step 3.** Retrieve and organize the information for your program's needs for your Program Evaluation Committee (PEC) and APE meetings.

## Rotation

(path: MedHub > in MyHome navigation tab > Schedules > Rotations)

**Step 1.** Login to MedHub.

**Step 2.** Click on the **Reports** tab, then click on **Rotations**.



**Step 3.** Retrieve and organize the information for your program's needs for your Program Evaluation Committee (PEC) and APE meetings.

[Go Back to the Checklist](#)

#### **IV. Agenda**



**Before the APE meeting, print out the Meeting Agenda on the next page.**

**<Insert Program Name> ANNUAL PROGRAM EVALUATION MEETING**

**Date/Time:** \_\_\_\_\_

**Location:** \_\_\_\_\_

**AGENDA**

- I. Update on Previous Improvement Projects/Prior Year's Action Plan Items
- II. Program Assessment:
  - a. Resident Performance
  - b. Faculty Development
  - c. Graduate Performance
  - d. Program Quality
- III. Action planning for upcoming academic year
  - a. Cause-Effect Diagram for Self-Study
  - b. Action Plan
- IV. Faculty Review/Approval of Action Plan

**ATTENDEES**

**Faculty**

Print Name:

Sign Name:

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**Residents/Fellows**

Print Name:

Sign Name:

PGY Level:

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