



CPRB SURVEY ITINERARY GUIDANCE DOCUMENT

Day 1 – Main Site			
Time	Meeting Description	Participants	Objectives of Meeting
	Land Acknowledgement	Residency Program Designate	
30 minutes	Meeting with CEO or Senior Administrative Designate to Whom Pharmacy Director Reports	CEO or Senior Administrative Designate Residency Coordinator(s) Residency Director Resident(s) Pharmacy Leadership (who provide support to the Residency Program)	<ul style="list-style-type: none"> • Review Accreditation Canada (AC) or other nationally applicable standards and regulatory requirements as they pertain to pharmacy • Discuss major issues faced by the organization • Reaffirm organizational commitment to advancing research, education, and patient care • Discuss organizational commitment to learning environments that ensure safety and freedom from intimidation, harassment, and other forms of abuse • Evaluate the safety and quality of the medication use system • Define the role of the pharmacy department in the overall planning and delivery of patient care services within your organization
30 minutes	Meeting with the Pharmacy Administrative Team	Residency Coordinator(s) Residency Director Resident(s)	<ul style="list-style-type: none"> • Provide a broad overview of the pharmacy department and services offered • Discuss the role and contribution of pharmacists, technicians/assistants, and residents to patient care

		<p>Pharmacy Leadership (who provide support to the Residency Program) Residency Advisory Committee Chair</p> <p><i>CEO or Senior Administrative Designate may attend RAC members may attend</i></p>	<ul style="list-style-type: none"> • Review drug information services, including formulary, safe medication practice policies, and adverse drug event reporting • Highlight initiatives undertaken to advance the safety and quality of the medication use system • Ensure methods to provide adequate learning resources for residents • Discuss pharmacy services and resident involvement in research and teaching activities • Discuss the role of the Residency Advisory Committee
45 minutes	Meeting with the Residency Director	Residency Director	<ul style="list-style-type: none"> • Discuss how the Director contributes to the strategic planning and ongoing quality improvement of the residency program • Review program activities related to leadership and management • Evaluate the extent to which the coordination and administration functions of the program are delegated • Ensure procedures to maintain resident safety • Discuss the role of the Residency Advisory Committee
15 minutes	BREAK		
120 minutes	Meeting with the Residency Coordinator	Residency Coordinator(s)	<ul style="list-style-type: none"> • Discuss how competencies are translated into learning objectives • Review how levels of expected performance are set within a rotation and throughout the program, and how these are communicated • Evaluate how resident performance and expectations are assessed and documented • Understand the tracking of requirements over the course of the program • Discuss how residents' knowledge and skills are developed and assessed • Review how coordinators support residents and preceptor training and supervision • Discuss the role of the Residency Advisory Committee • Understand curricular content that advances reconciliation with First Nations, Métis, and Inuit peoples living in Canada • Develop and document the resident's individual learning plan

15 minutes	Clarification Meeting	Residency Coordinator(s)	
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Considerations for Scheduling (Day 1)

- Programs are encouraged to reach out to the Lead Surveyor when planning the itinerary to discuss any program specific factors.
- When surveyors are on site the preference is in-person meetings. If there will be virtual attendance meetings may be scheduled in advance of the on-site survey days.
- In situations where meetings continue after the lunch hour, schedule a 1-hour lunch break.

Day 2+ – Main Site and Additional Sites

Surveyors aim to visit residents at their home site and/or any site that hosts residents for 25% or more of their residency year

Time	Meeting Description	Attendees	Objectives of Meeting
30 minutes (Year 1 Programs Only)	Tour of Pharmacy Department & Resident Workspace	Resident(s) Manager of Operations (or designate)	<ul style="list-style-type: none">• Review the training environment for the residency program (distribution/operations rotation)• Discuss the pharmacy portion of the medication cycle• Visit the pharmacy resident workspace
30 minutes	Tour of Patient Care Area (& Resident Workspace PRN) With current or recent resident rotation	Resident(s) Pharmacist Preceptor(s) working in assigned patient care area	<ul style="list-style-type: none">• Discuss the resident's working relationship with the health care team• Evaluate the extent to which the healthcare team participates in the training of the resident• Review the training environment for the pharmacy residency program• Examine the medication cycle from prescription to drug administration• Discuss documentation in the health record by pharmacists and pharmacy residents• Visit the pharmacy resident workspace (if not previously visited)
90 minutes	Meeting with Residents	Current Resident(s) Resident(s) from prior year	<ul style="list-style-type: none">• Discuss the knowledge and skills residents are expected to learn• Review the methods used to achieve these knowledge and skills• Evaluate residents' learning experiences• Identify the opportunities for residents to continuously improve their personal practices and contribute to collective improvements in practice• Assess the residents' abilities to meet the program's educational outcomes• Discuss the overall administration of the program• Track the completion of requirements over the course of the program• Develop and assess personal learning objectives• Understand curricular content that advances reconciliation with First Nations, Métis, and Inuit peoples living in Canada
15 minutes	BREAK		
60 minutes	Meeting with Residency Preceptors	Preceptors (as many as possible) except	<ul style="list-style-type: none">• Discuss the role of the Preceptor in rotation design, educational content, and evaluation

		Residency Coordinator(s) and Residency Director	<ul style="list-style-type: none"> • Review how residency program competencies (educational outcomes) are assessed • Evaluate the processes used for preceptor orientation • Discuss ongoing preceptor support and training provided by the program • Review preceptor self-assessment methods • Share experiences in precepting projects
15 minutes	Clarification Meeting	Residency Coordinator(s)	

Considerations for Scheduling (Day 2+)

- Resident Preceptors meeting should have a maximum of 10 attendees. If more than 10 attendees expected please schedule an additional meeting. The additional meeting can be held concurrently if required.
- For programs with more than one site the Meeting with Residency Preceptors at the Main Site may be shifted to Day 1 to accommodate additional site visits if needed.
- The Survey Team will travel between sites. At each individual site they will meet with the precepting team and tour the pharmacy department (if it provides a rotation experience), tour the patient care areas and tour the resident workspace.
- In situations where meetings continue after the lunch hour, schedule a 1-hour lunch break.

Day 3 – Main Site			
Time	Meeting Description	Attendees	Objectives of Meeting
15 minutes	Clarification Meeting	Residency Director Residency Coordinator(s)	<ul style="list-style-type: none"> • Clarify and review outstanding points • Answer any questions
15 minutes	BREAK		
30 minutes	Closing Remarks	Residency Director Residency Coordinator(s) Resident(s) <i>Other participants (Pharmacy Leadership, Preceptors, RAC Members etc.) at the discretion of the program.</i>	<ul style="list-style-type: none"> • Discuss the strengths and opportunities for improvement in the residency program • Review the next steps in the accreditation survey process

Considerations for Scheduling:

- Meetings to commence early in the day.