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## **CPRB PROGRAM SAMPLE ITINERARY & REQUIRED DOCUMENTS**

### **IN-PERSON SURVEYS**

#### **YEAR 2 CPRB ACCREDITATION STANDARDS**

The Program Residency Director, Coordinator, or Administrative Assistant are to send the CPRB Surveyors the survey documents in an electronic format. The program should share documents through an agreed-upon file hosting site (e.g., SharePoint, Dropbox, OneDrive). Documents should be numbered/labeled as per the list below. The lead surveyor and/or the CPRB Coordinator will contact you to confirm your preferred method to provide the documents.

Surveyors to sign the institution's confidentiality agreement upon arrival at site.

#### **Framework for Program Pre-Survey Documents – 30 Days Prior to Date of Survey**

**Please create a separate sub-folder for each numeric grouping below (e.g., residency program manual contents located in a sub-folder)**

1. Contractual agreement with primary partner designated organization (if this is a shared program)
  - 1.1 Reports associated with partner accreditation surveys - Accreditation Canada (AC) survey report (or CCAPP report) and territory regulatory report
  - 1.2 Inspection reports associated with partner accreditation surveys
2. Provincial or Territorial Pharmacy Regulation Report
3. Itinerary – a template is provided as a guide. Contact lead surveyor for assistance if geography is complex, dual surveys, etc.)
4. CV Residency Program Director
5. CV Residency Program Coordinator
6. Request for Accreditation and related documents
  - 6.1 Any changes to the organizational structure of the organization, organizational structure of the pharmacy department since the last CPRB accreditation in any format, i.e., ppt or word format
  - 6.2 Mission statement and goals/objectives of the pharmacy department
  - 6.3 Most recent pharmacy services annual report
  - 6.4 Quality improvement plan and strategic plan for the pharmacy department
  - 6.5 Quality improvement plan and strategic plan for the residency program
  - 6.6 Schedule of residency rotations including preceptors for previous since previous accreditation survey and current year
7. Residency Advisory Committee Terms of Reference and minutes since previous accreditation survey and current year

8. Residency Program Manual and Residency-related policies and procedures
  - 8.1 Expectations of residents and preceptors
  - 8.2 The intended educational outcomes of the program
  - 8.3 Description (Learning goals and objectives) for each residency rotation available for each resident(s)
  - 8.4 Description (Learning goals and objectives; schedule) of the formal academic curriculum (e.g. mandatory course work, mandatory academic half-days or full days)
  - 8.5 Evaluation/Assessment forms – provide access to online evaluation forms if applicable
    - 8.5.1 Resident performance – self-assessment
    - 8.5.2 Resident evaluation of preceptor
    - 8.5.3 Resident evaluation of rotation
    - 8.5.4 Resident evaluation of Coordinator
    - 8.5.5 Resident evaluation of Program Director
    - 8.5.6 Resident evaluation of Residency program
    - 8.5.7 Preceptor assessment of resident
    - 8.5.8 Preceptor self-assessment
  - 8.6 Criteria for successful completion of the program
  - 8.7 Policies concerning professional, family, and sick leave and the effect such leaves shall have on the residents' ability to complete the program
  - 8.8 Policies governing scheduling of residency experiences, including duty (service) roster shifts, if applicable
  - 8.9 Procedures and tools for evaluating training site (rotation) and residency program
  - 8.10 Procedures for assessment and evaluation of resident(s), preceptor(s), coordinator(s), director
  - 8.11 Processes for remedial action if deficiencies in the progress of the resident(s) are noted
  - 8.12 Processes that shall be used to address all discrepancies in assessment
  - 8.13 Policies governing intimidation and harassment and other forms of abuse

## **Program Required Documents 7 Days Prior to Date of Survey**

The program sets up folders in a document sharing system (e.g., SharePoint, Dropbox, OneDrive). The documents must be available to the surveyors and the CPRB Coordinator at least seven (7) days prior to the survey visit. (If any of these documents are available electronically earlier, the surveyors ask they be sent to them prior, if possible, but this is not a requirement.)

Please organize the folders using the following structure:

1. Residents (for previous accreditation cycle and current year), **Please number and label folders for each resident to include**:
  - 1.1 Program's letter of offer
  - 1.2 Resident's confirmation of acceptance letter
  - 1.3 Prior learning assessment (transfer of credit documents) (if applicable)
  - 1.4 Documented competencies or education outcomes – Evidence of Achievement for all rotations, projects, assignments, academic sessions (e.g., journal club, academic half day)
    - 1.4.1 Completed Evaluations/Assessments
      - 1.4.1.1 Resident performance – self-assessment
      - 1.4.1.2 Resident assessment of preceptor
      - 1.4.1.3 Resident evaluation of rotation
      - 1.4.1.4 Resident assessment of Coordinator
      - 1.4.1.5 Resident assessment of Program Director
      - 1.4.1.6 Resident evaluation of Residency program
      - 1.4.1.7 Preceptor assessment of resident
      - 1.4.1.8 Projects, presentations, and reports for publication
  - 1.5 Confirmation of completion of the program (e.g., copies of letters, transcripts and/or certificates)
  - 1.6 Resident's Learning Portfolio
    - Presentations, journal club, written material, etc. including self-assessments of all activities
    - Written learning plan
2. Preceptors
  - 2.1.1 Self-assessment
3. Record of successful and unsuccessful resident(s) (for entire history of the program)
4. List of resident(s) to whom ACPR was granted (for entire history of the program)

**NOTE:** For programs with greater than 4 residents per year, the surveyors may indicate how many and which residents' records to provide.

## **Program Required Documents On-Site**

1. Current pharmacy policy manual (paper or electronic)
2. Examples of documenting in the patient's record

## **Sample Itinerary for In-Person Surveys**

A sample of a survey itinerary is provided in the next few pages. Please follow the sequence of meetings and interviews wherever possible. The lead surveyor (the surveyor initiating contact with you) may ask for information about the campuses where the resident(s) complete various rotations. Surveyors will visit those campuses that deliver 60 residency training days or more. For organizations with multiple campus programs (>4 campuses), the surveyors may choose which campuses to visit and will discuss the itinerary with you.

**If you have questions or if schedule changes are required consult with the lead surveyor 30 days prior to the on-site visit.**

- It is **expected that the resident(s) will be on-site and available during the survey**. Their participation is required at meetings as indicated on the sample itinerary
- Please have a room reserved for **the duration of the survey for On-Site Document Review** and meetings. (See list of required documents. Other document/manuals may be included as desired)
- The patient care area(s) toured must be areas where the residents have participated in patient care.

If yours is a multiple campus program, please have transportation arranged between the campuses for Tour of Department/Patient Care area(s) and meetings with various personnel (see Accreditation Policies and Procedures for definitions of multiple campus programs).

### **Leading Practices (optional)**

As part of our sharing and learning from each other, we are offering the opportunity for you to identify leading practices in your residency program. These have no influence on your accreditation, but the surveyors will discuss them with you. You can also submit these after the survey visit and discussions.

## Itinerary – Single Campus - Day 1

Refer to the document “Y2\_ProgramInterviews\_WhatToExpect\_InPerson\_FINAL\_2021” for details about each meeting.

DAY	TIME	TITLE OF MEETING	PARTICIPANTS SHALL INCLUDE
Day 0		Review of survey documents at hotel	Surveyors
Day 1	0800-0830	Meeting with the CEO, Administrative person to whom Pharmacy Director reports	CEO or (Senior Administrative designate), Administrative person to whom Pharmacy reports, Residency Director and Coordinator(s), and Resident(s)
	0830-0915	Meeting with the Pharmacy Administrative Team  - include a handout, and time for further questions from the surveyors Rather than a formal presentation the administrative team is requested to provide in any format (e.g., word, ppt) the department’s strategic plan and any major changes to either the organization or to the pharmacy department since the last survey visit.	Residency Director, Residency Coordinator(s), Resident(s), and Pharmacy Leaders who provide direct support to the Residency Program  <i>CEO or (designate) may attend</i>
	0915-0945	Meeting with the Residency Program Director	Residency Program Director
	0945-1115	Meeting with the Coordinator(s) Questions from surveyors	
	1115-1215	Meeting with Residency Preceptor(s) (from <b>all</b> campuses, may set up teleconferencing if needed)	As many Residency Preceptor(s) as possible <b>except</b> the Residency Director, and Coordinator(s)
	1215-1315	<b>LUNCH</b>	Surveyors
	1315-1500	Meeting with the Resident(s)	Current Resident(s) and from one year previous if available
	1500-1545	Tour of Patient Care Area(s) where the resident is currently working or where a rotation has recently been completed Including sit down with health care team	Pharmacist(s) regularly working in the Patient Care Area(s), Resident(s)
	1545-1600	Check in with the residency coordinator	Residency Program Coordinators
	1600-	Review of on-site documents if required  Check in with Residency Coordinator(s) (or designate) for any clarifications and arrangements for the next day	Surveyors

## Itinerary – Single Campus - Day 2

Refer to the document “Y2\_ProgramInterviews\_WhatToExpect\_InPerson\_FINAL\_2021” for details about each meeting.

DAY	TIME	TITLE OF MEETING	PARTICIPANTS SHALL INCLUDE
Day 2			
	0900-0915	Clarification meeting	Residency Director and Residency Coordinator(s)
	0915-1000	<b>BREAK</b> and Surveyors meeting	Surveyors
	1000-1100	Closing remarks	Residency Director, Residency Coordinator(s), and Resident(s)  Others at the discretion of the program

## Itinerary Year 2 simultaneous/sequential with Year 1 – Single Campus - Day 1

Refer to the document “Y2\_ProgramInterviews\_WhatToExpect\_InPerson\_FINAL\_2021” for details about each meeting.

DAY	TIME	TITLE OF MEETING	PARTICIPANTS SHALL INCLUDE
Day 0		Review of survey documents at hotel	Surveyors
Day 1	0800-0830	Meeting with the CEO, Administrative person to whom Pharmacy Director reports	CEO or (Senior Administrative designate), Administrative person to whom Pharmacy reports, Residency Director and Coordinator(s), and Resident(s)
	0830-0900	Meeting with the Pharmacy Administrative Team  - include a handout, and time for further questions from the surveyors Rather than a formal presentation the administrative team is requested to provide in any format (e.g., word, ppt) the department’s strategic plan and any major changes to either the organization or to the pharmacy department since the last survey visit.	Residency Director, Residency Coordinator(s), Resident(s), and Pharmacy Leaders who provide direct support to the Residency Program  CEO or (designate) may attend
	0900-0930	Meeting with the Residency Program Director	Residency Program Director
	0930-1100	Meeting with the Coordinator(s) Questions from surveyors	
	1100-1200	Meeting with Residency Preceptor(s) (from <b>all</b> campuses, may set up teleconferencing if needed)	As many Residency Preceptor(s) as possible <b>except</b> the Residency Director, and Coordinator(s)
	1200-1300	<b>LUNCH</b>	Surveyors
	1300-1445	Meeting with the Resident(s)	Current Resident(s) and from one year previous if available
	1445-1515	Tour of Patient Care Area(s) where the resident is currently working or where a rotation has recently been completed	Pharmacist(s) regularly working in the Patient Care Area(s), Resident(s)
	1515-1545	Tour of Pharmacy Department	Manager of Operations or (designate), Resident(s)
	1545-1600	Check in with the residency coordinator	Residency Program Coordinators
	1600-	Review of on-site documents if required  Check in with Residency Coordinator(s) (or designate) for any clarifications and arrangements for the next day	Surveyors

## Itinerary – Single Campus - Day 2

Refer to the document “Y2\_ProgramInterviews\_WhatToExpect\_InPerson\_FINAL\_2021” for details about each meeting.

DAY	TIME	TITLE OF MEETING	PARTICIPANTS SHALL INCLUDE
Day 2			
	0900-0915	Clarification meeting	Residency Director and Residency Coordinator(s)
	0915-1000	<b>BREAK</b> and Surveyors meeting	Surveyors
	1000-1100	Closing remarks	Residency Director, Residency Coordinator(s), and Resident(s)  Others at the discretion of the program



## Itinerary – Two Campuses - Day 1

Refer to the document “Y2\_ProgramInterviews\_WhatToExpect\_InPerson\_FINAL\_2021” for details about each meeting.

DAY	TIME	TITLE OF MEETING	PARTICIPANTS SHALL INCLUDE
Day 1 <b>Combined campuses</b>	0800-0815	Meeting with the CEO, Administrative person to whom Pharmacy Director reports	CEO or (Senior Administrative designate), Administrative person to whom Pharmacy reports, Residency Director and Coordinator(s), and Resident(s)
	0815-0845	Meeting with the Pharmacy Administrative Team  - include a handout, and time for further questions from the surveyors - Rather than a formal presentation the administrative team is requested to provide in any format (e.g., word, ppt) the department’s strategic plan and any major changes to either the organization or to the pharmacy department since the last survey visit.	Residency Director, Residency Coordinator(s), and Resident(s) Pharmacy Leaders who provide direct support to the Residency Program  <i>CEO or (designate) may attend</i>
	0845-0915	Meeting with the Residency Program Director	Residency Program Director
	0915-1045	Meeting with Residency Coordinator(s) Questions from the surveyors	Residency Program Coordinator(s)
	1045-1100	<b>BREAK/TRAVEL</b>	Surveyors split up to travel to campuses. Please provide method of travel and travel times in advance
Day 1 <b>For each campus</b>	1100-1200	Meeting with the Residency Preceptor(s) at home sites	As many Residency Preceptors as possible <b>except</b> the Residency Director, and Coordinator(s)
	1230-1300	<b>LUNCH</b>	
	1300-1445	Meeting with the Resident(s)	Current Resident(s) and from one year previous if available
	1445-1515	Tour of Patient Care Area(s) where the resident is currently working or where a rotation has recently been completed	Pharmacist(s) regularly working in the Patient Care Area(s), Resident(s)
	1515-1545	Tour of Pharmacy Department	Manager of Operations or (designate), Resident(s)
	1545-1600	Travel to main campus	Surveyors
Day 1 <b>Combined</b>	1600 -	Review of on-site documents Check in with Residency Coordinator(s) or (designate) for arrangements for the next day	Surveyors

## Itinerary – Two Campuses - Day 2

Refer to the document “Y2\_ProgramInterviews\_WhatToExpect\_InPerson\_FINAL\_2021” for details about each meeting.

DAY	TIME	TITLE OF MEETING	PARTICIPANTS SHALL INCLUDE
Day 2			
	0900-0930	Travel to main campus	
	0930-0945	Clarification meeting	Residency Director and Residency Coordinator(s)
	0945-1015	<b>BREAK</b> and Surveyors meeting	Surveyors
	1015-1115	Closing remarks	Residency Director, Residency Coordinator(s), and Resident(s)  Others at the discretion of the program

## Itinerary – Multiple Campuses (up to 4) – Day 1

Refer to the document “Y2\_ProgramInterviews\_WhatToExpect\_InPerson\_FINAL\_2021” for details about each meeting. Please provide two separate meeting rooms.

DAY	TIME	TITLE OF MEETING	PARTICIPANTS SHALL INCLUDE
Day 1 <b>Combined</b>	0800-0815	Meeting with the CEO, Administrative person to whom Pharmacy Director reports	CEO or (Senior Administrative designate), Administrative person to whom Pharmacy reports, Residency Director, Coordinator(s), and Residents
	0815-0845	Meeting with the Pharmacy Administrative Team - include a handout, and time for further questions from the surveyors - Rather than a formal presentation the administrative team is requested to provide in any format (e.g., word, ppt) the department’s strategic plan and any major changes to either the organization or to the pharmacy department since the last survey visit.	Residency Director, Residency Coordinator(s), Resident(s), and Pharmacy Leaders who provide direct support to the Residency Program  <i>CEO or (designate) may attend</i>
	0845-0915	Meeting with the Residency Program Director	Residency Program Director
	0915-1045	Meeting with Residency Coordinator(s) Questions from the surveyors	Residency Program Coordinator(s)
	1045-1115	<b>TRAVEL</b>	Surveyors split up to travel to campuses. Please provide method of travel and travel times in advance
	1115-1245	Meeting with Residency Preceptor(s) at home sites	As many Residency Preceptors as possible <b>except</b> the Residency Director, and Coordinator(s)
	1245-1315	<b>LUNCH</b>	Surveyors split up to travel to campuses. Please provide method of travel and travel times in advance
Day 1 <b>For each campus</b>	1315-1345	Tour of Pharmacy Department	Manager of Operations or (designate), Resident(s)
	1345-1415	Tour of Patient Care Area(s) where the resident is currently working or where a rotation has recently been completed	Pharmacist(s) regularly working in the Patient Care Area(s), Resident(s)
	1415-1445	Travel to main campus	Surveyors
Day 1 <b>Combined</b>	1445-1630	Meeting with Resident(s)	Current Resident(s) and from one year previous if available
	1630-	Review of on-site documents if required Check in with Residency Coordinator(s) or (designate) for arrangements for the next day	

## Itinerary – Multiple Campuses (up to 4) – Day 2

Refer to the document “Y2\_ProgramInterviews\_WhatToExpect\_InPerson\_FINAL\_2021” for details about each meeting.

DAY	TIME	TITLE OF MEETING	PARTICIPANTS SHALL INCLUDE
Day 2 <i>For each campus</i>	0830-0900	Meet at main campus or travel to other campuses	Surveyors
	0900-0945	Tour of Pharmacy Department	Manager of Operations or (designate), Resident(s)
	0945-1015	Tour of Patient Care Area(s) where the resident is currently working or where a rotation has recently been completed	Pharmacist(s) regularly working in the Patient Care Area(s), Resident(s)
	1015-1100	Travel back to main campus	Surveyors
	1100-1115	Clarification meeting with Residency Director and Coordinator(s)	Residency Director and Residency Coordinator(s)
	1115-1145	Break and Surveyors meeting	Surveyors
	1145-1245	Closing remarks	Residency Director, Residency Coordinator(s), and Resident(s)  Others at the discretion of the program