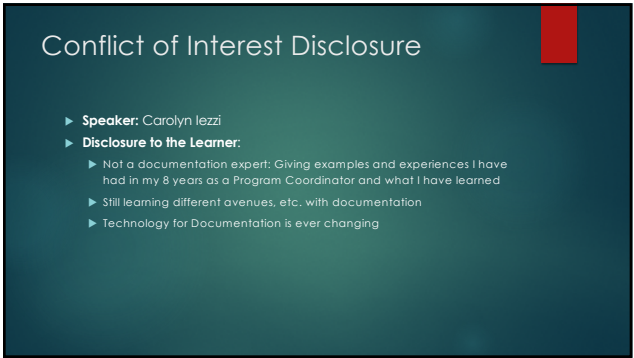
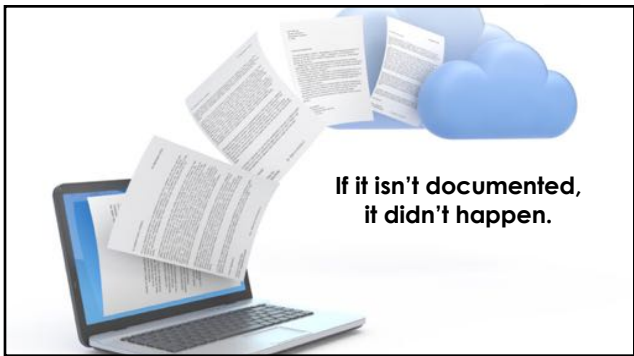




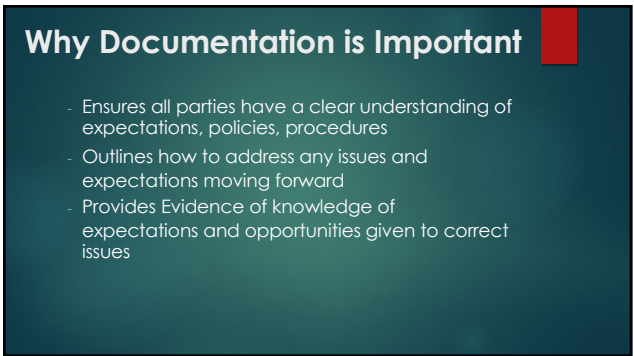
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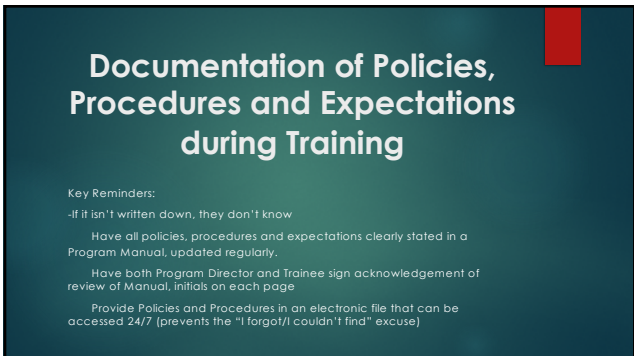
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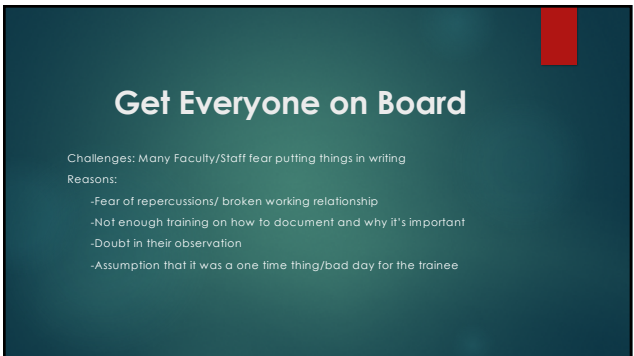
3



4



5




6

Solutions:

- Provide training for faculty/staff on importance of documentation
- stress the importance of trainees needing feedback (good or bad) and why
- explain how documentation doesn't have to be negative, show how it can be positive and constructive
- train faculty and staff how to give constructive criticism and how to properly document
- Remind faculty/staff the expectation of working at a teaching institution, feedback and documentation is expected

Note: expectations, policies and procedures should also be given to faculty/staff


- send when hired and yearly reminder



7

Document it Immediately

- ensures nothing is forgotten
- ensures proper time frames/documentation is as accurate as possible



8

Types of Documentation and Sources to get the Job Done



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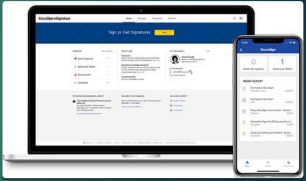
DocuSign

Reason to use it:

- legally binding in most cases
- DocuSign confirms it is in full compliance with the privacy and security requirements of HIPAA, and its service meets HHS standards for digital signatures.

What to use it for:

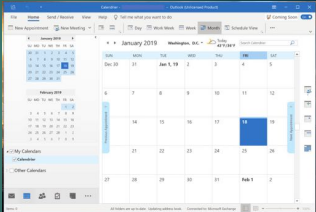
- offer letters
- contracts
- program manuals
- evaluation reviews



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Use your calendar

- one-off conversations (can be important later on)
- appointments (exams, Dr., wellness, etc.)
- all off days and reasoning
- deadlines (prevents the "I forgot/I didn't know" excuse)

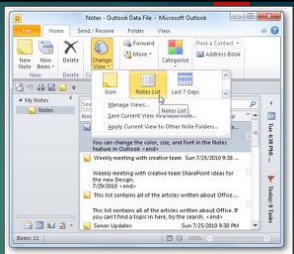


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Take Note

When to use it


- meetings
- conversations



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“Per our Conversation”

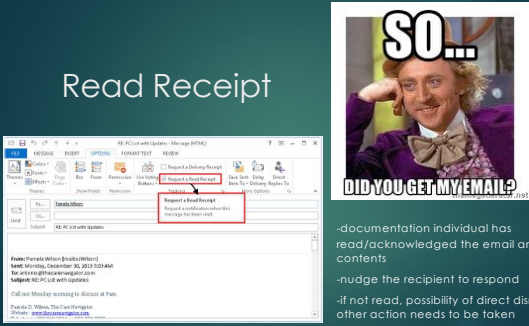
No, you're NOT a Karen!



1. Allows both parties to agree on what was discussed
2. Prevents confusion of expectations
3. Provides a detailed review of what was discussed
4. Always
5. save to files

13


Read Receipt



- documentation individual has read/acknowledged the email and it's contents
- nudge the recipient to respond
- if not read, possibility of direct disregard, other action needs to be taken

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Electronic Files




- Provides HouseStaff access to their files 24/7, meeting ACGME requirements
- Provides all evaluations, milestones, documentation within reach to program and trainees
- Allows more documentation compared to paper files
- Easier to save items

Notes: Make sure trainee is marked as "Read Only" to prevent editing of documents

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Three's Company



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Why three?

- prevents he said she said
- allows meeting minutes/notes to be taken for documentation
- provides professional feedback/discussions

Note: Try having an agenda sent out for every meeting. Allows both parties to know what will be discussed and prevents the meeting from going off the topic

- also allows both parties to contribute to meeting discussion

Follow-up with an email detailing meeting discussion, minutes and outcome
 Goal: Be specific in expectations and communication, be detailed, take notes

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ZOOM Recording



- great feature for meetings
- prevents any confusion/argument of what was discussed

Note: be mindful of what is discussed/said "other people are listening"

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Screen Shot



Ways of Communications have changed within programs and texting is now a regular form of communication within programs.
-always screenshot discussions, reminders, etc., and save to their files

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Who to consult when issues arise

- ACGME
- DIO
- Chair
- Chiefs
- ABA
- Institution Legal/ Team
- HR
- Clinical Competency Committee

Note: still make sure to have everything in writing, meeting minutes should be taken on all meetings, per our conversation e-mail follow-ups with phone conversations

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In Summary



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