

REMEDIATION STEPS CHECKLIST

- Gather written examples of the learner's deficits
 - Helpful to have multiple examples from multiple sources so it doesn't become a case of "he says/she says", but rather can show a pattern of how the learner is perceived
 - Types of evaluation:
 - 360-degree evaluations can be very helpful
 - Critical Incident Reports (e.g., Praise/Early Concern Card developed by the ABIM)¹
 - Professionalism Mini-Evaluation Exercise (P-MEX)²
- 1st Remediation Review Meeting
 - Review evaluations with Learner
 - Gather his/her ideas regarding who a good Advocate and Coach would be (see below)
- Create a remediation team, which would ideally include the following people (all of whom should be able to have continuous involvement with the learner to create trust and a consistent approach; goal is to promote fairness; no "conflict of interest):
 - Advocate: often his/her advisor
 - Role: to attend progress meetings and serve as an advocate for the learner
 - Coach ("neutral" mentor): often an associate director
 - Role: guide the learner through remediation exercises, may perform some evaluation
 - Director(s): often the program or clerkship director
 - Role: final "decision-maker"
 - Note: this person should not do front-line evaluations
 - Front-line Evaluators (multiple)
 - Role: to provide input on learner performance/application of goals/skills
- Create a remediation plan
 - Initial planning:
 - Decide which remediation exercises to use
 - Discuss plans with another educator initially and regularly to ensure more than one educator in agreement with plan
 - Contact GME Office/Medical School/Legal Department as appropriate
 - Document domains of concern (diagnose Learner)
 - Document goals or expectations, especially *minimal expectations*
 - Document how to achieve goals (# of sessions, content, expectations/homework)
 - Document evidence of achievement
 - Document action if remediation plan is not achieved
 - Have all members of remediation team sign the contract
- Create a calendar that details timing of coaching sessions and remediation review sessions
 - When planning remediation sessions, consider scheduling 15 extra minutes post-meeting to record results and happenings from every session in real time to reflect each member(s) perspective
- Document
 - Coaching sessions and progress
 - Interval progress review meetings with Director, Coach, Advocate, and Learner
 - Any meetings held about the learner in his/her absence
 - Have attendees sign the minutes
 - Record time spent
 - Recommend keeping a separate record that includes your perspective from every remediation interaction/teaching session, whatever your role. Often remediation events are recollected and/or perceived differently by the Learner, Coach, Advocate, and Evaluators, so written real-time notes that are as detailed and specific as possible are ideal.

REMEDIATION STEPS CHECKLIST CONTINUED

Note: It is controversial whether or not to share information with upcoming faculty

- Able to help coach vs. unfair bias
- Review policies in place at your own institution before “passing information forward”
- Consider sharing information with lead supervisors only so that evaluators’ schedules can be lightened/adjusted accordingly while keeping information from front-line evaluators to ensure evaluations are as bias-free as possible

¹ ABP and APPD, Teaching and Assessing Professionalism": A Program Director's Guide, page 61, 2008.

² ABP and APPD, Teaching and Assessing Professionalism": A Program Director's Guide, page 62, 2008.