

Document Number: CRMEC Policy 16

Document Name: Accreditation Visit Observers

Scope

This policy sets out a clear role for observers of accreditation survey visits.

Overview

The Canberra Region Medical Education Council (CRMEC) may include observers on accreditation visits. Observing an accreditation visit provides individuals with an opportunity to learn how a visit is conducted, including the way in which interviews are conducted and how survey teams review the information and make decisions. This experience contributes to initial and continuing training for surveyors. Observing a visit can be beneficial for representatives from facilities in preparation for their own accreditation visit. Observing survey visits in other jurisdictions can help postgraduate medical councils and other organisations develop their own procedures and processes. Therefore, the CRMEC is supportive of facilitating observation of survey visits.

Process

An observer's attendance at an accreditation visit may be initiated by invitation from the CRMEC or through a request from a health service. Observers generally undertake observation of an accreditation survey visit as a part of accreditation survey training, although they may also be a representative from an unrelated health service preparing for an accreditation visit.

Eligibility

Before being accepted as an observer an accreditation visit, observers are required to:

- Have undergone appropriate preliminary training, conducted either by the CRMEC, an equivalent Postgraduate Medical Council or another related organisation offering accreditation training.
- Have made a declaration of perceived or actual conflicts of interest that is accepted by the CRMEC and the health service undergoing accreditation.
- Have completed a confidentiality agreement.
- Be accepted as an observer by the CRMEC Director and accreditation survey visit team leader.

Acceptance as an observer

The CRMEC does not require its surveyors to undertake an observation as a part of surveyor training but may offer observation (within the ACT training network or elsewhere) as an opportunity for additional training. Some individuals who have participated in surveyor training may request the opportunity to observe a visit.

The CRMEC Director will evaluate all applications for participation as an observer. Considerations might include the size of the health service, the size of the formal accreditation survey team, and any issues related to the specific accreditation survey visit.

The survey team leader will be advised when an observer may be attending with the team and will have the opportunity to raise any legitimate concerns with the CRMEC Director.

The health service will be informed of the name of the observer along with the names of the formal accreditation survey team members. The health service's rights to raise an objection to inclusion of a specific

individual outlined in *Policy 15: Selection, Appointment and Training of Accreditation Surveyors* extends to potential observers.

Conflict of Interest and Confidentiality

Any identified or perceived conflict of interest should be declared to the CRMEC by the observer and may, at the discretion of the CRMEC Director, disqualify an observer from participating in an accreditation visit. As for formal members of the accreditation survey team, the health service will be advised of the intended participation of an observer and have an opportunity to raise any objection or concerns related to conflict of interest. The procedures surrounding declaration and management of conflicts of interest are outlined in *Policy 04: Conflict of Interest*.

Individuals are required to sign and return a confidentiality agreement prior to observing an accreditation survey visit. Observers must treat all documentation and information associated with an accreditation visit confidentially and must return all documentation and notes to the CRMEC after the visit and any associated meetings.

All communication related to the accreditation visit should be made through the CRMEC Director or the accreditation survey team leader, the observer should not communicate directly with the health service on any matter arising from an accreditation survey visit.

Activities as an observer

Prior to observing an accreditation survey visit the observers should familiarise themselves with the CRMEC policies associated with accreditation processes and any additional documents provided by the CRMEC Director.

Observers will be considered supernumerary and should not undertake survey responsibilities (e.g., interviewing, communicating with the health service) without the guidance or supervision a formal accreditation team member. The survey team leader/s may, at their discretion, assign duties to the observer to assist team members while on the visit.

Observers will generally be present for the duration of an accreditation visit, including any pre and post accreditation visit team meetings. Observers will be present at interviews conducted with the health service staff; however, the observer may not independently pose questions to interviewees as part of the accreditation process.

Observers may feel free to contribute to discussions in closed team meetings and can be present when the team develops the accreditation report but should not influence the team's decisions.

As part of the CRMEC quality assurance process, observers may be requested to provide feedback on the visit or the accreditation process. This feedback will be treated as confidential and not divulged without prior consent. Observers will not be asked to audit the performance of survey visit team members or CRMEC staff.

Costs

It is expected that the observer and/or the observer's organisation will meet any costs associated with participation in an accreditation survey visit. The CRMEC will negotiate costs with observers when the CRMEC initiates the observation experience (e.g., as continuous professional development for CRMEC surveyors). For surveyors employed in public health facilities, it is generally expected that observing a survey visit be rostered as professional training time.

Related Policies and Relevant Guidance

- The Australian Medical Council (AMC). *New National Framework for Prevocational (PGY1 and PGY2) Medical Training (2024+)*, 2023. <https://www.amc.org.au/accredited-organisations/prevocational-training/new-national-framework-for-prevocational-pgy1-and-pgy2-medical-training-2024/>
- Australian Medical Council: *National Standards for Prevocational (PGY1 and PGY2) Training Programs and Terms*, 2023. <https://www.amc.org.au/accredited-organisations/prevocational-training/new-national-framework-for-prevocational-pgy1-and-pgy2-medical-training-2024/>
- Australian Medical Council: Requirements for Prevocational (PGY1 and PGY2) Training Programs and Terms
- Australian Medical Council: Domains for assessing and accrediting prevocational training accreditation authorities.
- CRMEC Policy 04: Conflict of Interest
- CRMEC Policy 06: National Standards
- CRMEC Policy 07: Overview of Accreditation
- CRMEC Policy 09: Accrediting a Full Health Service
- CRMEC Policy 15: Selection, Appointment and Training of Accreditation Surveyors

Version Control

Review Date	Version	Updated by	Approved by	Changes made
May 2014	1.0	CRMEC	CRMEC	
May 2016	2.0	Director	Director	Formatting
August 2017	2.1	Admin	Director	Formatting
August 2020	2.2	CRMEC PA	Director	Layout, added new subheadings to organise information, added overview.
February 2023	2.3	Admin	Director	Formatting
Jan 2024	2.4	Director	N/A	Terminology review for consistency with new National Framework and related documents added