peer advisory CONVERSATION

Participant Information Package

March 2024

CVO
College of Veterinarians of Ontario

Public confidence in veterinary regulation.

Dear Colleague,

Thank you for volunteering to participate in the Peer Advisory Conversation! The College is pleased to confirm your involvement as a conversation participant.

A Peer Advisory Conversation is a transparent, practical, and effective way for Ontario veterinarians to promote and enhance the quality of their practices and demonstrate to the public their commitment to improving animal care through ongoing professional development. The conversation with a veterinary peer is designed to be educational and supportive in nature.

A veterinarian, trained as a Peer Advisor by the College, will conduct the conversation with you. This is an opportunity for you to share your practice experiences with a colleague and reflect on your professional knowledge, skills, and development. The conversation promotes reflective practice and provides tools and resources to assist veterinarians in their professional development.

As a participant, you will participate in a conversation focused on three areas:

- Continuing Professional Development (CPD) Discussion;
- Medical Records Review and Chart Stimulated Recall (CSR)/Case Based Discussion; and
- Non-Technical Skills Discussion

Following the Peer Advisory Conversation, you will receive a report from the Peer Advisor which will include a summary of areas of strength and opportunities for ongoing learning identified during the conversation, and a list of relevant resources.

This package contains information you will need throughout the Peer Advisory Conversation process. Further information including the complete conversation tools is available on the College website at www.cvo.org/PAC.

The College welcomes your feedback related to your experience as a participant. We will invite you to complete two post-conversation surveys; one immediately following your conversation with the Peer Advisor, and the other will accompany the final report that will be mailed to you. Your comments will assist the College with further improvement of the program.

If you have any questions, please do not hesitate to contact Emily Ewles, Principal, Quality Assurance & Improvement, at 1-800-424-2856 ext. 2240 or eewles@cvo.org.

Sincerely,

KLambert

Kim Lambert, DVM, MSc
Associate Registrar, Regulatory Programs
College of Veterinarians of Ontario

Table of Contents

Peer Advisory Conversation

The College of Veterinarians of Ontario has introduced the Peer Advisory Conversation, a voluntary program launched in 2021. The conversation supports veterinarians in assessing their practice against professional standards and identifying opportunities for learning. The program will be considered as a core component of a future mandatory Quality Assurance Program.

Goal and Objectives

The goal of the Peer Advisory Conversation is to provide a positive learning experience and support for veterinarians in providing safe, competent care that is consistent with current practice standards and is in the best interest of those they serve.

The objectives of the Peer Advisory Conversation are to:

- Support a veterinarian's performance in relation to their scope of practice;
- Provide a positive educational experience for the veterinarian through a two-way conversation with a Peer Advisor;
- Be applicable to all areas of practice;
- Be feasible in cost and time;
- Be acceptable to the profession; and
- Provide useful feedback to the veterinarian.

Benefits of Participating

As a participant in the Peer Advisory Conversation, you will have the opportunity to:

- Share your experiences with a peer
- Bounce ideas off of a colleague
- Learn something new
- Get feedback on how to focus your continuing professional development
- Contribute to the profession's responsibility to ensure quality care through quality assurance activities.

Peer Advisors

Peer Advisors are approved by the Quality Assurance Committee and participate in a rigorous training process. Their leadership and commitment to quality practice in the profession is appreciated.

Dr. Leann Benedetti
Dr. Sarah Charron
Dr. Michael Corradini
Dr. Maggie Himann
Dr. Shannon Howitt
Dr. Wendy Menary
Dr. Paul O'Neill
Dr. Karen Ward
Dr. Barbara Winslow
Dr. Maher Zaytoun

Timeline

The following timeline provides an overview of the steps involved in the Peer Advisory Conversation process.

Day 1

PARTICIPANT
Sign up to participate at www.cvo.org/PAC

COLLEGE STAFF
You will receive a confirmation of your participation and the Pre-Conversation Questionnaire.

PARTICIPANT — **Day 1**
Submit your completed Pre-Conversation Questionnaire.

Week 1

COLLEGE STAFF — **Week 1**
You will be matched with a Peer Advisor and will receive an information package from the College.

Week 2

PEER ADVISOR — **Week 2**
You will be contacted by your Peer Advisor.

Week 3

PARTICIPANT — **Weeks 2-4**
Submit medical records of four (4) cases to the College.

Week 4

PEER ADVISOR — **Weeks 4-6**
Your Peer Advisor will review the cases you submitted and the Peer Advisory Conversation will be scheduled.

Week 5

PARTICIPANT — **Weeks 4-6**
Complete the Pro-QOL and review the conversation tools.

Week 6

Week 7

PARTICIPANT & PEER ADVISOR — **Weeks 7-8**
The Peer Advisory Conversation will be conducted online, by telephone, or in-person using guided tools. The conversation will be approximately 2 hours. The participant will complete a Post-Conversation Questionnaire.

Week 8

Week 9

PEER ADVISOR — **Weeks 9-10**
Your Peer Advisor will submit a Summary Report and completed tools to the College.

Week 10

Week 11

COLLEGE STAFF — **Week 11**
You will receive your Peer Advisory Conversation Report and a Post-Report Questionnaire.

Week 12

PARTICIPANT — **Week 12**
Complete the Questionnaires to share your feedback with the College!

Preparing for Your Peer Advisory Conversation

The following checklist will assist you in preparing for your Peer Advisory Conversation. Each of these steps is described in detail on the pages that follow.

Steps in the Peer Advisory Conversation Process	Participant Checklist
1. Submit your Pre-Conversation Questionnaire to the College.	☐
2. You will be matched with a Peer Advisor and you will receive an information package from the College within one week.	Completed by College Staff
3. The Peer Advisor assigned to you will contact you the following week to introduce themselves and outline next steps.	Completed by Peer Advisor
4. Select four (4) cases[1] that will be reviewed by the Peer Advisor and complete a Case Cover Sheet for each case. Submit copies of medical records for each case to the College within three weeks of receiving your information package.	☐
5. Complete the Professional Quality of Life Scale (ProQOL). The Peer Advisor will discuss this tool with you during the conversation.	☐
6. Your Peer Advisor will contact you and together you will schedule an agreed upon date for your Peer Advisory Conversation. The Conversation should take place within eight weeks of the date you submitted your Pre-Conversation Questionnaire.	☐
7. Ensure you have a private space reserved where you and the Peer Advisor can meet or where you can utilize Zoom audio and video conferencing without interruption.	☐
8. Review and update your CPD Activity Log. The Peer Advisor will discuss your CPD activities with you during the conversation. The CPD Activity Log is available in the Professional Practice Portal.	☐
9. Review the questions you will be asked during the Peer Advisory Conversation and any Professional Practice Standards or resources you think would be helpful. The conversation tools are available at www.cvo.org/PAC.	☐
10. Complete the Peer Advisory Conversation on the date you have scheduled with your Peer Advisor. The conversation will be approximately 2 hours.	☐
11. Complete the Post-Conversation Questionnaire you will receive following your conversation.	☐
12. You will receive your Peer Advisory Conversation Report and a Post-Report Questionnaire within four weeks of completing the conversation.	Completed by College Staff
13. Complete your Post-Report Questionnaire to share your feedback with the College.	☐

[1] Review the Guidelines on Selection of Cases and Submission of Medical Records prior to selecting your records. The Guidelines are available in the appendix on page 16.

Steps in the Peer Advisory Conversation Process

Step 1: Submit your Pre-Conversation Questionnaire

The get the Peer Advisory Conversation process started, complete a Pre-Conversation Questionnaire. The information you provide on the Questionnaire will be used to assist the College with matching you with a Peer Advisor. Your completed Pre-Conversation Questionnaire will be provided to your Peer Advisor and will assist them with understanding your learning goals and scheduling the conversation.

a) The Pre-Conversation Questionnaire will be provided via email.

b) Submit your completed Questionnaire to: qualityassurance@cvo.org or (519) 824-6497/1-888-662-9479 (fax).

Step 2: Peer Advisor Match

College staff will review your Pre-Conversation Questionnaire and match you with a Peer Advisor. You will receive an email from the College advising you of the match. This information package will be included in the email. Conversations can be conducted in-person or online via Zoom audio and video conferencing.

Step 3: Peer Advisor Introduction

The Peer Advisor assigned to you will contact you the following week to introduce themselves and outline next steps. Feel free to communicate directly with your Peer Advisor should you have any questions regarding the process.

Step 4: Select Four (4) Cases and Submit Medical Records

Four (4) cases that you have selected will be reviewed by the Peer Advisor and used as the basis for the Chart Stimulated Recall (CSR)/Case Based Discussion. It is anticipated that participants will spend approximately two hours collecting and submitting medical records.

a) Review the Guidelines on Selection of Cases and Submission of Medical Records in the appendix on pages 16-17.

b) Using the submission criteria provided in the Guidelines, select four cases, complete a Case Cover Sheet for each case, and submit medical records to the College. The case cover sheet will be provided via email.

c) Upload copies of these records including relevant components to the CVO Cloud Drive. **We ask that you please submit your medical records within three (3) weeks of receiving this information package from the College.**

Step 5: Complete the ProQOL

The Professional Quality of Life Scale (ProQOL) is a self-assessment tool that will be used in the Non-Technical Skills Discussion. Take a few moments to review and complete this tool prior to your Peer Advisory Conversation. You will not be asked to submit your completed ProQOL or share any specific details; however, your Peer Advisor will discuss the tool with you in general during the conversation.

a) The Professional Quality of Life Scale (ProQOL) will be provided by email.

b) Complete the ProQOL and keep a copy for your reference during the Peer Advisory Conversation.

Step 6: Schedule the Conversation

Your Peer Advisor will contact you and together you will schedule an agreed upon date for your Peer Advisory Conversation. The Conversation should take place within eight weeks of the date you submitted your Pre-Conversation Questionnaire.

Step 7: Reserve a Private Space

Ensure you have a quiet space reserved where you and the Peer Advisor can meet or where you can utilize Zoom audio and video conferencing without interruption.

Zoom Audio and Video Conferencing

If your conversation will be conducted remotely, your Peer Advisor will send you an email with instructions to join the call. The following additional instructions may also be helpful to you:

a) Reserve a space where you will have access to a computer or mobile device, a webcam, and a telephone or a wired headset (headphones and microphone).

b) Let your Peer Advisor know if you do not have a webcam, or a high-speed Internet connection. In this case, calling in by phone only may be more appropriate.

c) Determine how you will join the call. You can simply click on the link to the Zoom meeting provided by the Peer Advisor and click “Join with computer audio”.

   Alternatively, you can download the Zoom mobile app to join the call from your Apple or Android device. A Windows Desktop app is also available. Call from the app by selecting “Join” and entering the meeting ID provided.

   - **Zoom Download Centre:** https://zoom.us/download

Step 8: Review your CPD Activity Log

Review and update your CPD Activity Log. The Peer Advisor will discuss your CPD activities with you during the conversation. Your Peer Advisor will not receive a copy of your CPD Activity Log, and your log will not be audited; however, it will be helpful to the flow of the conversation if you are familiar with some activities you have completed within the past year.

If you use the online CPD Activity Log provided by the College, it can be accessed in the Professional Practice Portal at https://cvo.ca.thentiacloud.net/webs/cvo/service/#/

Step 9: Review the Conversation Tools

Review the questions you will be asked during the Peer Advisory Conversation and any Professional Practice Standards or resources you think would be helpful.

It is recommended that you don't "complete" the conversation tools in advance as this may hinder the natural flow of the conversation; however, for questions that ask for examples of situations in practice, you may wish to have some situations in mind to share with your Peer Advisor during the conversation.

You should also be familiar with documents and standards that relate to your area of practice and know how to locate relevant information. There is no expectation that you will be able to recite information from the documents.

a) Review the conversation tools on the College website:

- **Medical Record Review**
- **Continuing Professional Development (CPD) Discussion**
- **Chart-Stimulated Recall (CSR)/Case Based Discussion**
- **Non-Technical Skills Discussion**

b) Review any Professional Practice Standards or policies on the College website you think would be helpful.

- **Standards:** https://www.cvo.org/standards

Step 10: Complete the Peer Advisory Conversation

Complete the Peer Advisory Conversation on the date you have scheduled with your Peer Advisor. The conversation will be approximately two hours in length, with a set amount of time allocated to each focus area.

2 hours

Continuing Professional Development (CPD) Discussion	30 minutes
Chart Stimulated Recall (CSR)/Case Based Discussion	60 minutes (15 minutes per case)
Non-Technical Skills Discussion	30 minutes

For instructions on using Zoom Audio and Video Conferencing, see Appendix pages 16-17.

Step 11: Provide Feedback to the College

Complete your Post-Conversation Questionnaire to share your feedback with the College! The Post-Conversation Questionnaire is your opportunity to convey your opinion to the College about your experience as a participant.

Your feedback is welcome and is essential to our evaluation of the program. Your feedback will also be used to assist with the evaluation of the performance of your Peer Advisor. Your responses are confidential and will only be shared in aggregate form.

Step 12: Receive your Peer Advisory Conversation Report

You will receive your Peer Advisory Conversation Report and a Post-Report Questionnaire within four weeks of completing the conversation.

The report has been password protected to safeguard confidentiality. The password to open the report is your last name (in all lowercase letters) followed by your licence number. For example: smith1234

Step 13: Provide Feedback to the College

Complete your Post-Report Questionnaire to share your feedback with the College! The Post-Report Questionnaire is your opportunity to convey your opinion to the College about your experience as a participant.

Thank You!

We hope that your participation in the Peer Advisory Conversation provides you with a positive learning experience and support in providing quality care to those you serve.

Don't forget to log your participation as a CPD activity!

Frequently Asked Questions

Are clients and patients directly involved in the Peer Advisory Conversation?

No. Clients and patients are not involved in the discussion. The conversation does include a case review and a discussion about patient care, but Peer Advisors do not observe treatments.

Are the questions the advisor will ask me available to review prior to the Peer Advisory Conversation?

Yes. The conversation tools and forms are available on the College website at: www.cvo.org/PAC

Where should I schedule the Peer Advisory Conversation?

Ensure you have a private space reserved where you and the Peer Advisor can meet or where you can utilize Zoom audio and video conferencing without interruption.

Can I share my experience with the Peer Advisory Conversation with others?

Yes, participants are free to share their own experience. The conversation tools and forms are available on the College website. Sharing of the discussion details (i.e. the specifics of the cases discussed, etc.) and written report is up to the participant; participants may share these with others if they want to.

Can the results of my Peer Advisory Conversation be made public on the Public Register?

No, the Peer Advisory Conversation Report is confidential, and results will not be made public on the Public Register.

Can the Peer Advisory Conversation Report be shared with College committees?

No, the Peer Advisory Conversation Report is confidential and cannot be shared with College committees. In exceptional cases, serious concerns identified by the Peer Advisor may be brought to the Registrar for review. This only happens if public safety is a significant concern and only the area(s) of risk or concerns will be brought forward; the Report will not be shared.

Do I need client consent to submit medical records to the College?

No. The College is permitted by law to review medical records kept by members to determine if requirements and standards are being met. The College has strict privacy and security guidelines in place to protect confidential information.

Do I need to know everything in the College Professional Practice Standards and policy documents prior to my Peer Advisory Conversation?

You should be familiar with documents and standards that relate to your area of practice and know how to locate relevant information. There is no expectation that you will be able to recite information from the documents.

Does my employer have to pay me for my time spent in the Peer Advisory Conversation?

An employer is not obligated to pay employees for time spent participating in a Peer Advisory Conversation. Conversations can be scheduled at your convenience. In the Pre-Conversation Questionnaire, you will be asked to select preferred days of the week and preferred times for the conversation which may include morning, afternoon or evening time slots.

How are the Peer Advisors selected and trained?

Peer Advisors apply and are selected based on the information they submit as well as an interview. Once selected, a Peer Advisor undergoes a rigorous training process. Following that they must complete a full Peer Advisory Conversation of their own before starting to be active as an advisor. Data will be collected around the Peer Advisor’s performance. The information will be reviewed and used to provide feedback to the Peer Advisor on their activity. Peer Advisors will participate in ongoing training.

How is conflict of interest addressed in the Peer Advisory Conversation?

Each volunteer is provided with a list of Peer Advisors and asked to indicate if there is a conflict of interest with anyone on the list. Questions to guide this decision are:

- Have you had a working or personal relationship with this individual in the past (e.g. an acquaintance, a close friend, a competitor)?
- How close were your interactions?
- How long ago was this relationship?
- Could you or the facility in which you work reasonably be viewed as a competitor to the licensed member/Advisor (e.g., for patients, clients, referral sources, etc.)?

How is the Peer Advisor chosen for my Peer Advisory Conversation?

There is an effort to match participants with Peer Advisors who have similar experience. When this is not possible, Peer Advisors are made aware of the circumstances relevant to your scope of practice.

Is there a cost to me to participate in the Peer Advisory Conversation?

No. There is no cost to participate in the Peer Advisory Conversation. The development of the Peer Advisory Conversation is funded through the College's Quality Assurance Program.

What happens after the Peer Advisory Conversation?

The Peer Advisor submits a written report to the College. College staff on the Quality Practice Team reviews the report and provides the participant with the final report. Reports are confidential, and information gathered from reports will only be shared in aggregate form. It is anticipated that participants will receive the report within four weeks of their Peer Advisory Conversation.

The participant will be invited to complete two post-conversation surveys; one immediately following the conversation with the Peer Advisor, and the other will accompany the final report that will be mailed to the participant. The survey comments will assist the College with further improvement of the program.

What information does the Peer Advisor receive prior to the Peer Advisory Conversation to help them prepare?

Peer Advisors receive the contact information and the practice information that the participant has provided on the Pre-Conversation Questionnaire. The Peer Advisor is also provided with the four medical records that were submitted by the participant for case review and discussion.

The advisor is not informed of previous history, complaints, any published discipline summaries or other College matters.

What is the timeline for conducting a Peer Advisory Conversation?

For an individual conversation, it is anticipated that the process will be completed approximately 12 weeks from the date your Pre-Conversation Questionnaire is submitted. See the timeline on page 5 for further information.

Who can volunteer to participate in a Peer Advisory Conversation?

Any licensed veterinarian in clinical practice can volunteer to participate.

Who selects the cases to be reviewed and discussed during the Peer Advisory Conversation?

Volunteers select their own cases for review and discussion. See the Guidelines on Case Selection and Submission of Medical Records on page 16-17 for more details.

Will information about the results of my Peer Advisory Conversation be shared with my employer?

No. The College does not share any information about a participant's Conversations with his/her employer.

If your question wasn't answered here, please contact:
qualityassurance@cvo.org or (519) 824-5600/1-800-424-2856

Appendix

Guidelines on Selection of Cases and Submission of Medical Records

During the Peer Advisory Conversation, the Peer Advisor will discuss four (4) recent cases that you have treated using the Chart-Stimulated Recall (CSR)/Case Based Discussion Conversation Tool. For this purpose, please select four cases and submit the relevant medical records for each case prior to the conversation. Records for each case must be submitted to the College before the conversation can be scheduled. Keep the following guidelines in mind when selecting cases.

1. Cases should represent the breadth of your practice. Select cases that represent a variety of conditions and not all one type of animal or condition if applicable. If you provide veterinary dentistry services in your practice, please include medical records for one dentistry case. This case will be discussed using the same questions as a surgical case.

2. Select cases that are representative of the common conditions you see in your practice.

3. Submit more recent cases, from the past two years. When submitting records for chronic cases, please choose one that has been diagnosed in the past one to two years, with at least two follow-up assessments. The records prior to the diagnosis are not required to be submitted.

4. Each case and their accompanying medical record should reflect one of each of these focus areas:
    a. A surgical case (or dentistry case)
    b. An emergency case or acute condition
    c. A wellness or routine visit
    d. A chronic condition diagnosed within the past two years or, if not relevant, a complex diagnosis

Once selected, submit a copy of the medical record for each case. Please do not submit original records. Use one Case Cover Sheet for each case and organize the relevant record components that will help the Peer Advisor understand and follow the chronology of the case.

The following record components should be submitted for each case, if applicable:

- Client/Patient Identification Form(s)
- Emergency Contact Information
- Consent Forms
- Client communications (discharge instructions, home care templates, discussion notes)
- History/PE Information
- SOAP/DAP Forms, Progress Notes
- Protocols (i.e. surgical)
- Laboratory Reports
- Digital copies of diagnostic imaging (i.e., radiographs)
- Controlled Drug Logs
- Referral Letters
- Estimates, Invoices
  (you may redact prices if you wish)
- Monitoring Forms, Flow Sheets

The following is a general guideline for what information to include for each case type:

- **Surgical Case:** include the pre-surgical assessment visit, the surgery, and the post-surgical assessment visit, as applicable

- **Emergency Case or Acute Condition:** include records from first diagnosis until resolution, as applicable
- **Wellness or Routine Visit:** include records that are applicable for that wellness/routine visit; if puppy or kitten wellness visits, then can include the whole vaccine series
- **Chronic Condition:** please choose one that has been diagnosed in the past one to two years. Include records from first diagnosis and at least two follow-up assessments

For radiographs, provide digital copies, if possible; please do not submit originals. If your practice does not have digital radiographs, please submit digital photos taken from the original radiographs.

Please complete a **Case Cover Sheet** for each case and submit it with the copy of the record.

Submission of Medical Records

The College has considered best practices for security of transferring medical records for the Peer Advisory Conversation and has implemented a system that will allow you to securely upload medical records to the CVO Cloud Drive.

Once you have been matched with a Peer Advisor, you will receive an email inviting you to upload your medical records to a secure folder on the CVO Cloud Drive.

Please use the link to upload the four (4) medical records you have selected to use in the Peer Advisory Conversation.

If you are uploading multiple files for one medical record, it is recommended that you combine them into a compressed (zipped) folder named with the case type (e.g. surgical case, wellness visit, etc.), or begin the file names with the case type so that your Peer Advisor can easily identify which files belong to which medical record.

We ask that you please upload your medical records within three (3) weeks of receiving your information package from the College.

If you have any questions regarding selection and submission of medical records, please contact:

qualityassurance@cvo.org
1-800-424-2856

Zoom Audio and Video Conferencing

If your conversation will be conducted remotely, your Peer Advisor will have sent you an email with instructions to join the meeting. The following additional instructions may also be helpful to you:

Option 1: Call with the Zoom Desktop Client or by logging into your Zoom account through your internet browser:

1. Open your Zoom Desktop Client or go to https://zoom.us/signin and login to your account**.**
2. Click on **the link provided to you by the Peer Advisor**.
3. Click **Join with computer audio**. A wired headset (headphones and microphone) is recommended.
4. To **call in by phone**, choose your location and number, call in on your phone, and enter the meeting ID.

Option 2: Call using audio only from your phone

You can join a Zoom meeting as an audio-only participant from your phone.

1. Call the phone numbers listed under **Dial by your location**.
2. Enter the meeting ID when prompted.

Option 3: Call from your mobile device with the Zoom mobile app

1. Open the app and select “Join”.
2. Enter the meeting ID provided.

Zoom Web App Controls