

# The Art of Etiquette and Administration During Chief Year: What IM Residency Does Not Teach You

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# What are you most afraid of during chief year?



When poll is active, respond at **PollEv.com/ypcchief449**



Text **YPCCHIEF449** to **22333** once to join

Running meetings with many high stakes  
physicians

Calling people in to a shift during emergencies

The 1000 of emails that will come our way

Balancing teaching, attending, Boards,  
administrative tasks

All of the above

I am not afraid

# Overview

- Organization and Calendar Management
- Meeting Management
- Email Hacks

# Organization of Tasks & Calendar Management

# Objective

- Develop a systematic approach to creating individual and group Chief calendars with: Residency events, reminders, and tasks to be shared and divided amongst the Chief group to
  - (1) maximize productivity
  - (2) eliminate redundancies
  - (3) avoid errors

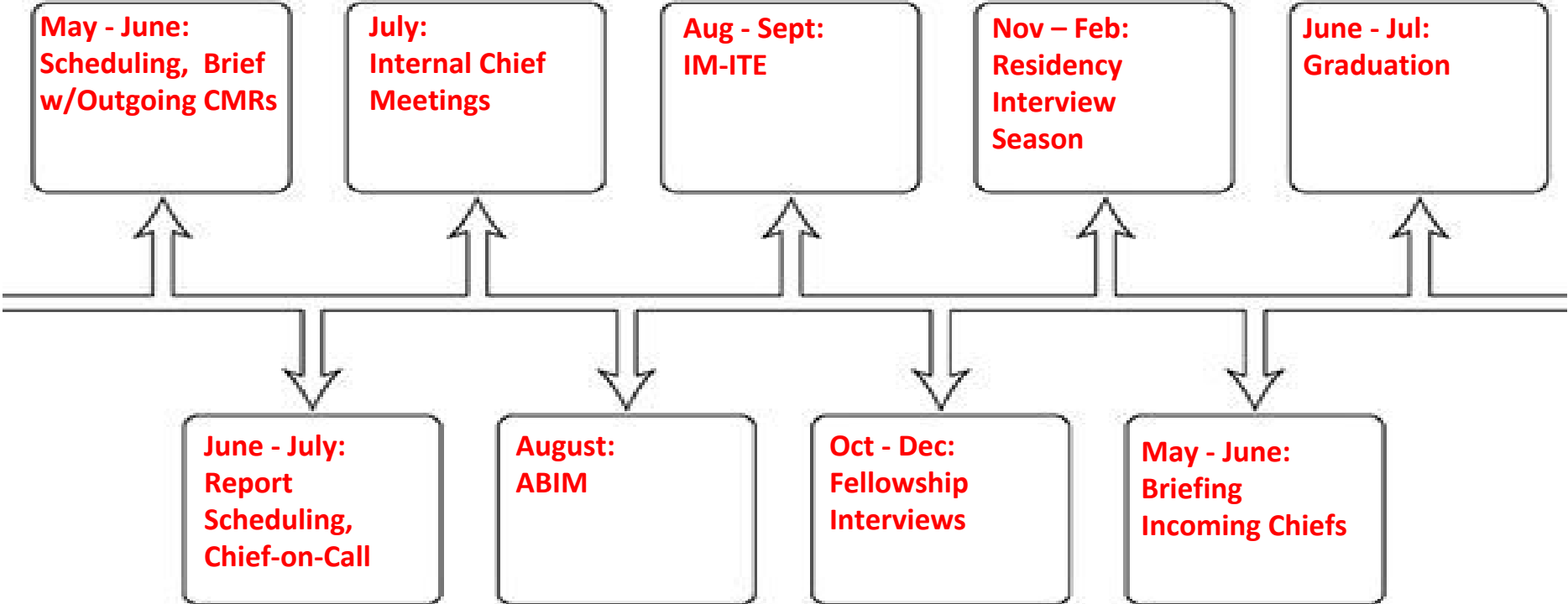
# Outline

- General outline of the academic year
- Identify Chief Tasks – Roles/ Responsibilities
- Calendar Management

\*Won't be discussed in detail, but important considerations:

- Communication, Cohesiveness, & Consistency
- Equitable Division of Task
- Personal/Professional Goals

# General Year Outline



# Tasks @ Hand

- Education
- Resident Scheduling
- Meetings
- Interview Season
- Special Event Planning
- Chief Scheduling



# Education

- Morning Report
- Firm Conferences
- Noon Conferences
- M&M
- Board Review

# Scheduling

- Resident Rotation Schedules
- Templates/AMION
- Scheduled night calls
- Block switch conflicts
- Ambulatory
- Medical Student Scheduling (Sub-Interns)
- In Training Exam
- Conferences (ACP, SGIM)
- Jeopardy

# Meetings

- **General Rule of Thumb: minimize meetings**
- Internal Chief Meetings\*
- PD/APD Meeting\*
- ICU leadership meeting
- Medicine wards leadership meeting
- Faculty Meetings

...more to come!

# Event Planning

- Interview Season:
  - Pre-dinners/happy hour
  - Resident-led tours
  
- Special Events:
  - Intern Retreat
  - Graduation

# Chief Scheduling

- ABIM
- Chief-on-Call
- Email Management - more to come!
- Attending Schedule – inpatient/outpatient
- Medical Grand Rounds
- International Health Elective
- Fellowship interviews and job interviews
- Medical Student teaching
- Scholarship Days
- Vacations/personal days!

# Example: Yale CMR

- **Education:** Morning Report, Firm Conferences, M&M, Board Review
- **Resident Scheduling:** Academic year, templates, scheduled night calls, block switch conflicts, ambulatory, ITE, AMION
- **Meetings:** Internal, PD/APDs, ICU/Wards Meetings, Faculty
- **Interview Season:** pre-dinners/social hour, resident-led tours
- **Special Event Planning:** IM Masquerade Ball, Intern Retreat, Graduation
- **Chief Scheduling:** ABIM, Chief-on-Call/Email, Attending, MGR, IHE, Fellowship interviews, Med Student teaching, vacations/personal days, Call of the Week @ MGR

# Calendar Organization & Planning

My calendars



YPC/MP Chiefs 15-16



Attending Block Dates



Brian - Work



John - work



Peter - Work



Reminders



Sanjeet - work



Sauda - Work



YPC/MP - Conferences/Ev...

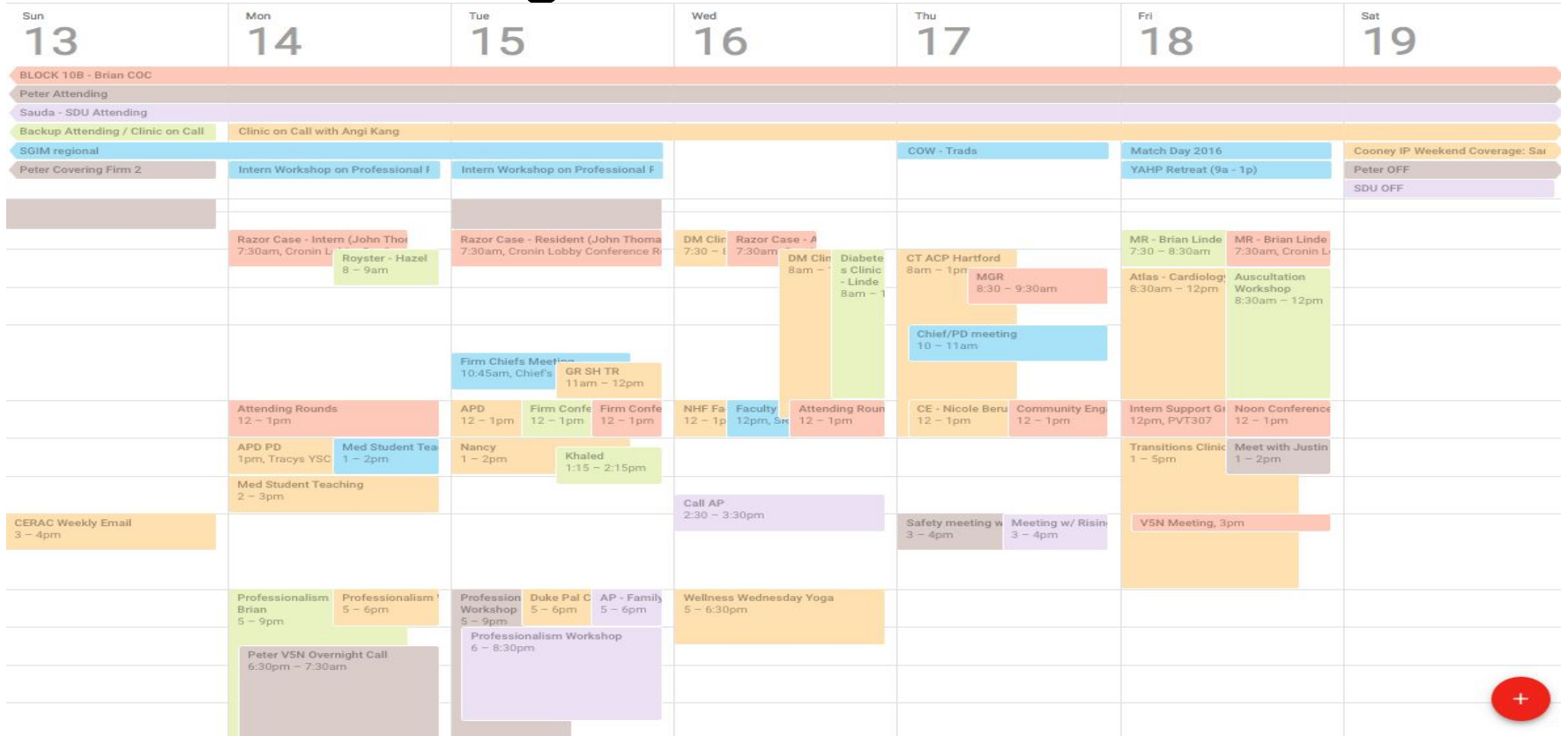


# Calendar Reminders - examples

- Block Switch emails – coverages
- Intro to Block emails (ICU, service)
- Special Conference Reminders
- Interview Season Social Events



# Calendar Management



**Let's try it!**

# Summary & Action Items

- Create a rough outline of your program's academic year
- Identify/Review Chief Responsibilities
- Create & maximize use of Google Calendar

# How to Run a Meeting

# Objective

- Practice leading or facilitating a meeting, including:
  - (1) Agenda setting
  - (2) Managing difficult situations:
    - Such as voicing opinions that may conflict with other administrators' viewpoints

Think about the **most effective** meeting you have ever been a part of. Share with your neighbor.

- What made it effective?
- What happened before the meeting?
- What happened during the meeting?
- What happened after the meeting?

Think about the **worst** meeting you have been a part of. Share with your neighbor.

- What made it effective?
- What happened before the meeting?
- What happened during the meeting?
- What happened after the meeting?

# As a middle manager, you will be involved in a variety of meetings:

5-10 minute talks in the hallway  Scheduled weekly hour long meetings

They will be with different kinds of people:

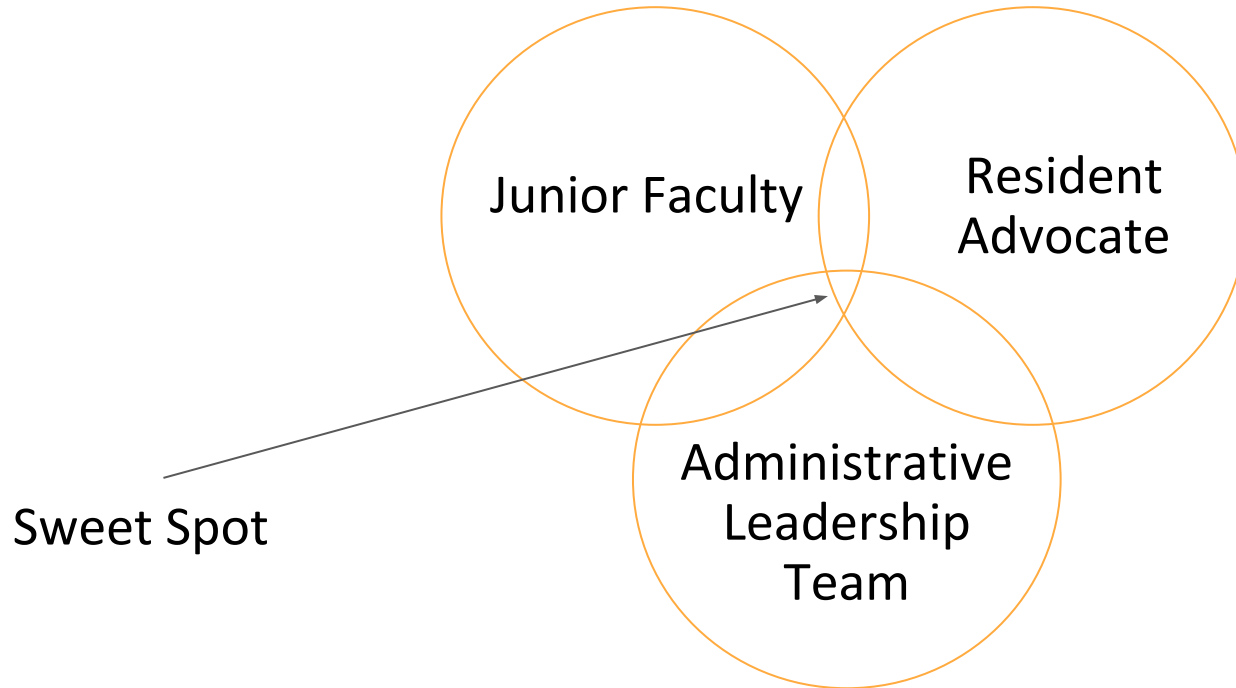
- Residents
- Fellow attendings
- Superiors

They will be composed of different numbers of participants

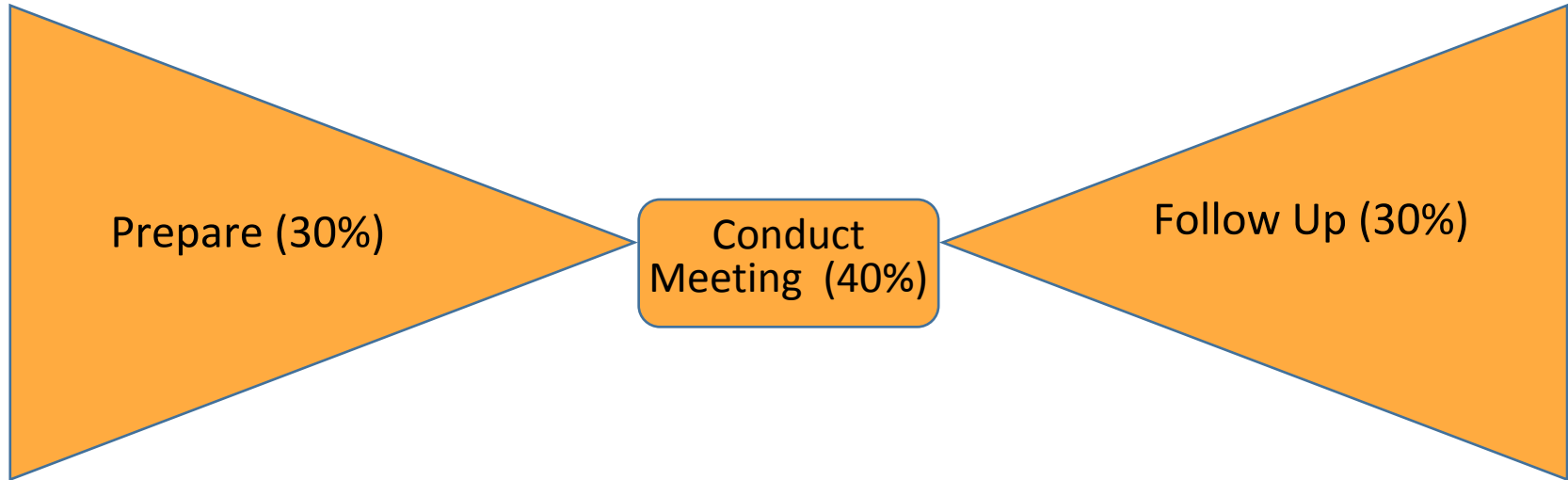
They will be held at different frequencies



The chief resident wears many hats, and should ideally wear all of them at all times.



# Effective Meetings often have this bow-tie shape



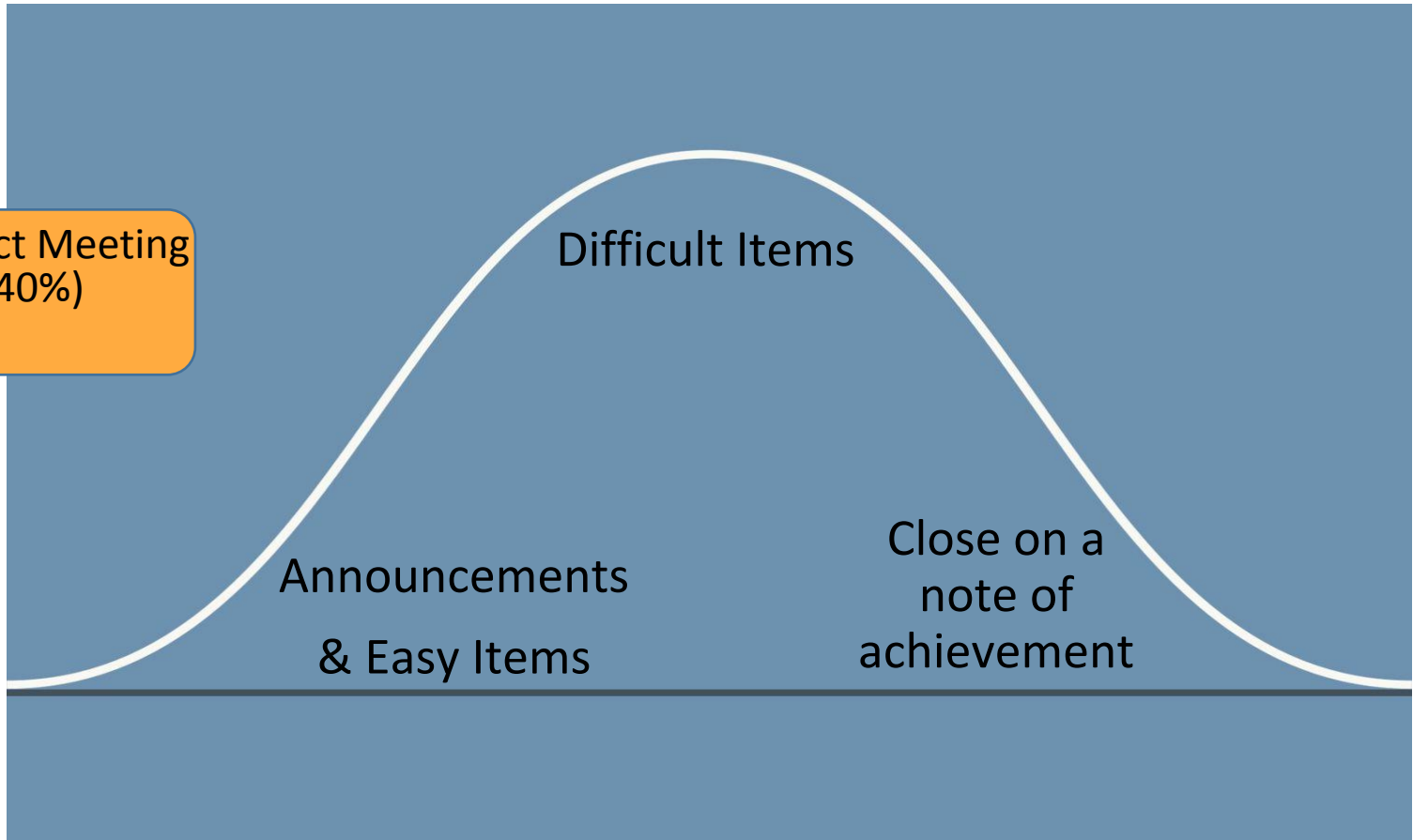
# Prepare for the meeting and define agenda



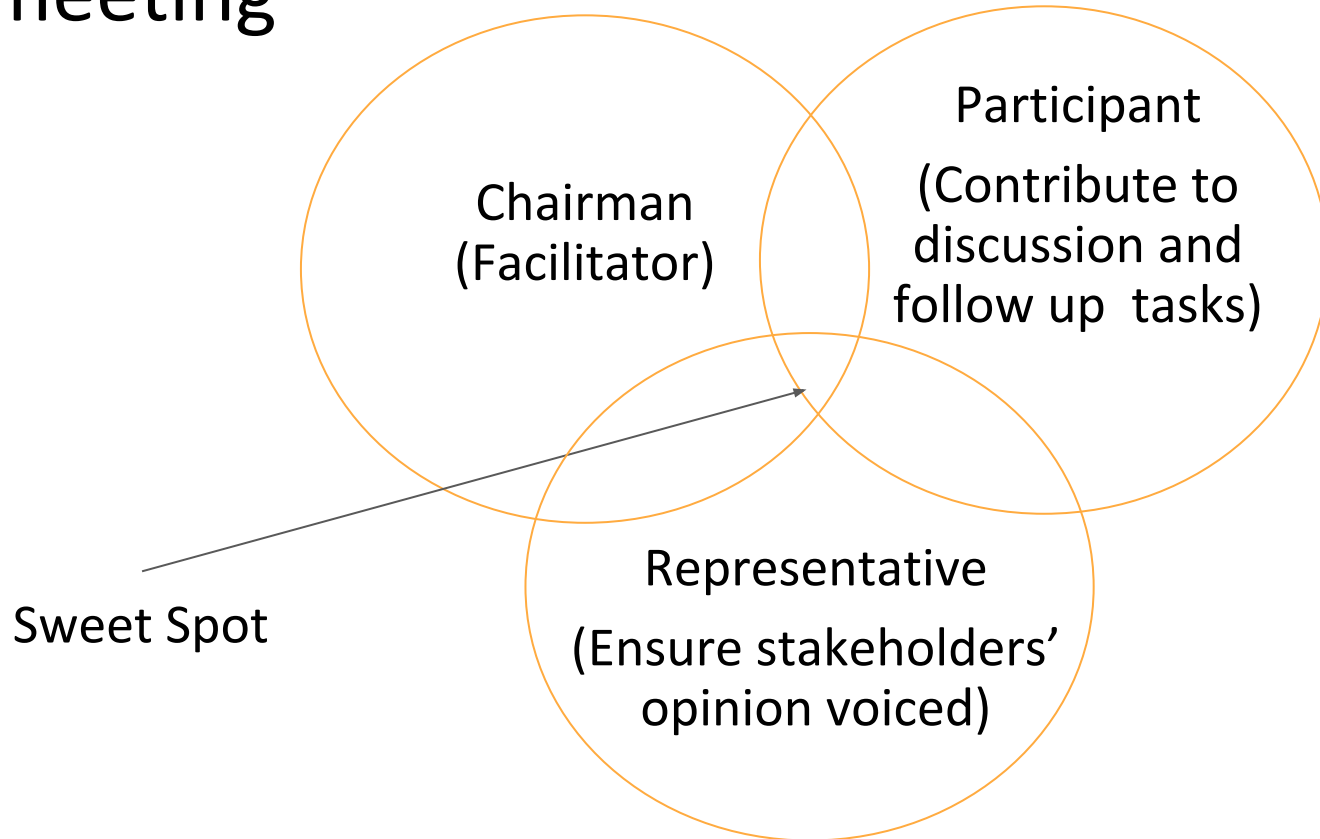
Prepare (30%)

- Determine who is the **chairman** of the meeting
- Determine what is the **purpose** of the meeting
- Make an agenda with **time limits**
- Make each item clear:
  - Information-digestive – For your information
  - Constructive-originitive – For discussion (“What shall we do?”)
  - Executive Responsibilities – For a decision (“How shall we do it?”)

Conduct Meeting  
(40%)



# Your objectives might differ based on the meeting

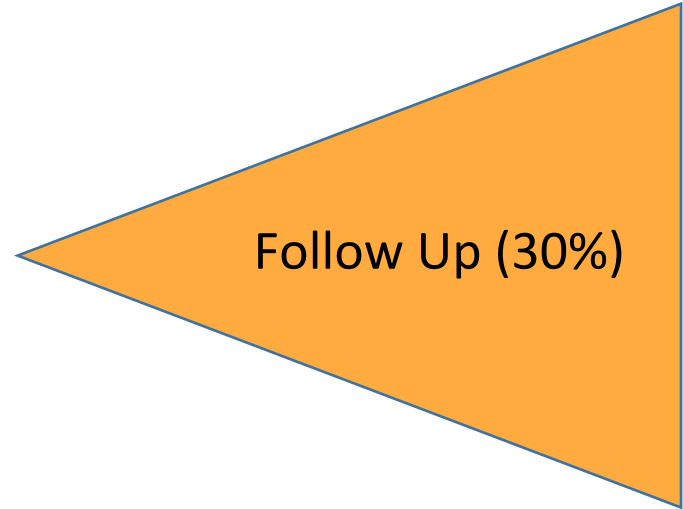


# The chairman's role during the meeting

- (1) Define objective of meeting - ideally done and disseminated prior to meeting as an agenda
- (2) Conduct meeting
  - A. Deal with subject
    - Make an action plan (decision or follow up plan)
    - Terminate discussion once a point is reached where no further progress can be made (avoid circular discussion)
  - B. Deal with people
    - Start on time
    - Ensure everyone has a voice
    - Try to come to the most senior person last

# The chairman should follow up on tasks and delegate after the meeting

- Ensure action steps for each item are clear: by whom and by when
  - “Dr. Jones, would you feel comfortable emailing him and letting us know at the next meeting?”
- Write down **who is doing what** in the minutes, send back out to meeting participants
- Again, delegate.



# Common Problems & Solutions



# Someone talks too little or too much in a meeting

## Too much

Use a phrase the garrulous person used to turn the conversation to someone else. Example: “The residents don’t read emails – that’s interesting. Dr. X, have you also found that to be the case?”

## Too little

Probe the participant to determine if the silence is due to diffidence or hostility (towards either someone else in the room, you as the chair, the issue, or situation). Example: “Dr. X, you’ve been quiet, what do you think?”

# You disagree with your program director in the meeting

- If you are the chairman of the meeting, ensure others have also voiced their opinion, including your co-chiefs who may have the same opinion as you. You should also feel empowered to table the issue. Ex: “I’ll gather some possible solutions offline and put this on the agenda for next week.”
- If you are a participant/representative, you may voice your opinion and offer to take on the task of gathering more data Ex: “I don’t think the residents would agree. Let me see if I can gather some feedback from the residents about this issue.”

# You are having repetitive meetings you don't want to have

If you have option to end the meeting

1. Determine the objective of the meeting
2. Determine a way to meet this objective some other way

If you do not have the option to end the meetings

1. Determine if another chairman (who would be responsible for setting the objective and agenda for the meeting) would be a better person to run this meeting
2. Suggest longer time intervals between unwanted meetings
3. Determine a way to meet objective of meeting in another way

# Let's try it

- Give me a group of any kind!
- Give me an objective this group might have!

# Summary

- Construct a framework for how to plan an effective meeting
- Define the different roles and objectives a chief resident may have in a meeting
- Demonstrate how to chair a meeting through role play, including how to manage difficult people and situations

## Sources:

- (1) Anderson, Sharon. "How to Run a Meeting." May 2006, Retrieved from: <https://www.ohsu.edu/xd/education/schools/...of.../1-HO-How-to-Run-a-Meeting.ppt>.
- (2) Jay A. How to run a meeting. Harvard Business Review 54(2):43-57, 1976

# Email Hacks:

For Effective Communication &  
A Productive Day

# Objective

Learn components of making an email professional and effective.

- Practice writing emails based on the email's objective, whether it is to ask for administrative help, promise the residents a deliverable, or engage multiple groups in a conversation.

# Email Hacks

- **Constructing Emails**
- Organizing the Inbox
- Email and Your Day



# Email Challenge

- Take 30 seconds to think of:
  - A conflict that your favorite TV/Movie/Book character went through with a good or bad outcome
  - Example: Death of Jack in movie Titanic because Rose didn't share the wooden tile



# Three Minute Email Challenge

- Write an **email regarding the conflict that your character went through**, and what he/she could have done to avoid the bad outcome or praise them about the good outcome
- Goal: To be effective and convey a message to the character
- What: Write how you would any email
- Include: **Pertinent Subject, Header/Greeting, Body, Ending**
- How: Use actual email browser or word document

# Three Minute Email Challenge

- Share email with your neighbor
- Warn neighbor of spoilers!

What does your email look like?

Hey

---

Hey Rose,

I wanted to give you some feedback about the night the titanic sank into the freezing ocean on april 1912. i wish that you could have split the wooden tile with jack. Maybe if you lay on one side of the board and he lay on the other, you both could have survived. what about taking turns going into the water? There were also people who passed away around you, and they were laying on flotation devices. you should have looked for an item that Jack could have used instead of gazing at the stars and humming a song. just a few thoughts. |

Atsuko

Dear Rose,

I am writing to tell you **three ways that may have kept Jack alive** when the Titanic sank on **April 1912**.

**1) Sharing the Wooden Tile with Jack:**

- Splitting the wooden tile by balancing both of your body weights on the ends of the wooden board may have preventing sinking
- Jack could have been out of the freezing water and survived

**2) Taking Turns in the Water**

- Taking turns using the board so that one person was not in the cold water the whole time

**3) Finding Other Material for Flotation:**

- There were people who passed away around you, that had **flotation devices**
- **Looking and finding a flotation device** for Jack to use may have saved his life

Thank you very much for your consideration.

Sincerely Yours,

Atsuko Yamahiro, MD MPH  
Assistant Professor of Medicine  
Associate Program Director  
MetroHealth System

# What is Email Etiquette?

- Etiquette (definition): “Showing consideration for other people”
- Good email etiquette considers reader’s time to read and time to act
- Positive impression left on sender when organized and thoughtful
- Use appropriate MODE of communication (pick up phone, talk in person, or meeting if multiple recipients)

# Subject

- Determines if email will be opened/read in a timely fashion, if at all
- Should be short, concise, has details regarding date, etc
- Include summary of the email
- Avoid All caps, typos, RE:RE:RE:RE:RE:RE:RE:
- Start new email if conversation does not match subject title



Which Subject is the most helpful?

- A. IMPORTANT PLEASE READ ABOUT MEETING
- B. RE: RE:RE:RE:RE:RE:RE:RE:RE:RE: Meeting
- C. PGY-1 Class Meeting Update
- D. PGY-1 Class Meeting Postponed Until 3/20
- E. Re: Meeting

# Greeting

- Show Professional and Common Courtesy
- “Hello” “Dear” “Thank you” “Sincerely”
- Avoid “Hey”
- Starting an email with just a name may come off as terse or demanding (mixed opinions)

# To BCC or not to BCC...

- BCC (Blind Copy) when email list is long
- Recipients do not have to scroll through dozens of email addresses
- Prevents accidental “Reply all” to all recipients

# Body

- Be as concise as possible
- Keep body to less than 25 lines
- Remember Email is meant for scanning (not reading)
- Use short words that are easily digestible
- Use bullet points with subheads at beginning to summarize sentences
- Use numbers if order or sequence matters
- Avoid paragraphs
- Inject air into messages by providing white space
- If critically important message, have a peer review and edit

# Attachments

- Title attachment appropriately
- Example. NOT 034923849238409234.jpg
  - (Save as: Intern.Class.Photo.2018.jpg)
- Easier to Search for if saved

# Email Hacks

- Constructing Emails
- **Organizing the Inbox**
- Email and Your Day

# Inbox Folder

- Four categories:
  - (1) Admin
  - (2) Education
  - (3) Clinical
  - (4) Events

# Inbox Folder

- Try not to go overboard with folders
- If Email domain has good search function, folders not necessary
- Archive and move messages out of actual inbox



# Remembering the Reminders

- Do not use the presence of email in inbox as a "reminder" or a "to-do" task
- Instead, make a google calendar reminder, or reminder on your phone
- Saves time
- Clears the box

# Color Coding

- If multiple people in one email account, utilize organization by color coding

# Email Hacks

- Constructing Emails
- Organizing the Inbox
- **Email and Your (Productive) Day**

# When to Check Email

- (1) Check email at designated times of day
  - (a) Ex: once in the morning for <1 hour & once in the evening for <1 hour
    - Do not have it open and respond as they come (people will start expecting your immediate response!)
    - Set cut off with a timer or stop watch
    - Respond to all email ~24 hours (exceptions apply)
- (2) Do not attempt to multi-task (such as checking EMR/patient messages or preparing report with Email open)
  - Put off all distractions
- (3) Communicate to your program that for urgent matters, you expect a call or a page
  - Do the same for others
  - Use different modes of communication effectively

# No Privacy to Work Emails

- Assume email on hospital or company line is NOT private
- Often emails are monitored by employers
- Employers have the right to look at email
- Email are forever (even if deleted), retained on hard drives and servers
- There is **no such thing** as a private email
- Always log out of your email; access to struggling residents, personal issues

- **Three top Miss America officials have resigned after emails were revealed showing them ridicule former contestants over their looks and**



**Miss New York Mallory Hynes Hagan reacts as she is crowned Miss America 2013 on Saturday, Jan. 12, 2013, in Las Vegas.** *Associated Press/Isaac Brekken*

**Erik Wemple** • Opinion

# Studies agree: Media gorged on Hillary Clinton email coverage

# Angry Emails

- Never reply angry; take a pause, write a draft in a word document (a situation where you may not want to reply within 24 hours)
- Sender often send apologize, as they read the non-response from you
- If you REALLY feel the need to send, make a phone call instead



# Summary

- Write Emails knowing they will be scanned and not read
- Keep the Inbox clear and make use of generalized folders
- Know the permanent nature of emails and that they are monitored

## Sources:

(1) Steele, Jeffrey. "Email The Manual" Marion Street Press, LLC. September 2016.



# Executive Summary

- Organize your calendar to optimize your collective time and don't let inefficiency rule your Chief year
- Run effective meetings and don't let meetings rule your Chief year
- Organize emails and don't let emails rule your Chief year

...and remember to have fun!

# Questions/Comments?

Thank you!