



## Site Visitor Quick Reference Guide

The following tips are intended to assist site visitors with preparing for and completing a successful site visit.

**The Golden Rule:** The purpose of the accreditation self-study report and site visit process is to verify that the program meets the CAAHEP *Standards*. The site visit team's approach is consultative, supportive, and collaborative. The team and the process can assist the program in its continuing development and quality improvement processes. Frame the various sessions as *conversations*.

### #1 Tip: Stay current!

- Read all the monthly e-newsletters.
- Review the changes to the CoAEMSP Policy Manual, CAAHEP Policy Manual, and the CoAEMSP *Interpretations* documents.
- Participate in the quarterly *Conversations with Site Visitors* to hear the latest.

### Preparation

1. As soon as the 'site visit confirmation' email is received, the **team captain** schedules a call with the Program Director (preferably web-based with video). If scheduling permits, invite the site visit team member(s) to participate. The conversation should include:
  - a. General introduction of the team members.
  - b. Initial questions *from* the Program.
  - c. Review travel logistics for the team.
  - d. Review the planned schedule for the visit.
    - i. Verify students are available.
    - ii. Review the number of suggested participants for each session, i.e., graduates, preceptors, Advisory Committee members, and employers.
    - iii. Review the appropriate individuals for the Advisory Committee and employers; do not include individuals employed or contracted by the program or sponsor.
  - e. Clarify if the program has added or removed the following since the submission of the SSR:
    - i. Satellites or alternate locations.
    - ii. Out-of-state locations, clinical or field sites, or an Assistant/Associate Medical Director.

- f. Verify if there have been any changes to the Program Director or Medical Director.
  - g. Review the *Executive Analysis* and the Program's response with the Program Director. Instruct the Program Director to complete and upload the *Response to the Executive Analysis* form from the CoAEMSP website.
  - h. Review the *Documents for the Site Visit* form from the CoAEMSP website.
  - i. Review the documents for the site visit required to be uploaded to the CoAEMSP-designated fileshare.
  - j. Please review the due date for uploading all documents, including the final site visit schedule, to the CoAEMSP-designated fileshare. This should be completed at least two weeks before the visit.
  - k. Since student records are challenging to compile for upload in any meaningful fashion, instruct the Program Director that the team will review records on the first day of the site visit. For programs that maintain records either partially or totally electronically, elements of the student record are often in various platforms. Request that the Program Director retrieve records electronically during the site visit and share specific elements that the team wants to review. Programs are not required to maintain hard copy records or maintain all components of the student records/file in one location.
  - l. Instruct the program to notify the site visit team when all documents for the site visit have been uploaded to the CoAEMSP-designated fileshare.
  - m. Recommend to the program to review the sample Site Visit Report as a self-assessment tool.
  - n. Discuss the potential for an additional phone or video call with the SV Team.
  - o. Solicit any *final* Program Director questions or concerns.
  - p. Provide your preferred contact information for the program to reach you (cell number).
  - q. Obtain the Program Director's cell number.
2. Review the instructions for site visitors in the confirmation email from CoAEMSP, including the link to the confidentiality agreement for the SV Team members.
  3. Once you receive the site visit confirmation email and have discussed travel plans with the program, make airline and hotel reservations. Delays in booking typically increase airline fares. SV Team members should coordinate arrival and departure times to the extent possible. Inquire if the program can provide airport and local transportation. If that is not possible due to distances, request approval from CoAEMSP to rent a car.
  4. Reservations are submitted for approval through Direct Travel via the Concur website.
  5. Expense reports must be submitted to CoAEMSP within 14 days after the completion of the site visit.

## New Format: Documents for the Site Visit (effective January 1, 2024)

The documents for the program to upload have been simplified, as outlined in the resource tool, *Documents for the Site Visit*. Programs upload documents with a specified name to a *single* folder, similar to the self-study report. The purpose of these documents is to provide more current information [e.g., Advisory Committee meeting minutes, Resource Assessment Matrix (RAM), etc.] and additional documents, if applicable to the program (e.g., a clinical manual).

The folder structure provides for new or revised documents in the categories listed below. Documents that were included with the original self-study report should not be repeated. This folder is intended for documents that bridge the gap between the submission of the SSR and the current time.

1. Meeting minutes
2. Manuals
3. Summary tracking
4. Schedules
5. Reports
6. Other planning documents
7. Agreements
8. Evaluation and feedback
9. Other updates

## Review

1. Documents in the Program's fileshare include:
  - a. The original Self-Study Report with the accompanying Documentation folder.
  - b. After site visit confirmation, the Documents for the Site Visit folder.
2. Review all documents in the program's fileshare **before** the visit is essential for all SV Team members

## The Site Visit

1. Conversations with preceptors from the hospital and capstone field internship may be conducted through web-based meetings. The program is responsible for scheduling and arranging those sessions using the web meeting of its choice. Some programs may choose to have preceptors come to campus or include individuals both in person and virtually.

2. Tips for completing the Site Visit Report:
  - a. 'Suggested evidence' is *suggested* and not required. Do not cite a program because one of the suggested pieces of evidence is not found. Is there other evidence that the *Standard* was met through documentation, conversations, etc.?
  - b. Do not cite a program for the same thing in multiple places, i.e., tracking, Advisory Committee. Choose the most appropriate location and refer to the appropriately cited *Standard* in the comment sections.
  - c. For any *Standard* cited, consider what evidence the program would be requested to submit in response to the Site Visit Findings Letter.
  - d. For 'not met' categories, be as specific as possible regarding what is missing, not found, or did not meet the *Standard*. Refrain from stating what the program must do to meet the standard; identify what is missing to demonstrate the program is not meeting the standard. As the program moves through the accreditation review process.
  - e. *Standards* violations may be cited, but not meeting an *Interpretation* is not the basis for a citation. However, there may be an opportunity to make a recommendation.
3. At the conclusion of the site visit, share the findings of the SV Team, but do not project or display the summary page from the report. The exit session is a conversation with the attendees. The program will receive the Site Visit Findings Letter and the Site Visit Report after the site visit. **Do not leave a copy or summary of the Self-Study Report.**
4. If the SV Team cites multiple 'not met' categories that essentially address the same issue, discuss those as one potential citation. For example, the Advisory Committee meeting minutes, the Advisory Committee members, or tracking patient encounters.
5. At the exit summary, review the projected dates for review by the CoAEMSP Board and the CAAHEP Board; these dates are provided in the email confirming the site visit.
6. Do not provide an estimated date to receive the Site Visit Findings Letter; the time from the site visit to the receiving of the letter can vary depending on different factors.
7. Do not specifically recommend that the Program Director or staff attend ACCREDITCON; this can appear self-serving by CoAEMSP and as a conflict of interest because of the cost involved. It is *okay* to recommend educational opportunities, including ACCREDITCON, in conjunction with other potential resources, both free and fee-based.

## Updates

1. CoAEMSP is diligently working on the backlog of site visits – with your help. Please continue to expect somewhat ‘aged’ self-study reports and work with the Program Director on the updated information in the *Documents for the Site Visit*.
2. The Site Visit Report has been updated to remove some pieces of suggested evidence that can be confusing. The revised Site Visit Report the team completes is a separate Excel document, and the team will need to complete the cover page with the program info.
3. A Self-Study Report aligned with the 2023 CAAHEP *Standards* has been launched. It will affect programs submitting a self-study report after June 1, 2024, for programs seeking initial or continuing accreditation and January 1, 2025, for programs seeking the Letter of Review. The Site Visit Report will also be aligned to match the 2023 CAAHEP *Standards*. You can anticipate site visits based on the 2023 CAAHEP *Standards* beginning in late 2025.