



## Site Visitor Checklist

Thank you for sharing your time serving on a site visit team; so, what's next? The checklist below will aid the newer site visitors and jog the memory of the seasoned site visitors. Remember that the Site Visit Team is the face of CoAEMSP and CAAHEP and frequently the only face-to-face contact the program may have with the representatives. Proper planning and attention to detail can make all the difference in the program's perception of the CAAHEP accreditation process.

✓	Activity
	<b>Scheduling</b>
	<ul style="list-style-type: none"> <li>Receive confirmation of the program location and site visit dates from CoAEMSP. <b>Hold</b> those dates on your schedule.</li> </ul>
	<ul style="list-style-type: none"> <li><b>Do not</b> make travel reservations (air or hotel) until directed to by CoAEMSP with the site visit confirmation email – and – you have connected with other members of the Site Visit Team.</li> </ul>
	<b>Travel Arrangements</b>
	<b>Team Captain</b>
	<ul style="list-style-type: none"> <li>Contact the Program Director [and copy your SV team member(s)] <i>as soon as CoAEMSP staff has confirmed the visit</i>, reassuring them your intent is to be helpful as they prepare for the site visit.</li> </ul>
	<ul style="list-style-type: none"> <li>Schedule a meeting with the program director and the SV team member(s), preferably via web meeting (ex., Zoom, Teams). Allow for one hour.</li> </ul>
	<ul style="list-style-type: none"> <li>Sample template language for the email: <p>Greetings from your site visit team. I am the team captain for your site visit, and I want to introduce myself and begin the process.</p> <p>(PD name): I would like to schedule a video call with you to discuss your questions, the schedule, travel arrangements, review of the Executive Analysis, additional documents to upload, timelines, resources available, and any other details. If scheduling permits, our team member will join us as well.</p> <p>Here are some date and time options: please let me know your availability.</p> </li> </ul>

✓	Activity
	We look forward to working with your program.
	<ul style="list-style-type: none"> <li>• Schedule a meeting with the PD and the SV Team member(s), preferably via web meeting (i.e., Zoom, Teams, etc.)</li> <li>• Confirm with the PD the recommended lodging, arrival airport, travel timing, and ground transportation to the hotel and program.</li> <li>• Begin the discussion with the PD about the site visit schedule.</li> <li>• Review the schedule: <ul style="list-style-type: none"> <li>○ purpose of each meeting and who is expected to participate.</li> <li>○ purpose of conversations with the clinical liaisons and preceptors (you do not meet with management at clinical and field internship sites).</li> <li>○ program personnel, program director, medical director, and administrative staff are not included in the conversations with the Advisory Committee, employer, graduate, or preceptor conversations, even if they function in both roles. Individuals associated with the program inherently have a potential conflict of interest in providing unbiased feedback.</li> <li>○ Preceptors may be interviewed via a web meeting platform. The SV Team does not travel to clinical or field internship sites.</li> </ul> </li> <li>• Review the <i>Executive Analysis</i> (EA) with the program director and request they complete the <i>Response to the Executive Analysis</i> form and upload it to the CoAEMSP-designated fileshare.</li> <li>• Discuss/explore any changes or updates since the self-study report was submitted, i.e., new satellite campus, new alternate location, new program director, medical director, or faculty, and other changes.</li> <li>• Review the <i>Documents for the Site Visit</i> list and clarify what documents the programs should include.</li> <li>• Review all the documents uploaded by CoAEMSP and the program in the CoAEMSP-designated fileshare.</li> <li>• All documents, including the schedule, should be uploaded at least 2 weeks before the site visit.</li> <li>• Answer questions.</li> </ul>
	<ul style="list-style-type: none"> <li>• Schedule additional calls with the PD as needed to review the EA and answer questions. The typical site visit prep should not require more than 2 calls.</li> </ul>
	<ul style="list-style-type: none"> <li>• Request a final schedule to review at least 2 weeks before the visit and confirm travel arrangements.</li> </ul>
	<b>Once travel questions are answered</b>
	<ul style="list-style-type: none"> <li>• SV Team Member(s) contact the CoAEMSP-designated travel agency with desired flight schedules. CoAEMSP uses the Concur platform.</li> </ul>
	<ul style="list-style-type: none"> <li>• Coordinate the arrival and departure times of SV Team Members and ensure the same airport is used; if possible, attempt to arrive at a similar time.</li> </ul>

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	<ul style="list-style-type: none"> <li>SV Team Captain confirms hotel of choice. Recommend selecting a hotel with a restaurant or within walking distance.</li> </ul>
	<ul style="list-style-type: none"> <li>If the program does not provide transportation to/from the airport, seek approval from CoAEMSP to rent a car.</li> </ul>
	<ul style="list-style-type: none"> <li>When all arrangements are confirmed, share them with the program director.</li> </ul>
	<ul style="list-style-type: none"> <li>Confirm you have cell phone numbers for the SV team member(s) and the program director.</li> </ul>
	<p><b>Note:</b> do <b>not</b> plan social visits with friends or family in the local area <b>or with program personnel</b> on the night of arrival or the evening(s) of the site visit.</p>
	<b>Program Materials</b>
	<ul style="list-style-type: none"> <li>Download the program's materials as soon as they are available in the CoAEMSP-designated fileshare.</li> </ul>
	<ul style="list-style-type: none"> <li>Instruct the program director to notify you once all additional files are uploaded.</li> </ul>
	<ul style="list-style-type: none"> <li>Extract files from the zip folder so that you are not relying on 'temp' files.</li> </ul>
	<ul style="list-style-type: none"> <li>Review all materials before arriving at the host city. Make notes and craft questions. A thorough review typically takes several hours.</li> </ul>
	<ul style="list-style-type: none"> <li>Review Site Visit Report complete demographic data on the SV Report (site visitor names, contact info, etc.). See the document <i>Ready to Submit the Site Visit Report</i>.</li> </ul>
	<ul style="list-style-type: none"> <li>Have references readily available (electronically or paper copies) <ul style="list-style-type: none"> <li>CAAHEP <i>Standards</i> and CoAEMSP <i>Interpretations</i> documents</li> <li>CoAEMSP <i>Site Visitor Manual</i> (includes question guide for use during the site visit)</li> <li>Accreditation process flow charts</li> </ul> </li> </ul>
	<b>Preparing to Travel</b>
	<ul style="list-style-type: none"> <li>Bring your laptop and accessories.</li> </ul>
	<ul style="list-style-type: none"> <li>Bring your CoAEMSP-issued name tag.</li> </ul>
	<b>During the Site Visit</b>
	<ul style="list-style-type: none"> <li>Do not plan dinner or other social activities before or during the site visit.</li> </ul>
	<ul style="list-style-type: none"> <li>Focus on the program, and only reply to calls, texts, or other communications <i>during break</i> or <i>after hours</i>.</li> </ul>

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	<ul style="list-style-type: none"> <li>Take notes during the conversations with the different stakeholders; these are important for the preparation of the SV Report and later responding to concerns addressed in the SV Findings Letter.</li> </ul>
	<ul style="list-style-type: none"> <li>Dress is business formal for the entirety of the site visit. No jeans, cargo pants, t-shirts, sneakers, etc.</li> </ul>
	<b>After Site Visit</b>
	<ul style="list-style-type: none"> <li>Submit the Site Visit Report within one week.</li> </ul>
	<ul style="list-style-type: none"> <li>Email the CoAEMSP Expense Report within two weeks to the designated CPA firm.</li> </ul>
	<ul style="list-style-type: none"> <li>Respond to the CoAEMSP regarding the accuracy of the Findings Letter within the designated time frame.</li> </ul>
	<ul style="list-style-type: none"> <li>Complete the peer evaluation of your SV Team Member(s).</li> </ul>
	<ul style="list-style-type: none"> <li>Upon request from CoAEMSP, confirm the destruction of all paper and electronic materials resulting from the site visit, including your notes and copies of program materials.</li> </ul>
	<b>Other Notes</b>