

Medical Assisting  
**2017 Annual Report**



Education Review Board  
**Instructions**

MAERB

**For**

**Completion**

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## Introduction

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Welcome to the 2017 Annual Report Form (ARF)! You are reading these instructions because it is your duty to complete this year's ARF. In August 2015, MAERB revised its policy on the Annual Report Form and the new MAERB policy related to the ARF is Policy 205. Below are two reminders about some changes that were introduced with the 2015 ARF:

**Reminder about Trigger Course and Admission Cohort Definitions:** The "trigger course" is the first course in the Medical Assisting program curriculum in which any of the psychomotor and/or affective competencies are taught and measured. The formal "admission cohort" is the group of students who have successfully completed the trigger course. See MAERB Policy 205 for additional wording. Some programs also have a formal admission process that is used to define the admission cohort. The admission process needs to follow the same guideline related to the teaching and assessing of the psychomotor and/or affective competencies, but it can also be used to define the admission cohort.

**Reminder about the Data Monitoring Date:** Although in your 2017 ARF you will be including data that is being collected up to the point in time of the submission of the ARF, the data from the previous year's cohort (in this case 2016, the top row of the 2017 ARF) will not be evaluated by MAERB at this point in time; rather, the data from the three years prior to the most recent year will be evaluated.

The MAERB office, however, will be reviewing the integrity of all the data submitted. As a result, if there are issues related to any of the years that are being reported on this 2017 ARF, the MAERB office will be contacting the program, and there will be an unlock fee charged if changes need to be made.

**MAERB Policy Manual:** In order to access the manual, go to the MAERB website ([www.maerb.org](http://www.maerb.org)) and click on the "Documents" page. It is located in the section "Standards and Policies." In addition, on the same page you will find resources under "Annual Report Form," such as the "Outcome Thresholds Chart," which provides you with details about the thresholds, raw data, and examples of what MAERB considers to be appropriate raw outcomes data.

## General Instructions

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1. All CAAHEP-accredited medical assisting programs have either a fall or spring submission deadline for the 2017 ARF. Typically, but with some exceptions, programs that admit 3+ times per year have been assigned to the fall ARF schedule, while programs with one or two admission cohorts per year submit in the spring. The MAERB office will contact your program every year during the appropriate cycle to provide you with the login information and the password for your program.
2. Please do not contact your MAERB Case Manager until you have read this entire ARF Instructions document, including the step-by-step details, and have looked at the relevant screens within the ARF. If you have read the instructions and you still have questions, you may contact your MAERB case manager or call 1.800.228.2262 and ask to speak with someone in the Accreditation Department. Please note that MAERB staff will no longer be conducting live ARF webinars; instead, video recordings of each of the segments of the ARF are posted at the MAERB website for your convenience.
3. The Medical Assisting Program Director is the person responsible for the accuracy of the data, not only for the most recently reported year of data, but for all 5 years of data on the ARF. You may be asked at any time to submit raw data in support of any or all reporting

years on your ARF. If that occurs, you will be given only a few days to produce the required documents. In light of this, it would be wise to make sure that this information is readily accessible.

4. You must submit the completed ARF online for each CAAHEP-accredited medical assisting program option (associate degree, diploma, and certificate) at your institution.
5. Only one submission is required for multiple campus programs. This submission should contain the aggregate data for all MAERB-approved multiple campus programs.
6. If your program was newly accredited by CAAHEP within the past 12 months, you will find your ARF to be blank. Please fill in the data only for the 2016 cohorts.
7. The ARF User ID and password have been given only to the Medical Assisting Program Director. This information is confidential; it is the duty of the Program Director to maintain this confidentiality. The Program Director is also given a “read-only” User ID and password, which is sent to the “dean” contact at your program and may be shared with other individuals, if the program director wishes.
8. After going to [www.maerb.org](http://www.maerb.org), you will need to log in, using your established User ID and password. After logging in, go to “Annual Report Form,” into which you will be submitting data for the 2016 calendar year, as well as updating data for previous years. If you have any problem logging in, contact your Case Manager.
9. When you are ready to begin inputting the data, you should begin with the first tab, “Enrollment, Retention, and Graduation,” and then fill out the other tabs in sequence, as they are dependent upon each other.
10. While you are entering data into your online ARF, you should regularly save your work, as the system will automatically log you out after a ten-minute period of inactivity. You will be able to sign in and out as often as you wish, as long as you do not click on the final submit button on the Dashboard.
11. After you have filled in all of the necessary data and the relevant Dialogue Questions and Actions Plans and have reviewed your work, you will need to submit the ARF from the Dashboard page. You will not be able to submit the report if there are incomplete items.
12. The MAERB office provides a “hard” due date for completion of the Annual Report Form, and late submissions will be charged a \$250 late fee.
13. Once you submit your final ARF with the data from 2016 and updated data from prior years, you will be unable to change any data until your next year’s ARF, unless you pay a \$200 “unlock” fee. After final completion, you will have “read-only” access to the submitted report.
14. If you submit your ARF and it is later found to lack statistical integrity, your program will be charged a \$200 “unlock” fee, so that the proper revisions can be made.
15. To print your ARF or save it as a PDF, click on the “Print” icon to the right of the Exam tab in the upper right of your screen. Please save a final copy for your electronic and paper records. Please note that, if you have extensive comments in the Dialogue Questions and/or Action Plans of any tab, the entire wording of your comments may not be visible in the PDF copy of the final ARF, so you should save a Word version of those comments in your files.

## Dashboard

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**Dashboard:** The “dashboard” provides an up-to-date summary of all data for each of the years in the current 5-year reporting window. It automatically recalculates and updates as you add data. There is nothing to complete within this tab; it is for your reference only.

## Enrollment, Graduation, and Retention

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The row for 2016 data isn't visible when you first start working on the Retention tab. The five years of data placed into this tab should reflect the **current** status of all Medical Assisting students, organized by the month and year of admissions and are designated as a cohort, who were admitted into your program over the last 5 years. You will be including the following information: How many total students have been admitted; how many have dropped out from among those students admitted; how many have graduated as of the date of submission of the ARF; and how many are still active in your program. You will be including this information based upon the current, up-to-the-moment enrollment status of the program.

You will need to update the data entered for the previous admission cohorts prior to entering the data for the 2016 year. The instructions below will indicate that order. It is very important to remember that the data is based upon the admissions cohort date, rather than the year of graduation, so you may find yourself updating several of the rows, and not just the top row.

NOTE: If you have two CAAHEP-accredited programs (i.e., both an Associate Degree and a Certificate/Diploma), this page allows you to report any students who transferred out of one of your CAAHEP-accredited Medical Assisting program options and into your other CAAHEP-accredited Medical Assisting program. Record of any such student transfer should, therefore, be reported and visibly reflected on the ARF for each program. On the one ARF, you will identify the number of those who transferred out of the appropriate program, based on year of admission, and, on the second ARF, you will enter them as “transfers” into the other program. **Please contact your Case Manager if you have any questions regarding this.**

In order to begin your ARF, select the tab for Enrollment, Retention & Graduation.

Please note the following definitions for each column. There is a central rule that governs the inclusion and updating of the data in this category: No student should be counted in more than one row of any given tab. In addition, once a student is placed within a given admissions cohort, he/she remains there indefinitely. If the student drops out and later returns to your program, you should adjust the numbers in the original admissions cohort, not in the cohort date when the student returned to the program, unless the original cohort year is no longer included on the current ARF (in which case, you would add the student to the cohort year of re-enrollment).

- Column #1: “Enrollment Date Month Year” is the specific entry point for each admissions cohort who entered in 2016. You will need to manually enter this information for the 2016 calendar year. If you have established a “trigger” course (see MAERB Policy 205), include the number of students who successfully completed that course. If you intend to change your trigger course, you will need to notify your MAERB case manager.

- Column #2: “Number of new students enrolled” is the total number of **new** Medical Assisting students in a given admissions cohort. You will need to manually enter this information for 2016, but you should not change this number for the preceding years, unless you realize that the data for previous years is incorrect.
- Column #3: “Transfer Students” is the total number of advanced placement or transfer students (students who transferred into your program mid-stream from another institution or were granted advanced placement of some form) for the specific admissions cohort. This number is usually “0.” You will need to manually enter this information for 2016, but you should not change this number for the preceding years, unless you realize that the data for previous years is incorrect.
- Column #4: automatically adds columns 2 and 3 to calculate the class total.
- Column #5: “In Progress” or “Stopped out” is a catch-all category for anyone who is either currently enrolled or on a leave of absence from the specific cohort, as of the date that this ARF is completed. Generally speaking, the numbers in this column should become progressively smaller as you update the data for previous cohorts; in other words, the numbers found in the column for the oldest several years will likely be zero. This information will be calculated based upon the numbers you submit in the columns for “Number Dropped Out (Attrition)” and “Number of this Class Graduated-to-Date” for 2016 admissions.
- Column #6: “Number Dropped Out (Attrition)” is the number of students, from among those enrolled for a given admissions cohort, who are no longer officially enrolled in the program. You will need to manually enter this information for those admitted in 2016 and update the number, if needed, for the earlier years.
- Column #7: “Number of this Class Graduated to Date” is the number of students who have graduated to-date from the among the specific admissions cohort. You will need to manually enter this information for the 2016 admissions and change this number for the preceding years if any students from an earlier admission year has graduated from your program in the past 12 months. NOTE: A “graduate” is someone who has been issued a transcript that shows that the Associate Degree, Certificate, or Diploma has been conferred; it is not equivalent to a “completer.”
- Column #9: This column is unmarked and is the retention threshold for that particular year. Your Retention Rate is automatically calculated by taking the total number of graduates, adding the number of students “In Progress,” and then dividing that number by the total number of students.

### Step-By-Step Instructions

1. As was stated above, before entering the new data for the 2016 admission cohort/s, you **MUST** update the data for each of the previously entered years, if there are still student numbers in the “In Progress or Stopped Out” column for those prior years. You will find yourself updating the information about the number of students who dropped out and the numbers of the admissions cohort who graduated within the past twelve months (i.e., since last year’s completed ARF). You should update in the following manner:
  - a. Click “edit” in the left column for the cohort that you need to update.
  - b. In the entry boxes that appear below the grid, enter the correct data to reflect the changes.

**Cohort Admission Entry**

Month  Year

Number of Students Initially Enrolled    Transfer Students    Number "Dropped Out" (Attrition)    Number of this Class Graduated to Date

Start:

- c. **Once correctly updated, click on "Save."**
- d. You will receive a confirmation screen that the update has been saved.
- e. Click "Continue" to proceed with the next cohort, and you will be directed to the original screen.

**MAERB ERROR ALERT**

Perhaps the most common error that the MAERB office receives on the ARF is programs forgetting to update the previous years' data. It is important to remember that, if you have student numbers in the column "In Progress or Stopped out," you will generally need to update the number "dropped out" or the number "graduated." It is only when you have a zero in the "In Progress or Stopped Out" column that you will no longer need to update that row. As a general rule, we have discovered that, if the 5-year total number for "In Progress or Stopped out" is more than approximately 20%-30% of the 5-year total number of students enrolled, there is probably an error in the data.

- 2. After you complete the updates for the previous years, you can then enter the data for the 2016 admission cohort/s.
  - a. You may enter up to 12 cohorts (one per month).
  - b. Click "Add Admission Entry."
  - c. Enter the month, date, and data for the cohort in the boxes provided, and click "Save."

**Cohort Admission Entry**

Month  Year

Number of Students Initially Enrolled    Transfer Students    Number "Dropped Out" (Attrition)    Number of this Class Graduated to Date

- d. When the confirmation appears, click "Continue"

- e. Repeat steps b thru d until all cohorts for the current reporting year have been added.
  - f. If you have both a day and an evening section that admit in the same month, you may combine them into a single cohort for that month. If you wish to be able to view day and evening cohorts separately, contact your MAERB Case Manager.
3. If you need to respond to the Dialogue Questions and fill out an action plan, you will need to systematically save the information that you enter. Answer all of the dialogue boxes and be sure to save before proceeding to complete and save the action plan. Failure to do so will result in the information from the Dialogue Questions being lost.
  4. Carefully check each entry and, if necessary, edit, as outlined in Step 1. Please remember that any new graduates from among those admitted in 2012-2015 on the “Enrollment, Retention, and Graduation” tab will mean that you need to update the “Graduate Survey,” “Job Placement,” and “Employer Survey” tabs for those same admission years, as was discussed in the “General Guidelines” section.

## Graduate Survey

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The five years of data found on this tab should reflect up-to-date information, ordered by admission cohort, regarding any person who graduated from your Medical Assisting program over the last 5 years. You will be including the following information: How many graduate surveys were sent out; how many graduates returned the survey; and how many responded positively to the cognitive, psychomotor and affective questions.

Prior to entering the data for the 2016 year, you will need to update the data entered for the previous admission cohorts included on the chart if you have updated the number of graduates for earlier years on the Enrollment, Retention, and Graduation tab and, as a result, sent out and received additional surveys. The instructions below will indicate that order. It is very important to remember that the data is based upon the admissions cohort, rather than the year of graduation, so you may find yourself updating several of the rows.

In order to begin, select the tab for “Graduate Survey.”

Please note the following definitions for each column. There is a central rule that governs the inclusion and updating of the data in all the categories: No student should be counted in more than one row of any given tab. Once a student is placed within a given admissions cohort, he/she remains there forever. If the student drops out and later returns to your program, you should adjust the numbers in the original admissions cohort, not in the cohort date when the student returned to the program, unless the year of admission is no longer on the ARF.

- Column #1: “Calendar Year Admitted” is automatically populated, based upon the information entered in the “Enrollment, Retention & Graduation” tab.
- Column #2: “Number of Graduates” is an aggregate of all the admission cohorts in that particular year and is automatically populated based upon the information entered in the “Enrollment, Retention & Graduation” tab. If you updated this number in the previous tab, you will have to manually update the other numbers in columns 3, 4, and 6 through 8 of the respective row.
- Column #3: “Number of Graduate Surveys Sent” is the number of surveys that were delivered to the graduates from a given admission cohort year. You will need to manually



enter this information for 2016 and, if applicable, update this number for the preceding years.

- Column #4: “Number of Graduates Returning Surveys” is the number of surveys that were returned by the graduates. You will need to manually enter this information for 2016 and, if applicable, change this number for the preceding years.
- Column #5: “Participation Percent” is the automatic calculation of the percentage of returned surveys based upon dividing the number of graduates returning surveys by the number of graduates.
- Columns #6 - #8: “Positive Responses—Cognitive, Psychomotor, Affective” contain the number of students who, in response to all the questions in the particular domain, yielded an average of at least a “3” on the 5-point scale. Each returned survey must be reviewed three times (one time for all Cognitive questions, once for all Psychomotor, and once for all Affective).
- Column #9: “Number of Surveys with Overall Positive Responses” is automatically calculated as the mean average of the three domain columns (#6-#8) immediately preceding.
- Column #10: “Percent Grad Survey Success” is the percentage of the mean average divided by the number of grads returning surveys.

### Step-By-Step Instructions

1. Prior to submitting the information for the 2016 admissions cohorts, you will need to update the prior years. If you updated the number of graduates from a given admissions cohort year, you will need to update the number of graduate surveys sent, the number of graduates who returned the surveys, and the number of positive responses in the three domains. You can do that by completing the following steps:
  - a) Click “edit” in the left hand column for any year in which you have updates.
  - b) Click “Edit,” and a pop-up box (see below) will appear with the results previously entered. Update the numbers to include any changes in the results since the previous year’s ARF was submitted last year, and then click “Save.”

Edit Graduate Survey 2016	
Number of Grad Surveys Sent	28
Number of Grads Returning Surveys	18
Number of Surveys with Positive responses - Cognitive	18
Number of Surveys with Positive responses - Psychomotor	18
Number of Surveys with Positive responses - Affective	18

Save Cancel

- c) The grid will show the changes.
  - d) Repeat this for each year, as necessary, to update previous entries.
2. After you have updated the previous admissions cohort, enter the data for the 2016 Admission cohort.
    - a) Click “Edit,” and a pop-up box (see below) will appear with “0” in all of the boxes. Enter the correct numbers, and then click “Save.”
    - b) The numbers that you entered will be filled into the grid, and the 2016 Graduate Participation and Graduate Satisfaction rates will be calculated.
  3. If you need to respond to the Dialogue Questions and fill out an action plan, you will need to systematically save the information that you enter. Again, answer all of the dialogue boxes and then save; then complete and save the action plan. It is very important that you save the information that you provided in the Dialogue Questions before beginning the Action Plan section. If you don’t, you will lose all the information in the first section.

## Job Placement

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The five years of data found on this tab should reflect the information from all of the graduates of your Medical Assisting program, organized by admissions cohort, who graduated from your program over the last 5 years. You will be including the following information: How many graduates were placed; and how many graduates were hired as medical assistants or into a related field.

You will need to update, if applicable, the data entered for the admission cohorts prior to entering the data for the 2016 year. The instructions below will indicate that order. It is very important to remember that the data is based upon admissions cohort rather than the year of graduation, so you may find yourself updating several of the rows.

Please note the following definitions for each column. There is a central rule that governs the inclusion and updating of the data in this category: No student should be counted in more than one row of any given tab. Once a student is placed within a given admissions cohort, he/she remains there forever. If the student drops out and later returns to your program, you should adjust the numbers in the original admissions cohort, not in the cohort date when the student returned to the program, unless the original year of admission is no longer on the ARF.

- Column #1 “Calendar Year Admitted” is automatically populated based upon the information entered in the “Enrollment, Retention & Graduation” tab.
- Column #2 “Number of Graduates” is an aggregate of all the admission cohorts in that particular year and is automatically populated based upon the information entered in the “Enrollment, Retention & Graduation” section. If you updated any students from a given admission cohort on the Enrollment tab, you will have to manually update the data from the same row of admission on this tab.
- Column #3 “Total Number of Positive Placements” is the number of graduates who satisfy one of the following four conditions: 1) became employed as a medical assistant; 2) became employed in a related field, 3) continued directly with his/her education, or 4) entered the military. You will need to manually enter this number for 2016 and update the numbers, if applicable, for the previous years.

- Column #4 “Number of Grads Employed as MA or in a related field” is a subsection of Column #3 and focuses on the first two conditions: 1) became employed as a medical assistant; or 2) became employed in a related field. You will need to manually enter this number for 2016 and update the numbers for the previous years, if applicable.

### Step-By-Step Instructions

1. The previously submitted job placement data from previous ARFs has been entered into this report. If there were **additional** graduates who became employed as a medical assistant or in a related field, entered the military or continued their education after the previous data was submitted, you should update this information by completing the following steps:
  - a. Click “edit” in the left hand column for the first year in which changes are needed.
  - b. Enter the current numbers of:
    - i. Positive Placements
    - ii. Grads Employed as MAs or in a Related Field
  - c. Click “Save.”
  - d. Check to be sure that new data now appears in the respective cells.
  - e. If there are additional cohorts that require updating, select year and proceed as above.
2. Enter the data for the 2016 Admission cohort, using the same process.
3. If you need to respond to the Dialogue Questions and fill out an action plan, you will need to systematically save the information you enter. You will need to answer all the dialogue boxes and then save; then complete and save the action plan. It is very important that you save the information you provided in the Dialogue Questions before beginning the Action Plan. If you don't, you will lose all the information in the first section.

## Employer Survey

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The five years of data found on this tab should reflect the **current** information about all the graduates of your Medical Assisting program, ordered by admissions cohort, who graduated from your program over the last 5 years. You will be including the following information: How many employer surveys were sent out; how many employers returned the survey; and how many employers responded positively to the cognitive, psychomotor and affective domain questions.

You will need to update the data entered for the admission cohorts, if necessary, prior to entering the data for the 2016 year. The instructions below will indicate that order. It is very important to remember that the data is based upon admissions cohort rather than the year of graduation, so you may find yourself updating several of the rows.

Please note the following definitions of each column. There is a central rule that governs the inclusion and updating of the data in this category: No response about a particular student should be counted in more than one row of any given tab. Once a student is placed within a given admissions cohort, he/she remains there forever. If the student drops out and later returns to your program, you should adjust the numbers in the original admissions cohort, not in

the cohort date when the student returned to the program, unless the year of admission is no longer on the ARF.

- Column #1 “Admission” is automatically populated based upon the information entered in the “Enrollment, Retention & Graduation (ERG)” section.
- Column #2 “Total Number of Positive Placements” is an aggregate of positive placements of the admission cohorts in that particular year and is automatically populated based upon the information entered in the “Job Placement” section. If you updated this number in the Job Placement tab, you will have to manually update the other numbers in the same admission year row.
- Column #3 “Number of Grads Whose Employers were Sent Surveys” is the number of surveys that were sent to the employers of graduates from a given admission cohort year. You will need to manually enter this information for 2016 and revise upward this number, if applicable, for the preceding years.
- Column #4 “Number of Grads Whose Employer Returned Surveys” is the number of surveys that were returned by the employers of graduates from a given admission cohort year. You will need to manually enter this information for 2016 and revise upward this number, if applicable, for the preceding years.
- Column #5 “Participation Percent” is the automatic calculation of the percentage of the employer surveys that were returned, calculated by dividing the number of employers of graduates returning surveys by the number of grads employed as an MA or in a related field.
- Columns #6 - #8 “Positive Responses—Cognitive, Psychomotor, Affective” contain the number of employers who, in response to all the questions about the graduates in the particular domain, yielded an average of at least a “3” on the 5-point scale. Each returned survey must be reviewed three times (one time for all Cognitive questions, once for all Psychomotor, and once for all Affective).
- Column #9 “Number of Surveys with Overall Positive Responses” is automatically calculated as the mean average of the three domain columns (#6-#8) immediately preceding.
- Column #10 “Percent Employer Survey Success” is the percentage of the mean average divided by the number of employers of graduates returning surveys.

### Step-By-Step Instructions

1. The previously submitted employer survey data from previous ARFs has been entered into your ARF. However, if there were employers who submitted surveys after last year’s ARF was submitted, you will need to update this information by completing the following steps:
  - a) Click edit in the left hand column for the first year in which you have changes.
  - b) In the pop-up, enter the correct data to reflect the changes:
    - i) Number Employer Surveys Sent
    - ii) Number Employer Surveys Returned
    - iii) Number of Positive Surveys – Cognitive
    - iv) Number of Positive Surveys – Psychomotor
    - v) Number of Positive Surveys – Affective
  - c) Once each year’s data is correctly updated, click on “Save.”
  - d) Repeat this for each year, as necessary, to update previous entries.
  - e) Click “Save” to proceed with the next cohort.

2. Enter the data for the 2016 Admission cohort.
3. If you need to respond to the Dialogue Questions and fill out an action plan, you will need to systematically save the information you enter. You will need to answer all the dialogue boxes and then save; then complete and save the action plan. It is very important that you save the information you provided in the Dialogue Questions before beginning the Action Plan section. If you don't, you will lose all the information in the first section.

## Graduate Analysis

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The data found on this tab should reflect the number of students, based upon graduation year, who graduated from your program over the last five reporting years. In addition to the four years of data already entered for you, you will be including the following information: How many total students graduated in calendar year 2016; how many of those students participated in some form of distance (including hybrid) education; and how many of those graduates received credit through experiential learning. MAERB collects data regarding graduates with distance learning and/or those granted advanced placement for experiential learning for informational purposes only.

Even though the data for previous years is visible, the number of graduates in the previous calendar years that were entered for the program in previous years cannot be altered by you. If the numbers for prior years are incorrect, please contact your MAERB Case Manager.

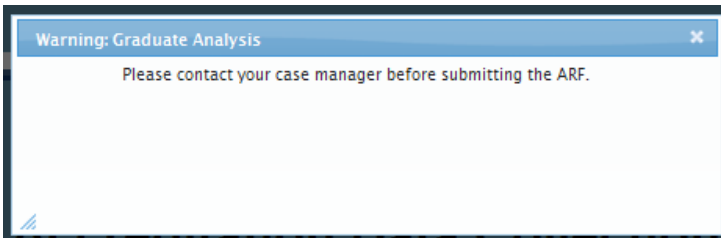
**DO NOT LEAVE THIS TAB BLANK.** You must enter a number on this tab. If you had no person graduate from your Medical Assisting program at any time during calendar year 2016, then you should enter a "0." There are no thresholds related to this section of the Annual Report. The number of graduates recorded on this tab automatically feeds into the Exam tab.

Please note the following definitions of each column. **Unlike all prior ARF tabs, the dates in this tab refer to a student's date of Graduation, not the Admission date.**

- Column #1 "Year of Graduation" is simply the calendar year in which the students graduated.
- Column #2 "Total Number of Students who graduated in the Calendar Year" is the total number of person who graduated (i.e. successfully completed all elements of your program) in that calendar year. You will need to manually enter in the number for 2016. For example, you will simply put down the number of all the students who graduated in 2016, regardless of the graduate's year of admission.
- Column #3 "Number with Distance Education" is the number of students who completed part of the program through distance education and who graduated in the 2016 calendar year. You will need to manually enter in the number for 2016.
- Column #4 "Number with Experiential Learning" is the number of students who received credit for experiential education and who graduated in the 2016 calendar year. You will need to manually enter in the number for 2016.

### MAERB Error Alert

A common error made on the ARF in this section is when programs enter the same number for the “total number of students who graduated in the calendar year” as the number that they put down for the “number of this class graduated to date” for the Admissions Cohort on the Graduation/Retention/Enrollment tab. In order to prevent this error, if you enter the same number on both tabs, you will see the following screen to warn you of a problem.



### Step-By-Step Instructions

To complete the Graduate Analysis tab:

1. Click “Edit” in the left hand column of the grid.
2. Enter the number of students:
  - a. who graduated from your Medical Assisting program at any time **between January 1 and December 31, 2016**. Except for rare instances, this will NOT be the same number as the “number of this class graduated to-date” for 2016, as found on the Enrollment, Retention, and Graduation tab.
  - b. who, as a subsection of the larger graduate number, completed part or all of the program via distance education (including hybrid)
  - c. who, as a subsection of the larger graduate number, were granted advanced placement for experiential learning
  - d. Click “Save.”

## Exam

**This tab is based on Graduation cohort year.** It does **NOT** refer to the year of admission, nor the year in which a particular exam was taken. Due to the 2014 changes to MAERB’s ARF policy, please remember that the 2017 ARF will only include exam data for those graduating in calendar years 2013, 2014, 2015, and 2016. Already entered into your 2017 ARF is exam data for any CMA (AAMA) takers/passers from among those who graduated in calendar years 2013, 2014, 2015, and 2016. All other exam results will have to be obtained by you and reported directly to your MAERB Case Manager prior to the submission of your ARF. For more details about which specific medical assisting exams can be counted toward the Exam threshold of the ARF, you should review MAERB Policy 205 and/or the “Outcomes Threshold Chart.”

**CMA (AAMA) Exam Results:** The CMA (AAMA) participation and exam results for those individuals who both graduated between January 1, 2013 and December 31, 2016 and took the CMA (AAMA) exam prior to **August 15, 2017**, have already been uploaded into the Exam tab of your ARF. Any graduate who took and/or passed the CMA (AAMA) exam **after** August 15, 2017 will be reported and appear on the 2018 ARF. The cells with the exam results are locked and not able to be edited by you. If you believe there to be a discrepancy regarding your CMA (AAMA) exam numbers, please contact the Certification Department of the AAMA at 1.800.228.2262.

After you have contacted the Certification Department of the AAMA, if there is still a discrepancy regarding the total number of takers or passers found on your 2017 ARF, contact your Case Manager at MAERB for further direction.

**MAERB Error Alert:**

**Any exam data that you reported on last year's ARF for previous years' graduates who took and/or passed the RMA (AMT), the NCMA (NCCT), the CCMA (NHA), or the CMAC (AMCA) certification exams has been removed by MAERB with the opening of the 2017 ARF. This includes any graduates that you reported to have taken "more than one" different exam or passed "more than one" different exam. This data was removed by MAERB because a program may have had additional graduates take or pass one or more of these exams within the past twelve months. Therefore, you will need to update and report this information to your MAERB Case Manager again this year, prior to submitting your final 2017 ARF online.**

Results of the RMA (AMT), NCMA (NCCT), CCMA (NHA), and CMAC (AMCA) exams must be submitted by you to your MAERB Case Manager via email and using the grid below prior to your final online submission of your ARF, as these agencies are currently unable to supply their exam results to MAERB in the format needed for uploading. In order to get this information, please contact the respective Certification Department: the RMA (AMT) is given by the American Medical Technologists (1.800.275.1268); the NCMA is given by the National Center for Competency Testing (1.800.875.4404); the CCMA is given by the National Healthcareer Association (1.800.499.9092); and the CMAC is given by the American Medical Certification Association (1.888.960.2622). Please be careful to organize your takers and passers based on their year of graduation, and not the year that they took or passed a given exam.

**NOTE about the CMAC (AMCA) credential:** Effective October 8, 2015, a fifth medical assisting credential became accredited with NCCA. As such, and in keeping with the 2015 Standards, CMAC (AMCA) exam results may be counted (for any graduate who took the exam after October 8, 2015) by your program toward meeting the exam outcome thresholds that have been established by MAERB.

If any of your graduates took or passed any of the NCCA-accredited exams other than the CMA (AAMA), please submit an email to your MAERB Case Manager with the following information in the form of the grid below, including headings and years:

Year of Graduation	# of Grads Who Took the RMA (AMT) Exam	# of Grads Who Passed the RMA (AMT) Exam	# of Grads Who Took the NCMA (NCCT) Exam	# of Grads Who Passed the NCMA (NCCT) Exam	# of Grads Who Took the CCMA (NHA) Exam	# of Grads Who Passed the CCMA (NHA) Exam	# of Grads Who Took the CMAC (AMCA) Exam	# of Grads Who Passed the CMAC (AMCA) Exam
2016								
2015								
2014								
2013								

You must send this information to your Case Manager prior to submitting the form, as you will be charged a \$200 unlock fee if you submit it after you have submitted the ARF. If you have questions regarding completion of the above-listed grid, contact your Case Manager.

Under the **Participation** section of the Exam tab, you will need to manually fill out the column “Number of Students, if any, who took more than one of the **five** different qualifying exams.”

### Step-By-Step Instructions - Participation:

- Click on the each of the Edit buttons, for 2013, 2014, 2015, and 2016:
  - On the pop-up screen, enter the number of graduates for a given year, as reported on the Graduate Analysis page, **who took “more than one” exam**. If there are no graduates who took more than one different qualifying exam, leave it as “0.” Then “Save” your work.

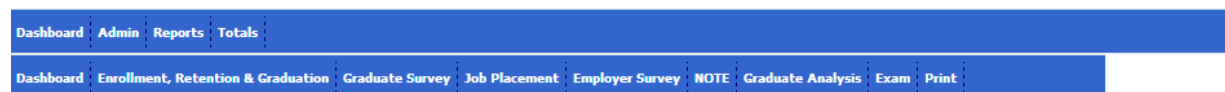
In addition, under the **Passage** section of the Exam tab, if you have any graduates who took “more than one certifying exam,” you will need to manually fill out the column “Number of Students who passed more than one of the **four** qualifying exams.”

### Step-By-Step Instructions – Exam passage

- Click on the each of the Edit buttons, for 2013, 2014, 2015, and 2016:
  - On the pop-up screen, enter the number of graduates for a given year, as reported on the Graduate Analysis page, **who passed “more than one” exam**. If there are no graduates who passed more than one exam, leave it as “0.” Then “Save” your work.

## Submitting Your ARF

Carefully review the document prior to final submission and proceed to the Dashboard for submission. If you have left a section incomplete, you will receive the message below.



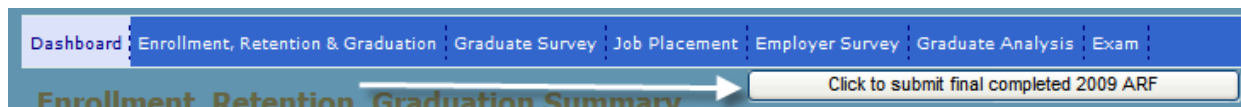
Before submitting this cohort data you must complete the following:



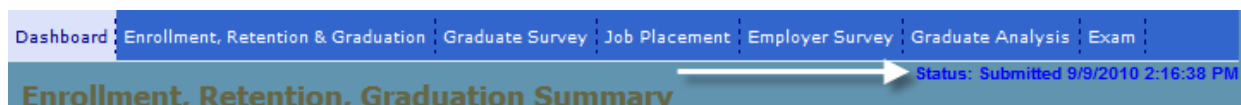
When you click on the words, “Before submitting this cohort data, you must complete the following,” if there are any incomplete portions of the ARF, they will be listed for you. You will not be able to submit the final ARF until all specified items have been completed.

After completing all required sections of the ARF, your ARF is ready for submission. Go to the Dashboard tab and click on “Click to Submit Final Completed ARF,” in order to electronically submit your final ARF. Once the ARF has been submitted online to the MAERB, you may view your completed ARF or print out a copy any time that you choose. **Your ARF is not considered to be complete until you click on the “Final Submit” button.** You can confirm that your ARF has been submitted, when you see the words, “Status: Submitted” in bold-faced blue print in the upper-right corner of the Dashboard.

1. Once your ARF is complete, click the “Submit” button identified in the screen shot below.



2. You will receive the following confirmation if your electronic submission is successful.



3. Be sure to click on the “print” tab, in the upper right-hand corner of the screen and save a PDF version of your final, completed ARF. Save the file permanently.

## Dialogue Questions and Action Plans

The Annual Report Form is designed so that, if you do not meet a threshold in the year prior to the current reporting year, you are required to fill out dialogue questions and create an Action Plan.

The purpose in submitting this information to MAERB is to provide the context for any ARF data that is below threshold and to allow you and MAERB, as an external audience, to analyze that context. In addition, developing an action plan enables you to articulate some concrete steps for improvement.

Below you will find the dialogue questions and the prompts for the Action Plan that you might need to fill out in the ARF. You will find in italics what you need to highlight in your response. And, of course, additional information is always welcome, based upon the goal above.

In addition, you will find the template for the action plan, as the structure is the same in all of the categories, so that you can prepare for those questions as well.

### Step-By-Step Instructions –Enrollment, Retention and Graduation Dialogue Questions

Please answer the questions below regarding your retention rate. All questions must be answered, and the grid must be completely filled out.

1. List the internal and external factors that resulted in your retention rate not being met, as reported in the second-to-most-recent reporting year. Briefly describe the effect that each factor contributed

*Answer question, listing and describing each factor which seemed to affect students during the current reporting year.*

2. What percentage of your attrition would be attributed to academic factors?

*Identify the percentage.*

3. Who is responsible for instituting changes to improve the retention rate of the medical assisting students?

*Who establishes and monitors medical assisting student retention? It is appropriate to list more than one person.*

4. Is attrition concentrated with one particular instructor or course? If so, please list the course and describe how it directly impacted the attrition within the program.

*Have you noted a specific course/module or instructor being related to attrition? How has that course/module or instructor affected the attrition?*

### **Step-By-Step Instructions - Graduate Survey Participation**

#### **Dialogue Questions**

Please complete the dialogue questions and action plan regarding graduate participation outcome below.

1. To what do you attribute the drop in the graduate participation rate for the second-to-last reporting year? Identify any program change(s) to which you can associate this result?

*What was different about this group of students or the program that could account for the drop in participation?*

2. When is the graduate survey conducted and by what type of process? Electronic, face to face meeting, mail, etc.?

*What type of survey process do you use? Do you send out surveys at a set time after each group of graduates, or do you send them out just once a year?*

3. How many months after graduation are the graduate surveys sent out?

*When are the surveys distributed to the graduates?*

4. What format do you use for distribution and follow-up of the surveys (i.e., email, telephone contacts, and handouts)?

*How is distribution conducted and what type of follow up is used?*

5. Who is responsible for distributing the surveys to the graduates?

*Who distributes the surveys and conducts the follow up if the surveys are not returned?*

6. Who is responsible for tracking and analyzing the results of the graduate surveys?

*Who monitors and analyzes the return rates?*

## Step-By-Step Instructions - Graduate Survey Satisfaction

### Dialogue Questions

Please complete the dialogue questions and action plan regarding the graduate satisfaction outcome below.

1. To what do you attribute the drop in the graduate satisfaction rate for the second-to-last reporting year? Identify any program change(s) to which you can associate this result?

*If this is a drop from previous year, what factors that might have had an impact? Are there are changes that have occurred that might have affected the graduate satisfaction rate?*

2. Describe the areas indicated for improvement by the graduates (e.g., facilities, job preparedness, job placement, salary, faculty, curriculum, and practicum).

*What areas did the graduates identify as unsatisfactory/needing improvement?*

3. What suggestions do your communities of interest have for improving graduate satisfaction?

*What did your advisory committee identify as possible solutions to be the above factors and for improving graduate satisfaction?*

4. Who is responsible for tracking and analyzing the results of the graduate satisfaction surveys?

*Who monitors and analyzes the results of the graduate survey?*

## Step-By-Step Instructions - Job Placement

### Dialogue Questions

1. To what do you attribute the drop in the job placement for the second-to-last-reporting year? Identify any program change(s) to which you can associate this result?

*Has there been a program or environmental change that has affected the placement of graduates? (This question applies to the graduates of a specific admissions cohort.).*

2. Is the unemployment rate comparable for all job categories in your locale, or is it specific to healthcare related jobs?

*Discuss how the local unemployment rate for healthcare-related jobs compares with other types of job categories.*

3. What is the local job market for medical assisting graduates? Do the practicum sites you currently use have a history of hiring your graduates?

*Has the job market for medical assisting graduates changed, and, if so, in what way?*

*Where do your graduates find jobs? Do they find them through the practicum sites, former employers, online postings, or some other source?*

4. Identify the factors that adversely affect positive placement of your graduates. Briefly explain the impact of each factor.

*What are specific factors—for example, competition, market saturation, and so on—that have an adverse effect on placement of your graduates?*

5. Who is responsible for tracking and analyzing the job placement of your graduates?

*Who monitors placement and/or assists graduates with placement?*

### **Step-By-Step Instructions - Employer Survey Participation**

#### **Dialogue Questions**

1. To what do you attribute the drop in the employer participation rate for the second-to-last reporting year? Identify any program change(s) to which you can associate this result?

*Consider what might have caused the drop and how those factors might have impacted participation in the employer response.*

2. When is the employer survey conducted and by what type of process, electronic, face to face meeting, mail etc.?

*How do you distribute your employer surveys?*

3. When do you distribute your surveys to the employers?

*When do you provide your surveys to the employers? At what point do you follow-up on those who have not responded?*

4. What format do you use for distribution and follow-up of the surveys (i.e., email, telephone contacts, and handouts)?

*Do you use an electronic survey, telephone survey or paper survey? How do you follow up with employers who do not respond?*

5. Who is responsible for distributing the surveys to the employers?

*Who distributes the surveys to employers? Does this individual have a relationship with the employers which fosters a response being submitted?*

6. Who is responsible for tracking and analyzing the results of the employer surveys?

*Who monitors and analyzes the employers who have not responded?*

### **Step-By-Step Instructions - Employer Survey Satisfaction**

#### **Dialogue Questions**

Please complete the dialogue questions and action plan regarding Employer Survey Satisfaction outcome below.

1. To what do you attribute the drop in the employer satisfaction rate for the second-to-last reporting year? Identify any program change(s) to which you can associate this result?

*If this is a drop from previous year, what factors that might have had an impact? Are there changes that have occurred that might have affected the employer satisfaction rate?*

2. Describe the areas indicated for improvement in graduates' job performance. Indicate if each of these is in the graduate(s) knowledge, performance or behavior.

*What areas did employers identify as unsatisfactory/needing improvement, and did those weaknesses manifest themselves in knowledge, performance or behavior?*

3. What suggestions do your communities of interest, including the employers, have for improving employer satisfaction?

*What did your advisory committee identify as possible solutions to be the above factors and improving employer satisfaction?*

4. Who is responsible for tracking and analyzing the results of the employer satisfaction surveys?

*Who monitors and analyzes the results of the employer survey?*

### **Credential Exam Outcomes**

#### **Exam Participation**

Please complete the dialogue questions below about exam participation.

1. What steps does the program take to educate students about the opportunity to take the five NCCA-accredited Medical Assisting credentials?

*What events and/or activities provide the students with access to the exams?*

2. What are the obstacles preventing students from taking an exam and how is the program addressing those obstacles?

*What impediments do students face in trying to take an exam? Is there any pattern that you have noted? What have you put into place to help the students overcome those impediments?*

3. What steps has the program taken to promote a culture of "credentialing exam participation," and what have been the impediments in promoting that culture?

*How has the program helped students to develop an understanding of the importance of the exams? What has prohibited the development of that understanding?*

4. What strategies has the program taken to improve the exam participation rate, and how successful are those strategies?

*What steps has the program taken to systematically improve participation, and how would you evaluate the usefulness of those strategies?*

## **Exam Passage**

Please complete the dialogue questions below about the exam passage rate.

1. How do you prepare students to take the CMA (AAMA), RMA (AMT), NCMA (NCCT), CCMA (NHA), and/or CMAC (AMCA) exams?

*What program-sponsored activities are in place to help students pass the exams?*

2. What areas of student weakness have been identified by exam results?

*What areas have been particularly difficult for the students?*

3. Were the examination results discussed with the communities of interest, and what were their recommendations?

*What has the advisory committee recommended that the program put into place to improve the exam passage rate?*

## **ACTION PLAN**

### Analysis of Previous Plan (if appropriate)

*If you had a previous action plan, you would analyze the results of that plan here. What changes occurred, related to the objectives of the action plan?*

### Action Plan with Measurable Objectives

*What do you plan to do? What are the objectives you plan to achieve?*

### Responsible Party

*Who will be implementing the plan?*

### Steps for Implementation

*Based on the action plan, what steps will be taken to achieve the objectives?*

### Timeline for Implementation of Each Step

*When do you plan to complete each of the steps?*