Medical Assisting Education Review Board
2017 Site Visit Instructions

At this time, the MAERB *Program Director Handbook* contains instructions about the site visit for Program Directors who have site visits scheduled for 2015 and 2016, as those visits will be conducted under the 2008 *Standards and Guidelines*. The instructions below are designed for Program Directors who will have visits in 2017 under the 2015 *Standards and Guidelines*. This information will be incorporated into the *Program Director Handbook* in the summer of 2016, but we are publishing it now as a separate excerpt in order to provide support in advance. If you have any questions, feel free to contact your Case Manager at the MAERB office.

Self-Study

The directions outlined below for completing the Self-Study are specific to the programs that will be visited beginning in 2017, as those visits will be conducted under the 2015 *Standards and Guidelines.* There is a Self-Study Template available on the MAERB website for programs that will be visited under the 2015 *Standards and Guidelines*.

Reviewing the Self-Study Template found on the MAERB website is a very good beginning to the process, as understanding the components of the Self-Study will ensure a smooth Self-Study process. The Self-Study Report (SSR) requires you to look critically and comprehensively at your program and to compile the data that has been collected over the last several years. It is an evaluative inventory of resources, assessments, and curriculum.

As the Program Director, it will be very important for you to read the directions completely, and your next step will be to proceed through each section of the Self-Study, which is organized by Standard. In responding to the specific areas of the Self-Study, you will need to demonstrate that the program is compliant with the 2015 *Standards and Guidelines*. The SSR template is designed specifically to correspond to the *Standards and Guidelines,* as well as to the MAERB Core Curriculum. In addition to filling out the form, you are required to submit a number of documents in order to provide more support.

In the SSR template there are specific instructions that outline the appendices. In addition, MAERB has developed a naming protocol in order to help you to name the documents that are necessary to be attached. The naming protocol is embedded within the instructions on the SSR template.

Four months prior to the site visit, you will be required to submit your Self-Study Report directly to the MAERB Server. Prior to the deadline, MAERB will provide you with a link for uploading your SSR.

At the same time, you will also need to submit payment to MAERB for the comprehensive review fee. In addition, those programs undergoing continuing accreditation will need to submit the continuing accreditation fee.   The payment for the fees should be sent to MAERB by mail at the following address:

> MAERB
> 20 N. Wacker Drive, Suite 1575
> Chicago, IL, 60606

When you receive your site visit confirmation letter from MAERB, you also will receive the invoices for the total expense.

Two to four months prior to the established site visit date, the MAERB office will contact you with the names of and brief background about the surveyors. It is important to respond as quickly as possible if you perceive any conflict of interest. If there is no conflict of interest, you can confirm the selection of the team members.

After the MAERB office receives the SSR, your case manager will review the Self-Study to ensure that all of the parts are complete. It is then sent to a MAERB Liaison, who reviews it to provide any necessary directions to the site visitor. Approximately two months prior to the site visit, the MAERB office sends the Self-Study to the site surveyors. At any point in this review process, you might be contacted with questions and requests for further clarification and documentation.

Relevant Resources:

> **Self-Study Report Template:** The lengthy report that you will complete during the year prior to the site visit.

Visit Schedule

Approximately 4-6 weeks prior to the visit, the Team Coordinator will contact you in order to set up the schedule for the visit as well as review the travel specifics. The MAERB office will have provided the surveyors with the lodging and travel options that you sent when you confirmed your site visit date. The surveyors' travel and lodging plans should be discussed at this time, so that arrangements can be made. The program is responsible for the transportation of the team to and from the airport (frequently there are shuttles available) and to and from the hotel.

In addition, the Team Coordinator will want to create a schedule for the visit with you. You will be sent a sample Site Visit Agenda that you are free to adapt; it lists all of the specific components required during the site visit. It will be necessary for you to identify the people who will be participating in the visit, such as the advisory committee, current students, graduates, faculty, support staff and administrators. Your responsibility will be to set up all appointments and meetings. In addition, there are always formal opening and exit interviews with the Medical Assisting program faculty and the administrative leadership.

During that initial contact with the Team Coordinator, it will be very important for you to review the documentation that is required for the site visit. You will find that the Team Coordinator will be a useful resource in clarifying the documents that are necessary for the site visit.

You will also need to make plans for the surveyors to be provided with access to lunch each day and other snacks and amenities.

Resource Room

You will need to provide a private room for the surveyors, and they should have access to the materials outlined below, as well as the other documents that are necessary and outlined on the Site Visit Documentation Checklist. The surveyors should have access to the internet, as well as a printer and a

shredder. In other words, set up a temporary office so that the surveyors can accomplish their tasks as efficiently and effectively as possible.

Documentation

The directions outlined below for providing documentation are specific to the programs that will be visited during 2017 and afterwards, as those visits will be conducted under the 2015 *Standards and Guidelines.*

As you are finalizing your work on the Self-Study, you will want to start compiling the documentation that you need to provide to the surveyors during their visit. It is important to create a "map" or "guide" to help the surveyors understand the logic and purpose to the wealth of information that you are providing to them. Programs create that guide in a number of different ways: highlighting, color coding, organization, and so on. The method can vary, but it is important to have a system that is comprehensible to the surveyors.

As of 2017, MAERB requires the use of electronic files, but it is important to ensure that you have a backup of some type in case there is any problem with the system. For example, those materials could be stored on an external hard drive or on a laptop for the use of the surveyors.

Your most important resource will be the Documents for On-Site Review and Document Checklist. It includes a detailed explanation of how to organize the material electronically. You can use the Checklist as a method of ensuring that you have all of the material available.

Rather than replicating the Documents for On-Site Review and Document Checklist in this section of the Program Director Handbook, the focus here will be specifically on the curricular materials.   The goal is to outline a possible method for organizing the documentation for the cognitive objectives and the psychomotor and affective competencies of the MAERB Core Curriculum. There are, obviously, variants to this process, but this method will at least enable you to understand the required basics.

The surveyors will have reviewed all of the syllabi when they review the SSR. If you have updated your syllabi in any way, you should provide the updated syllabi to the surveyors. In addition, you should have a copy of your Self-Study Report available electronically in the resource room for the surveyors.

For the 2015 MAERB Core Curriculum, you will also need to have the assessment tool available for each of the the 100 cognitive objectives and the 95 psychomotor and affective competencies. You will need to include the blank assessment tool/s that was used to assess that objective or competency. For the cognitive objectives, the assessment method has traditionally been either an exam, paper assignment, oral report, discussion board, and so on. It is important to highlight the questions which cover the objective in the specific document. For the psychomotor and affective competencies, there will need to be a copy of the tool that you use, which can be blank skills assessment check-off or some other appropriate tool. If a given evaluation tool documents the achievement of more than one objective and/or competency, additional copies of the tools must be made and placed in all other appropriate domain folders. Many Program Directors will color code, in order to provide helpful guidelines to the surveyors; if you do so, be consistent and explain the method to the surveyors.

You will need to make sure that you also have the textbooks available for all the classes so that the material can be double-checked by the survey team.

You will find a model for naming documents and organizing them in the Documents for On-Site Review and Document Checklist. There are other materials that are necessary, and the Document Checklist will help you to identify those materials.

Relevant Resources:

> **Documents for On-Site Review and Document Checklist**: The checklist outlines the other materials that need to be available to the surveyors in the resource room.

> **MAERB Policy 220**: This policy outlines the document retention requirements.

During the Visit

As a general rule, the surveyor team meets the night before at the local hotel in order to discuss its initial findings after the surveyors' individual review of the Self-Study and prior to seeing the material available at the campus. It is generally helpful to arrange for transportation of the surveyors to the campus in the morning and a return to the hotel in the evening, but those are details to discuss in your initial conversations. Also, the team will rely on you, or whomever you designate, to serve as a guide during the visit. It is a good idea to provide your cell number so that the surveyors can contact you if they have any questions or they are looking for more information.

Quite frequently, surveyors will request more documentation. Providing additional documentation during the site visit is acceptable and appropriate.

The surveyors will also find it very helpful if you provide them with a list of names and titles of the people with whom they are going to meet, so that they can use that resource for completing their report.

At the end of the visit, there is a formal exit interview, during which the surveyors share their findings. The findings will include specific citations and a summary of the program's strengths. The findings related during the exit interview are tentative, and citations may later be added or deleted. The findings from the exit interview are only relayed orally, and not in writing.

After the Visit

You will receive an email from the MAERB office with a link to a survey in order to evaluate the team who visited the campus. It is very important that you fill out the survey. You can also share that link with other people on the campus who interacted with the surveyors. The MAERB office relies upon that data in order to develop surveyor training. The feedback from all of the surveys within a given semester is aggregated, in order to maintain confidentiality. The comments from individual surveys, however, remain confidential.

The surveyors submit the Onsite Survey Report (OSSR) to the MAERB office five days after the visit has concluded. There is then a review process by the MAERB staff and the MAERB liaison. During the review, it is conceivable that citations will be added or deleted, in coordination with the team coordinator. You will then be provided with the final copy of the OSSR and are asked to review it for factual accuracy. If you think the report contains inaccurate information or undeserved citations, you are asked to submit material to document the correct information. In addressing issues of factual accuracy, you are focusing only on the information that was available to the surveyors at the time of the

visit. At this time, it is not appropriate to submit material that corrects a valid citation or to provide new information that was not available at the time of the visit. If you attempt to correct a citation with your response to the survey report, the documentation will not be accepted for review by the Board.

Along with providing a response to the OSSR, you will also need to submit a Request for Accreditation Services (RAS) In order to submit the RAS, you will need to go to the CAAHEP website and fill out the appropriate form: http://www.caahep.org/Content.aspx?ID=11. MAERB requests that you use Option 1 for the electronic submission. It will be automatically transmitted to the MAERB office, and you will be contacted if any further information is needed.

Any response will be reviewed by the MAERB Liaison, working with the Team Coordinator, and, if appropriate, changes will be made to the report. Based upon the OSSR and your official response to it, a recommendation is then created and reviewed by the MAERB members The MAERB is authorized to add, delete, or modify any citations found in the OSSR prior to its recommendation to CAAHEP. After Board discussion, the MAERB recommendation is forwarded to CAAHEP for final action and is typically voted upon by CAAHEP within 45 days of the MAERB meeting. You will be notified of the CAAHEP decision following its meeting. The CAAHEP notification will indicate the type of accreditation action being recommended, any deficiencies being cited, and the due date of the progress report, if required. As a general rule, the CAAHEP letter is received five to eight months after the site visit.

This process varies if there is an adverse recommendation, such as probation, withhold accreditation, or withdrawal of accreditation. In those instances, the program has the opportunity to request reconsideration.

In terms of the specific timeframes, programs approved for initial accreditation are given accreditation for a period of no more than five years. At the end of the five-year period, the initial accreditation expires, unless MAERB makes a new recommendation for continuing accreditation to CAAHEP. Programs with initial accreditation are asked to provide status reports to MAERB throughout the five-year initial accreditation period. At the end of the five-year period, the program with initial accreditation may be granted continuing accreditation for up to an additional five years, lengthening the time between comprehensive reviews to no more than ten years. Programs that apply for continuing accreditation may be granted continuing accreditation for a maximum of ten years before another comprehensive review is required. Any program may be required to undergo an early site visit at the discretion of MAERB, based on the program's continued compliance with the *Standards*.

Adverse Recommendations

In the instance of a MAERB adverse recommendation, such as probation, withhold accreditation, or withdrawal of accreditation, the program will receive a letter prior to any official notification to CAAHEP, as is outlined in MAERB Policy 335. The program has three options at this particular stage: first, to request reconsideration based upon new data; second, to request voluntary withdrawal of accreditation or withdrawal of the program's application in lieu of an adverse recommendation; or, third, to accept the adverse recommendation.

In requesting reconsideration, the program has the ability to provide **new** material to demonstrate progress toward compliance with the CAAHEP *Standards and Guidelines for Medical Assisting Programs*. The program has 7 days in which to declare its intention for a request for reconsideration and then 30

days to provide the appropriate documentation. If an institution choses to request reconsideration, it will need to demonstrate that it is addressing the specific citations effectively and that the appropriate changes have been made. Due to the nature of many of the citations, it is sometimes simply not conceivable that a program will be able to make the necessary changes within the specified time frame. For example, if it is indicated that specific competencies need to be taught and assessed, that process will require more time than 37 days granted by MAERB. In addition, major curricular changes and the necessary implementation also takes a significant amount of time. Therefore, whether or not a program should request reconsideration, as opposed to accepting the pending adverse recommendation, is a decision based in large part on the nature of the citations.

If a program decides to request reconsideration, no recommendation will be sent to CAAHEP until the submitted documentation has been reviewed by MAERB. At its next meeting, MAERB will determine if the request for reconsideration is successful or not, and the program will be notified.

CAAHEP also provides the option for a program to voluntarily withdraw, in lieu of an adverse recommendation. If a program decides to follow that path, it can contact the MAERB office for the correct template to be sent to CAAHEP.

The program's final option is to accept the adverse recommendation. In that instance, the program will be sent a formal letter from CAAHEP with specific instructions and details.