Instructions for Program Directors and Site Surveyors

When you receive the formal notification of your site visit, you will receive a link to a SharePoint Site to access the SharePoint site that was designed for you to share documents with your surveyors. Please test the MAERB SharePoint site and sign in immediately. If you have any problems, please contact Sarah Marino (smarino@maerb.org) for help.

Below you will find instructions for how to use the SharePoint site for your visit, how to enter the SharePoint site, how to upload documents, and how to create alerts for yourself.
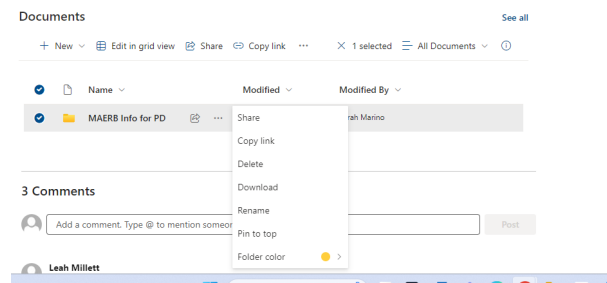
Use of the SharePoint Site

The goal of using a protected SharePoint site is to develop a safe space for Program Directors to share the program materials. SharePoint is password-protected and only people who are formally given access to the SharePoint site will be able to access it. The MAERB staff will have access to all the sites, but Program Directors can be assured that only their Site Surveyors will be able to access the material. In addition, there will be a site developed just for the Site Surveyors so that they can do their work. In using SharePoint, it protects the confidentiality of the data as nothing is downloaded on individual computers.

Program Directors

You will receive access to a SharePoint Site that is titled with the name of your organization, and you will be able to add documents to that site. MAERB will be sending you an email with a link for you to access that site approximately two months before your visit, and you should access it immediately. On that site, you will find important materials to prepare for the site visit, including the contact information for your Site Surveyors.

MAERB does not provide access to the medical assisting Program Director's supervisors or any of the other instructional staff, but the Program Director can download the folder, "MAERB info for PD," that MAERB has provided the Program Director. To download the folder, the following steps must be followed. The graphic below illustrates the directions.

• Hover your cursor over the folder • You will see an ellipsis of three periods • Right click on the ellipsis	• A menu will pop up with several options • Click on download • A zipped folder will be downloaded

MAERB requires that Program Directors of Continuing Accreditation Programs submit the ARF raw data to the SharePoint Site in the documents area one week prior to the site visit. Initial Accreditation Programs do not have any ARF raw data, so they do not need to submit that information. In addition, if the Site Surveyors ask you for additional information prior to the site visit, you must provide that additional information on the SharePoint site rather than through email. Finally, if you choose to do so, you may upload to the SharePoint site the electronic resources that you need to supply as of the date of the site visit.

The MAERB Office has created folders for you to use to help you organize the data that you need to upload. The folder titled "1. MAERB Info for PD" is populated with the documents from the MAERB office. The second folder is designed for the curricular samples that the Site Surveyors will request from you at least two weeks prior to the start of the site visit and that are due at least seven days prior to the site visit. You will need to provide your ARF Raw Data 7 days prior to the site visit, and you will find a folder labelled for that purpose. Also, you will need to post a Site Visit Agenda and, potentially, updated materials, your surveyors will provide you with timelines for that purpose, and you will put those documents in the fourth folder. Finally, there are two folders that are optional, but if you determine that you would like to place the material required at the time of the site visit, outlined in the handout "ARF Raw Data and Onsite Documentation," you can do that as well. Those materials need to be completed by the start of the site visit.

Documents

Name	Modified	Modified By
📁 1. MAERB Info for PD	Monday at 7:01 AM	Sarah Marino
📁 2. Curricular Samples--Due 7 days prior to site visit	Monday at 7:02 AM	Sarah Marino
📁 3. ARF Raw Data--Due 7 days prior to site visit	Monday at 7:02 AM	Sarah Marino
📁 4. Updated Materials and Agenda--Need to be available at Surveyors Deadline	Monday at 7:11 AM	Sarah Marino
📁 Course Records, Optional Use--Need to be available at site visit	Tuesday at 5:40 PM	Sarah Marino
📁 Supporting Documentation, Optional Use--Need to be available at site visit	Monday at 7:00 AM	Sarah Marino

Do not zip the folders that you upload to SharePoint, as the Site Surveyors need to download them to open them. In addition, avoid using too many folders to organize the materials. Finally, you should use the simplified abbreviations that are outlined in the ARF Raw Data Submission and On-Site Electronic Documents or in the Organization of Documents for Submissions that is on the MAERB website under the Resources Tab on the Site Visits and Program Resources page in the "instructions" section.

Entering into SharePoint Site

Both Program Directors and Site Surveyors will be able to access the SharePoint site by clicking on the link that is included in an email from MAERB.

We register you with the address where you received the information about the site visit. If you are signed into the browser with a different email address, there will be some disconnect. You do need to ensure that you are signed into the browser with the correct email address.

Prior to getting to the SharePoint site, you may be asked to sign into SharePoint Online:

We have used your work address to invite you to the SharePoint site, so the assumption is that you would then click on your organizational account and sign in. Once you sign in, you will have access to the site where you will find the documents.

It might be that you are asked to request access to the SharePoint site, as some institutions have firewalls that require that. In that case, please request access, and a MAERB staff member will receive that request and provide you with access.

If your organization does not use Office 365, you will need to create a Microsoft Account. It is as easy as filling out your name and creating a password. You will then get a message to verify your information and, once you do that, you will be able to access the SharePoint site.

SharePoint Site and Documents

When you enter the SharePoint site, you should either create a bookmark or a favorite in your browser so that you can easily access the SharePoint site again.

On the site, you will see a large area, labeled Documents:
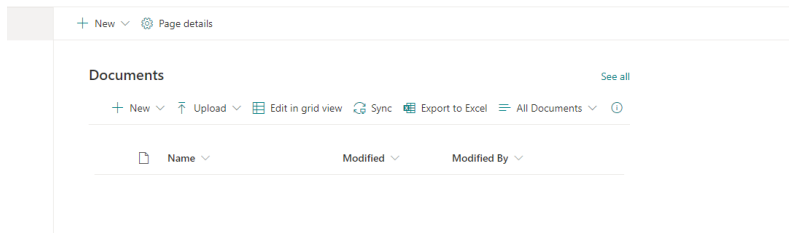
Program Directors will then be able to upload any documents that the Site Surveyors may request prior to the visit. Also, Program Directors of Continuing Accreditation programs will be uploading all the ARF materials to this site for the MAERB staff to access one week prior to the site visit. In addition, Program Directors can also upload all the materials requested for the electronic resource room to this site.

If you are planning to use your institutional platform for the Course Records, Supplementary Documents, and Updated Materials, you will only include the ARF material on the SharePoint.

To upload materials, you can just drag and drop the individual files into the appropriate folder, but if you have folders to upload or use a browser other than Chrome, that might not be as effective as using the "Upload" function. To use the "Upload" function, you would click on Upload, and it will then ask you if you want to upload a File or Folder. Below you will find the example of uploading a folder.
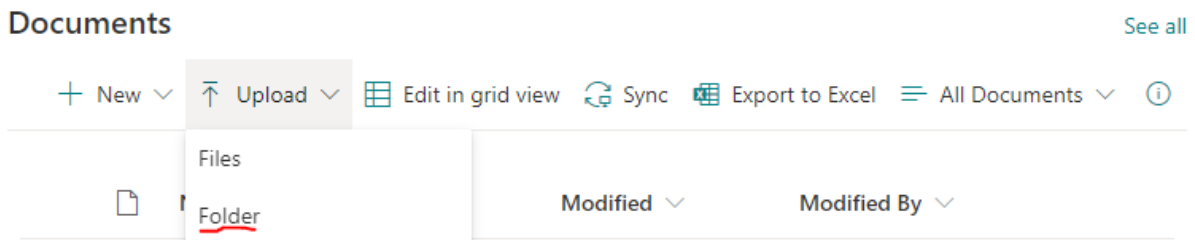
You should click on Folder and then browse on your desktop for the appropriate folder. You will a question reaffirming the Upload, and you can click on Upload again.
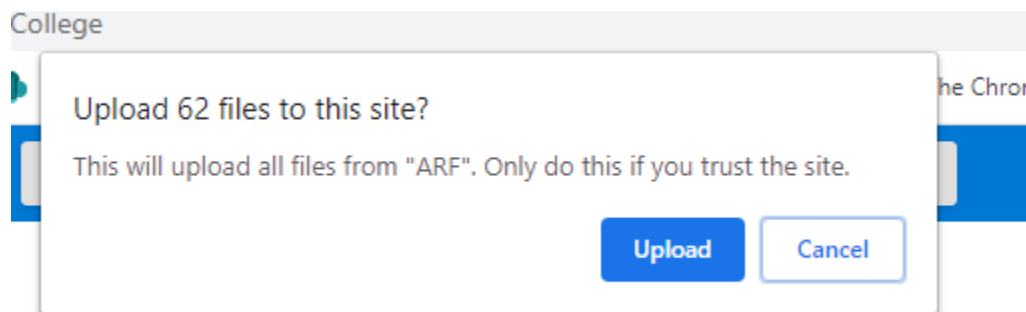
Then, depending upon the size of the folder and the number of documents, you will see the system uploading it. There is sometimes a need for patience, as browsers do not like to rush.

Documents   See a

+ New ∨   ↑ Upload ∨   ⊞ Edit in grid view   ⟳ Sync   ⬛ Export to Excel   ⟳ Uploading 67 items   ≡ /

□	Name ∨	Modified ∨	Modified By ∨
📁	ARF	A few seconds ago	Sarah Marino

If Program Directors also want to use the SharePoint site for their Electronic Resource Room, they will then repeat the process for all the folders. When the process is completed, the tab can be closed. The MAERB staff will access the ARF materials one week prior to the Site Visit. It is possible that Site Surveyors will ask Program Directors for additional material prior to or during the site visit. In that situation, Program Directors should use the SharePoint site to post the additional material so that you can avoid email and circulating documents.   Program Directors and Surveyors will consider the timing for any additional materials requested prior to the site visit.

If Program Directors want to use it to provide the electronic resources, outlined in the handout "ARF Raw Data Submission and On-Site Electronic Documents" required for the site visit, those materials are due when the site visit starts. If alerts are created (see section below), Site Surveyors and Program Directors will be automatically informed about any updates.

In addition to folders, you can easily upload individual documents, dropping and dragging them appropriately. The Surveyors will be automatically notified when that is completed through a process of creating alerts.

Creating alerts

Program Directors and Site Surveyors can create alerts so that you know when new documents have been added to the site, which can be a very helpful service. To do so, you will need to click on the "See all" that is on the upper right of the document pane.

Documents   See all

+ New ∨   ↑ Upload ∨   ⊞ Edit in grid view   ⟳ Sync   ⬛ Export to Excel   ≡ All Documents ∨   ⓘ

□	Name ∨	Modified ∨	Modified By ∨

After you do so, you will see an expanded list of items and then an ellipses (series of three periods).
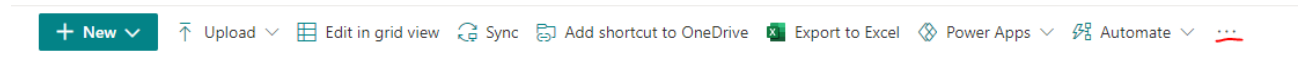
You will click on the ellipses, and you will get a dropdown menu, and you will need to click on "Alert me." You will then check to make sure that the settings match those below and click on OK. It is very important that you click on "Daily Summary" when asked when to send alerts. Otherwise, you will receive a lot of emails.

You will then receive confirmation that you set up an alert. After doing so, you will be alerted anytime somebody uploads a document or a folder to the site.

Site Surveyors

You will receive access to a SharePoint Site that is titled with the name of the organization that you are visiting. You will have access to the main page where the Program Director will submit the ARF Material. As you know, you should not be reviewing the ARF material, as the MAERB office will be doing that for you. If you do need to request additional information from the Program Director prior to the site visit, you must ask the Program Director to submit the material on that page to avoid the confusion of email back and forth. In addition, at the top of the page, you will see a link titled "Site Surveyors," and you will be able to access a subsite.

Surveyors Sample

F **SampleProgram**

The subsite will contain the program's Self-Study Report and your OSSR materials. The Program Director will not be able to access that subsite, so it is a place where you can privately do your work with your team member.

If you want to keep both tabs open at the same time, you should hover your cursor over the Surveyor Site and then right click. A menu will drop down, and one of your options will be to "open the link in a new tab." Click on that option, and the Surveyor site will open in a new tab, and you will be able to alternate between the two tabs.

Problem-Solving SharePoint

The MAERB office puts the program's Self-Study on the site. If you do not see all the documents in the Self-Study, you might need to refresh the page a few times.

One problem-solving tip is as follows:

1. At the home page, click on "See All"

Documents   See all

＋ New ∨   ↑ Upload ∨   ⊞ Edit in grid view   ↻ Sync   📊 Export to Excel   ☰ All Documents ∨   ⓘ

2. It will take you to a page that just focuses on documents, and it seems to reload the page.

If the material is still incomplete, please contact the Leah Millett (lmillett@maerb.org) for help, as she will make sure it is complete.

Only then should you contact the Program Director if there is a missing document.

During the site visit if new items are added, you will need to refresh the page to see those items.

Comments

There is a comment function built into the SharePoint site for easy communication. To use the comment function, you need to type "@" and then the person's email, and a box should pop up for you to confirm. The Team Coordinator can write messages on the main Program page to the Program Director for any additional information, and the Team Members can communicate with each other on the Site Surveyor page.

The Comment section is not designed for long discursive emails, but it is great for brief requests.