

2022 Standards Organization of Documents for Reports for MAERB

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Introduction

Program Directors of CAAHEP-accredited medical assisting programs need to provide the MAERB with documentation when responding to an On-Site Survey Report (OSSR), a Progress Report, or a Probation Report. This document provides an overview of how to best organize the electronic information effectively, and it focuses on the most cited standards and the commonly requested documentation.

Please remember that you need to submit only the documentation that is requested by CAAHEP or MAERB. This document includes all the areas found within the CAAHEP Standards, but **your OSSR Report or CAAHEP letter will list only certain areas for which you are required to submit documentation, so you only need to search for the specific area/s that pertain to your program.**

To use this resource effectively, go to Table of Contents and click on the link that corresponds to the particular CAAHEP Standard that has been cited. You will then find the guidelines for labeling and organizing the documents for either your Response to the Survey Report (RTSR), Progress Report, or Probation Report.

We have been very detailed in this document, but, again, you will need to submit only the information that is required in either your OSSR or your Progress/Probation Report.

Here are some general guidelines to think about when you are putting together your electronic resources:

1. Include a Cover Letter: Your submission should include a cover letter that lists each citation and a brief summary of what your report contains to address the citation.
2. Organize by Standard: To make it easy to identify, the materials should be organized by the Standard cited. For the proper naming conventions, refer to the guidelines.
3. Use Sub-Folders Appropriately: The electronic organization shouldn't have too many sub-folders, as that becomes too complicated and time-consuming for the MAERB reviewer. As a rule, you do not need to put one stand-alone document into its own folder, unless there is only one document needed for a specific standard.
4. Abbreviate File Names: Document titles should be abbreviated. See the note rules below for guidelines.
5. Rules for PDFs: If you decide to combine a large group of documents into a PDF, you need to add bookmarks so that the MAERB can easily and efficiently access and review the material. Avoid making the PDF too large, as it does not transmit well to the MAERB server or to the reviewers.
6. Duplicated Materials: If you are asked to provide the exact same document/s regarding two or more cited areas, please do so. This will help our reviewers.
7. Mode of Transmission to MAERB: The Program Director will need to zip, upload, and submit the Report at the *Submissions* tab of the MAERB website.

You will find a visual representation of the organization throughout this discussion to help you "see" the possibilities.

You will put all the information into one folder that is labeled as follows:

For a Response to Survey Report (RTSR): YY.MMRTSR
 For a Progress Report: YY.MMPProgRprt
 For a Probation Report: YY.MMProbRprt

I.B - Sponsorship – Responsibilities of Program Sponsor

Folder	I.B.2 & 3
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	ArtAgrmnt	<i>An executed articulation agreement that outlines that students will receive academic credit if they enter into the specific program or institution, as is outlined in MAERB Policy 233.</i>
Document	PrepPlan	<i>A preparedness plan for both the institution and the medical assisting program that outlines the steps in case of any unanticipated interruptions of the educational process, as is outlined in MAERB Policy 277.</i>

II.A - Program Goals - Program Goals and Minimum Expectation

Folder	II.A
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	MinExp	<i>Statement of minimum expectations</i>
Document	AddGoals	<i>Statement of additional goals</i>
Folder (or Document)	Syllabi	<i>Syllabus for all courses with additional goals</i> Name should include Course Number and abbreviated title Examples: MA190Admin MA201MdTrm MA211Clin1 MA212Clin2
Document	PrgGoals	<i>Program Goals</i>
Document	NarrChgs	<i>Narrative that details changes</i>
Document	CurrChgs	<i>Documents that outline curriculum changes</i>
Folder	AdvMtg	<i>Minutes of Advisory Committee meetings</i>

Documents (3)	YY.MMAdv	<i>One Document for each meeting</i>
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II.B – Program Advisory Committee

Folder	II.B
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	NarrChgs	<i>Narrative that describes how program personnel identify and respond to changes</i>
Document	Rstr	<i>Roster of Advisory Committee</i>
Folder	AdvMtg	<i>Minutes of Advisory Committee meetings</i>

Documents (3)	YY.MMAdv	<i>Individual Documents of advisory minutes—depending on what is requested.</i>
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Folder	AdvMtgFllwup	<i>Material such as email, links, that demonstrates program followed up with missing members.</i>
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III.A - Resources – Type and Amount

Folder	III.A
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
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Document/Folder	Faculty	<i>Faculty Member</i>
Document/Folder	ClerStaff	<i>Clerical Staff</i>
Document/Folder	SuppStaff	<i>Support Staff</i>
Document/Folder	Curr	<i>Curriculum</i>
Document/Folder	Finances	<i>Finances</i>
Document/Folder	Confidential	<i>Spaces for confidential interactions</i>
Document/Folder	ClstrmFac	<i>Classroom Facilities</i>
Document/Folder	LabFac	<i>Laboratory Facilities</i>
Document/Folder	StudFac	<i>Student Facilities</i>
Document/Folder	PractAff	<i>Practicum Affiliations</i>
Document/Folder	Eqpmnt	<i>Equipment</i>
Document/Folder	Supplies	<i>Supplies</i>
Document/Folder	CompRrcs	<i>Computer Resources</i>
Document/Folder	InstMat	<i>Instructional Materials</i>
Document/Folder	ProfDev	<i>Professional Development</i>

III.B – Personnel

Folder	III.B
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Folder	ProgDir	Program Director

Document	JobDes	<i>Job Description</i>
Document	AdminDut	<i>Administrative Duties</i>
Document	Narr	<i>Narrative of Service</i>
Document	InstrMeth	<i>Instructional Methodology proof</i>
Document	Certificate	<i>MA certification proof</i>
Document	PDwrkbk	<i>Program Director Workbook</i>
Document	Resume	<i>Resume</i>

Folder	Faculty	<i>Faculty</i>
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Folders (# of Faculty)	LastName.First Initial	<i>Individual Faculty Member</i>
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Document	JobDes	<i>Job Description</i>
Document	EdorExp	<i>Background in courses Taught</i>
Document	InstrMeth	<i>Instructional Methodology</i>
Document	Evaluation	<i>Student or Peer Evaluations</i>
Document	FacQualAttest	<i>Faculty Qualifications Attestation Form</i>
Document	Resume	<i>Resume</i>

Folder	PractCoord	<i>Practicum Coordinator</i>
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Folders (# of Practicum Coordinators)	LastName.First Initial	<i>Individual Practicum Coordinator</i>
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Document	Selection	<i>Selection of practicum sites</i>
Document	OrientMat	<i>Orientation Materials</i>
Document	Oversight	<i>Oversight of Practicum Sites</i>
Document	Assess	<i>Assessment of Students</i>
Document	ProgCurr	<i>Knowledge of Medical Assisting Program Curriculum</i>
Document	MedAsst	<i>Medical Assisting Background</i>
Document	PCWkbk	<i>Workbook</i>
Document	JobDes	<i>Job Description</i>
Document	CV	<i>Resume</i>

III.C - Curriculum

Folder	III.C
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	CrseCat	<i>Course Catalog</i>
Document	NarrSeq	<i>Narrative explaining sequencing</i>
Document	CurrCrseLst	<i>Curriculum Course List</i>
Document	NarrComp	<i>Narrative Competency Completion</i>
Folder (or Document)	Syll	<i>Syllabus for all listed courses</i>
Document	CurrMap	<i>Curriculum map detailing the course in which each objective or competency is placed.</i>
Folder (s)	Course Number & Abbreviated titles	Examples: MA190Admin MA201MdTm MA211Clin1 MA212Clin2

Document	Syll	<i>Syllabus (highlight the specific objectives and/or competencies that were cited)</i>
Document	GrPolCog	<i>Grading Policy (scale and pass score) Cognitive Objectives (might be included on the syllabus)</i>
Document	GrPolPsAf	<i>Grading Policy (scale and pass score) Psychomotor and Affective Competencies (might be included on the syllabus)</i>
Document	Objective or Competency # (for example, I.C.3)	<i>Blank Assessment Tool</i>
Document	Objective or Competency # (for example, I.C.9)	<i>Blank Assessment Tool</i>
Document	Objective or Competency # (for example, I.P.2)	<i>Blank Assessment Tool</i>

Document	Objective or Competency # (for example, I.P.4)	<i>Blank Assessment Tool</i>
Document	Objective or Competency # (for example, I.A.3)	<i>Blank Assessment Tool</i>
Document	CrseRoster	<i>Course Roster</i>

Document	Superv	<i>How students are supervised</i>
Document	PrctAgr	<i>Template of Practicum Agreement</i>
Document	NarrComp	<i>Narrative about practicum completion</i>
Document	StHand	<i>Student Handbook</i>
Document	CrseCat	<i>Course Catalog</i>
Document	StCat	<i>Student Catalog</i>
Document	CrseRoster	<i>Course Roster</i>
Folder	PrctTmeSht	<i>Practicum Time Sheet for each student</i>
Note: The Practicum Time Sheets can be PDFed into one document, but they will need to be bookmarked by student.		

Document	Student Last Name.First Initial	<i>Individual Time Sheet</i>
Document	Student Last Name.First Initial	<i>Individual Time Sheet</i>
Document	Student Last Name.First Initial	<i>Individual Time Sheet</i>
Document	And so on	<i>Individual Time Sheet</i>

Folder	PrctEval	<i>Practicum Evaluation for each student</i>
Note: The Practicum Time Sheets can be PDFed into one Document, but they will need to be bookmarked by student.		

Document	Student Last Name.First Initial	<i>Practicum Evaluation</i>
Document	Student Last Name.First Initial	<i>Practicum Evaluation</i>
Document	And so on	<i>Practicum Evaluation</i>

III.D - Resource Assessment

Folder	III.D	Resource Assessment
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Documents	YY.MMResAss	
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IV.A.1 - Student Evaluation - Frequency and Purpose

Folder	IV.A.1
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	NarrGrdng	<i>Narrative explaining grading policies and practices</i>
Folder	Syllabi, Grdbks, Rosters	<i>Syllabi, Gradebook, Rosters</i>
Folder	Course Number & Abbreviated titles Examples: MA190Admin MA201MdTrm MA211Clin1 MA212Clin2	<i>Syllabi, Gradebook, and Rosters for specific course</i>

Document	Syll	<i>Syllabus</i>
Document	Rstr	<i>Roster</i>
Document	Grdbk	<i>Gradebook</i>

IV.A.2 - Student Evaluation – Documentation

Folder	IV.A.2
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	NarrEval	<i>Narrative about evaluation records</i>

IV.B.1 - Outcomes - Outcome Assessment

Folder	IV.B.1
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In requesting the raw data to match with the reported aggregated data, MAERB traditionally requests the raw data for the admission cohorts for two years in the future, and, as is outlined below, the most effective approach is to organize it by year. There is a sample below of how to organize it by year. In addition, there are times in which information is requested about the program's tracking of student achievement of the competencies and the raw data that supports that. There is a template provided for that information.

Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	ARFTrackTool	<i>Completed and up to date ARF Tracking Tool</i>
Folder	YYRawDataARF	<i>Raw data</i>

Folder	CrsRstrs	Corresponding to Trigger Course or
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	NOTE: If there is only one admission cohort per year, the submission could just be a Document. Rosters should be annotated to show which students are not MA students, which did not finish or pass the Trigger Course, and which students dropped out during the 1 to 2-week add/drop period.	Formal Admissions Cohort
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Document	MM.YYCrsRstr	<i>Course Roster for specific cohort</i>
Document	MM.YYCrsRstr	<i>Course Roster for specific cohort</i>
Document	MM.YYCrsRstr	<i>Course Roster for specific cohort</i>
Document	And so on	<i>Course Roster for specific cohort</i>

Folder	EmplSurv Note: The employer surveys need to be organized by the year of graduation. If surveys are combined into one PDF, the document must be bookmarked.	<i>Employer Surveys</i>
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Folder	YYYYGraduates	<i>Employer Surveys</i>
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Document	Student Last Name.First Initial	<i>Individual Survey</i>
Document	Student Last Name.First Initial	<i>Individual Survey</i>
Document	Student Last Name.First Initial	<i>Individual Survey</i>
Document	And so on	<i>Individual Survey</i>

Folder	GradSurv Note: The graduate surveys need to be organized by year of graduation. If surveys are combined into one PDF, the document must be bookmarked.	<i>Graduate Surveys</i>
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Folder	YYYYGraduates	<i>Graduate Surveys</i>
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Document	Student Last Name.First Initial	<i>Individual Survey</i>
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Document	Student Last Name.First Initial	<i>Individual Survey</i>
Document	And so on	<i>Individual Survey</i>

NOTE: If the student's name is not provided on the completed survey, you may name the Documents as follows: Stud1, Stud2, Stud3, etc...

Document	NarrTrckng	<i>Narrative explaining tracking mechanism and trigger course</i>
Folder	TrckngTls	<i>Tracking Tools for the achievement of the psychomotor and affective competencies, organized by graduate cohort.</i>

Document	Student Last Name.First Initial	<i>Individual Tracking Mechanism</i>
Document	Student Last Name.First Initial	<i>Individual Tracking Mechanism</i>
Document	Student Last Name.First Initial	<i>Individual Tracking Mechanism</i>
Document	And so on	<i>Individual Tracking Mechanism</i>

Document	CrsRstr	<i>Course Roster of most recently assessed practicum students</i>
Folder	PractMat	<i>Practicum Time Sheets and/or Practicum Evaluations</i>

Document	Student Last Name.First Initial	<i>Practicum Time Sheets and/or Practicum Evaluations</i>
Document	Student Last Name.First Initial	<i>Practicum Time Sheets and/or Practicum Evaluations</i>
Document	Student Last Name.First Initial	<i>Practicum Time Sheets and/or Practicum Evaluations</i>
Document	And so on	<i>Practicum Time Sheets and/or Practicum Evaluations</i>

V.A.1 – Publications and Disclosure

Folder	V.A.1
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	StudCat	<i>Student (College)Catalog</i>

Document	CatAdd	<i>Catalog Addendum</i>
Document	FacHndbk	<i>Faculty Handbook</i>
Document	StdntHndbk	<i>Student Handbook</i>
Document	PromLit	<i>Promotional Literature</i>
Document	NarrAch	<i>Student/Graduate Achievement</i>

V.A.2 – Publications and Disclosure

Folder	V.A.2
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	InstAccred	<i>Sponsor Institutional Accreditation Status LOCATION REQUIRED</i>
Document	MAPrgmAccred	<i>Medical Assisting Programmatic Accreditation, Name and website of CAAHEP LOCATION REQUIRED</i>
Document	AdmPolicies	<i>Admission Policies and Practices</i>
Document	TechStandards	<i>Technical Standards or Statement that there are no Technical Standards LOCATION REQUIRED</i>
Document	OccRisks	<i>Occupational Risks LOCATION REQUIRED</i>
Document	PolicyAPtrnsfrExp	<i>Policies on Advanced Placement, Transfer of Credits, and credits for experiential learning LOCATION REQUIRED</i>
Document	Credithrs	<i>Number of credits required for completion of the program LOCATION REQUIRED</i>
Document	ArtAgrmnts	<i>Availability of articulation agreements for transfer of credits LOCATION REQUIRED</i>
Document	Tuition	<i>Tuition/fees and other costs required to complete the program LOCATION REQUIRED</i>
Document	Refunds	<i>Policies and processes for withdrawal and for refunds of tuition/fees LOCATION REQUIRED</i>
Document	PolClinicalExp	<i>Policies and processes for assignment of clinical experiences LOCATION REQUIRED</i>

V.A.3 – Publications and Disclosure

Folder	V.A.3
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	AcadCal	<i>Academic Calendar LOCATION REQUIRED</i>
Document	StdntGrieveProc	<i>Student Grievance procedure LOCATION REQUIRED</i>
Document	AppealProc	<i>Appeals process LOCATION REQUIRED</i>
Document	ProcCmpltn	<i>Criteria for successful completion of each segment of the curriculum and for graduation LOCATION REQUIRED</i>
Document	PolClinWork	<i>Policies by which students may perform clinical work while enrolled in the program LOCATION REQUIRED</i>

V.B - Lawful and Non-discriminatory Practices

Folder	V.B
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	StudCat	<i>Student (College) Catalog</i>
Document	CatAdd	<i>Catalog Addendum</i>
Document	FacHndbk	<i>Faculty Handbook</i>
Document	StdntHndbk	<i>Student Handbook</i>
Document	FacGrvPol	<i>Faculty Grievance Policy</i>
Document	NarrFac	<i>Narrative explaining faculty grievance policy</i>

V.C – Safeguards

Folder	V.C
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	SafePol	<i>Safety Policies</i>
Document	PhotoEquip	<i>Photographs of equipment</i>
Document	RcptEquip	<i>Receipts of equipment</i>
Document	ActEduc	<i>Programs activities are educational</i>
Document	StdntUse	<i>Students are not used as staff</i>

V.D - Student Records

Folder	V.D
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	AdmPol	<i>Admission Policy</i>
Document	AdvPol	<i>Advisement Policy</i>
Document	CounselPol	<i>Counseling Policy</i>
Document	EvalPol	<i>Evaluation Policy</i>
Document	NarRetRec	<i>Narrative Retention of Student Records</i>

V.F – Agreements

Folder	V.F
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Type	Document/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Document	CrsRstr	<i>Course Roster of most recently assessed practicum students</i>
Folder	ActAffAgr	<i>Active Affiliation Agreement</i>

Document	Student Last Name.First Initial	<i>Individual Affiliation Agreement</i>
Document	Student Last Name.First Initial	<i>Individual Affiliation Agreement</i>
Document	Student Last Name.First Initial	<i>Individual Affiliation Agreement</i>
Document	And so on	<i>Individual Affiliation Agreement</i>