

## Site Visit Documents: Preparing the Required Materials for the Site Visit

### Introduction

There are materials needed to share or present after the submission of the Self-Study Report (SSR) for the accreditation site visit. The good news is that you will have already gathered a lot of that material when preparing your Self-Study, so there is a good foundation on which to build. Every program submits its Self-Study 4 months prior to the accreditation site visit. Outlined below is the timeline of events that occur after the submission of the Self Study and prior to the site visit.

**Initial Self-Study Review:** The MAERB office reviews the Self-Study to ensure that all the materials have been submitted. You are contacted by the MAERB office if there are missing materials or items. The Self-Study is then reviewed by a Subject Matter Expert, and questions and comments are provided to the Site Surveyors who will be visiting your program.

**SharePoint Access and Documents:** The Program Director receives access to a customized SharePoint site 6-8 weeks prior the Site Visit. The SharePoint site contains a folder of documents that provide directions for the materials you need to submit, as well as empty folders for you. In addition, you will receive the contact information for the Site Surveyors who will be visiting your program.

**Site Visit Logistics:** You will start working with the Site Surveyors, as they develop their travel arrangements. In addition, they will provide a list of comments and questions about the program; those comments and questions may necessitate provide the Site Surveyors additional material.

**Two Weeks Prior to the Site Visit:** You will need to have prepared a draft agenda using MAERB's Site Visit Agenda template to post in the MAERB SharePoint Site so that the Site Surveyors can review it. In addition, the Site Surveyors will request that you provide five assessment tools as curriculum samples. They will choose which specific assessment tools you will need to submit.

**One Week Prior to the Site Visit:** You will need to submit your ARF raw data, the five assessment tools requested by the Site Surveyors, and your finalized agenda for MAERB staff review.

**At the Site Visit:** The Site Surveyors will be reviewing the course records, supporting documentation for the resource assessment, and any other updated materials. For these documents, you will either have them available in the resource room on site **OR** use the MAERB SharePoint site. You will also have all your curricular materials organized and ready for review.

## Overview Chart of Required Materials

Documents	Due Dates	Materials Required	Submission Process
Agenda	Rough draft two weeks prior to the site visit  Final version one week prior to site visit	Agenda, with times and participants, using MAERB's Site Visit Agenda Template	Submit to SharePoint Folder: 4. Updated Materials and Agenda
ARF Raw Data <b>Not required for initial accreditation</b>	One week (7 days) prior to site visit	5 years of raw data matching your most recent ARF	Submit to SharePoint Folder: Folder: 3. ARF Raw Data
Curricular Materials—blank assessment tools	Samples one week (7 days prior)  All curricular materials are to be available at site visit.	Most recent curriculum that was taught or is currently in process at the time of the visit	There will be requests for five samples, two weeks prior to the site visit. The samples need to be submitted SharePoint Folder: 2. Curricular Samples  Most of the curriculum will be reviewed on site.  All curricular materials will need to be available for the curriculum review meeting, and they can be organized in physical folders, digital folders, Program Learning Management System, or MAERB SharePoint Site for your program.
Course Records	To be available during the site visit	Gradebooks and Rosters for the most recent Course Cohort  Tracking Mechanism for Psychomotor and Affective competencies: Most recent group/cohort of graduates  Practicum Documentation (Time Sheets and Evaluations): Most recent practicum cohort	Resource Room on campus or MAERB SharePoint Site for your program  SharePoint Folder: Course Records, Optional use
Supporting Documentation for your Annual Resource Assessment Form	To be available during the site visit	Resource Assessment documentation: surveys and other materials for the last <b>three*</b> years of resource assessments  <b>*Initial Accreditation Programs need only one year of data</b>	Resource Room on campus or SharePoint Folder: Supporting Documentation, Optional use
Additional or Updated Materials	To be available either prior or during the site visit	Recent documents requested by Site Surveyors or relevant changes, if applicable, showing changes that have occurred, if any, since the submission of your Self Study.	SharePoint Folder: 4. Updated Materials and Agenda for your program or Resource Room

## Resource Room

As you are planning the site visit, it will be important to make sure that you have a designated private area, such as a classroom, seminar room, or conference room, for the Site Surveyors to discuss and work. There will need to be tables and electrical outlets for them to plug in their computers. The Site Surveyors might ask for some monitors to be set up, but you should ask them what they need. While they are on campus, they will need access to the internet so that they can access the SharePoint site and other materials you might provide electronically.

## Overview of Materials

Outlined below are additional details about materials that you will need to submit. As the chart above outlines, some of the materials need to be posted electronically on the MAERB SharePoint site for your program while other materials can be shared at the site visit in either electronic or paper form that the Site Surveyors can access in the Resource Room.

When you can access the MAERB SharePoint Site 6-8 weeks prior to the site visit, you will find the following pre-numbered folders, as shown below:

1. MAERB Info for PD
2. Curricular Samples—Due 7 days prior to site visit
3. ARF Raw Data—Due 7 days prior to site visit (not necessary for initial accreditation)
4. Updated Materials and Agenda—Needs to be available at Surveyors' deadline
5. Course Records, Optional Use—Needs to be available at site visit
6. Supporting Documentation, Optional Use—Needs to be available at site visit

## Agenda

You will need to use the Site Visit Agenda template to create an agenda for the visit. The Site Visit Agenda template is available in your MAERB SharePoint site, and you can find it online on the MAERB website ([www.maerb.org](http://www.maerb.org)) under the *Resources* tab on the *Site Visit and Program Resources* page.

You will find the instructions on this handout, along with a list of required participants and activities. In addition, there is a chart that you can fill out with some of the required meetings specified. The rest of the agenda you will create depends upon the availability of people on your campus.

ARF Raw Data Submission – Required to be submitted to the MAERB SharePoint Site one week prior to site visit

**PLEASE NOTE: Programs applying for initial accreditation are not required to provide this ARF-related information.**

If your program is applying for continuing accreditation, one week prior to your site visit, you will need to submit to the MAERB office via the SharePoint site the raw data to support your most recently submitted Annual Report Form (ARF).

*The MAERB office will review this ARF raw data to ensure compliance with the Standards and Guidelines along with your site visit.* Outlined below is the necessary data required:

Raw data (matching the program's current ARF) for the following outcomes:

- a. Retention:** Five years of course rosters reflecting your admission cohort in one of the following two methods. If you have a formal admission process that is unique to the medical assisting program, you may not utilize a trigger course:

<b>Formal Admission Process</b> Programs receive applications and can accept or deny students.	<b>Trigger Course (MAERB Policy 205)</b> First course in which students are taught and assessed on any psychomotor or affective competencies
<ul style="list-style-type: none"> <li>Rosters should clearly indicate any students who dropped the course during the drop/add period.</li> </ul>	<ul style="list-style-type: none"> <li>Rosters should clearly indicate any person who did not pass or complete the trigger course.</li> </ul>

- b. Graduate and Employer Survey Participation and Satisfaction:** Raw data, organized by year of graduation, that matches the five reported years from your most recently submitted ARF.

<b>Graduate Surveys</b>	<b>Employer Surveys</b>
<ul style="list-style-type: none"> <li>Must include date of the survey</li> <li>Must include the year of graduation</li> <li>Must include individual responses to all questions, in all domains</li> </ul>	<ul style="list-style-type: none"> <li>Must include date of the survey and name of the evaluator</li> <li>Must include name of the graduate</li> </ul>

If a given survey was conducted via telephone, the person transcribing the answers must indicate on the survey that it was conducted via telephone and must either sign or initial the completed survey.

- c. MAERB's ARF Tracking Tool:** An unprotected Excel copy of your current, fully updated ARF Tracking Tool.

## Curricular Materials

You will need to have available for the site surveyors all the syllabi and course content outlines, tests, checkoff sheets, and assignments for every course in the medical assisting curriculum. You will provide blank assessment tools. Those materials, as outlined above, can be stored in paper folders, electronic folders, digital learning resources, or a learning management system. You are allowed to use your own organization, but you need to be able to find the material. It will be necessary to prepare the material in such a way that you and your faculty can access it quickly.

It may be that some of the courses are currently being taught, and you also may need to provide information from courses that were taught in the recent past to ensure that you have the entire MAERB Core Curriculum available. You will need to have the instructors available during a 90-120 minute curriculum meeting to explain the materials to the Site Surveyors, as they will sample your curriculum materials while they are in your resource room during the visit. You will also need to have textbooks and other instructional materials available.

In your agenda, be sure to include the 90-120 minute curriculum review meeting with the surveyors. Please arrange to have this meeting in a room that allows for a show and tell of the curriculum materials. If it is all in a learning management system or electronic documents, a room with a computer and projector will be useful; if it is in paper folders, it would be great to have a large table.

## Course Records

You are required to include the following information to support the teaching and assessment of the MAERB Curriculum. In addition, you will need to provide information that confirms the program is complying with the required practicum experience.

<b>Rosters</b>	The official course listing of students for each most recently assessed course	The most recently assessed group of students for every course in which the MAERB Core Curriculum is taught
<b>Gradebook</b>	The gradebooks that contain all the grades, which include test scores, assignments, etc., for each student in the course.	The most recently assessed group of students for every course in which the MAERB Core Curriculum is taught
<b>Tracking mechanism for Psychomotor and Affective Competencies</b>	A master competency checklist <u>for each student</u> , or a detailed gradebook that shows the assessment of the student on <b>each</b> psychomotor and affective competency.	Most recent graduate cohort
<b>Practicum Documentation</b>	Documentation that shows that the students complete 100% of your advertised practicum (which must be at least 160 supervised practicum hours in a healthcare setting prior to graduation): <ul style="list-style-type: none"><li>• Time sheets (completed by the students and verified by the practicum site)</li><li>• Supervisor practicum evaluations, demonstrating that the students have performed a range of administrative and clinical skills</li></ul>	Most recent practicum cohort

Supporting Documentation for Resource Assessment Form—See MAERB Policy 225

**Initial Accreditation Programs do not need to supply 3 years of forms, but they do need to complete the resource assessment that is a part of their Self-Study, along with one year of supporting documentation.**

For programs undergoing continuing accreditation, you should include three years of documentation that the program has used for its most recent resource assessments.

In January 2024, MAERB put in place a new required Resource Assessment Form and required surveys. You will need to share the completed required surveys. Many programs also used the new Resource Assessment Form and the required surveys in 2023.

For the resource assessments that correspond to the years prior to 2024, you used other documentation to support your annual resource assessment. You will need to supply that documentation.

#### [Additional or Updated Materials](#)

When they are reviewing your Self-Study, Site Surveyors may request additional materials, which you can then include in the folder designated in the SharePoint site if they want to see those materials prior to the site visit or in the Resource room on campus.

Also, If, during the four months between the time of submission of your SSR and the site visit itself, any of the information that you submitted in your SSR has changed, you will need to provide the new, updated information to the Surveyors at the start of your site visit.