

SharePoint Instructions for Program Directors

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 inform people when you have posted information.

IMPORTANT: There is no method available to alert Site Surveyors when you have uploaded material. You will need to use the comment function to let Site Surveyors know when you have updated the information.

Comments/Alerts

The Site Surveyors will be uploading documents to the site for you to review and you will be posting materials for them to review. To let them know, when you have posted materials, you can use the comment function.

To use the comment function,

1. type "@" and then the person's name
2. a box will pop up for you to confirm

The Comment section is not designed for long discursive emails, but it is vital to let people know when you have posted information, and it serves as an important alert.

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 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.

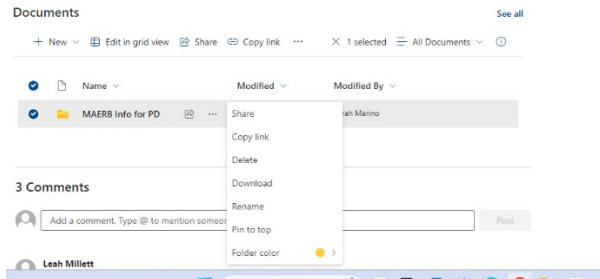
Access

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.

Entering the 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. **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.**

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:



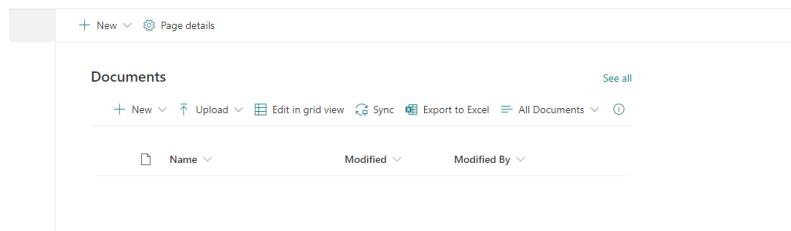
We have used your work address to invite you to the SharePoint site, so the assumption is that you would then click on your organizational account and sign in. Once you sign in, you will have access to the site where you will find the documents.

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

On the site, you will see a large area, labeled Documents, with a series of pre-developed folders:



The folders can help you organize the data that you need to upload, and you will see them when you enter the SharePoint Site. There are some basic guidelines to govern uploading information:

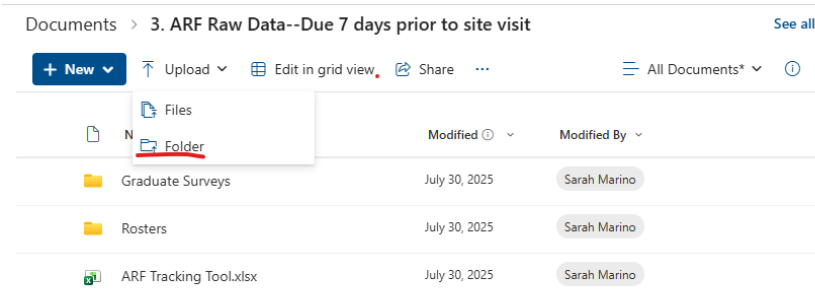
- Do not zip the folders that you upload to SharePoint
- Avoid using too many folders to organize the materials.
- Use the simplified abbreviations that are outlined in Site Visit Documents handout or in the Organization of Documents for Submissions that is on the MAERB website under the Resources Tab on the Site Visits and Program Resources page in the “instructions” section.

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 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.

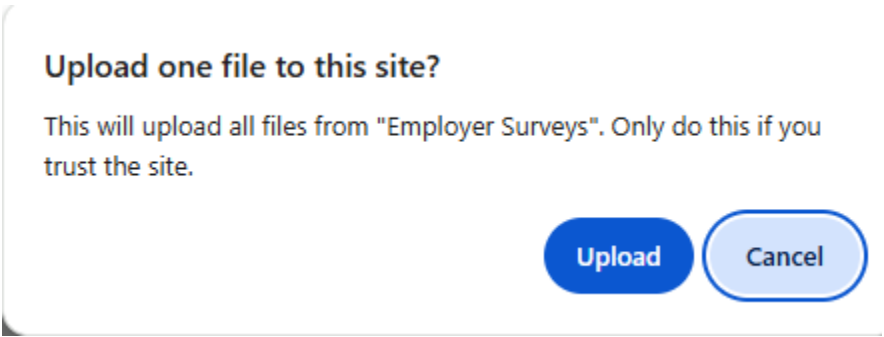
If you are planning to use your institutional platform for the Course Records, Supplementary Documents, and Updated Materials, you will only include the ARF material on the SharePoint.

Uploading Material

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.

You can use the same process for files.

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 additional material so that you can avoid email and circulating documents. Program Directors and Surveyors will develop the timelines 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.