



Site Surveyor Handbook

**What Every Site Surveyor
Needs to Know**

**MEDICAL ASSISTING
EDUCATION REVIEW BOARD**

August 2025

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Introductory Material

GENERAL INFORMATION

MAERB Staff Members

The MAERB office is virtual, and it is open from 8:00 am – 4:30 pm EASTERN

Executive Director:

Sarah R. Marino smarino@maerb.org

Sarah's cell phone: 773-354-0995

Assistant Director of Accreditation/Program Manager:

Jim Hardman jhardman@maerb.org

Program Manager:

Shannon Cannon scannon@maerb.org

Administrative Assistant (Part-Time, morning hours EASTERN):

Leah Millett lmillett@maerb.org

Department – General Contact

Email maerb@maerb.org

Phone 312/392-0155

Website: www.maerb.org

Foremost Travel Agency

Foremost Travel phone numbers: 800-225-7185 or 312-726-4492

Foremost Business Hours: Monday through Friday, 8:00 am to 5:00 pm (Central)

Foremost Travel Agents: Kristy or Dan

Email: Kristy Kristy@foremosttravel.com or Dan dan@foremosttravel.com

24/7 number for travel emergencies due to weather or delays: (800) 544-0971

Travel Profile: <https://foremosttravel.com/corporate-profile/>

CAAHEP Information

Phone: 727-210-2350 (located in Florida – EST)

Website: www.caahep.org

Medical Assisting Education Review Board

The Medical Assisting Education Review Board (MAERB) is a Committee on Accreditation (CoA) of the Commission on Accreditation of Allied Health Education Programs (CAAHEP). CAAHEP is committed to outcomes-based accreditation and ensuring that the allied health professions represented in its CoAs have a close link with other organizations that serve the specific profession.

MAERB consists of educators, administrators, and practitioners within the fields of medical assisting and allied health. It represents the CAAHEP-accredited programs. Each member serves as a Liaison to numerous CAAHEP-accredited programs and works with the MAERB staff to review the pertinent materials that are submitted by the programs. The Liaison is not in direct contact with the programs; rather, the Liaison works directly with the MAERB office.

CAAHEP as the Accrediting Body

CAAHEP serves as the umbrella accreditation organization, and it is recognized by the Council on Higher Education Accreditation (CHEA). MAERB provides CAAHEP with recommendations about the accreditation status of the medical assisting programs based upon the *CAAHEP Standards and Guidelines for the Accreditation of Educational Programs in Medical Assisting*. CAAHEP makes the final accreditation decision.

Legal Status

The Medical Assisting Education Review Board (MAERB) is an independently incorporated 501(c)(3) nonprofit organization.

Sponsoring Organizations

Within CAAHEP's structure, CoAs are required to have sponsoring organizations that provide information about the profession. The "sponsoring organization" structure is a part of CAAHEP, as every CoA is required to have at least one sponsoring organization, and the majority have several. The goal in establishing sponsoring organizations is to serve as a formal mechanism for acquiring information for those who represent the profession.

The American Association of Medical Assistants (AAMA) is MAERB's founding sponsoring organization, and the relationship between MAERB and AAMA is a close and productive one. In April 2018, MAERB acquired two other sponsoring organizations: American Medical Technologists (AMT); and National HealthCareer Association (NHA).

Sponsoring organization representatives from each entity attend the open sessions of the MAERB meetings to provide input about the MAERB's communities of interest. In addition, there are times in which there are joint committees for special projects.

The MAERB Office

The MAERB office is virtual, and its office hours are 8:00 am – 4:30 pm EASTERN.

All programs currently accredited with CAAHEP, as well as those going through the process of initial accreditation, are assigned to a MAERB staff member, who serves as the Program Manager for the program and to whom any questions or concerns should be directed. This individual has information readily available regarding the programs in their respective case files and should be the first contact

with questions regarding the program that you are visiting as a site surveyor. The Executive Director and the Assistant Director of Accreditation (who also serves as a Program Manager) work closely with all the Program Managers to ensure that questions about accreditation are answered promptly and consistently. Program Managers will refer questions as appropriate to the Executive Director and the Assistant Director of Accreditation. In addition, the office remains in frequent contact with the MAERB Liaisons to rely on their expertise. The MAERB staff work together to ensure consistency and accuracy in response to the questions that they receive.

The MAERB Administrative Assistant oversees sharing the site visit materials for all the programs and working with the SharePoint sites. At the same time, any content questions about the Self-Study should be addressed to the Program Managers or the MAERB Executive Director.

MAERB Site Surveyors

As part of CAAHEP's accreditation process, medical assisting programs undergo a comprehensive review at least once every ten years, a process that is designed by MAERB. The comprehensive review requires that institutional and program personnel analyze and evaluate the program based upon the CAAHEP *Standards and Guidelines for the Accreditation of Educational Programs in Medical Assisting*.

MAERB relies upon volunteer site surveyors (peer reviewers) to visit the programs to verify, validate, and clarify that the information in the Self Study is accurate and that the program is complying with the CAAHEP *Standards and Guidelines*. Site surveyors accomplish the following tasks:

- Review the self-study and supporting documentation, including assessment tools, prior to the visit to determine if further clarification or documentation is needed before or during the site visit.
- Review all required on-site documentation.
- Verify that the program's compliance outlined in the Self-Study is demonstrated onsite.
- Focus on areas of concern identified by the MAERB Liaison.
- Validate the program's compliance with the *Standards and Guidelines*.
- Clarify areas in which the program may not be following the specifics of the *Standards and Guidelines*.

MAERB site surveyors serve as representatives of MAERB/CAAHEP, and they report their findings to the MAERB members who, in turn, make recommendations that are reviewed and affirmed by CAAHEP.

The site visit is the culmination of many years of work, and it is the most visible part of the accreditation process for the program and the sponsoring institution. It is an event that involves the full spectrum of institutional personnel who support and serve the medical assisting program.

MAERB is committed to ensuring that programs undergoing a comprehensive review are treated consistently and respectfully. The goal of the MAERB *Surveyor Handbook* is to provide a comprehensive overview of the site visit and set the foundation for a good and productive experience.

MAERB Site Surveyor Qualifications and Responsibilities

MAERB Surveyor Qualifications

MAERB Surveyors fit into one of the following categories:

- medical assisting educator
 - be employed at least 30% of a full-time contract in a CAAHEP-accredited medical assisting program in good standing
 - have at least two years' experience as a faculty member
 - have prepared for and gone through a CAAHEP medical assisting site visit
 - have documented educational theory and practice
 - have a minimum of an Associate degree
 - hold a current NCCA or ANSI-accredited medical assisting credential
- medical assisting practitioner
 - practice at least a minimum of 20 hours per week
 - be a graduate of a CAAHEP-accredited medical assisting program
 - have experience with medical assistant education, such as serving as a part-time faculty, practicum supervisor, or Advisory Committee member
 - hold a current NCCA or ANSI-accredited medical assisting credential
- dean/administrator in allied health
 - be employed by an educational institution having a CAAHEP-accredited medical assisting program
 - have experience in working with programmatic or institutional accreditation
- physician
 - hold an unrestricted license to practice medicine within the United States

If a current surveyor is no longer employed in one of the fields listed above or has retired, there is a five-year window allowed for surveying. After five consecutive years of retired or unemployed status, the surveyor will no longer be eligible to go on site visits.

MAERB surveyors have a range of specialties and experiences, as they come from and serve a diverse group of medical assisting programs. It is expected that all surveyors will have a background, with varying levels of expertise, in the following areas to serve effectively on a survey team.

- Competency-based educational theory and performance
- Outcomes assessment
- Curriculum design and development in medical assisting
- Postsecondary education institutional processes and procedures
- Current trends and expertise in the field of medical assisting
- Principles of institutional administration, such as the fiscal policy and planning and organizational structure

In addition, there are several personal attributes that are very important to be effective as a surveyor. Surveyors need to demonstrate tact, sensitivity, collegiality, objectivity, professionalism, and open-mindedness. Effective communication skills are also highly important, as the surveyors have the

responsibility of addressing diverse audiences. It is also expected that surveyors complete their duties within the timeframes that are allotted and focus specifically on the tasks at hand.

MAERB Surveyor Application

MAERB will send out an announcement to the CAAHEP-accredited medical assisting programs when they are accepting applications for surveyors. Prospective surveyors can then access the application from the MAERB website. The application asks for verification of the applicant's qualifications and a brief personal statement. The applicant also needs to obtain recommendations from two people. The application and recommendations are then reviewed by the MAERB office to ensure that the applicant meets the qualifications. MAERB evaluates potential surveyors by the criteria listed above and, in addition, tries to ensure that surveyors have a variety of skills. Successful applicants will receive an acceptance letter and information about upcoming training sessions. If an applicant's immediate supervisor does not submit a recommendation for the applicant, the applicant will not be eligible to be chosen as a surveyor at that time.

Required Surveyor Service

Successful applicants are required to attend a Surveyor Training Workshop. All surveyors are expected to participate in at least one survey every year. After the initial training, they are provided with additional online/webinar training annually. Medical assisting educators and practitioners are required to keep their professional medical assisting credential current.

Surveyor Terms

Surveyors are appointed to five-year terms. Prior to the end of the term, there will be a reappointment review to determine if another five-year term is appropriate. The material reviewed will include the following:

- Number of visits conducted over the past five years and general availability to MAERB
- Findings of the peer and program evaluations that were completed after each site visit
- MAERB's office's records on participation in surveys and punctuality in submitting materials
- For Team Coordinators, review and evaluation of the OSSRs

Based upon this review, it will be determined if the surveyor is to be recommended for reappointment.

A surveyor may be removed from the list of active surveyors at any point during the five-year term if there are serious issues that emerge through the evaluation process. In such an event, the surveyor will be notified in writing. There is no appeal process.

Surveyors may request to become inactive for up to one year, due to personal or professional reasons. In such a situation, the MAERB Office will extend the five-year term for one additional year.

Complaints

As stated above, Surveyors are reviewed by their peers and by the program personnel of the site visits in which they participate. If there is an instance in which a site surveyor is reviewed negatively due to a dereliction of duty, inappropriate behavior, or other problematic issues, the MAERB office will, first, contact the surveyor, outline the problems, and consider how to best resolve it. If there is a significant issue and/or a trend of issues, the MAERB office will contact the Executive Committee of the MAERB to

discuss potential actions that could range from contacting the surveyor to notifying the surveyor that their service as a volunteer is no longer required.

Problematic issues that occur on site visits and incur negative feedback and/or complaints from peers or program personnel include the following: not following the travel policies, not being prepared for a visit, not responding to emails or phone calls, being unpleasant and/or abrupt to program personnel, spending too much time talking about one's program, and being inflexible about the variety of ways that a program can meet the standards.

Initial Training for Surveyors

Prior to being assigned to their first site visit, surveyors need to participate in a Surveyor Training Workshop, which entails pre-workshop preparation and successful completion of the CAAHEP Site Visitor Quiz.

Workshop attendees are required to be familiar with the following materials:

- *CAAHEP Standards and Guidelines for the Accreditation of Educational Programs in Medical Assisting*
- *MAERB Policy and Procedures Manual*
- *MAERB Program Director Handbook*
- *Educational Competencies for the Medical Assistant (ECMA)*
- *Surveyor Handbook*

These materials will be covered in the Surveyor Training Workshop, but it is expected that the attendees study the material prior to attending the workshop. In addition, as further preparation for the Surveyor Training Workshop, there are several videos that provide you with additional background about these materials. You can find them on the MAERB website under the Resources tab on the Educator Video page in the "Videos—Standards and Guidelines" section. There are six videos that cover the CAAHEP *Standards and Guidelines*. On the same page, under "Videos—Ongoing Topics," there are three videos that provide some recorded role play that highlights the curriculum review that surveyors conduct on sight. In addition, there is a Site Visit Preparation Video, designed for Program Directors, but very useful for Site Surveyors.

The Surveyor Training Workshop will then provide prospective surveyors with the opportunity to apply the materials listed above prior to the workshop so that the activities and the behaviors necessary to conduct a successful site visit are practiced.

After attending the workshop, prospective surveyors need to complete and pass the Site Visitor exam, which is at the CAAHEP website (www.CAAHEP.org).

The last, and very important, step is that prospective surveyors need to sign a "Site Surveyor Code of Ethics" (see Appendix A for an example).

Team Coordinator Training of New Surveyors

New Surveyors are paired with experienced Team Coordinators on their first two visits to help with the practical training. Outlined below are some helpful methods for Team Coordinators to help new Surveyors learn the "ins and outs" of conducting the site visit:

Communication after the Self Study has been received

- After receiving the Self Study and related materials from MAERB, the Team Coordinator should contact their Team Member/s to set up a group appointment for the purpose of making sure that all parties have received and can download information sent from MAERB.
- In this meeting, the Team Coordinator should discuss travel arrangements and ask everyone to complete the Foremost Travel Profile, if that has not already been done.
- The Team Coordinator should outline the logistics for the site visit: how the site visit is to be conducted, expectations for meetings, methods for reviewing the materials
- The Team Coordinator should copy the Team Member/s on ALL emails to the Program Director to keep them in the loop, ensure their informed participation, and give them insight into the processes and preparation.

Self-Study Review

- The Team Coordinator should share how he/she reviews the Self-Study but should also explain that there is no right or wrong way, as the important point is for it to be reviewed and analyzed.
- The Team Coordinator should agree with the Team Member on a timeframe for preparation, together establishing a set period of time to review the material, during which time all members of the site visit team should take notes for later discussion prior to the site visit.
- The Team Coordinator should remind the Team Member that there are many ways to teach and assess, so the important question is how the program addresses the Standard and advise the Team Member to avoid comparisons or judgments in reviewing the syllabi and curriculum map.

On the Visit

- At the meeting which takes place the evening before the site visit, the Team Coordinator should outline the strategy for the visit as well as discuss the details of the schedules and the interviews. In particular, the Team will prepare for the on-site curriculum review meeting.
- Throughout the site visit, the Team Coordinator should make sure that there are brief periods of time during which the team can meet privately.
- At the end of the site visit, the Team Coordinator should remind the Team Member about the peer evaluation and the expense voucher to be submitted to MAERB (accounting@maerb.org)
- The Team Coordinator should have the Team Member review the draft of the completed On-Site Survey Report (OSSR), encouraging questions and seeking suggestions.

Conflict of Interest

When requesting potential visits with the MAERB office and after being assigned, site surveyors need to ensure that they have no material, academic, or professional conflict of interest, and they need to avoid situations which may lead to potential conflicts of interest while on the site.

A material conflict of interest refers to any situation in which a surveyor stands to gain materially from either association with representatives from the program/institution being visited or from visiting the site. Site surveyors are prohibited from making recommendations or promoting specific textbooks or other instructional materials while serving as a surveyor, as that may be perceived as a conflict of interest if the surveyor has something to gain from that recommendation. In addition, this would also be an academic conflict of interest, as programs have the autonomy to choose their own textbooks and instructional material. Surveyors should also disqualify themselves from a potential site visit if at any

point they have served as a consultant to that program or to the sponsoring institution or organization of the program.

While on site, surveyors should not accept favors, services, gifts, or gratuities from the institution or program being visited. When hospitality is offered, site surveyors should use good judgment and common sense to determine its appropriateness. It is generally appropriate and helpful for programs to stock the resource room with coffee, soft drinks, and snacks, for example, for the convenience of the site surveyors. At the same time, surveyors should be considerate in their requests for food or drink, as these things might not be available in smaller communities.

An academic or professional conflict of interest may occur due to relationships within the academic community of medical assisting. Surveyors are prohibited from visiting schools in the state in which they live or work. In addition, if the surveyor has a friendship or any current or past working relationship with the program director, this is a conflict of interest. Site surveyors should not sign up to visit programs at which relatives, former students, or associates are employed or at institutions at which they were employed or from which they graduated.

And, finally, the most difficult type of conflict of interest may arise when a surveyor has a philosophical conflict with the program: for example, curricular design, staffing, or interactions with the community. As another example, the MAERB allows the programs to fulfill the exam participation and passage outcome thresholds with five NCCA-accredited exams. Surveyors should not recommend or endorse any one exam, as all are acceptable.

During the Self-Study review process, a surveyor should inform the MAERB office if she/he feels unable to remain objective about the design or structure of the program. Programs have the freedom and responsibility to comply with the *Standards and Guidelines* in a variety of ways, and site surveyors have the responsibility to evaluate compliance based upon that individuality. Expecting a program to comply with one's own beliefs is a philosophical conflict of interest, and surveyors need to recuse themselves immediately if those philosophical differences threaten to affect objectivity.

Confidentiality

Medical assisting programs that are either CAAHEP-accredited or going through the initial accreditation process are assured that the information that they share with MAERB remains confidential and that MAERB site surveyors are required to respect that confidentiality. While there is certain information about the program that is public and is posted or published for an external audience, there is also information that is private and is shared only with the MAERB surveyors to provide context or background. MAERB site surveyors are pledged to confidentiality regarding non-public information and may not share that information with others. It is appropriate for surveyors to share private information with the MAERB staff, as the staff are committed to the same confidentiality, but it is not appropriate to share confidential information with any other person or entity.

Surveyor Responsibilities

Site surveyor responsibilities for the comprehensive review include, but are not limited to, the following:

- Extensive and analytical review of the program's Self-Study prior to the site visit
- A one-and-a-half-day (sometimes two-day) site visit that frequently involves long days and numerous meetings

- Submission, on the part of the Team Coordinator, of the On-Site Survey Report (OSSR), within one week of the site visit
- Follow-up conversations about the OSSR, as it is reviewed by the MAERB Office and the MAERB Liaison

In the fall and spring of each year, the MAERB office emails all surveyors the list of available visits for the upcoming semester. For example, in the fall, the assignments are for the following spring. Surveyors are asked to respond with their top four preferences/choices, and then the MAERB office takes that aggregated information and assigns surveyors, in teams of two or more, to one of the chosen visits. Surveyors are not required to conduct a site visit each semester, but they may, if they wish.

Prior to submitting your preferences for a given semester, it is important to do the following:

- Check your personal calendar for availability.
- Clear all potential site visit dates with your supervisor.

The MAERB office expects that you will participate in the site visit to which you have been assigned.

The number of team members on a given site visit varies according to the number of programs and/or campuses at a specific institution. For example, a multiple campus program that has one program and two campuses will often be assigned three team members for a two-day visit. MAERB has also used teams of four to best utilize the surveyors' time. When surveyors are submitting their preferences for an upcoming semester, they are aware of those programs that are either multiple campus or multiple awards. The details will, at times, change, depending upon the availability of the surveyors and the size of the program.

Site visits are scheduled for one and a half days, with programs with multiple campuses/programs sometimes scheduled for two full days. Programs expect the survey teams to spend the full allotment of time on the campus; under no circumstances should surveyors make plans to conclude the visit early, without prior permission from both the school and the MAERB office.

Teams are designed to provide effective coverage of the program. Recognizing that serving as a site surveyor is professional development for members of the medical assisting community, the MAERB office carefully designs the teams to ensure that those team members who are less experienced are paired with a surveyor who is more experienced.

Every team has a Team Coordinator, who has the responsibility of leading the team through the process of the site visit review; however, it is expected that the team will work collaboratively. Site surveyors may be eligible to serve as Team Coordinators after two visits if their evaluations have been positive, but the MAERB office understands that some people prefer to defer that service until they have completed three or four visits. To effectively train Team Coordinators, the MAERB assigns a mentor (an individual who has served as a Team Coordinator previously) to the new Team Coordinator.

Team Coordinator duties include the following:

- Coordinating with the Team Member on the travel to and from the site visit.
- Working with the program director to create an agenda for the visit.

- Together with the Team Member, communicating the team's findings to the program personnel at the exit interview. Traditionally, the Team Member reports on the strengths, while the Team Coordinator reads the rest of the Exit Interview Script, including a listing of the deficiencies.
- Completing and submitting the On-Site Survey Report within one week of the site visit.
- Responding to questions from the MAERB office and the MAERB Liaison about specific deficiencies listed and their corresponding rationales.

The Team Member assists and supports all these activities. It should be noted that, to avoid confusion, the Team Coordinator will be the only contact with the Program Director prior to the visit.

Emergency Situations

MAERB takes its commitment to the program very seriously, and the MAERB expects that surveyors fulfill their commitment to visit a site once the date has been confirmed. There are, however, emergency issues that come up. In those situations, the surveyor should contact the MAERB office immediately to let the staff know about the situation, even if participation in the visit still remains a possibility. Because a program prepares many months for the site visit and, obviously, does not want it to be postponed, the MAERB office greatly appreciates being given advance notice of any potential conflict to make backup plans if necessary. In other words, if you have any concerns about your ability to conduct the site visit, contact the MAERB office immediately. If you need to withdraw from participation in a site visit, you will have to contact Foremost Travel to cancel your flight as well.

The MAERB/CAAHEP Site Visit

Information Provided to Surveyors

As outlined above, site surveyors are assigned to site visits well in advance of the actual site visit, usually four to seven months ahead of time.

The goal is to provide the site surveyors the Self-Study Report on a secured SharePoint site at least two months prior to the site survey. At the same time, the surveyors are also sent the following materials in two separate folders to effectively prepare for the visit. You will note that the first folder contains "action items," while the second folder contains "reference items."

First Folder – Action Items

- Site Visit Data Sheet:** This sheet contains contact and travel/hotel information.
- Surveyor To-Do List:** Please look through this list immediately. You will find travel arrangement details, along with a checklist of activities before, during, and after the visit. Please look in the Reference folder for MAERB's Travel Policy in case you have any questions.
- Sample Emails:** These sample letters are designed for use by the Team Coordinator to communicate with the Team Member and program director. There is a new draft email focused on the samples that you will request in advance.
- Institution Self-Study Review Form:** This is a form that you will need to fill out and submit with your OSSR. It contains the comments from the MAERB liaison about the program's Self-Study, and it provides you with a space to respond to any comments from the liaison.

- The Team Coordinator will need to submit this form with the OSSR. You should read it prior to reviewing the Self-Study.
- E. **Annual Report Form PDF:** You will find a PDF version of the program's most recent Annual Report Form to review prior to the visit, unless it is an initial accreditation. You will not be verifying their ARF data nor citing for unmet thresholds. However, having a copy of the program's recent ARF can be an important source of information to you.
 - F. **Student Survey Results:** As part of the new process of reviewing the curriculum, you will have access to the results of a survey that the students in the program filled out. It may be that you will meet with a different set of students on the campus, but the responses will help guide your discussion, as it will give you insight into the processes of the program.
 - G. **ARF Raw Data Submission and On-Site Electronic Documents:** This checklist outlines the instructions provided to the program director from the MAERB office, so that you understand what the Program Director is using to organize the visit. **It is vitally important that you carefully review this document with the program director prior to the visit so that there are very clear expectations about the onsite material.** **Special Notes: The MAERB office will be reviewing the ARF raw data for the site visit. Please remind the program director that the material needs to be submitted to the MAERB office via SharePoint one week in advance. Initial Accreditation programs do not submit ARF materials. It is optional for the program to use the SharePoint site for submission of their Electronic Resource Room documents.**
 - H. **Inquiry Form:** This form has been developed to help you to organize your questions for the Program Director prior to the site visit. In addition, you can also include your requests for updated materials.
 - I. **Assessment Tool Samples:** This document contains some guidance to help you in determining what five assessment tool samples you will request prior to the site visit.
 - J. **Curriculum Review Meeting:** This form has been developed to help you to prepare for the Curriculum Review meeting prior to the site visit. It allows you to compile your thoughts and questions efficiently
 - K. **Updated Site Visit Scripts & Questions:** This document contains the script for the opening interview, the possible questions for different groups, and the script for the exit interview. Please note that there is an extensive description of the curriculum meeting. **A section has been added about the materials that you will be reviewing on site.**
 - L. **Checklist Lab Equipment and Supplies:** Site Surveyors have used the requirements of the MAERB Core Curriculum to evaluate the equipment and supplies in the lab. MAERB has created a checklist to make it easy for you, but that checklist is designed to ensure that the students have the resources to achieve the competencies, so there is the need to be flexible.
 - M. **Travel Voucher:** Please submit the Travel Voucher promptly after the visit, via email, to accounting@maerb.org. You can pdf your receipts, but please keep the travel voucher in the Excel format.
 - N. **Multiple Campus Checklist:** This handout will be used only if you are visiting a multiple campus program. If you are visiting a multiple campus program, you will need to fill out this checklist and submit it to the MAERB office with your completed OSSR. The program director will have received a similar document to aid her/him in preparing the material for you.

Second Folder: Reference Folder

1. **Travel Instructions and Policy:** You will find the information about MAERB's Travel Policies.
2. **Updated Site Visit Agendas:** This template has been updated to allow for the important curriculum review meeting. The Team Coordinator, in conjunction with the Team Member will be working with the program director to create the agenda. **The template has been updated with instructions about the Resource Room and virtual meetings**
3. **SharePoint Instructions:** This document provides you with information about the SharePoint site that has been developed, including both the Program Site and the Surveyor Site.
4. **CAAHEP Standards and Guidelines:** We are adding this important material to the folder to make it easier for you to access it.

A.

MAERB is now using SharePoint to share the Self-Study and OSSR materials. You will find more information about the use of SharePoint in the handout "SharePoint Instructions." You will receive access to two connected SharePoint sites.

1. **Program Site:** This site is designed for the use of the program director and the site surveyors. If you need to request additional materials, the program director will provide it on this site. In addition, you can share drafts of the agenda with each other. The program director will be uploading their ARF raw data on the MAERB website, but you should remember that the MAERB office, and not the surveyors, will be reviewing that ARF material. Finally, the program director has the option to place on the *Program Site* via SharePoint the Electronic Resources that you will review during the site visit. If the program chooses not to do so, the Electronic Resources will be available on site in the designated Resource Room.
2. **Surveyor Site:** You will be able to access the *Surveyor Site* via a link on the top of the *Program Site* page. The program director will not be able to access that site . . . or even see the link. MAERB will be placing onto this SharePoint site the Self-Study Report (SSR) materials, the OSSR materials, and all the documents outlined below. You will be able to work on these materials together as surveyors without having to worry about email correspondence with each other. Rather than emailing the OSSR to each other to work on, you will be able to work on it together in the SharePoint site. When you are finished with the OSSR, you can notify Leah Millett (lmillett@maerb.org) and let her know that you are done with the OSSR.

The best thing to do is test your access to the SharePoint site immediately so that if you have any problems, you can contact the MAERB office.

Likewise, it is critical that you read the information promptly and completely, as the MAERB office often finds that it fields questions and concerns that could have been eliminated if the surveyors had read the materials beforehand.

Special Note: Multiple Campus Programs

MAERB's policy 125 Accreditation of a Multiple Campus Program outlines the requirements for a CAAHEP-accredited medical assisting program that is located on different campuses of the same

institution. In visiting that CAAHEP-accredited program, it is necessary to visit all the campuses on which the program is taught in its entirety.

There are many variants of multiple-campus programs. Some programs have one additional campus located 30 miles from the main campus. Other programs have a main campus and three satellite campuses up to 120 miles from the main campus. Because there are so many variables, MAERB decides how many Surveyors are needed for the site visit and how long the site visit will be. Many of the site visits will be a typical day and a half, but we will assign three site surveyors. At times, we will determine that it is necessary to have a two-day visit, and, in those cases, it is necessary to either fly out in the evening after a full 8:00 – 5:00 day or else spend an extra night and fly out the next morning.

When you are sent the information to choose site visits, the MAERB office will outline the length of the site visit, and we will add those details in the confirmation letter. It is important that you take note of those details so that you can make the appropriate travel arrangements and work effectively with the Program Director to set up the agenda.

Travel Arrangements

It is recommended that the site surveyors start making the travel arrangements upon receiving the site visit materials, as there are several factors that frame the travel decisions. It is required that the arrangements be made at least one month prior, if not earlier, to the visit. The Team Coordinator should contact the team member and review site visit and travel plans as soon as the site visit information is received. In addition, the Program Director should be consulted regarding travel arrangements prior to making those plans definite. Outlined below are some of the variables that shape the travel to and from the site.

Airline travel arrangements, hotel accommodations, and, if necessary, plans for rental cars, are made through the MAERB designated travel agent. Please see Appendix B to review the complete instructions and MAERB's Travel Policy.

It is expected that the school will provide transportation for the site surveyors to and from the airport and during the site visit, if a reasonably priced shuttle is not available. The Team Coordinator needs to consult with the Program Director regarding this and then communicate with the Team Member(s). If it is necessary to rent a car, the travel agent will contact the MAERB Executive Director for authorization.

Detailed information about contacting the Travel Agent is found in MAERB's Travel Policy (Appendix B) at the end of this document.

As a summary, the Team Coordinator and Team Member(s) will work in coordination with the authorized travel agency, Foremost Travel. The plane ticket will be paid directly by MAERB. The hotel reservations will be made at the same time that the flight is booked, but the payment will be made by the surveyors at the time of the site visit. If there is a rental car, one of the site surveyors will need to put the cost of the rental car on their own credit card. Surveyors are required to submit a travel voucher at the end of the site visit for reimbursement of hotel and food expenses.

In arranging travel, the surveyors need to ensure that they set up a meeting time, usually the night before the visit, so that they can discuss the Self-Study Report and strategize the best approach for talking with the Program Director and other communities of interest.

Self-Study Report

It is vitally important that the site surveyors fully review the Self-Study prior to arriving on the site. It is not a task that can be done on the airplane heading to visit the site. While there are a great many details to examine within the Self-Study, the central purpose in reviewing the Self Study is to prepare for the site visit. Careful review of the Self-Study will save time on site, as questions for the Program Director can be prepared in advance and checklists for items to review can be created. You will be looking for the following issues:

- inconsistent statements or materials
- omitted or out-of-date items
- items needing verification
- incorrect material

It is important that the surveyors communicate with each other to identify any immediate concerns. Surveyors should share with each other their areas of expertise so that they can effectively work together during the site visit.

MAERB Staff Review of SSR: Prior to the site surveyors receiving the Self-Study, it will have already been reviewed by the MAERB office and the MAERB Liaison. First, a MAERB staff member reviews the Self-Study to identify any obvious omissions and then contacts the Program Director to retrieve any missing materials. If the Program Director is not able to supply the missing information, the Program Manager will make note of it for the Team. In addition, the staff member will check the posted outcome and will make a note of it for the surveyors so that the surveyors do not need to worry about doing so.

Liaison Review of SSR: Then, after the Program Manager reviews the Self-Study, the MAERB Liaison, who oversees the accreditation process for the program, reviews it, focusing on two central questions: Are there any specific concerns about the program meeting the *Standards*, based on the documentation? Does the sequence of the program appear logical? The liaison's questions for the program can range from the simple: *Can you verify the public member on the advisory committee?* — to more complicated points: *How does the program follow up on its resource assessment?* If the Liaison has any comments or questions, they will be sent to the survey team along with the initial transmission of the Self-Study; on occasion, this information may be sent after the first transmission. The Liaison does not look at the Curriculum Map to verify that the MAERB Core Curriculum is accurately represented.

Surveyor Review of SSR: The surveyors then receive the “Self-Study Review Form” that has been filled out by the Program Manager and by the Liaison. Any comments and questions found there will need to be followed up by the survey team. After the visit, the Team Coordinator fills out the final column of the Self-Study Review form and responds to each question/comment. Some of the comments and questions require the surveyors to be onsite, while answers to others might become evident during the team's discussion of the Self-Study. If the latter, then the Team Coordinator should share those questions with the Program Director prior to the site visit so that the program has the best opportunity for resolution by the time of the visit.

There are a number of appendices to review and the majority of them align directly with CAAHEP's *Standards and Guidelines*. You will also need to review the program's syllabi in detail to determine if the MAERB Core Curriculum cognitive objectives and psychomotor and affective competencies, or their

equivalent, are listed on the syllabi. You will examine the syllabi and the curriculum map closely, as they will provide you with information about the MAERB Core Curriculum prior to your arrival at the site visit. The syllabi, in particular, will be very important documents for your understanding of how the program teaches, assesses, and achieves the MAERB Core Curriculum. You will also be receiving student responses to a survey that MAERB asks the program to administer, and the students will provide you with a preliminary snapshot of the curriculum in the program.

You need to look at the big picture of the curriculum as represented on the program's syllabi. Prior to a given site visit, you will have been sent a blank On-Site Survey Report (OSSR), which consists of a Word document and three Excel workbooks. In the Excel workbooks you will note that a sample of cognitive objectives and psychomotor and affective competencies are already highlighted for you. You should start with that sample and track to ensure that the syllabi (or an appropriate addendum) contain the specific objective or competency. If you find that some are missing, you should start tracking all of them; you will need to look at the summary page to determine if you need to review them all. Working on the representation of the MAERB Core Curriculum prior to the visit will allow you to inform the Program Director of any issues prior to the site visit. The Team Coordinator and Team Member have the option of dividing up those duties.

As you know, with the shift in how you review the MAERB Core Curriculum, you will not be receiving the individual assessment tools in the Self-Study. You will have the opportunity to review the curriculum at the site visit, and the program is required to have all the curricular materials available for you to review on site. At the site visit, you will have the opportunity to sit down with the Program Director and the instructional staff and discuss the curriculum. In that discussion, you will have the chance to review the material, as they will be showing you the tests, assignments, check-off sheets, role plays, and so on. You will find that there is a column on the OSSR Curriculum worksheet for you to take notes about specific curricular items, but those notes are for your reference.

You will be asking the Program Director for **five** samples prior to the site visit. The goal in asking for those samples is first, to look in detail at how the program assesses the MAERB Core Curriculum and, second, to use the samples as a method for continuing the conversation at the site visit. During the curriculum meeting at the site visit, you will see much more material, but these samples are designed to help you prepare.

In asking for samples, you can develop your own list based upon your review of the curriculum map and the syllabi. Your goal should be to get at least one sample from each of these four categories:

- Tests, worksheets, discussions for cognitive areas
- Clinical check-offs
- Administrative tasks
- Affective behaviors

There is a handout, labeled "Assessment Tool Samples," in the *Documents* packet that you receive from MAERB prior to the site visit, which outlines some possible combinations, but you may generate your own. You are limited to requesting FIVE samples.

Contact with Program Director

As site surveyors prepare for the visit, it is important for the Team Coordinator to be in touch with the Program Director during this process. As the team communicates via email and/or phone during the review of the Self-Study, any larger issues should be discussed with the Program Director at least one month prior to the team's arrival. Providing the Program Director with a "heads up" about any concerns establishes a collegial atmosphere for the visit and may eliminate some unnecessary deficiencies. Many Program Directors are new to the site visit process, and, since site visits occur so infrequently, there is always the need for re-education.

In addition, the Team Coordinator needs to consult with the Program Director about the agenda for the visit (more details below) and about the documentation required to be in the Resource Room. In addition, this is a good time to remind the Program Director of some of the items that are important to be included in the Resource Room. There is information about the Resource Room in *The Program Director Handbook* and the *the Site Visit Documents: Preparing the Required Materials for the Site Visit* handout.

The Program Director should already have a copy of the *Site Visit Documents: Preparing the Required Materials for the Site Visit*, which outlines the materials that are necessary on site. To ensure that there is no confusion during the site visit itself, it is very important to contact the Program Director at least several weeks before the visit and carefully review the documents required for the site visit. There should be no assumptions made that the Program Director clearly understands precisely what is involved. Ask very direct questions about how the materials are organized such as the following:

- How is the electronic material being organized? Have you organized the course materials by course?
- How do you track the achievement of the psychomotor and affective competencies for every student? What can you show us for the last graduate cohort to demonstrate that the students have achieved all the psychomotor and affective competencies?
- How do you intend to show the curricular materials to us? Remember we are going to be sitting down with you and other instructional staff to review sections of the curriculum, and you will need to be able to pull it out.
- What method are you using to ensure that the right materials can be easily found?
- Have you organized the Annual Report Form data by admission cohort for retention, and by year of graduation for job placement, graduate survey, employer survey, and exam? Did (or will) you submit this ARF raw data to the MAERB office one week prior to the visit?

Most of this communication should occur at least 30 days prior to the site visit, and it is also important to confirm the logistical details of the agenda (see below) with the Program Director at least one week before the visit.

Agenda

MAERB publishes a site visit agenda template, but that template needs to be tailored specifically to the program, based on the availability of the many communities of interest: faculty, staff, students, employers, advisory committee members, and so on. It will also need to be modified if the program is a multiple campus. Program Directors should submit a draft of the Site Visit Agenda to the Surveyors at

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least two weeks prior to the site visit, and the Surveyors should review and respond within a one week period so that it can be finalized one week prior to the site visit.

The site visit agenda should be a collaborative effort, developed by both the Program Director and the Surveyors. The Program Director and site visit team can work on that agenda together on the SharePoint site. The site visit should always begin with an informal meeting with the Program Director, followed by a formal meeting with the larger group of administrators and faculty who are involved with the program. The visit should conclude with an informal meeting with the Program Director, followed by a formal exit interview with the administration and any program personnel that wish to attend. All other meetings can be scheduled according to the availability of the specific groups. Be patient with the Program Director as she/he attempts to “herd cats” on the campus.

Outlined below are some of the common elements of a site visit agenda. It is very important in all these meetings that the site surveyors obtain a list of names and titles of the people with whom they speak, as that information is included in the On-Site Survey Report (OSSR).

Initial Meeting with the Program Director (Practicum Coordinator and Faculty may also be involved)

At this initial meeting, the surveyors should share with the Program Director what they have learned about the program through the Self Study and what questions they have that they would like answered during the site visit. One of the goals of this initial meeting is to address any concerns that the Program Director might have about the process, without making any specific promises about accreditation decisions. In addition, it is a good time for the site surveyors to ask about any changes that may have taken place after the submission of the Self-Study. It is important to establish that, while the site surveyors function as the eyes and ears of MAERB/CAAHEP, they don’t make any of the accreditation decisions. The role of the surveyors is to gather information and to report it.

Opening Session with Program Officials

This session should include all the individuals at the institution who are involved in the program, specifically the administration. At this meeting, site surveyors should do the following:

1. Introduce themselves, including their role on the survey team, titles and current and past roles within medical assisting education and practice
2. Explain that they represent MAERB and CAAHEP
3. Define the purpose of the visit, which is to verify and clarify the Self-Study Report and the medical assisting program’s compliance with the *Standards and Guidelines*
4. Emphasize that the information gathered, unless defined as public, will remain confidential
5. Remind the program that the site surveyors do not make accreditation decisions
6. Explain that the interviews with students, graduates, employers, and other communities of interest provide information to help the site surveyors gather an accurate picture of the program, and that all the interviews need to take place without the Program Director or medical assisting faculty being present

In addition to these points, the site surveyors should read the formal Opening Session script that outlines the formal accreditation processes.

Program Director and Faculty Curriculum Meeting

In this meeting, you will have an in-depth discussion of the curriculum, along with a review of different sections of a course or one complete course. The Program Director and medical assisting faculty need to be available to discuss the curriculum samples and the whole curriculum.

Other Meetings and Activities

1. Interviewing students, graduates, employers, program support services, practicum supervisors, faculty, and Advisory Committee members
2. Reviewing student records
3. Visiting the pertinent laboratories and classrooms
4. If applicable, visiting other campuses and practicum sites

These meetings allow for the triangulation that is so vitally important to the verification and validation process. During these meetings, the site surveyors will be relying upon the scripts provided to them. On many occasions, the same question, reframed according to the audience, will be asked to different groups. Discrepancies in documentation should be discussed with the Program Director to ascertain if there is any available material to address potential issues.

During these meetings, the Surveyors should take careful notes, as, if there are any deficiencies, the rationale for each needs to be based upon evidence directly related to the *Standards and Guidelines*.

Informal Closing Meeting with the Program Director

During the site visit, the site Surveyors should communicate and keep in close contact with the Program Director and, if any questions arise based upon the interviews, the Surveyors should request, if possible, information from the Program Director to respond to those issues. This informal meeting allows for a final check-in order to ensure that the Surveyors have reviewed all the material pertinent to the site visit.

Exit Interview

The Program Director, in consultation with the administration, determines the individuals who will attend this final meeting. The Surveyors provide an oral summary of the team's assessment of the program's strengths and deficiencies. The Surveyors should remind and inform the audience of the following points:

1. The confidential information will remain confidential.
2. The site visit team does not make accreditation decisions.
3. The program will receive a version of the On-Site Survey Report (OSSR) after it has been reviewed by the MAERB office, approximately one month after the site visit.
4. The program can correct any deficiencies prior to CAAHEP's final review, by submitting material directly to MAERB within three weeks of receipt of the OSSR.

5. The program will receive an online evaluation form to evaluate the Surveyors and the level of support offered to them from the MAERB office.

In addition, at the exit interview, the Surveyors present the strengths of the program as well as outline the potential deficiencies. MAERB surveyors should not add any additional information such as suggestions or possibilities for improvement, as those do not relate to the *Standards and Guidelines*, and they can appear to represent the Surveyor's personal views. To ensure that the visit remains focused on the main goal, Surveyors should only report on the findings of the OSSR.

All the meetings listed above are a big portion of the site visit, and those meetings are often the hardest for the Program Director to coordinate as there are several busy people involved. The Team Coordinator and the Program Director should agree on the agenda prior to the team arriving onsite so that the Program Director can set up the various meetings. There are times in which the agenda can shift, due to changing schedules, but the team should avoid making any last-minute changes to the agenda and be respectful of the schedules of the communities of interest.

Questions and Scripts for meetings/interviews at the site visit

To assist the Surveyors in conducting interviews and meetings, there are scripts and questions available to both cover the important points as well as to start the conversations with the many communities of interest. The scripts for the opening interview and the closing interview are very important, as they cover the relevant legal information. Surveyors are sent those scripts together with the materials that they receive for each given site visit.

The questions for the various meetings are designed to be guides rather than mandates. You may find that there are other areas that you wish to cover. You should, however, note that many of the questions designed for these interviews focus on the program's outcomes and the Accreditation Standards, and that focus is quite deliberate. Your goal is to determine how the program meets those outcomes within the requirements of the *Standards and Guidelines*.

You can see that the format of the questions focuses on the goal that you have in talking with the specific group of people. Here is an example from the document that focuses on interviewing the advisory committee. You have a list of discovery points, essentially why you are asking the question. Then there is the list of the Standards that relate to those discovery points. In the second column, you have some suggested questions. Those questions are designed to help you discover the answer to the discovery points.

Advisory Committee

Discovery points	Suggested Central Questions
<ol style="list-style-type: none">1. How does the program respond to the needs of the community that they serve?2. How does the program get feedback from the communities of interest represented on the advisory committee?	<ol style="list-style-type: none">1. What do you do and learn during a typical advisory committee meeting?<ol style="list-style-type: none">a. What have you learned so far about the program's goals?b. What have you learned about the curriculum?c. How would you characterize the needs of the students?

<p>3. How does the program use and respond to the feedback it receives from the communities of interest?</p> <p>Standards</p> <p>II.A Program Goals—Program Goals and Outcomes</p> <p>II.B Program Goals—Appropriateness of Goals and Learning Domains</p>	<p>d. How often does the advisory committee meet?</p> <p>e. If you are unable to attend a meeting, is any follow-up done with you? If so, what type of follow-up?</p> <p>2. Based on your knowledge of the program, its students and its graduates, how would you evaluate the resources that are available to this program?</p> <p>3. In discussing the program’s outcomes, such as retention, job placement, exam participation and passage, what have you learned about the challenges and achievements that the program has faced?</p> <p>a. What type of advice have you given to the program based on the outcomes?</p> <p>4. What changes and suggestions have you provided to the program, and what type of action has the program taken?</p> <p>5. For those of you who have worked directly with the students, what do you see as the greatest strengths of the graduates? What do you see as some opportunities for the program to further nurture the students’ skills?</p> <p>6. How do you see the program and its staff working with the larger health care community that they serve?</p>
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It is important to remember that the people with whom you talk at the site visit might not fully understand precisely *why* you are visiting the medical assisting program, even though they know it is for an important reason. That is not necessarily the fault of the Program Director. It’s just that accreditation of academic programs are educational and somewhat mysterious for those who are outside the process, and even for some of those who are in the process. It is part of your job to introduce yourselves and to explain your team’s function.

There is also a section in the *Scripts and Questions* that focuses on the question that should be asked about the required documents that a Program Director should have available at the site. You will be reviewing the gradebooks, the tracking mechanism, the practicum documentation, and the supporting documentation for the Annual Resource Assessment Form. The section in the *Scripts and Questions* handout provides the reason why you are looking at those materials, some questions to ask, and the supporting Standard.

Materials Needed for the Site Visit

The Surveyors need to bring with them the program's Self-Study Report, the customized OSSR (On-Site Survey Report), along with all the other documents that were sent by the MAERB office, such as the PDF of the Annual Report Form. In addition, surveyors should bring their own laptops because programs are required to use electronic files.

Materials to be Reviewed at the Site Visit

In addition to the blank assessment tools for the curricular materials, the Program Director will also have the following items available for each course:

- course syllabus;
- the course roster of students for the most recently assessed group of students;
- a gradebook; and a tracking mechanism (i.e., detailed gradebook or master competency check list or a mechanism of the program's design) to ensure the achievement of all psychomotor and affective competencies.

It is important to note that the 2022 *Standards and Guidelines* have eliminated the requirement that the students need to pass all the psychomotor and affective competencies in a specific course before moving to the next course. However, students still need to achieve all the psychomotor and affective competencies prior to graduating from the program, so the tracking mechanism needs to illustrate that.

COURSE DOCUMENTS AND STUDENT ACHIEVEMENT RECORDS



The MAERB revised Policy 220 “Retention of Course Documents and Student Achievement Records” and removed the requirement that Program Directors keep the transcripts of the students. At the same time, Standard V.D requires that satisfactory records be maintained for student admission, advisement, counseling, and evaluation. It mandates that grades and credits for courses must be recorded on the student transcript and permanently maintained by the sponsor in a safe and accessible location. As surveyors, you can certainly request a copy of a student transcript if you have any concerns about course sequencing.

Annual Report Form (ARF) Raw Data

The program will be submitting its raw data, in support of its most recent Annual Report Form, to the SharePoint site that is shared with the Site Surveyors and the MAERB staff. The MAERB staff will be reviewing the ARF raw data to ensure that the raw data supports the aggregated numbers that are submitted for the Annual Report Form.

The Surveyors receive a copy of the program’s most recent Annual Report Form (ARF). It is important to review that ARF and look at the outcomes, as that will help with some of the conversations that you have about curriculum. Because the program’s ARF is submitted by the program annually and is reviewed by the MAERB office and supervised by the MAERB members, the Surveyors do not “cite” the programs if they have not met any given threshold. At the same time, in considering the links between the outcomes and the other standards, Surveyors will certainly be having conversations about the program’s outcomes.

Student, Patient, and Instructional Staff Safety

CAAHEP’s *Standards and Guidelines* focus on student, patient, and instructional staff safety. It is important that the laboratory setting is up to clinical settings. One issue that comes up in this area is the use of expired materials.

Many programs receive donated, expired materials, and there can be a valid use for those materials. Most medical materials, such as needles, fluids, disinfectant solutions, catheters, sutures, and so on, are imprinted with an expiration date. Beyond this date, the manufacturer does not guarantee the sterility, safety, or stability of the item. All expired medical supplies **MUST** have some safeguards set up, so that they are not inadvertently used on live human subjects. It is never acceptable to use any expired items invasively.

NOTE: It is never acceptable for programs to use expired or non-expired medications, but they may use “mock meds” or “demo meds” in simulations only.

The method for indicating that materials are expired can vary according to the set-up of the lab. Here are a few examples:

- Separating the expired materials from the non-expired materials by putting the expired materials in a box and marking as “expired”
- If the materials are already in their own packaged box, marking the packaged box as expired
- If space does not allow for clear separation, the use of color-coded labels or dramatic Xs to indicate that supplies are expired, with a legend posted in the clinical space that explains the

purpose of the label is appropriate or the use of labels that specify the following: “NOT FOR USE ON HUMAN SUBJECTS.”

- A clearly outlined instructional plan for the order of the cabinets to ensure that students know what materials are expired and unexpired and when they can be used

The storage in the lab is central to safeguarding the health and safety of all the participants in the program, but you do need to consider the different systems that a Program Director might use to ensure that safety.

Acceptable practice for expired medical supplies in the following instances:

- Instructing students in a simulated environment
 - *Example:* Instructor is demonstrating the technique of administration of parenteral medications on injection pads. The use of expired medical supplies is acceptable for the demonstration of skills when not performing on live human subjects.
- During student simulated practice times
 - *Example:* Student practicing the technique of venipuncture on a simulated human arm, prior to assessment of competency. The use of expired medical supplies is acceptable for the practice of skills when not performing on live human subjects.
- Assessing student skills for technique only
 - *Example:* CLIA-waived tests have quality controls built in or available separately. Expired tests and controls may be used as long as they are being used to assess the technique of completing the test correctly and not for the purpose of performing a quality control measure.

Unacceptable practice to use expired medical supplies in the following instances:

- Any invasive procedures, such as injections, venipuncture, capillary puncture, on live human subjects, including any solutions that are injected, needles that are used, and so on.
 - *Example:* Students learning to administer parenteral medications initially practice on injection pads, but then they inject fellow students. Students must use in-date supplies when using live human subjects.
- If the use of an expired supply would result in an inability to assess that the student was successful in achieving competence.
 - *Example:* Students are being assessed on performing a quality control measure using a liquid control solution with a chemistry analyzer. The liquid control must be in-date as it is critical to the assessment of the competency of the student.

Professional Standards for MAERB Surveyors

MAERB Surveyors represent MAERB and CAAHEP, and it is important to remember that all comments and behaviors will be evaluated by the visited program. As is outlined in a previous section, MAERB Surveyors are held to very high standards with the confidentiality of program materials and potential conflicts of interest. Peer review is the hallmark of the accreditation system in the United States, and there are certain professional standards that need to be adhered to for it to be effective.

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Professional Behavior

1. **Be respectful:** The program and institution have invested a great deal of time and energy preparing for this site visit. It is important to acknowledge this by your behavior. You need to invest your full energy and attention to the program during the site visit. Avoid checking your email or texting when you are meeting with program personnel. Don't engage in personal conversations with your team member in front of program personnel. Treat with respect the schedule that has been developed. It may be that you don't think that the program is displaying enough attention or respect to the process, but that should not affect your behavior. Be on time for meetings.
2. **Dress up:** Remember that the program has dressed up for the site visit. It is expected that you dress professionally. Jeans and sneakers are not appropriate attire.
3. **Be kind:** The people you meet during the site visit are going to be apprehensive. Combat that fear with kindness. Frightened people don't talk freely, and your goal is to get people talking about the program so you can find out the information that you need.
4. **Seek common ground:** Don't emphasize your credentials, experience, or position to verify your ability to conduct the site visit. The fact that MAERB has sent you to the site is enough verification, and it is important not to intimidate the people at the site.
5. **Collaborate with your peer surveyor:** It is important that the program not derive differences of opinions amongst the surveyors visiting. If there are any concerns about working with your fellow surveyor, contact the MAERB office, but do not publicly denigrate your partner.

Accreditation Representation

1. **Focus on CAAHEP:** Many of the programs are unsure about the relationship between MAERB and AAMA. Correct them gently when they talk about AAMA accreditation, as there is no such thing, and be prepared to describe CAAHEP.
2. **Be prepared:** Arrive at the campus well-prepared and with a list of items that you want to discuss and accomplish while there. Nothing will damage your credibility more as a peer reviewer than if the program thinks that you have not read the Self-Study.
3. **Be thorough:** You have a lot to cover on the site visit, and it is important that it be covered. The accreditation process itself loses credibility if you indicate that the program is in compliance in an area that you have not reviewed.
4. **Avoid looking for problems:** A frequent complaint made by the programs is that the site surveyors seem to be looking for flaws and errors. Avoid asking "trap" questions; rather, ask searching questions. Acknowledge the positive thoughts and sentiments expressed by the participants. When hearing concerns, seek verification in other areas and remain open to the full range of evidence.
5. **Avoid referencing other programs:** It is frequently tempting to reference how your program does things. Ironically enough, program personnel often ask for that advice, but they really don't want it, as they then feel that their program is being evaluated against yours. To avoid that conundrum, either say nothing at all, or say, "I have seen some programs do it this way."
6. **Ensure the integrity of the conversations:** Explain that you need to interview students, graduates, faculty, and advisory committee members privately so that you can get honest feedback from the participants.

7. **Don't nurture your pet peeves:** All the MAERB surveyors have different areas of expertise. Avoid going on a witch hunt within your area of expertise or a specific area of concern.
8. **Don't tell them how to do it:** As we all know, there are many different processes that can be put into place to achieve an outcome. Programs need to develop their own processes to be compliant with the *Standards and Guidelines*.
9. **Don't advocate for certain credentials:** The *Standards and Guidelines* allow programs to meet outcome thresholds by having graduates pursue certification options from among any of the five NCCA-accredited exams in medical assisting: CMA (AAMA); RMA (AMT); NCMA (NCCT); CCMA (NHA); and CMAC (AMCA). Respect the decisions that the program has made.
10. **Focus on the larger issues:** There is a certain amount of checking that needs to be done on smaller issues, but don't dwell on what can be easily fixed. Focus on the larger, more substantive issues.
11. **Be wary of institutional politics:** There may be times in which a Program Director asks the team to cite something as a way of getting the administration to pay attention to that issue. You need to stick with the minimum requirement that is outlined in the *Standards and Guidelines*.
12. **Acknowledge terminology differences:** Academic terminology can vary considerably across programs, even when we are all referring to the same thing. For example, the definition of "course learning objectives" varies considerably and has several different names.
13. **Avoid extraneous suggestions:** If an issue is not part of the *Standards and Guidelines* and is not being cited, do not mention it. The *Standards and Guidelines* create the necessary parameters of the visit.

Conflict of Interest, Academic Integrity, and Confidentiality

1. **Maintain confidentiality:** As is outlined above, you will be reassuring the program that the confidential information that you have received will remain confidential. In addition, be careful what you share internally. At times, you may hear "side comments," items not relevant to the *Standards and Guidelines*. Be careful not to share those with your fellow Surveyor/s.
2. **Don't look for a job or seek an applicant:** Do not use the site visit as a method of job-hunting, as this is not appropriate. Likewise, don't use the site visit as a means of finding out what "talent" is out there. It is inappropriate to poach faculty or administrators.
3. **Don't recommend textbooks, learning management systems and so on:** CAAHEP and MAERB need to be extraordinarily careful not to endorse any book, publisher or company, and the site surveyors need to be vigilant in this area. In addition, it can be seen as a conflict of interest, if a surveyor stands to benefit from one of those recommendations.

After the Site Visit

The Team Coordinator needs to finish the On-Site Survey Report (OSSR) within one week of the conclusion of the site visit. Along with your OSSR and the Core Curriculum workbooks, include your completed Self Study Review Form that addresses the issues that the Liaison has noted prior to the site visit. You will put/keep the finished versions of these documents on SharePoint site and notify the MAREB Administrative Assistant when it is complete.

Both Surveyors need to submit their expense reports and receipts within a week after the visit to accounting@maerb.org. If there are any concerns about the site visit, whether regarding the performance of one of the Surveyors or issues within the program, Surveyors are asked to call either the

MAERB Executive Director or Assistant Director. It is also necessary to evaluate your Team Member, and there is an evaluation link on the “Surveyor To-Do List.” The MAERB office also sends out a reminder the week after the site visit.

The Team Coordinator will hear from the MAERB office approximately 1-2 weeks after the submission of the OSSR. The MAERB office will have produced a review form discussing the deficiencies and the rationales. It is not unusual for the office to have questions about the OSSR and to seek clarification. There are several goals in providing that information: 1) provide timely feedback to the surveyors regarding the accuracy of their OSSR report; 2) assure that the deficiencies (if any) are communicated with the program in the clearest possible terms; and 3) present a history of the changes to the MAERB board when it reviews the program. The OSSR has a range of audiences, and the goal of the MAERB office is to ensure that the OSSR meets the expectations of all the audiences.

The MAERB Review of your OSSR may ask you to give consent to certain changes in your report. The development of the On-Site Survey Report is a collaborative process, and MAERB wishes to honor the experience that the surveyors had on the site. However, it’s not uncommon for changes in deficiencies or in the wording of rationales to be made, either upon review by MAERB staff or at the MAERB meeting. In addition, a program is now allowed to correct any deficiencies when it responds to the OSSR that is sent by the MAERB office.

Conclusion

This handbook focuses on the logistics of the site visits rather than in-depth training on the methods of conducting site visits. MAERB provides that training through on-ground training, on-line webinars, and other methods of communication.

This handbook is designed to provide an outline and overview of the process.

This handbook will be reviewed and revised on an annual basis, so feedback is extraordinarily helpful.

Peer review is vital to the accreditation process, and the work that the MAERB site surveyors do is invaluable. It is volunteer work that needs to be conducted with integrity, professionalism, and empathy. The site surveyors are required to be versed in the intricacies of accreditation and the nuances of the *Standards and Guidelines*, the *MAERB Policies and Procedures Manual*, and a host of other documents. The dedication of the individuals who take on this task is greatly appreciated and valued by MAERB.

Appendix A: Site Surveyor Code of Ethics

Site Surveyor Code of Ethics

As a site surveyor, I pledge myself to:

- A. Respect the confidentiality of communications, documents and correspondence received from institutions and programs during the accreditation process.
- B. Avoid disclosing to anyone the location of surveys that I have participated in.
- C. Complete assignments by the scheduled dates, so as not to impede the overall progress of the accreditation process.
- D. Notify the MAERB Executive Director if unable to complete an assignment by the scheduled date.
- E. Make impartial decisions based upon the current *CAAHEP Standards*.
- F. Represent the MAERB in a professional manner.
- G. Not to remove original documents from site without approval by the MAERB Executive Director
- H. Not serve as surveyor if:
 - 1. employed within the same state as the sponsoring institution;
 - 2. residing within the same state as the sponsoring institution;
 - 3. a graduate or former student of the program or another program owned by the same corporation or system;
 - 4. recently been an appointee of the sponsoring institution or have relatives who are appointees of the sponsoring institution;
 - 5. previously surveyed the program within the past 5 years;
 - 6. not acceptable to the program/sponsoring institution; or
 - 7. served as a consultant to the medical assisting program(s) within the previous two years.
- I. Avoid making recommendations or promoting specific textbooks or other instructional materials while serving as a surveyor.
- J. Avoid referencing affiliation(s) regarding any member of the survey team (i.e., personal and professional memberships).

I also understand that:

MAERB discourages assignment of team members whether from the same state or from the same institution to serve on the same survey team.

MAERB discourages assignment of team members to serve with the same team member on subsequent surveys within a two-year time frame.

NOTE: In signing and agreeing to this *Site Surveyor Code of Ethics* document, I also affirm that I have read the most recent version of the Surveyor Handbook.

Signature

Date

Appendix B: Foremost Travel

MAERB is currently working with Foremost Travel (www.foremosttravel.com) to organize and manage the travel and lodging of the Surveyors for the accreditation site visits. It is required to contact Foremost for all travel, even if you plan to drive to the site visit. Surveyors are required to book both travel (flights, rental cars) and hotels through Foremost Travel.

Foremost Travel phone numbers: 800-225-7185 or 312-726-4492

Foremost Business Hours: Monday through Friday, 8:00 am to 5:00 pm (central)

Foremost Travel Agents: Kristy Miller (primary) or Dan Lindell (secondary)

Email: Kristy kristy@foremosttravel.com or Dan dan@foremosttravel.com

24/7 number for travel emergencies due to weather or delays: (800) 544-0971

Please add Foremost Travel to your cell phone contacts.

Travel Profile: <https://foremosttravel.com/corporate-profile/>

Method of contacting the travel agent/s:

1. You can send an email to Kristy with your travel needs. If Kristy is out of the office, the email will be automatically forwarded to Dan or another travel agent.
2. You can call the agency during their operating hours. If Kristy is on another line, leave a message on her voicemail. If Kristy is out of the office, her voicemail will indicate that and provide instructions for who to contact. Then you would contact that person and leave a message if s/he is not available.

Both MAERB and Foremost Travel Agency are deeply invested in providing good service to the MAERB site Surveyors. An agent will respond as soon as possible to either get further information or to follow up. Your travel needs will probably not be arranged immediately but there will be a good start on setting it up.

If you have followed the suggested methods above and you do not receive a response from Foremost Travel, please contact Sarah Marino (smarino@maerb.org) to let her know that there are problems.

There are two dedicated travel agents, Kristy and Dan, who will be working with the Surveyors. If they are not available, there are other travel agents at the organization who will be available to ensure that the travel arrangements will be made. The travel agency will handle air travel, hotel, and, if necessary, rental car reservations. The air travel will be paid for on the MAERB credit card. You will need to use your credit card to pay for the hotel and the rental car reservation.

All Surveyors will be asked to fill out a Personal Travel Profile Form, and you can ask Kristy to send you that link.

The Team Coordinator should contact the Program Director as soon as possible after the Self-Study material has been received to find out more details about the logistics. It is expected that the program/sponsoring institution provide transportation from the airport to the hotel and back as well as transportation from the hotel to the program site. The program might also recommend the use of a shuttle service from the airport and arrange for transportation to the program. The Team Coordinator

should also contact the Team Member(s) so that they are aware of the additional details, including when the team will be meeting prior to the official start of the site visit.

This coordination is vitally important as Foremost Travel will be helping the team to organize the travel to create efficiencies and to save money. Foremost Travel will have the list of programs/institutions to be visited, the names of the Site Surveyors visiting the locations, and the names of the hotels that the program recommended.

You will be able to make your arrangements by phone or email.

When you call Foremost Travel, you will be able to work with Kristy or Dan to arrange for plane tickets and a hotel.

If you want to drive to the program site in your own vehicle, you can certainly do so. **You will need to call Foremost to get documentation that the cost of driving your own vehicle or renting a vehicle (reimbursement at the IRS rate) is less than the lowest air fare to the site.** If the cost is higher, MAERB will reimburse you only up to the cost of the lowest airfare.

In a situation in which the Team Coordinator has consulted with the Team Member and the Program Director and it is determined that there is a need for a rental car for the two Team Members for ground transportation, the Team Coordinator will arrange for the rental through Foremost and Foremost will contact the MAERB office for approval.

The air travel will be paid for by a MAERB credit card, so the only expenses that will need to be paid by the Surveyors on the site visit are for lodging, food, and, if applicable, a rental car. As stated above, Foremost Travel will help you arrange lodging and a rental car. You will need to supply your personal credit card to guarantee those reservations. No charges will be made for lodging or the rental car until you arrive at the hotel or rental car agency.

If there are any travel issues during the visit, you can call Foremost Travel during the following hours and days: Monday through Friday, 8:00 am to 5:00 pm (Central Time). If an issue occurs outside business hours, there is a 24/7 number for travel emergencies due to weather or delays: (800) 544-0971

IMPORTANT NOTE: There are times in which Surveyors want to stay a few extra days in the area that they are visiting. Foremost will price the flight for the typical timeframe of the visit and then book the flight that the surveyor requests with the extra days. If the flight that the surveyor wants costs more than the original flight. The surveyor will be responsible for the difference.

For example, Sally has a site visit in Orlando on a Thursday and Friday. The traditional schedule would be to arrive on Wednesday and depart on Friday. Sally, however, wants to arrive on Wednesday, but leave on Sunday. It costs \$50 more to leave on Sunday, and that information will be on the travel receipt that the Surveyor and MAERB receives from Foremost and then will be subtracted as an advance from the travel voucher. In addition, Sally will be authorized for only a two-night stay, as she typically would be able to return home on late Friday afternoon.

MAERB Guidelines for Travel for Site Surveyors

Air Travel: Tickets should be purchased at least a month, if not more, in advance to take advantage of discount fares. The travel agent will be working with you to find the lowest fare in economy class. First-class travel is not reimbursable. **If you choose to combine trips or travel with a spouse, partner or friend, due to family issues or other obligations, you can book the travel through Foremost and you will need to reimburse MAERB.** If MAERB needs to cancel the site visit or if you are unable to attend due to an emergency, the unused ticket will be on file at Foremost Travel for use on another site visit. Airfare above \$500 needs to be approved by the MAERB office, and Foremost will contact MAERB for that approval. MAERB will not pay for flight insurance or for flight changes due to a visit ending early or a change in plans.

Because the site visits are scheduled to be a day and a half, the expectation is that you will arrive the night before the site visit and then leave on the afternoon of the second day. There may be extenuating situations with flights, but Foremost will address that on a case-by-case basis.

Train, Bus or Shuttle: You may find that you can take public transportation or a shuttle from the airport to the hotel, and those costs are reimbursable. You will need to provide a receipt to submit with your travel expenses. On rare occasions, you may be able to take a train to the program site, and those expenses are reimbursable as well.

Automobile: You may determine that you would prefer to drive to the site visit using your own vehicle. In that instance, you would be reimbursed for mileage at the rate set by the IRS of 67 cents per mile (which is the established rate for 2024 or the least expensive air fare, whichever is the least expensive. Document mileage with a printout from a website such as MapQuest.com. Toll fees and parking charges are also reimbursable with receipts. Because MAERB pays by mileage, gas costs are not reimbursed as the mileage charge covers that. You will need to get documentation from Foremost about the least expensive airfare.

Lodging: Surveyors can book separate rooms, and, to limit costs, the individual room costs should be under \$200. Costs above \$200 need to be approved by the MAERB office. The lodging will be reserved using the site surveyor's credit card and the site surveyor needs to pay for the hotel room at the time of the site visit and be reimbursed by MAERB.

Rental Car: On rare occasions, the use of a rental car may be necessary. There will never be more than one rental car for a team visit, as the team members are expected to coordinate arrangements. The use of a rental car will need to be approved by the MAERB office. MAERB reimburses the rental car costs and the gas costs. MAERB does not reimburse mileage with rental cars, but it will cover the insurance costs for the rental car.

Meals: Up to \$65 per day will be reimbursed for actual meal expenses (including tips) or will be advanced upon request. Itemized receipts (not credit card statements) must be included. All reimbursements in excess of actual payments must be returned to MAERB. MAERB will not reimburse purchases of alcoholic beverages.

MAERB Travel Expense Vouchers

Airfare will be paid for in advance by MAERB, but Surveyors will need to submit a Travel Expense Voucher for the expenses incurred during the visit, including food, lodging, and incidental travel expense. You were sent a Travel Expense Voucher when you received the program's Self-Study.

At the end of the visit, you must submit the Travel Expense Voucher to Accounting (accounting@maerb.org) in the MAERB office with the necessary receipts. Please keep the travel voucher in the Excel Format and PDF your receipts. The materials will be processed within seven days.

MAERB now has the banking capacity to reimburse via Zelle, and you can find out more information about that system at the following website: www.zelle.com. You might be able to sign up for a Zelle account through your online banking system, and, if that is not possible, you can sign up via an app. If you are interested in being paid by Zelle, you will need to indicate that on your travel voucher and provide the appropriate contact information. If you are not interested in electronic reimbursement, MAERB will send you a check.

Below is a list of questions that I have received, as well as answers to those questions.

1. If MAERB is going to put the air travel on its credit card, why do I need to provide my credit card in the Foremost Travel Agency Profile?
As is outlined in the policy, MAERB is only able to pay for the air travel in advance. The credit card information that you supply is to reserve the hotel room. Your credit card will not be charged until you arrive at the hotel. In other words, it is precisely the same as when you reserve a hotel room on your own. You will find information about the cancellation policy in the travel sheet that Foremost sends you.
2. Will I get my frequent-flier miles?
Yes, you will still get your frequent-flier miles, and you will note that there is a section in Foremost's travel profile for you to provide that information.
3. What if I have a TSA PreCheck number?
Foremost Travel can enter in your TSA pre-check number into your reservation.
4. What if I want to drive to the site using my own personal vehicle?
You may certainly drive to the site, and you will note that the Travel Policy outlines the reimbursement schedule for driving your own car. You do need to provide documentation when you submit your travel voucher that the costs of driving your own vehicle (reimbursement at IRS rate per mile) is less than the lowest air fare to the site. If you want to drive to have your own vacation after the site or because you want to enjoy the scenery and it costs more than the lowest air fare, MAERB will reimburse you for the lowest air fare.
5. Do we contact the MAERB office if we want to rent a car?
No, you will be working directly with the travel agent to book a rental car, if one is necessary. As is true in the past, MAERB asks for the Surveyors to find alternative ways to get to the hotel,

such as airport shuttle, hotel shuttle, the program staff and so on. If a rental car is necessary, the travel agent will contact the MAERB office for authorization.

6. Do I need to contact the MAERB office for approval for travel prior to contacting the Travel agency?

No, if the ticket is over \$500 or if the use of a rental car is requested, the travel agency will contact the MAERB office for approval.