THE ON-SITE VISIT
(See also CAPTE Rules, Part 8)
(Revised 3/06, 10/06, 4/09, 1/12, 6/13, 8/13, 6/15, 7/15, 1/17)

The Self-study Report

All programs with the pre-accreditation status of Candidacy and those programs at the end of an accreditation cycle that wish to maintain an accredited status must prepare and submit a *Self-study Report*. Information regarding the *Self-study Report* is provided in Part 8, Sub-Part 8A. The program will be contacted by the Accreditation Department regarding the format for the *Self-study Report;* the *Self-study Report* is due 60 days before the on-site visit.

The On-site Visit

An on-site visit is a routine component of the accreditation process and is conducted by a team selected for the specific purpose of serving as an ad hoc committee of the accrediting agency. The on-site visit consists of an intensive series of conferences with administrative officials, faculty, and students of the program along with visits to selected program facilities. In cases of multi-campus programs, all locations will be visited. The primary purpose of the on-site visit is to provide a comprehensive view of the physical therapy education program in its particular environment.

In addition, the on-site visit provides a mechanism for verification and supplementation of the information included in the *Self-Study Report* submitted by the program. It also enables members of the on-site review team to gain insight into relevant data not conducive to the written word. The on-site visit allows and promotes dialogue among all levels of personnel involved in the education program, i.e., administrators, faculty, and students, and it provides a mechanism for consultation after the Exit Summary, if deemed appropriate. Included below are details about general responsibilities of the program director and the usual constituency of an on-site review team.

Planning for and completion of an on-site visit requires coordinated efforts among program personnel, members of Accreditation Department staff, and members of the on-site review team. The cost of the on-site visit is included in annual fees, so there is no additional cost to the institution for the visit.

Procedures for a Joint On-site Visit

When scheduling the dates for an on-site visit, the physical therapy education program may consider the possibility of a coordinated visit with an institutional accrediting association or with several health programs, if these visits are scheduled in the same year. The Commission is aware of the effort experienced by institutions responding to multiple accrediting agencies and hopes by coordinating visits it is able to provide greater service to institutions and to physical therapy education programs.

General Responsibilities of the Program Director during the Accreditation Process

Prior to the On-site Visit:

A. Fulfill responsibilities related to completion and submission of *Self-Study Report* following current instructions and documents.

B. Make reservations for the team at a hotel within a reasonable distance to the institution that has food service facilities or is within safe walking distance to food service facilities. Hotel rooms should be large enough so that the team can work comfortably at a table. Staff will advise the program of expense limitations. Communicate the hotel arrangements to the team members and

Accreditation Department staff using the On-site Visit Travel Information Form. Inform the team if hotel bill will be direct billed to the program; this should **only** occur if it provides a cost savings. If the hotel bill will be direct billed, then the program should submit the bill to Accreditation for reimbursement.

C. Plan on-site visit schedule and send to team members eight (8) weeks prior to visit. Ask for their response.

D. Negotiate the final schedule with the team leader no less than six (6) weeks prior to visit.

E. Provide the Accreditation Department and team members with a copy of the final schedule.

F. Provide additional material when requested by the team leader; any additional material is to be uploaded on the Portal using the Upload Additional Material button under the Self-study Report grid.

During the On-site Visit:

A. Provide a secure and private location for team to conduct interviews and where materials can be left safely. As much as possible all interviews should be held in the same room.

B. Provide the team with a brief orientation to the program and familiarize them with any special arrangements regarding the visit. Provide insights deemed important that were not included in *Self-study Report* prior to time that team begins meeting with faculty and administrative personnel. This activity may occur the day or the evening before the first day of the site visit. All members of the team should be present.

C. Provide additional, pertinent information requested for review on site (see list of required On-site Materials found in Instructions and Forms packet). Information can be provided in hard copy or digital format depending on the preferred format negotiated with the team leader. To facilitate the team's review, materials that can leave the campus should be brought to the hotel, preferably on Saturday but no later than Sunday morning.

D. Complete and provide **both an electronic Word copy and paper copy of** the following 3 forms:
- General Information Form (required even if no changes from info submitted in SSR);
- Persons Interviewed Form (including the credentials and titles; for clinical education faculty identify the facility); and
- Materials Provided On-site Form.

These documents are found in the Self-study Report Instructions and Forms document on the webpage for additional materials that is accessed from your home CAPTE Accreditation Portal page and **must be provided to the team leader at the start of the visit**. The electronic copy must be **one Word file** that contains all three documents. These forms become part of the Visit Report.

E. Provide additional information (orally or in printed form) as requested or required by team throughout the site visit. Printed or written forms and information can be provided in hard copy or digital format depending on the preferred format requested by the team.

F. Adapt the schedule to fit unforeseen changes and arrange with others for necessary modifications of individual schedules.

G. Facilitate adherence to the schedule (verifying appointment times with faculty, students, and administrators as needed).

H. Arrange for noon meal accommodation, preferably having lunch sent in. Lunch can be paid for by the team or if necessary, the program can submit the receipts to Accreditation staff for reimbursement.

I. Introduce team to key personnel when team is visiting outside of program area.

J. Supervise tour of teaching/program facilities.

K. Arrange for transportation of team to additional campuses, if appropriate, and other program/institution resources.

Following the On-site Visit:

A. Distribute web survey of On-site Reviewer Assessment to appropriate faculty and administrators and encourage completion.
B. If hotel bill was to be direct billed to the program, confirm with team that this occurred and send invoice, with a copy of hotel bill, to Accreditation Department.
C. Review the Visit Report for accuracy of content. Submit the Visit Report with Institution Response on the CAPTE Accreditation Portal utilizing the electronic version of the report provided by the Accreditation Department. Upload on the CAPTE Accreditation Portal any additional materials requested by the team using the Upload Additional Materials button under the SSR grid on the program's home page of the Portal. Please name all additional documents appropriately (see specific instructions on last page of the Visit Report). Programs should wait until they receive the Visit Report before any documents are uploaded. CAPTE will consider this response and all additional materials prior to making an accreditation status decision if received in time.
D. Complete the Critiques of the Accreditation Process.
E. Submit a Compliance Report on schedule, if requested by CAPTE.

On-site Review Team

An on-site review team usually consists of three members selected by staff in the Accreditation Department from the cadre of on-site reviewers. Each team is tailored specifically for the particular on-site visit. Factors considered in selecting members for a team include the following: type of institution, type of program, i.e., for the physical therapist or for the physical therapist assistant; type of expertise needed; and, geographic proximity. A member of the team is designated as the team leader for each selected team.

For a coordinated site visit that involves two or more accrediting agencies reviewing two or more specialized programs sponsored by a given institution, the team appointed might be modified according to the general format of that particular site visit.

The team selected for an on-site visit of an education program that does not yet have accreditation status will include persons who have had considerable experience as on-site reviewers.

Confidentiality

All information and data associated with accreditation of a program is considered to be confidential and privileged information. Use or disclosure of all information obtained as a result of serving with any appointed or elected group or in an employed position involved in the accreditation process is not authorized and is considered to be breach of confidence.

Preferred Schedule
On-site Visit to a Physical Therapist Education Program

The underlying philosophy of the following schedule is that there is value in hearing from students, clinical education faculty, graduates, and employers early in the visit so that the insights gained from those interviews can be used to enhance the interviews with faculty and others. The following schedule, while preferred, is subject to change based on its feasibility and the availability of the individuals to be interviewed.

<u>Sunday – Pre Day #1</u>

- The team meets with the program director (PD).
- Tour
  - Classrooms
  - Laboratories and equipment
  - Faculty offices
  - Research space/equipment
  - Student areas – lounge, lockers, changing facilities
  - Library
  - Learning resource areas
- Review schedule with PD. PD to identify topics for consultative session, if scheduled.
- Provide an electronic Word document and paper copy of the forms found in the Items Provided On Site.doc; these include the General Information, Persons Interviewed On Site and Materials Reviewed On Site forms.
- Executive session for team to review on campus materials. (Materials that can leave the campus can be at the hotel.)

<u>Monday – Day #1</u>

8:00 AM	Program director with team (may be breakfast meeting; may start earlier)
9:00 AM	Core faculty (including program director). Team leader introduces team, provides overview of accreditation process, purpose and value of accreditation, and objectives of on-site visit.
9:30 AM	Students enrolled in the early phase (e.g., first year students) of the program (six to ten students)
10:00 AM	Students enrolled in the mid phase (e.g., second year students) of the program (six to ten students)
10:45 AM	Break
11:00 AM	Students enrolled in the late phase (e.g., third year students; six to ten students; if on internships or long-term clinical experiences can use conference call or videoconference access)
11:45 PM	Lunch; Executive Session for team to review on campus materials
1:00 PM	Concurrent sessions: ACCE/DCE Support personnel Admissions Committee or Chairman of Admissions Committee
2:00 PM	**Established programs:** Recent graduates (minimum of 5; teleconference acceptable) **New programs:** Advisory or curriculum committee members or individuals who were instrumental in developing and evaluating the curriculum and implementing the program
3:00 PM	Clinical education faculty (CIs and CCCEs) – The program director and DCE/ACCE should not be present during the interviews (minimum of 5; teleconference acceptable); must be representative of different practice settings. **For initial accreditation visits, additional individuals may be necessary to ensure a broad representation of clinical education instructors used throughout the curriculum and from a variety of practice settings.**
4:00 PM	Employers of graduates (**established programs**) (minimum of 5; teleconference acceptable)
5:00 PM	Program director: Discuss additional information needed, review next day schedule and revise if needed.

Tuesday – Day #2

8:00 AM	Team meets with program director
9:00 AM	Travel to President's office
9:15 AM	President (½ hour meeting; adjust schedule to allow travel to and from offices)
9:45 AM	Provost or Vice President for Academic Affairs (½ hour meeting; adjust schedule to allow travel to and from offices)
10:15 AM	Dean of college/school (person to whom the PD reports; PD not present) (½ hour meeting; adjust schedule to allow travel to and from offices)
10:45 AM	Break (and/or adjustments for travel time)
11:00 AM	Faculty: individual core faculty or concurrent sessions with individual faculty (session one)
11:30 AM	Faculty: individual core faculty or concurrent sessions with individual faculty (session two)
12:00 PM	Lunch; Executive Session to review material
1:30 PM	Faculty: individual core faculty or concurrent sessions with individual faculty (session three)
2:00 PM	Faculty: individual core faculty or concurrent sessions with individual faculty (session four)
2:30 PM	Faculty: individual core faculty or concurrent sessions with individual faculty (session five) – **if needed OR** Executive Session
3:00 PM	Executive Session to review material
3:30 PM	Associated faculty (concurrent sessions may be scheduled)
4:00 PM	Open opportunity for others to meet with the team
5:00 PM	Program director – review additional material needed

Wednesday – Day #3

8:00 AM	Program director, if necessary to clarify findings/request additional information
8:30 AM	Executive session for team – reach consensus on recommendations to be included; finalize report; prepare presentation of exit summary
11:30 AM	Preview exit summary with program administrator
12:00 PM	Exit summary to institutional administrators, program director, and core faculty – regarding overall findings
12:30 PM	Lunch and consultation (if desired by program): on-site review team, program administrator, core faculty and institutional administrators
3:00 PM	Consultation session ends and team leaves

Note: It is not always possible to have the entire team doing the same thing at the same time. When preparing the schedule, concurrent sessions may need to be scheduled where the team is divided and concurrently reviews materials, tours physical facilities, or conducts interviews. However, all team members should be present for meetings with institutional administrators, the program director, program faculty (as a group), students, and employers of graduates.

Preferred Schedule
On-site Visit to a Physical Therapist Assistant Education Program

The underlying philosophy of the following schedule is that there is value in hearing from students, clinical education faculty, graduates, and employers early in the visit so that the insights gained from those interviews can be used to enhance the interviews with faculty and others. The following schedule, while preferred, is subject to change based on its feasibility and the availability of the individuals to be interviewed.

Sunday – Pre Day #1 (when possible)

- The team meets with the program director
- Tour
    - Classrooms
    - Laboratories and equipment
    - Faculty offices
    - Student areas – lounge, lockers, changing facilities
    - Library
    - Learning resource areas
- Review schedule with program director to identify topics for consultative session if scheduled
- Provide an electronic Word document and paper copy of the forms found in the Items Provided On Site.doc; these include the General Information, Persons Interviewed On Site and Materials Reviewed On Site forms.
- Executive session for team to review on-campus materials (Materials that can leave the campus can be at the hotel.)

Monday – Day #1

8:00 AM	Program director with team (may be breakfast meeting, may start earlier)
8:30 AM	Core faculty (including program director). Team leader introduces team, provides overview of accreditation process, purpose and value of accreditation, and objectives of the on-site visit.
9:00 AM	Travel to President's office
9:15 AM	President
10:00 AM	Students enrolled in first year of program (six to ten students)
10:45 AM	Students enrolled in the second year of the program (six to ten students; teleconference acceptable)
11:30 AM	Tour of facilities (if not completed on Sunday) OR Executive Session
12:00 PM	Lunch: Executive Session for team to review on-campus materials
1:30 PM	Administrative Officials I: Division chair and dean(s) or vice-president(s) and provost. Interviews may be conducted in a group or individually. All team members should be present with all administrators.
2:00 PM	Clinical education faculty (CIs and CCCEs) – The program director and DCE/ACCE should not be present during the interviews (minimum of 5; teleconference acceptable); must be representative of different practice settings. **For initial accreditation visits, additional individuals may be necessary to ensure a broad representation of clinical education instructors used throughout the curriculum and from a variety of practice settings.**
3:00 PM	**Established program**: Recent graduates (minimum of 5; teleconference acceptable) **New program**: Advisory committee members, individuals instrumental in developing and evaluating the curriculum and implementing the program
4:00 PM	**Established program**: Employers of graduates (minimum of 5; teleconference acceptable)
5:00 PM	Program Director: Discuss additional information needed, review next day schedule and revise if needed

<u>Tuesday – Day #2</u>

8:00 AM	Program director meeting with team
8:30 AM	Administrative Officials II: Division chair and dean(s) or vice-president(s) and provost (whichever individuals were not scheduled on Day #1). Interviews may be conducted in a group or individually. All team members should be present with all administrators.
9:15 AM	Executive Session (if needed; otherwise scheduled can be adjusted accordingly to accommodate other stakeholder interviews during this time)
10:30 AM	Faculty: other core faculty individually or as a concurrent group and general education faculty – If a group meeting, the program director is not present
12:00 PM	Lunch: Executive Session
1:00 PM	ACCE meeting with team (without the program director)
2:30 PM	Concurrent sessions: Support staff for program Student services personnel: Admissions, Financial Aid, Career Services, Tutoring-Testing Services, Library, etc.
3:30 PM	Open opportunity for others to meet with team
4:30	Review additional materials if needed
5:00 PM	Program director; review additional materials needed

<u>Wednesday – Day #3</u>

8:00 AM	Program director, if needed to clarify findings/request additional information
8:30 AM	Executive session for team- reach consensus on recommendations to be included; finalize summary; prepare presentation of exit summary
11:30 AM	Preview exit summary with program director
12:00 PM	Exit summary to institutional administrators, program director, and core faculty – regarding overall findings
12:30 PM	Lunch and consultation (if desired by program): on-site review team, program director, core faculty and institutional administrators
3:00 PM	Consultation session ends

Note: It is not always possible to have the entire team doing the same thing at the same time. When preparing the schedule, concurrent sessions may need to be scheduled where the team is divided and concurrently reviews materials, tours physical facilities, or conducts interviews. However, <u>all</u> team members should be present for meetings with institutional administrators, the program director, program faculty (as a group), students, and employers of graduates.

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