SSR full document checklist – 2024 SREs

*Check against policy location chart*

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| --- | --- | --- | --- | --- |
| Required Element  | Name of document | Appendix (A) or Onsite (O) | Present (P) or Absent (A)? | Initials of Staff and Program |
| Preface | Needs assessment (candidacy only) | A |  |  |
|  | Signature page | A |  |  |
|  | AFC check in | A |  |  |
| 2A | Program Assessment Matrix  | A |  |  |
| 2C | Needs Assessment Data | A |  |  |
| 2D1-2D8 | Program assessment matrix | A |  |  |
| 2E | Curriculum Assessment Matrix | A |  |  |
| 3A | Institutional State Authorization | A |  |  |
|  | Copy of authorization(s) to provide post-secondary education and the physical therapist assistant program (PTA Programs) | O |  |  |
|  | Written authorization to provide clinical education experiences in other states, where required, or documentation from other state that no such authorization is require | O |  |  |
|  | Institutional State Authorization. Copy of institutional authorizations from the state to provide (1) postsecondary education & (2) the physical therapist assistant technical program. If institution is in a collaborative arrangement with another institution to award degrees, provide requested information for the degree granting institution. | O |  |  |
|  | Institutional Financial Responsibility Composite Score. (For private institutions) Evidence of the most recent USDE Financial Responsibility Composite Score (a PDF from the USDE website is acceptable). | O |  |  |
| 3B | Copy of the most recent institutional accreditation action | A, O |  |  |
|  | Institutional Accreditation Program Approval. If institutional accrediting agency approval is necessary, provide a copy of the institutional accrediting agency approval for offering the physical therapy education program; if institutional accrediting agency approval is not necessary, provide a statement from the institutional accrediting agency to that effect. | O |  |  |
|  | Institution Not Degree Granting. If the program is located in an institution that is not the degree-granting institution, provide a copy of a written agreement with the degree-granting institution. | O |  |  |
| 3C | Provide faculty workload data for each faculty member on the individual Core Faculty Detail page. | A |  |  |
|  | Provide faculty workload data for each faculty member on the Associate Faculty Detail page. | A |  |  |
|  | Organizational Chart, including location of the program within the organizational structure of the institution. | A |  |  |
|  | Policy Location Chart (forms packet) | A |  |  |
|  | Collective Bargaining Agreement or Union Contract, if applicable | O |  |  |
| 3D | Policy Location Chart: the policies and procedures related to equal opportunity and nondiscrimination for faculty, staff and prospective/enrolled students. Identify, as applicable, where they are found, including the name of the document, page number and/or URL. | A |  |  |
|  | Handbook Institution Faculty, if available | A |  |  |
|  | Handbook Program Faculty, if available | A |  |  |
|  | Other Policies: If the policies delineated in these Elements are not found in supporting documents or are located in a Union Contract, provide a copy of the relevant policies or Contract provisions in the bookmarked document titled: Other Policies.pdf. (Do not provide entire Contract) | A |  |  |
| 3E | Include in Policy Location Chart the policies and procedures related to the rights, responsibilities, safety, privacy, and dignity of program faculty and staff. Identify, as applicable, where they are found, including the name of the document, page number and/or URL. Please review the list of specific policies for this required element.  | A |  |  |
|  | Collective Bargaining Agreement or Union Contract, if applicable  | O |  |  |
| 3F | Program Policies and Procedures Manual, if available | A |  |  |
|  | Include in Policy Location Chart the policies and procedures related to handling complaints that fall outside the realm of due process. Identify, as applicable, where they are found, including the name of the document, page number and/or URL. | A |  |  |
| 3G | Policy and procedure manual | A |  |  |
|  | Policy Location chart | A |  |  |
| 4A | Portal Fields: on the Core Faculty Information Page (see list of required fields) | A |  |  |
|  | CV (forms packet); uploaded on the appropriate Core Faculty Information Page on the portal | A |  |  |
|  | Evidence of licensure to practice in anyUnited States jurisdiction for corefaculty who are PT/PTAs and areteaching clinical content; for theprogram director; and for the clinicaleducation coordinator. For CAPTEaccredited programs outside the UnitedStates, evidence of licensure or regulated in accordance with theircountry's regulations. | O |  |  |
| 4B | An updated CV indicating post-licensure clinical experience as a PT/PTA | O |  |  |
| 4C | Narrative only – no other required documents |  |  |  |
| 4D | CV (forms packet); uploaded on the appropriate Associated Faculty Information Page for each associated faculty member who is involved in 50% or more of the contact hours of a course. | A |  |  |
|  | Associate faculty Workload Form | A |  |  |
| 4E | Narrative only – no other required documents |  |  |  |
| 4F | CV (forms packet); uploaded on the appropriate Core Faculty Information Page for the program director | A |  |  |
| 4G | CV (forms packet); uploaded on the appropriate Core Faculty Information Page for the program director | A |  |  |
|  | Evidence of licensure to practice in any United States jurisdiction for core faculty who are PT/PTAs and are teaching clinical content; for the program director; and for the clinical education coordinator. For CAPTE accredited programs outside the United States, evidence of licensure or regulated in accordance with their country's regulations. | O |  |  |
| 4H | Program Policies and Procedures Manual, if available | A |  |  |
|  | Program Director job description, if available | A |  |  |
|  | Institutional Faculty Handbook | A |  |  |
|  | Program Faculty Handbook, if available | A |  |  |
|  | Evaluations of the program director | O |  |  |
| 4I | CV (forms packet); uploaded on the appropriate Core Faculty Information Page for the Program Director | A |  |  |
| 4J | CV (forms packet); uploaded on the appropriate Core Faculty Information Page for the DCE/ACCE. | A |  |  |
| 4K | Narrative only – no other required documents |  |  |  |
| 4L | Program Policies and Procedures Manual, if available | A |  |  |
| 4M | Policy and procedure manual | A |  |  |
| 4N | Program Policies and Procedures Manual, if available | A |  |  |
|  | If the policies delineated in these Elements are not found in supporting documents, provide a copy of the relevant policies in the bookmarked document titled: Other Policies.pdf. | A |  |  |
| 5A | Student Recruitment Materials, if available | A |  |  |
|  | Include in Policy Location Chart (forms packet) the policies and procedures related to student recruitment and admission (please review minimal requirements listed in required element) | A |  |  |
| 5B | Relevant Student Information: Indicate where each of the items identified in the narrative is located; include the name of document(s) and the page number and/or specific URL reference(s) where the policies can be found. If the items are not located in supporting document(s), provide a copy of the relevant student information; a URL by itself is NOT sufficient for requested items. | A |  |  |
|  | Catalog Undergraduate. Note: At the very least, all Catalog pages relevant to the program must be combined and provided as a PDF; URLs by themselves are insufficient as a permanent record is required. | A |  |  |
|  | Financial Aid Brochure, if one exists | O |  |  |
| 5C | Program Policies and Procedures Manual, if available | A |  |  |
| 5D | Policy Location Chart | A |  |  |
|  | If the policies delineated in these Elements are not found in supporting documents, provide a copy of the relevant policies in the bookmarked document titled: Other Policies.pdf. | A |  |  |
|  | Institutional Student Handbook | A |  |  |
|  | Program Student Handbook, if available | A |  |  |
| 5E | A copy of the enrollment agreement, if applicable | A |  |  |
| 6A | Plan of study  | A |  |  |
| 6B | Catalog Undergraduate. All Catalog pages relevant to the program must be combined and provided as a PDF; URLs by themselves are insufficient as a permanent record is required. | A |  |  |
|  | Plan of study that list courses by term and includes prefix, #, title, credits, and student contact hours broken down by lecture, lab, independent study and clinical hours, plus primary faculty and other instructors. | A |  |  |
| 6C | Curriculum assessment matrix | A |  |  |
| 6D, 6E, 6F, 6G and 7A1 | Narrative only – no other required documents |  |  |  |
| 7A2 | One page plan of study that list courses by term and includes prefix, #, title, credits, and student contact hours broken down by lecture, lab, independent study and clinical hours. | A |  |  |
| 7B1 | One page plan of study that list courses by term and includes prefix, #, title, credits, and student contact hours broken down by lecture, lab, independent study and clinical hours. | A |  |  |
| 7B2 | One page plan of study that list courses by term and includes prefix, #, title, credits, and student contact hours broken down by lecture, lab, independent study and clinical hours. | A |  |  |
|  | 7B table (optional) | A |  |  |
| 7C1-7C3 | One page plan of study that list courses by term and includes prefix, #, title, credits, and student contact hours broken down by lecture, lab, independent study and clinical hours. | A |  |  |
| 7D1-7D13 | Narrative only – no other required documents – Please review the three items that must be included in each narrative for this required element. **Objectives, learning experiences, and method of assessment (outcomes)** |  |  |  |