CAHME®

SITE VISIT

INSTRUCTIONS

REV. 2/14/2024

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CAHME®
Commission on Accreditation
of Healthcare Management Education

EVENTS PRIOR TO SITE VISIT

12 Weeks Prior to the Visit
(Site Visit Readiness Checklist)

Program:
- Readiness Checklist submitted via e-mail to Eric Brichto at ebrichto@cahme.org.
- Initiate introduction communication with Site Visit Team (SVT) Chair and Coordinator (contact details provided in the introduction of the SVT email from CAHME staff).

Coordinator:
- Communicates with the Program as determined by the Chair.

10 Weeks Prior to the Visit
(Confirmation of Site Visit Schedule and Logistics)

Program:
- Sends the Coordinator a draft site visit schedule (using the "Events at Site Visit" template below as a guide).

Coordinator:
- Collaborates with the Chair to review the draft site visit schedule and return to seek revisions or set as approved. Contacts the Program Director regarding any changes to the schedule.
- Discusses (with the Program) travel logistics and hotel accommodations for the SVT (airport to hotel, hotel to campus for all days, and return to airport)
- Schedules the preliminary conference call with the site visit team and program leadership (program may invite others as needed), to take place at least two weeks prior to the site visit.

8 Weeks Prior to the Visit
(Self-Study Submission)

Program:
- Submit the complete Self-Study online within the CAHME Accreditation Management Portal (CAMP).

EVENTS PRIOR TO SITE VISIT

8 Weeks Prior to the Visit Cont'd
(Self-Study Submission)

- Inform the Coordinator and Chair how the Records Review documents (refer to Appendix 1) will be provided to the site visit team (i.e. LMS or other forms of digital access).
- Email the final Site Visit Schedule to the Coordinator and Chair of the SVT.

2-8 Weeks Prior to the Visit
(Site Visit Team reviews Self-Study)

Coordinator:

- Communicates any document needs to the program based on the SVT review of the self-study.

Site Visit Team:

- Review the self-study materials using the Decision Support Tool and Syllabus Review Worksheet.
- The Chair in collaboration with the Coordinator will schedule 2 to 3 SVT meetings to review the self-study materials.
- Identifies any information missing from standard self-study evidence.

2 Weeks Prior to the Visit
(Finalize Site Visit Logistics Conference Call)

Program and Site Visit Team:

- Attend pre-site visit conference call meeting.
- The purpose of this call is:
    - For the program to meet the site visit team, ask questions and work on any final logistics.
    - To review the final site visit schedule and arrangements.
    - To review any preliminary questions that the team may have after their review of the self-study.
    - For the site visit team to request additional documentation for the program to have available during the site visit.

PREPARATION FOR THE VISIT

Records Review Access

- Review Appendix 2 “Records Review Best Practices”
- Provide access for all SVT members to records noted in Appendix 1 “List of Documents for Records Review” at least 1 week prior to the site visit.
- The most commonly utilized forms of access are:
  - Learning Management System (LMS)
  - Digital Document: Provide access to necessary systems (i.e. Box, one-drive, etc.)

FERPA Exclusion for Accreditation Activities: See Appendix 3 “Guidelines for Access to Student and Faculty Records”

Documentation Criterion Evidence

- The following is required for your self-study submission within CAMP.
  - Examples of how the Program met the standards.
  - Summaries for all documents/spreadsheets/data to explain the information, exceptions, and how the material supports meeting the criterion.
- Any documentation that could not be uploaded within CAMP must be available for the Coordinator upon arrival.

Syllabi

- Provide a syllabus for every course and section taught during the self-study year (submit within CAMP)
- If multiple faculty members taught the same course, include all faculty syllabi
- Syllabi should be scanned into one PDF and uploaded within CAMP.

PREPARATION FOR THE VISIT

Syllabi Cont'd

Syllabi are reviewed with the following criteria in mind:

- Are the competencies assigned to the course listed in the syllabus?
  - List Program competencies that are assessed or addressed (according to the Program's mapping and proficiency scale) in the course
- Are learning objectives linked to competencies in the syllabus?
  - Learning objectives provide direction for what will be accomplished in the course. Each competency must be connected to a learning objective so the student can see the linkage.
- Is the level of competency attainment described in the syllabus?
  - At what proficiency level will this course prepare students to reach?
  - Ex. Communication – Level = 5
  - The proficiency scale must be defined somewhere so students and faculty know the measurement criterion
- Are assessments identified in the syllabus?
  - Student assessment will be described in the syllabus or in the LMS in enough detail that the SVT can determine its curriculum fit as it relates to the Program's mission
- Do the assessments meet the level of competency identified and the Program's mission?
  - Assessment descriptions provide specific detail that demonstrates how it meets the course objectives and Program mission
- Course Review Level: Is this a "graduate" level healthcare-related course?
- Curriculum View: Is this a graduate-level curriculum that includes healthcare-related knowledge and competencies aligned with the Program's mission?
  - Does the content, learning methods, and assessment methods depict the complexity of a graduate-level course?
  - Are students expected to learn at higher levels and demonstrate their understanding of concepts aligned with the complexity of healthcare administration?

PREPARATION FOR THE VISIT

Syllabi Cont'd

- The course includes health-care-related content that aligns with the Program's mission.
- Will this course meet this program's student needs in obtaining the healthcare knowledge they require to be placed post-graduation?

Meeting Space

- SVT needs a private space with (1) access to a printer/paper and (2) internet access for document review at the University and the hotel

Hotel Accommodations

- To take advantage of a program's knowledge of convenient, moderately priced accommodations, hotel arrangements should be made by the program for the site visit team. A hotel closer to campus (versus the airport) is preferable.
- Coordinator: 3 nights*
- Chair and all other team members: 2 nights*
- Hotel arrangements should include a suite, or another appropriate room, which can be used for executive sessions by the team.

**Exceptions may occur dependent on Program's schedule and location of the visit.*

Transportation

- Program will provide appropriate travel accommodations for the team (airport to the hotel, hotel to campus and back, around campus if meetings are in different locations, etc.)
- Options:
  - Program provides
  - Program hires transportation
  - Program advises the team on the best method for the team to reserve their own travel arrangements.

PREPARATION FOR THE VISIT

Meals

- Breakfast – Program to advise if the team should eat at the hotel or if breakfast will be provided on campus.
- Water/Beverages – Program to provide access to refreshments on campus for all site visit days.
- Thursday Lunch – Most efficient if brought in as the site visit team will be meeting with students over the lunch hour.
- Dinner – Coordinator will plan dinner off-site (suggestions for dinner are appreciated).
- If AASCB joint visit – some meals are combined and will be included on the site visit schedule. CAHME team joins opening evening dinner and others as indicated.
- Identify any food allergies

EVENTS AT SITE VISIT

A typical site visit lasts three full days. On occasion, the survey may be scheduled for a longer period if there is agreement that more time is needed to obtain a comprehensive understanding of the program due to the requirement to examine multiple programs, degrees or tracks.

DAY 1

Time	Location	Activity	Participants	Description
8:00 - 8:30 AM		Transport to site	Coordinator	The Coordinator arrives to conduct the records and facilities review. The Coordinator will tour the facilities used by the program. SVT may request additional information to support the Program's evidentiary support of the criterion if not included in self-study. The records review includes, but is not limited to: admissions records, faculty meeting minutes, student files, and course evaluations. Refer to *Appendix 1 – List of Documents for Records Review* for a list of records typically included in the site visit review.
9:00 AM - 12:00 PM	Confidential room with printer and paper access	Records review	Coordinator ***Program leadership nearby for questions***	
12:00 - 1:00 PM		Lunch	Coordinator and PD	
1:00 PM	Campus	Campus tour & resources review	Coordinator	
2:00 PM - 5:00 PM		Records review continued		
~5:00 PM	Hotel	Discuss findings of records review	SVT (SVT will coordinate dinner plans)	

The Program Director is responsible for coordinating all appointments and scheduling all meetings for the site visit team, as well as for ensuring the availability of all participants in the site visit.

Note: *This schedule should serve as a guideline and all times are estimated. It may be modified to suit the specific situation at the discretion of the site visit Chair. The Program Director should use this as a guide when creating the draft site visit schedule 10 weeks prior to the visit.*

EVENTS AT SITE VISIT

DAY 2

Time	Location	Activity	Participants	Description
8:30 - 9:00 AM	Hotel or campus	Breakfast, Welcome, and Introductions	SVT and PD	SVT might share requests for additional evidence as a result of the records review. PD can ask questions, clarify any logistics, etc.
9:30 - 9:45 AM	**Transition**			
9:45 - 11:30 AM		Criterion I & II	SVT and Faculty: All individuals normally considered to be members of the full-time and adjunct teaching faculty attend this session. Faculty of other departments who teach courses normally taken by students in the program should be invited to attend.	SVT asks faculty for examples of how the program meets the criterion. The self-study provides a solid foundation. This session allows the faculty to elaborate, provide additional examples, and clarify what was provided in the self-study.
11:30 AM - 12:00PM	**Transition**			

EVENTS AT SITE VISIT

DAY 2 CONT'D

Time	Location	Activity	Participants	Description
12:00 PM - 1:30 PM	Please reserve 2 rooms	Lunch with Students 2 groups	SVT and Students from all stages in the program (beginning, middle, near graduation). The Program will ensure there are adequate number of participants that they are representative of the stakeholders that will provide evidence for Criteria IIA4	Students who represent the program should attend, including students early, mid, and near the end of the program. SVT asks students for examples of criteria to support the self-study materials. Program leadership, faculty, and staff do not attend. Attendance: As many students as possible that are representative of the program's study body. Low attendance makes it difficult to validate self-study material. Program should consider notifying students very early to allow students to get it on their schedule.
1:30 - 1:45 PM	**Transition**			
1:45 - 2:45 PM		Criterion III	SVT and Faculty: All individuals normally considered to be members of the full-time and adjunct teaching faculty attend this session. Faculty of other departments who teach courses normally taken by students in the program should also attend.	SVT asks faculty for examples of how the program meets the criterion. The self-study provides a solid foundation. This session allows the faculty to elaborate, provide additional examples, and clarify what was provided in the self-study.
2:45 - 3:00 PM	**Break**			

EVENTS AT SITE VISIT

DAY 2 CONT'D

Time	Location	Activity	Participants	Description
3:00 - 4:00 PM		Criterion IV	SVT and Faculty: All individuals normally considered to be members of the full-time and adjunct teaching faculty attend this session. Faculty of other departments who teach courses normally taken by students in the program should be invited to attend.	SVT asks faculty for examples of how the program meets the criterion. The self-study provides a solid foundation. This session allows the faculty to elaborate, provide additional examples, and clarify what was provided in the self-study.
4:00 - 4:15 PM	**Transition**			
4:15 - 5:30 PM		Stakeholder's Meeting	SVT, Advisory Board, Alumni, and Preceptors The Program will ensure there are adequate number of participants that they are representative of the stakeholders that will provide evidence for Criteria IIA4	SVT asks the advisory board, alumni, and preceptors to provide examples of how the program meets the criteria. Students, faculty, staff, or program leadership should not attend this meeting. Program should ensure transportation for SVT back to the hotel
5:30 - 5:45 PM		Check-In	SVT and PD	SVT communicates any needs to PD
5:30 PM	Return to Hotel	Executive Session & Dinner	SVT	The site visit team returns to the hotel and holds a closed executive session in the evening. The site visit team will coordinate dinner plans.

EVENTS AT SITE VISIT

DAY 3

Time	Location	Activity	Participants	Description
8:00 - 8:45 AM	Hotel	Executive Session and Breakfast	SVT	SVT makes any last-minute requests for information, finalizes site visit findings, and prepares for the final report out.
8:45 - 9:00 AM	**Transition**			
9:00 - 9:30 AM		Meeting with University Leadership	SVT and Provost/President/Dean/ Associate or Assistant Deans/Department Chair	This session focuses on how the Program aligns with University/College mission and vision.
9:30 - 10:00 AM	**Transition**			
10:00 - 10:30 AM		Summary of Visit	SVT and PD and Program Leadership	SVT provides the PD and their invited guest with an overview of findings in more detail than the Final Report Out which is a reading of preliminary findings.
10:30 AM - 12:00 PM		Executive Session/Working Lunch	SVT	The team meets in a closed executive session. It is most convenient to arrange for lunch for the team to be provided in the room in which it is meeting.
12:00 - 1:00 PM		Exit Session	SVT Program can invite whomever they wish	The exit session consists of a summary report by the Chair of the site visit team. This verbal report is presented in a meeting that is open to the entire program faculty, students, preceptors, and other relevant observers at the discretion of the program. Discussion at this session is limited to clarification of content (not a discussion of the findings).

EVENTS AFTER THE SITE VISIT

Due within 6 Weeks After the Visit
(Draft Site Visit Report Submission)

- The Site Visit Team will finalize their report after leaving the site visit. The SVT enters their report into CAMP and sends it back to CAHME for a final review.
- CAHME staff will provide the findings to the Program for review. The program should expect to receive the draft site visit report within six weeks of the site visit. If the program would like further clarification or has questions regarding the site visit report, they may request a meeting with the Chair of the site visit team.

Due within 30 Days After the Draft Site Visit Report Submission
(Program Response to Draft Site Visit Report)

The program has 30 days to respond to the draft site visit report regarding its accuracy and content. For further clarification on this response, please see Article 16b. section B "Guidelines For Program Response To The Draft Site Visit Report" within the Policies and Procedures document located here under CAHME Processes and Governance Documents. A lack of response after 30 days will be considered acceptance of the draft report as-is.

Semester Following the Site Visit
(Decision from Accreditation Council and Board of Directors)

The Accreditation Council formally meets in the Spring and Fall of each year. Any site visit conducted during the Fall is acted upon at the Spring meeting. Any site visit conducted in the Spring is acted upon at the Fall meeting. Adjustments to the meeting timing may be made at the discretion of CAHME.

- CAHME staff assigns a reader (outside of the site visit team) to review the site visit report.

EVENTS AFTER THE SITE VISIT

Semester Following the Site Visit Cont'd
(Decision from Accreditation Council and Board of Directors)

- The SVT findings are shared with the Accreditation Council at the next regular meeting. The reader also shares the results of their review.
- The Accreditation Council reviews and votes on the accreditation decision and length of accreditation.
- The Accreditation Council recommendation is forwarded to the CAHME Board of Directors for the final decision.
- CAHME staff communicates the Board decision to Program after the Board Meeting.

APPENDIX I
LIST OF DOCUMENTS FOR RECORDS REVIEW

The program must provide access to the following documents one week prior to the Site Visit (unless documents are only available physically). This list is not exhaustive and is illustrative of the types of documents that might be used to support the ongoing program evaluation and competency assessment referenced in the narrative of the self-study. The site visit team will use these documents as evidence that the program meets the criteria.

Admissions:

- Spreadsheet (CSV/Excel) with columns for each admission criterion element. Rows for every application in the self-study year.
- Admission application files for (1) incoming students and (2) rejected students for the self-study year.
- Explanation for any admissions outside the stated admissions criteria.
- Explanation for any denials outside the standard admissions criteria.
- Advising records for students in the self- study year.

Student Concerns/Complaints:

- Records of any student complaints in the self-study year with documentation of how the complaints were handled. Include/link to any relevant policies.

Curriculum & Competency Attainment Evidence:

- Student orientation materials for the program's competencies/competency model.
- Analyses for the measurements of the attainment of the competencies in the program (from entry to graduation).
  - Sample Size: If self-study year cohort is:
    - Less than 30: include all students
    - Between 30 and 100 students: provide 50%
    - Greater than 100 students: provide 25%

APPENDIX I
LIST OF DOCUMENTS FOR RECORDS REVIEW

Curriculum & Competency Attainment Evidence Cont'd:

- Final Course Deliverable:
  - The final (graded) culminating requirement for all courses in the self-study year (e.g. exam, presentation/project/case analyses) with faculty feedback including any competency related feedback if appropriate.
  - All student deliverables must be retained for each student but only the sample sizes as noted above should be provided to the site visit team
- Final Program Deliverable:
  - Provide the appropriate sample size for the deliverable the Program uses to assess Program Level targets for competency attainment from the self-study year
  - Faculty feedback that demonstrates how student met the Program targets must be included.
- Course Evaluation:
  - Course evaluation questions and results for every course from the self-study year
  - Summary of where the feedback was shared, how/if the feedback was used for ongoing process improvement, and the outcomes (added to goals, changes made, and the feedback loop).

Student/Alumni/Preceptor Feedback:

Supporting materials for the assessment of stakeholder input. Examples include:

- Alumni Survey questions/instrument
- Alumni Survey results and analysis
- Summary of how Alumni Survey results were used for ongoing process improvement
- Preceptor evaluations for internships/residencies questions/instrument
- Preceptor evaluations for internships/residencies results and analysis
- Summary of how preceptor evaluation of internship/residency results were used for ongoing process improvement

APPENDIX I
LIST OF DOCUMENTS FOR RECORDS REVIEW

Student/Alumni/Preceptor Feedback Cont'd:

- Student evaluation of preceptors questions/instrument Student evaluation of preceptors analysis
- Summary of how student evaluation of preceptors results were used for ongoing process improvement
- Stakeholder input examples and how they were used for on-going process improvement

Program Evaluation and Planning:

- Faculty meeting/retreat minutes from the self-study year
- Student course evaluation for all courses taught during the self-study year
- Documentation of Meetings with: Faculty/Retreats, Advisory Board, Students, Alumni and Stakeholders that provide evidence of the Program's use the use of feedback for ongoing process improvement

APPENDIX 2
RECORDS REVIEW BEST PRACTICES

	DESCRIPTION	INSTITUTION COST	SECURITY	STRENGTHS	WEAKNESS
Best Practice	Provide LMS passwords to SVT no less than 1 week before site visit to confirm access prior to the visit.	Low	Needs to be verified with University IT Department	Highly Comprehensive	Requires IT approval at university. Configure system to ensure access and that access does not compromise student records.
Good Practice	Download all “relevant” student projects, papers, evaluation into a third-party resource at the discretion of the program. CAHME does not designate and assumes no responsibility for the records downloaded. Examples used (but not recommended) include DropBox, Box, Sharepoint, USB drives, etc.	High labor cost for programs. Requires folder organization, codification of records, standard record nomenclature, to site visitor satisfaction.	It is the sole responsibility of the program to ensure that records are secure.	Moderately Comprehensive	Higher risk of loss and compromise of student records. More work for program director to organize and name files in a way that site visitors can readily locate the information required.
Acceptable Practice	On the day before the site visit, the program director (or designee) and the site visitor coordinator shall be in the same physical location, and the program director/designee shall call up all records on the LMS on demand.	Highest cost. • Requires one additional day for the Coordinator to be on site. • Reimburse all Coordinator expenses. • CAHME supplemental fee on-site coordination $1,000 to be paid in advance. • In large programs, may require multiple CAHME coordinators to attend at the discretion of CAHME.	Highest level of security of student records.	May meet overly restrictive and unnecessary university requirements based on concerns over student data access.	Narrow view of student records Potential for sample to not be representative.

APPENDIX 3

GUIDELINES FOR ACCESS TO STUDENT AND FACULTY RECORDS

Regardless of approach, the FERPA exception allows access to student and faculty records to accreditors. CAHME is an educational authority and designates as a FERPA-permitted entities listed in § 99.31(a)(3)), redisclosing PII on behalf of the educational agency or institution must record disclosures according to the requirements in § 99.32(b)(2). Universities are permitted to release without student written consent and allows the institution the right to disclose education records or identifiable information to third parties (i.e., anyone not a "school official") without the student's consent, specifically to accrediting agencies carrying out their functions. Site visitors operate under the authority of CAHME and are requested to examine the program in relation to the CAHME's Policy and Accreditation Standards. The role of the site visitor is to be an objective gatherer of information, and it is their duty to ensure that student and faculty records are used only for purposes of accreditation. Site visitors must consider the interrelatedness of CAHME's requirements while evaluating compliance through observations, interviews, visits, and record reviews.

Programs that will not provide access to faculty and student records will not be considered for accreditation. CAHME provides no guidance related to educational institutions outside of the United States. CAHME standards require access to student records.

Reference United States Department of Education regarding Protecting Student Privacy website: https://studentprivacy.ed.gov/faq/educational-institution-or-agency-permitted-disclose-student-records-without-consent-accrediting

APPENDIX 3
GUIDELINES FOR ACCESS TO STUDENT AND FACULTY RECORDS

For large programs, the site visit team is not expected to review every student record. They should select a representative sample of students.

On February 8, 2024, the CAHME Accreditation Council approved the following table to guide the team in its selection of the recommended number of student records to be sampled.

Based on the total number of records available in column 1, the site visit team shall sample the corresponding number of records as defined in column 2. For available records between intervals, the team should not sample higher than the next highest interval level. In all cases, the maximum number of records to be sampled shall not exceed 400 without consulting the Vice President of Accreditation Operations.

Number of Student Records In the Program	Number of Student Records to Be Sampled Should Be No Less Than
More than 7,000	384
7,000	365
6,000	362
5,000	358
4,000	351
3,500	347
3,000	341
2,500	334
2,000	323
1,500	307
1,250	295
1,000	278
900	270
800	260

Number of Student Records In the Program	Number of Student Records to Be Sampled Should Be No Less Than
700	249
600	235
500	218
450	208
400	196
350	184
300	169
250	152
200	132
150	108
100	80
75	63
50	44
20	19

Estimates are based on a 95th percentile confidence interval, for proportions estimated at about 50% (maximum variation). The calculation applied for the Finite Population Correction factor is based on Kish, L. **Survey Sampling.** John Wiley & Sons, Inc. New York, London, 1965.