

# Onsite Visit Guidelines

## Site Visit

The American Board of Physical Therapy Residency and Fellowship Education (ABPTRFE) accreditation process is based on the fundamental principle of peer review that enables physical therapists and non-physical therapists from within higher education to make recommendations essential in assuring quality residency/fellowship programs for all participants. The process is guided by transparent standards that are established collaboratively by member programs and professional peers.

Accreditation focuses on assuring programs deliver, and participants complete, quality programs to support continuous improvement that enhances patient care and advances the profession. The [ABPTRFE Quality Standards](#) provide programs a framework to demonstrate and communicate their commitment to physical therapists through the achievement of its mission, goals, and outcomes.

## Preparing for a Site Visit

- Review the [ABPTRFE Processes and Procedures](#) document.
- Review the [ABPTRFE website](#) for site visit information and resources.
- ABPTRFE staff coordinates with programs to identify a date for the site visit based on the applicable initial or renewal of accreditation track.
- Once the site visit is scheduled, ABPTRFE provides the program with the site team members' names selected to serve on the visit. The program may object, with an adequate reason, to a specific evaluator and request another evaluator be selected.
- The site visit provides an opportunity for site visit team members to meet with representatives from the programs administrative, staff, and faculty. The program will coordinate the availability of these individuals who should be present or available either in-person or by teleconference during the scheduled site visit.
- Coordinate the schedules of the mentor, resident, and patient for the mentoring session observation(s) during the site visit.
- The program must complete and submit the Onsite Travel Logistics instrument within the [Accreditation Management System](#) (AMS) within 10 days of receiving the site visit confirmation correspondence.
- Site visit fees must be paid to ABPTRFE no later than 10 days prior to the site visit.
- Complete and submit the Self-Evaluation Report (SER), corresponding Exhibits, Participant Practice Site Chart, and Onsite Visit Document instruments within the AMS a minimum of 5 weeks prior to the site visit.
- The program administration, staff, and faculty should be informed of the accreditation process and expectations of the site visit. The site team members will conduct interviews, verify information, and collect documentation necessary to complete their individual reports. Program administration, staff, and faculty should be willing to answer questions, be cooperative, and flexible through the site visit.
- Prepare name badges for the program's administration, staff, and faculty.

## During the Site Visit

- Once the site team arrives, they should be directed to a private meeting room. Designate a private conference area for the team members to use during the site visit. Any filming, recording, or broadcasting of the site visit is prohibited. The private meeting room and any space used for conducting interviews may not be entered freely by program administration, staff, or faculty.
- ABPTRFE Site Team Members and program administration, staff, and faculty complete brief introductions. The program director should provide a brief 10 to 15-minute presentation on the program, its history and mission, and its evolution and future goals.
- Provide a brief tour of the facilities and identify the location of administration, staff, and faculty including any available interview rooms. The site team will withhold questions during the tour.

- The program should make arrangements for a working lunch for the site team members. Typically, the 45-minute lunch is scheduled for noon and should be confirmed again during the site visit. No interviews may be conducted during the working lunch.
- Confidential documents (e.g., samples of participant examinations, faculty evaluations) can be shared with the site team during interviews.
- The site team members will provide a brief wrap up meeting with the program director at the end of the site visit. The purpose of this meeting is to clarify any remaining questions from the site team, to review additional documents, and to provide the program director with the description of the processes and timeline following the site visit.
- The site team members will not consult with the program during the site visit. Any consultation will be provided within the Accreditation Report Rubric prepared by the site visit team which the program will receive 5 weeks after the site visit.
- The program must email all requested documents by the site team during the site visit to the site team (copying ABPTRFE staff) by the close of business following the end of the site visit.
- ABPTRFE asks that the program refrain from providing site team members with any type of gifts, favors, or services. Federal regulation restricts site team members from accepting any gifts exceeding \$20, favors, or services.

## After the Site Visit

- At the conclusion of the site visit, the program is asked to refrain from communicating with the site team. Any additional information that is requested during the site visit should be submitted to ABPTRFE staff. ABPTRFE will forward the information to the appropriate individuals.
- The program will receive the Accreditation Report Rubric 6-8 weeks following the site visit.
- The program has 30 days from the receipt of the Accreditation Report Rubric to respond. In the response, the program may add new or supporting information. Regardless of accredited status, all applicant programs are obligated to inform ABPTRFE of any changes in leadership, participant practice sites, or curriculum revisions subsequent to the date of the site visit.
- ABPTRFE takes action in accordance with its Processes and Procedures. The Board will take one of four actions: accredit, defer, show cause, or deny. Within 30 days, the ABPTRFE Director notifies the Program Director of the Board's decision through an Action Letter. The Action Letter outlines any deficiencies in the program's compliance with the ABPTRFE Quality Standards or conditions for initial or renewal of accreditation. The Action Letter also advises a program of its right to appeal an adverse decision based on its Processes and Procedures.

## Preparations for Site Visit

### Within 10 Days of Site Visit Confirmation

- Submit the Onsite Visit Travel Logistics instrument within the Accreditation Management System (AMS).

### 5 Weeks Prior to Visit

- Submit the Self-Evaluation Report (SER), Participant Practice Site Chart, and Onsite Visit Documentation instruments within the Accreditation Management System (AMS).

### 30 Days Prior to Visit

- Provide a private area and a simple working lunch for the site team.
- Arrange for interviews to be held in meeting areas that are private yet accessible to all persons who will

be interviewed.

- Secure private space for the mentoring session observation(s).
- Any materials in support of the Self-Evaluation Report and Exhibits should be neatly contained, organized, and accessible to the site team.

### 1 Day Prior to Visit

- Confirm with site team each participants' attendance at scheduled interview time.

## Required Site Visit Instruments

The Self-Evaluation Report, Participant Practice Site Chart, and Onsite Visit Documentation are located under Instruments tab in the [Accreditation Management System \(AMS\)](#). These instruments should be completed and submitted 5 weeks before the site visit.

### Self-Evaluation Report (SER) Instrument

When preparing the Self-Evaluation Report, programs are encouraged to first review the entire document, then pay attention to the terminology used, and finally focus on describing the processes and procedures. The most important part of completing the Self-Evaluation Report is to explain the processes and procedures that the program implemented and that demonstrates compliance with each Quality Standard. The program should provide the reason and approach for specific procedures that tie back and support the program's mission.

To effectively respond to the prompts, programs should carefully read each Quality Standard and key component in order to make sure adequate responses are provided and supporting exhibits are created.

Programs should develop appropriate narrative responses providing requested information based on the terminology used in the prompt. For example, the terms "provide" and "describe" are asking for narrative responses using full sentences that detail the processes or procedures which reasonably indicate the requested information is developed and implemented. For the terms, "indicate", "list", and "complete", programs are not required to provide comprehensive narrative content, but can instead simply outline the information requested. For these terms, full sentences are not required.

### Site Visit Documentation Instrument

The following materials **must** be uploaded within the Site Visit Documentation Instrument within the Accreditation Management System (AMS). Confidential documents (e.g., samples of participant examinations, faculty evaluations) can be shared with the site team during interviews. Please indicate within the Site Visit Documentation Instrument within the AMS those documents that will be shared during the site visit.

- Updated Exhibit 4 (Medical Condition Chart) for every program participant (clinical programs only) using the templates located on the [ABPTRFE website](#).
- Executed (signed) copies of program contract/agreement/letter of appointment for all participants within recent accreditation cycle.
- Participant Handbook.
- Educational resources available to participants and faculty.
- Documents describing and/or supporting the program's curriculum (e.g., Power Point presentations, copies of required readings, course modules, etc.).
- Completed copies of program director and program coordinator (if applicable) evaluations.
- Completed copies of faculty evaluations (if program director and coordinator have faculty roles, completed evaluations of these individuals within their faculty role must be viewed).

- Completed and graded copies of participant evaluations and examinations.
- Copy of program graduation certificate issued to graduates.
- Documentation collected on the post-completion performance of the program graduate used for program evaluation and continuous improvement.
- Site Visit Agenda (*refer to required components and recommended time allocations for the site agenda below*).

## Required Components of the Site Agenda with Recommended Time Allocations

The site visit takes approximately 12 to 14 hours over the course of two consecutive days. It is recommended that no more than 7 hours per day is scheduled with the longer day occurring on Day 1. Please allow a 15-minute break between scheduled interviews.

- Program Director. The program director should provide a brief 10-15 minute presentation on the program, its history and mission, and its evolution and future goals. (2 hours)
- Program Coordinator, if applicable. (1 hour)
- Institution's Administrator, if available. (30 minutes)
- Faculty. Multiple faculty members may be scheduled at the same time as a joint interview. (1 hour)
- Program Participants. Multiple participants may be scheduled at the same time as a joint interview). Offsite participants must be included through video or teleconferencing. (1 hour)
- Program Graduates, if applicable. (1 hour each but may be scheduled as a joint interview).
- Tour of Facilities. (15-30 minutes)
- Review of Documentation not provided within the Site Visit Documentation Instrument (45 minutes)
- Mentoring Session Observation(s). See the *Preparation for Mentoring Session Observation* section below. (Approximately one hour per observed session)
- Site Team private working lunch (45 minutes daily)
- Conclusion Meeting with Program Director (15 minutes)

## Preparation for Mentoring Session Observation

Mentoring in physical therapy residency and fellowship education is a primary component and requirement of ABPTRFE. Therefore, ABPTRFE conducts a thorough review of the program's mentoring. Program directors are advised to review the Key Element 2.4: Onsite Mentoring Session Observation Evaluation section of the [Accreditation Report Rubric](#) which outlines the requirements for mentoring evaluation and observation during the site visit.

In addition, the [ABPTRFE website](#) provides several resources (handbook and online coursework) available to programs to enhance their mentoring.

In accordance with ABPTRFE Processes and Procedures (policy 5.1), up to five mentoring sessions with different program mentors and participants will be observed (e.g., 1 participant, 2 mentors would have one mentoring session observation; 3 participants, 17 mentors would have three mentoring session observations; 10 participants; 17 mentors would have 5 mentoring session observations).

Staff will select the mentor/participant pair(s) that will undergo a mentoring session observation. If mentors are located at a geographical distant from the program's main address, additional mentoring session observations may require a separate site visit date due to distance and time restraints associated with the primary two-day accreditation visit.

The mentoring session observed during the site visit shall be conducted with the participant, mentor, and live patient in-person and within the same room. The site team will observe the pre-mentoring preparation between the participant and mentor (either written or verbal), as well as the post-session review between the program participant and the mentor (either written or verbal). The mentoring session observation(s) cannot be pre-recorded.

*Ensure the program has a contingency plan for observation of all live mentoring sessions should the original patients scheduled for this time during the site visit cancel.*

## Sample Site Visit Agenda

The following site visit schedule template is provided based on recommended ordering and flow of the site visit. Programs may make necessary adjustments to the timing of activities based on scheduling needs. If changes are made, please ensure correct time allocations are maintained for each activity.

### Day 1

<b>Time</b>	<b>Activity</b>	<b>Names of Individuals</b>
8:00a.m. – 10:00 a.m.	Initial Meeting with Program Director	
10:00 a.m. – 10:15 a.m.		Break
10:15 a.m. – 11:15 p.m.	Meeting with Program Coordinator (if applicable)	
11:15 p.m. – 12:00 p.m.	Documentation Review	
12:00 p.m. – 1:00 p.m.		Site Team Working Lunch
1:00 p.m. – 1:30 p.m.	Tour of Facilities	
1:30 p.m. – 2:00 p.m.	Meeting with Institution's Administrator (if applicable)	
2:00 p.m. – 2:15 p.m.		Break
2:15 p.m. – 3:15 p.m.	Meet with Program Faculty	
3:15 p.m. – 4:00 p.m.		Break
4:00 p.m. – 5:00 p.m.	Meet with Program Participants	

### Day 2

<b>Time</b>	<b>Activity</b>	<b>Names of Individuals</b>
8:00 a.m. – 8:30 a.m.	Meeting Program Graduates (if applicable)	
8:30 a.m. – 8:45 a.m.		Break
8:45 a.m. – 10:15 a.m.	Mentoring Session Observation	
10:30 a.m. – 10:45 a.m.		Break
10:45 a.m. – 12:15 p.m.	Mentoring Session Observation (*if applicable)	
12:15 p.m. – 1:00 p.m.		Site Team Working Lunch
1:00 p.m. – 2:30 p.m.	Mentoring Session Observation (* if applicable)	
2:30 p.m. – 2:45 p.m.		Break
2:45p.m. – 3:00 p.m.	Conclusion Meeting with Program Director	

\*See the *Preparation for Mentoring Session Observation* section above. If more than three mentoring observations are required, or any mentoring site observations required travel time during the main two-day site visit, a separate site visit will be scheduled to conduct these observations.

## Emergency Procedures

The following procedures should be initiated in case of emergency (weather, personal or family):

1. Immediately call the Team Lead to inform them of the cancellation.
2. Send an email notification to ABPTRFE staff advising staff of the cancellation. On the next business day, ABPTRFE staff will coordinate with program and site team to reschedule the visit.

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