ABPTRFE
American Board of Physical Therapy Residency & Fellowship Education

Onsite Visit Guidebook:
For Physical Therapist Residency and Fellowship Programs

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Onsite Visit Guidebook

For Physical Therapist Residency and Fellowship Programs

This guide outlines the responsibilities of residency and fellowship programs. **Review this guidebook in its entirety**.

Purpose

The purpose of the ABPTRFE onsite visit is to evaluate a residency or fellowship program's compliance with the ABPTRFE Quality Standards through direct observation and dialogue. Conducted as part of a comprehensive peer-review process, the onsite visit provides an opportunity to verify and expand upon the information presented in the Self-Evaluation Report and supporting materials. It allows the review team to assess the program's infrastructure, learning environment, and implementation of educational components, while offering the program an opportunity to demonstrate its commitment to continuous improvement, high-quality education, and the advancement of the physical therapy profession.

Preparing for the Onsite Visit

Review ABPTRFE Guidance Materials

- Read the ABPTRFE Processes and Procedures document.
- Visit the ABPTRFE website for site visit resources and information.

Coordinate Site Visit Logistics

- Work with ABPTRFE staff to identify a site visit date based on your accreditation track (initial or renewal).
- Once scheduled, ABPTRFE will provide the names, contact information, and travel arrangements of assigned site visit team members (through the ABPTRFE Site Team Information instrument in the Accreditation Management System (AMS). Programs may request the replacement of a team member with a justified reason.
- Submit the **Onsite Travel Logistics** form in AMS within **10 days** of receiving the site visit confirmation.

Prepare Program Personnel and Schedules

- Ensure availability of program administration, staff, and faculty for interviews, either in person or via teleconference.
- Coordinate schedules for the **mentoring session observation(s)** involving the resident/fellow, mentor, and patient.
- Educate all involved personnel on the accreditation process and site visit expectations. Team members will conduct interviews, review documentation, and may request additional material. Staff should be cooperative, prepared, and flexible throughout the visit.
- Prepare name badges for administration, faculty, and staff.

Submit Required Documents and Fees

- Submit the **Self-Evaluation Report (SER)**, required Exhibits, and **Onsite Visit Document** instruments in AMS **at least 5 weeks** prior to the site visit.
- Pay the site visit fee to ABPTRFE **no later than 10 days** before the visit. Payments must be **received** (not postmarked) by the due date to avoid having the onsite visit cancelled.

During the Visit

Provide a Private Workspace

- Upon arrival, direct the site team to a designated private meeting room.
- Ensure the team has exclusive access to this space, as well as any rooms used for interviews. Program personnel may not enter these rooms without invitation.
- Filming, recording, or broadcasting of the site visit is strictly prohibited.

Welcome and Introductions

- Conduct brief introductions between the ABPTRFE site team and the program's administration, faculty, and staff.
- The program director should give a **10–15 minute overview** highlighting the program's history, mission, development, and future goals.

Facility Tour

- Provide a brief, structured tour of the facility. For offsite locations, a virtual tour or photographs may be used.
- Point out locations of administrative offices, faculty and participant workspaces, and available interview rooms.
- Site team members will **not** ask questions during the tour.

Lunch Planning

- Offer lunch ordering options to the site team prior to the scheduled break. Onsite reviewers are responsible for paying for their meals.
- A **45-minute** lunch is typically held at **12:00 p.m.** each day of the visit.
- No interviews or meetings should occur during lunch.

Access to Confidential Materials

- Share confidential documents (e.g., participant examinations, faculty evaluations) with the site team as appropriate during interviews. These should be presented in a secure and professional manner.

Closing Meeting

- The site team will hold a brief wrap-up meeting with the program director at the conclusion of the visit.
- This meeting is used to clarify any outstanding questions, review additional documents, and explain the next steps in the accreditation process.

Consultation and Documentation

- Site team members **do not** provide consultation or feedback during the visit.
- Any recommendations or findings will be included in the **Accreditation Report Rubric**, delivered approximately **six weeks** after the visit.
- Any documents requested during the site visit must be emailed to the site team (copying ABPTRFE staff) **by the close of business on the final day of the visit**.

Gifts and Gratuities

- Programs must **not** offer gifts, favors, or services to site team members at any time.

After the Onsite Visit

Limit Communication with the Onsite Team

- After the site visit concludes, the program should **refrain from contacting** site team members directly.
- Any additional information requested during the visit but not provided at that time must be submitted to **ABPTRFE staff**, who will ensure it is forwarded to the appropriate individuals.

Receive the Accreditation Report Rubric

- The program will receive the **Accreditation Report Rubric** within six weeks following the onsite visit.

Submit Program Response

- The program has **30 days** from the date of receipt to respond to the Accreditation Report Rubric.
- In this response, the program may submit **new or supporting information** to any findings.
- Regardless of accreditation status, all programs are required to inform ABPTRFE of any **changes in leadership, participant practice sites, mentors, or curriculum** that occur after the site visit.

Board of Commissioner Action and Notification

- ABPTRFE will take one of four actions based on the review: **accredit, defer, show cause, or deny**.
- Within **30 days** of the Board of Commissioner's decision, ABPTRFE staff will send an **Action Letter** to the program director.
- This letter will outline any areas of noncompliance with ABPTRFE Quality Standards and detail any conditions attached to the accreditation decision.
- The letter will also inform the program of its **right to appeal** an adverse decision, in accordance with ABPTRFE Processes and Procedures.

Required Site Visit Documentation

All documents related to the accreditation onsite visit can be found under the **Instruments** tab within the Accreditation Management System (AMS).

Documentation	Purpose	Due Date
Onsite Visit Travel Logistics	Provides the onsite visit team with the program contact information, airport and hotel information, and a draft of the onsite visit agenda.	Within 10 days of receipt of the Onsite Visit Confirmation Letter
Self-Evaluation Report	Provides programs with the opportunity to demonstrate how their structure, processes, and procedures align with and fulfill the ABPTRFE Quality Standards. Its primary purpose is to	At least five weeks prior to the onsite visit

	document and explain how the program meets each standard, with specific attention to how these elements support the program's mission and goals	
Onsite Visit Documentation	Provides onsite team with required program documentation that must be reviewed	At least five weeks prior to the onsite visit
Site Visit Invoice	Indicates how the program is paying the onsite visit fees.	Payments must be **received** (not postmarked) at least 10 days prior to onsite visit

Site Visit Agenda: Required Components and Recommended Time Allocations

The onsite visit typically spans **12 to 14 hours** over the course of **two consecutive days**, with **no more than 8 hours** scheduled per day. The longer day should be **Day 1**.

Allow at least **15-minute breaks** between interviews.

Required Agenda Components

- **Program Director (2 hours)**
  - Should be scheduled first.
  - Includes a **10-15 minute** presentation on the program's history, mission, evolution, and goals.

- **Program Coordinator,** *if applicable* **(1 hour)**
  - Interview must be **separate** from the Program Director.

- **Institution Administrator,** *if available* **(30 minutes)**
  - Discuss support of program

- **Faculty (1 hour)**
  - May be scheduled as a **joint interview** with multiple faculty members.
  - **Include offsite faculty** via video or teleconference.
  - **Exclude** the program director and coordinator.

- **Program Participants (1 hour)**
  - May be interviewed jointly.
  - **Include offsite participants** via video or teleconference.

- **Program Graduates, *if applicable* (1 hour)**
  - May be interviewed jointly.
  - **Include offsite graduates** via video or teleconference.

- **Facility Tour (15-30 minutes)**
  - Provide a brief, structured tour of the facility.

- **Documentation Review (45 minutes)**
  - Review any documents not uploaded to the Onsite Visit Documentation Instrument.

- **Mentoring Session Observation(s) (approximately 90 minutes per session)**
  - See *Preparation for Mentoring Session Observation* section for details.
  - Observations must be conducted in person; virtual or pre-recorded sessions are not permitted.

- **Private Working Lunch – *Onsite Team only* (45 minutes per day)**
  - No interviews may take place during lunch.

- **Closing Meeting with Program Director (15 minutes)**
  - Provides final clarification, document review, and overview of next steps.

Sample Agenda

The sample site visit agenda below is based on the recommended sequence and flow of activities. Please refer to the *Required Components of the Site Agenda with Recommended Time Allocations* section above for detailed guidance.

Programs may adjust the order of activities as needed to accommodate scheduling constraints; however, it is essential to maintain the recommended time allocations for each component.

Day 1 (Approx. 8 hours)

Time	Activity
8:00 a.m.-8:15 a.m.	Site Team Arrival and Setup
8:15 a.m.-8:30 a.m.	Brief Introductions

8:30 a.m.-10:30 a.m.	**Program Director Interview** (includes 10-15 min presentation)
10:30 a.m.-10:45 a.m.	**Break**
10:45 a.m.-11:45 a.m.	**Program Coordinator Interview** (if applicable)
11:45 a.m.-12:30 p.m.	**Site Team Private Working Lunch**
12:30 p.m.-2:00 p.m.	**Mentoring Session Observation #1**
2:00 p.m.-2:15 p.m.	**Break**
2:15 p.m.-3:15 p.m.	**Faculty Interview** (may be joint; excludes director and coordinator; include offsite via teleconference)
3:15 p.m.-3:30 p.m.	**Break**
3:30 p.m.-4:30 p.m.	**Program Participants Interview** (joint; include offsite via teleconference)

Day 2 (Approx. 6.5 hours)

Time	Activity
8:30 a.m.-10:00 a.m.	**Mentoring Session Observation #2*** (*if applicable*)
10:00 a.m.-10:15 a.m.	**Break**
10:15 a.m.-11:45 a.m.	**Mentoring Session Observation #3*** (*if applicable*)
11:45 a.m.-12:30 p.m.	**Site Team Private Working Lunch**
12:30 p.m.-1:00 p.m.	**Institution Administrator Interview** (*if applicable*)
1:00 p.m.-1:45 p.m.	**Program Graduates Interview** (joint or individual; include offsite via teleconference)
1:45 p.m.-2:15 p.m.	**Tour of Facilities**
2:15 p.m.-3:00 p.m.	**Documentation Review** (for materials not uploaded to AMS)
3:00 p.m.-3:15 p.m.	**Break**

3:15 p.m.-3:30 p.m.   **Closing Meeting with Program Director**

*NOTE: *Refer to the **Preparation for Mentoring Session Observation** section. If more than three mentoring session observations are required, or if any observation requires travel during the main two-day site visit, a **separate site visit** will be scheduled to complete those observations.*

Onsite Visit Documentation

The following materials must be uploaded to the **Onsite Visit Documentation Instrument**.

Confidential documents (e.g., participant examinations, faculty evaluations) may be shared directly with the site team during interviews. If doing so, **clearly indicate in the Onsite Visit Documentation Instrument** which documents will be shared onsite rather than uploaded.

Required documents:

- **Updated Exhibit 4 (Medical Condition Chart)** for each program participant (clinical programs only), using the ABPTRFE template available on the website (*ACIR and Renewal of Accreditation template*).

- **Signed contracts, agreements, or letters of appointment** for all participants enrolled during the current accreditation cycle.

- **Participant Handbook.**

- **Educational resources** available to participants and faculty.

- **Curriculum materials,** such as PowerPoint presentations, required readings, and course modules.

- **Completed evaluations** of the program director and program coordinator (if applicable).

- **Completed faculty evaluations,** including those for the program director and/or coordinator if they serve in a faculty role.

- **Graded participant evaluations and examinations.**

- **Sample program graduation certificate** issued to graduates.

- **Post-completion performance data** used for program evaluation and continuous improvement.

Preparation for the 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. Please 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.

Review, the APTA resources available to programs to enhance their mentoring:
- APTA Guide to Successful Mentorship
- Successful Mentorship for Residency and Fellowship Education

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). 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.

ABPTRFE staff will select the mentor/participant pair(s) that will undergo a mentoring session observation. If mentors are located at a geographical distance 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.

For Clinical Programs

The mentoring session observed during the site visit shall be conducted with the **participant, mentor, and live patient in-person physically present in the same room**.

The site team will observe the following components:

- **Pre-mentoring preparation** between the participant and mentor (either written or verbal).

- Mentoring during **the patient-care episode.**

- **Post-session review** between the program participant and the mentor (either written or verbal).

Please note: Pre-recorded sessions or virtual mentoring observations are not permitted. The observation must occur live during the site visit.

Programs are strongly encouraged to schedule mentoring session observations early in the site visit agenda. Doing so allows flexibility to adjust the schedule if a patient cancels and helps prevent the need for a follow-up visit due to an incomplete observation.

For Non-Clinical Programs

For non-clinical programs where mentoring is integrated with curriculum elements rather than live-patient care, the mentoring session observed during the site visit must still occur **in person**, with the **participant and mentor physically present in the same room**.

The site visit team will observe the following components:

- **Pre-mentoring preparation** between the participant and mentor (may be verbal or written).

- **Mentored interaction or activity** that reflects curriculum-based learning (e.g., case discussion, simulation, literature review, project work).

- **Post-mentoring debrief or feedback** between the participant and mentor (may be verbal or written).

Please note: Pre-recorded sessions or virtual mentoring observations are not permitted. The observation must occur live during the site visit.

Emergency Procedures

In the event of an emergency requiring cancellation of the site visit, the following steps should be taken:

1. **Immediately contact the Site Visit Team Lead** by phone to inform them of the cancellation.

2. **Email ABPTRFE staff** (resfel@apta.org) to notify them of the situation. ABPTRFE will coordinate with the program and onsite team on the next business day to reschedule the visit.

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Contact: resfel@apta.org