**Virtual Site Visit Guidelines**

**August 11, 2020**

| **Item** | **Considerations** | **Comments** |
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| **Decision to conduct virtual site visits** | | |
| **Availability** | * Will virtual visits be conducted only in unusual/emergency situations? * Will virtual visits be an option that is part of regular accreditation business? Programs may request this option; both accreditor and program need to agree; there may be valid concerns for accreditor to refuse. | * Federal recognition will allow virtual visits, but these must be followed up with onsite visits. * CHEA recognition has no requirements regarding how site visit is conducted. |
| **Applicable situations** | * Are virtual visits allowed for candidacy, initial accreditation, reaffirmation of accreditation, focused visits, or programs on probation or with complaints pending? * Eligibility criteria should be developed for programs to participate in virtual visits. | * In non-emergency situations accreditors may prefer to perform candidacy, initial accreditation, programs on probation and focused visits on site. |
| **Technology** | | |
| **Platform responsibility** | * Who will control/host the platform for the virtual visit – accreditor, program, both? * Programs and site visit teams must ensure all participants have the technology requirements and facility to use the selected platform(s): * internet connection – broadband wired or wireless (3G or 4G/LTE) * audio device that may include speakers, microphone, phone, or similar device * webcam built-in or USB plug-in * Develop technology protocols; have a contingency plan in place. | * If the accreditor hosts the platform, staff can monitor participants and ensure that only the appropriate individuals participate in the various interviews and meetings. * Testing of all platforms is necessary prior to the actual virtual visit to ensure sufficient bandwidth and familiarity with the platform(s). * Tip sheets for joining virtual meetings should be provided for all participants. * Participants should have an alternate device available in case problems arise. |
| **Platform format** | * The platform should allow for all program participants to be viewed as well as heard by the site visit team, and vice versa. | * Bandwidth can be minimized by following the agenda closely and only having pertinent individuals logged on for respective interview sessions. |
| **Confidentiality of interviews and meetings** | * Private conversations between site visit team members during the virtual visit, document review or before/after scheduled meetings can occur via telephone. If the team prefers a video and voice connection, it can set up its own separate virtual meeting. * Confidential interviews with students, faculty, employers, etc. can be accomplished with separate webinars controlled by the accreditor, or individual telephone calls. | * It is not recommended that site team members use the private chat function of the platform during the virtual visit – texting or private calls during breaks are possible options. * The program should provide a comprehensive list of participants to ensure that only the appropriate individuals are online for their respective interviews/meetings. |
| **Recording virtual visits** | * The accreditor should have a clearly delineated policy about what, if any component of the virtual site visit can be audio or video recorded. | * Even if the accreditor hosts the platform, there remains the possibility that the program may have a hidden recorder. |
| **Review materials** | | |
| **Materials** | * Materials that would be available for review onsite should be available virtually through a secure document sharing application (Dropbox, Blackboard, etc.). The program should remove access to these materials at the conclusion of the virtual visit. | * If the accreditor asks/requires that documents for review are filed/labeled in a certain manner to enhance the flow of onsite visits – the same requirements could enhance the flow of the virtual visit. |
| **Confidential documents** | * Confidential documents (student, faculty files), can be shared virtually with the secure document sharing application or during virtual interviews through screen sharing. |  |
| **Conducting the virtual site visit** | | |
| **Preparation** | * There should be guidelines and training for the virtual site visit team. * There should be a meeting between the Site Visit Chair and program to set up the agenda, which should be equivalent to that for an onsite visit. * Appropriate time to switch to the next group/individual being interviewed should be factored into the agenda. * Appropriate breaks between interviews and meetings should be incorporated. | * The content reviewed and individuals interviewed for the virtual visit should be the same as for an onsite visit. * If the virtual visit is held over a wider timeframe than an onsite visit, separate meetings can enhance the confidentiality of interviews and site visitors may have more availability if they have part of each day for their full-time jobs. * Spreading out the visit may be more stressful for the program. |
| **Interviews and meetings** | * All participants should have a quiet space with minimal distractions and a reliable internet connection. * Start the first meeting 15 minutes ahead of schedule to work out any possible technical issues. Do this as well if meetings are spread out. * With current social distancing practices, each participant will need to login to the meeting separately. * As social restrictions ease, the site visit team, program participants or both may choose to gather in a meeting room. * Make sure all participants have audio and video functioning properly. | * Site visit team members should comport themselves in the same manner as for an onsite visit by: * dressing professionally (top and bottom) * not multi-tasking * keeping their eyes on the camera and focusing on the conversations * speaking clearly and keeping in mind voice and video delays * There should be an IT person dedicated to the visit. |
| **Facility tour** | * The program can play a pre-recorded video of the areas to be toured (e.g. university resources: library, classrooms, department offices, practice sites, etc.). If the team has questions, the video can be paused to allow the program to answer. * Alternately the tour may be done virtually with someone from the program using the camera on a device logged in to the webinar. | * It may be more efficient to require the program to submit a video of the facility in advance of the visit. * If the videos do not provide adequate information, questions about adequacy of the spaces and equipment can be posed to students and faculty. |
| **Policies, Standards and Reports** | | |
| **Standards** | * All accreditation standards are expected to be reviewed and met, regardless of the format of the site visit. |  |
| **Policies** | * Policies should clearly state all expectations for successful implementation of a virtual visit. | * Examples of policies: * Consent agreement to participate * Code of Conduct for interviewing format * Disclosure |
| **Costs** | * While costs to programs for virtual site visits would not include team member travel, lodging and meals, other accreditor expenses should be incorporated to complete the visit (e.g. if stipends are paid to team members). | * Reducing the costs to programs for virtual visits may create an impression that the virtual visit is not as important or effective as an onsite visit. |
| **Reports** | * Pre-drafting reports can aid in consistency and reduce volunteer time spent on writing the visit report. |  |