

# PEER REVIEW TEAM ACCREDITATION HANDBOOK

revised 2017

OCCUPATIONAL THERAPIST ASSISTANT & PHYSIOTHERAPIST ASSISTANT  
EDUCATION ACCREDITATION PROGRAM



# PREFACE

The purpose of this handbook is to provide information about the roles and responsibilities of the Peer Review Team members involved in the offsite and onsite accreditation reviews of an occupational therapist assistant and/or physiotherapist assistant education program. Completion of the offsite and onsite review is one component of the accreditation process of the Occupational Therapist Assistant and Physiotherapist Assistant Education Accreditation Program (OTA & PTA EAP).

The handbook is intended for the use of Peer Review Team members. It may also be a reference for occupational therapist assistant and/or physiotherapist assistant education program faculty and staff who are preparing for accreditation review, and others who have an interest in the accreditation processes for occupational therapist assistant and/or physiotherapist assistant education programs in Canada.

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# INTRODUCTION

## The Purpose of Accreditation

Accreditation is both a process and a condition. The process involves an integrated system of continuous assessment, evaluation, and improvement to comply with specified standards. The condition or state of being accredited provides a credential to the public and employers, affirming that a program has accepted and is fulfilling its commitment to educational quality. Four main functions of the OTA & PTA EAP are to:

- 1) establish criteria for evaluation of occupational therapist assistant and physiotherapist assistant education programs
- 2) conduct assessments that encourage colleges/universities to maintain and improve their programs
- 3) determine compliance with established criteria for accreditation
- 4) provide ongoing consultation to occupational therapist assistant and physiotherapist assistant education programs

## Accreditation: Values and Operational Principles

The OTA & PTA EAP's accreditation process works to ensure that the following values and operational principles are enacted.

In all of its operations, the OTA & PTA EAP believes in:

Collaboration: authentically engage key stakeholders

- Engage national stakeholders in **collaborative development** of standards
- Collaborate in **constructive conflict resolution** when necessary
- Facilitate a platform of **open discussion, respectful dialogue, consensus building, and collective support for decisions**

Respect: demonstrate inclusivity and value differences and diversity at individual, program and societal levels

- Support **diversity** in Canadian society through the lens of gender, language, culture, ethnicity, geography, and religion
- Collaborate in **constructive conflict resolution** when necessary

Quality: foster continuous quality improvement and excellence

- Foster **self-reflection** and growth within the OTA & PTA profession
- Embrace **critical reflection** of its practices and policies
- **Pilot** new standards and changes, and **communicate** the results clearly and in a timely fashion
- Model **flexibility** by adapting processes and standards to changing times while upholding quality in education
- Support the **right to quality** education
- Recognize programs for **innovation** within the framework of national standards

Fairness: apply standards, policies and processes consistently and objectively at all times

- Allow opportunities for **remediation and improvement**
- Ensure **consistency** in decision making

Accountability: demonstrate responsible decision-making and resource management

- Perform its business always in an **ethical manner** that generates **trust**
- Demonstrate **honesty** in all of its dealings
- Uphold the **highest confidentiality** in its practices and processes
- Conduct business in a **fiscally responsible and accountable** manner
- Model **flexibility** by adapting processes and standards to changing times while upholding quality in education
- Offer an **appeal process** that is fair, timely and objective

Transparency: inspire confidence through openness, communication and integrity

- Create **user-friendly** and helpful written documents and resources
- Communicate **clearly and respectfully** in all written documents and verbal encounters
- Ensure **wide and transparent distribution** of publicly available materials related to the accreditation process

## Guidelines for Good Practice

As members of the Association of Accrediting Agencies of Canada (AAAC), PEAC and CAOT are committed to ensuring that the operations of the OTA & PTA EAP are consistent with the *Guidelines for Good Practice in the Accreditation of Professional Programs*. The *Guidelines* are available for review on the home page of the AAAC website (<http://aaac.ca>).

## Conflict of Interest

The OTA & PTA EAP expects individuals who conduct business on its behalf to avoid real, potential or perceived conflict of interest in all aspects of the work completed. Details about the steps taken to ensure avoidance of conflict of interest are provided in policy *ACC-02 Conflict of Interest*.

## The Standards Framework

The framework for the Accreditation Standards for Occupational Therapist Assistant and Physiotherapist Assistant Education Programs in Canada is based on the “5 + 1” model described by the Task Force on Accreditation of Health Professions Education<sup>1</sup>. This model comprises five standards considered common to accreditation of professional education programs and requires that all programs:

- work closely with their practice communities and the public to prepare a workforce that can respond to and meet community needs
- provide appropriate, periodic, and ongoing faculty development and evaluation
- regularly assess the competencies and achievements of students and graduates
- maintain an effective process of continuous self-assessment, planning, and improvement
- communicate information and accurately represent themselves to the public to ensure accountability and consumer choice

An additional standard, the “+1” component of the model, permits accreditation programs to develop a standard specific to the profession(s).

The OTA & PTA EAP accreditation standards and criteria were adopted for Canadian occupational therapist assistant and physiotherapist assistant education programs through an iterative process, including feedback from focus groups, a broad national electronic survey consultation with stakeholders, and ongoing input from the OTA & PTA EAP Steering Committee, Standards Development Working Group and Advisory Committee. The standards include aspects of the CAOT and PEAC education accreditation standards and incorporate the Practice Profile for Support Personnel in Occupational Therapy (2009) and the Essential Competency Profile for Physiotherapist Assistants in Canada (2012).

Overall, the standards and criteria are intended to focus on the assessment of outcomes as the means of validating a program’s activities and guiding and improving efforts towards the achievement of its mission and goals.

## The Development of Accreditation for OTA & PTA Education in Canada

The Occupational Therapist Assistant and Physiotherapist Assistant Education Accreditation Program (OTA & PTA EAP) is a collaborative initiative of the Canadian Association of Occupational Therapists (CAOT), the Canadian Occupational Therapist Assistant and Physiotherapist Assistant Educators Council (COPEC) and Physiotherapy Education Accreditation Canada (PEAC). CAOT and PEAC are the accreditation agencies for Canadian occupational therapist and physiotherapist education programs respectively, while COPEC is the organization of educators of Canadian OTA & PTA education programs.

In 2009, 19 education programs signed on with the OTA & PTA EAP, following several years of discussion led by COPEC regarding the need for accreditation of these educational programs. The commitment of these original 19

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<sup>1</sup> Gelmon, S., O’Neil, E., Kimmey, J., and the Task Force on Accreditation of Health Professions Education. (1999). *Strategies for Change and Improvement: The Report of the Task Force on Accreditation of Health Professions Education*. San Francisco: Center for the Health Professions, University of California at San Francisco.



programs provided funding to the initial developmental activities. A Program Manager was appointed by CAOT and PEAC in September 2009.

The pilot OTA & PTA EAP accreditation standards were finalized in December 2010 and were used for the pilot accreditation reviews in early 2012. Revisions to the standards based on evaluative feedback from the pilot reviews were finalized in the fall of 2012 and applied to programs undergoing accreditation reviews beginning in the fall of 2013. A similar process took place in the development of the policies and procedures of the accreditation program.

## The Continuum of Education Standards and Quality

Accreditation of Canadian occupational therapist assistant (OTA) and physiotherapist assistant (PTA) education programs is supported by three groups: academic OTA and PTA programs throughout Canada (some of which are members of COPEC), CAOT, and PEAC. A continuum of guidelines and standards is developed and maintained by these three groups through representation in the Joint Accreditation Committee to ensure the competency of entry-level practitioners. Guiding documents and processes along the continuum include:

- Practice Profile for Support Personnel in Occupational Therapy, CAOT 2009<sup>2</sup>
- Profile of Occupational Therapy Practice in Canada, CAOT 2007<sup>3</sup>
- Essential Competency Profile for Physiotherapist Assistants in Canada, NPAG 2012<sup>4</sup>
- Essential Competency Profile for Physiotherapists in Canada, NPAG 2009<sup>5</sup>
- PEAC Accreditation Standards, Policies & Procedures<sup>6</sup>
- CAOT Accreditation Standards, Policies & Procedures<sup>7</sup>

## Stakeholders in the Accreditation Process

Accreditation must be a relevant and responsive process, continually evolving to incorporate changes in the education and practice environments. Therefore, it is a process that requires input from and is of value to a variety of stakeholders. For *educators*, accreditation provides validation of the education program, an opportunity for faculty professional development, and a framework for quality improvement in education. For the *profession*, accreditation provides an opportunity to influence the education process and work towards consensus around evaluation standards and consistency of learning outcomes. For *students, employers and the public*, accreditation provides a measure of educational quality.

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<sup>2</sup> Available on the [CAOT website](#)

<sup>3</sup> Available on the [CAOT website](#)

<sup>4</sup> Available on the [NPAG website](#)

<sup>5</sup> Available on the [NPAG website](#)

<sup>6</sup> Available on the [PEAC website](#)

<sup>7</sup> Available on the [CAOT website](#)

## Roles and Responsibilities of Stakeholder Groups

CAOT, COPEC and PEAC have been involved in the OTA & PTA EAP since its inception. Each organization has a unique role contributing to the development and ongoing evolution of this accreditation program. The roles of each stakeholder group are as follows:

### **CAOT and PEAC jointly:**

- developed and now govern the OTA & PTA EAP, collaborating with COPEC and other stakeholders as required
- recruited steering committee members during development of the program
- facilitated development of the pilot accreditation standards
- approve revisions to the accreditation standards
- developed the pilot policies and procedures for the operation of the OTA & PTA EAP
- approve revisions to the policies

### **COPEC:**

- requested initiation of the accreditation program
- is the recipient of the accreditation process
- funds the program through annual accreditation fees (non-COPEC-member education programs also pay annual accreditation fees to the OTA & PTA EAP)

### **CAOT, PEAC and COPEC jointly:**

- provide membership to the Peer Review Teams (PRT) for accreditation reviews
- provide membership to the JAC and collaborate through this committee to:
- review and revise accreditation standards
- review accreditation reports and make accreditation award recommendations
- develop, review, and revise policies and procedures related to the OTA & PTA EAP

### **PEAC:**

- is responsible for administering the accreditation program

# OVERVIEW OF THE ACCREDITATION PROCESS

## The Accreditation Process

To provide some context for PRT members about completion of activities related to the accreditation review, the typical steps in the accreditation process are described below.

### 1. Candidacy Status

As per policy [ACC-14 Candidacy Status](#), the education program applies for and receives candidacy status which confirms that:

- a certificate/diploma is granted by the educational institution
- the education program is affiliated with an institution authorized under applicable law to provide postsecondary education
- the individual responsible (i.e., program head/coordinator/director) for the OTA & PTA education program is a registered occupational therapist or physiotherapist registered with no conditions with the appropriate provincial regulatory body.
- the education program includes 500 OTA/PTA practicum hours, of which 150 hours are OTA hours and 150 hours are PTA hours (single discipline programs must include 350 fieldwork hours)
- the education program has ensured that clinicians within the program's catchment area are able to provide the number of placements required for the program's students.
- There is
  - a curriculum framework document and an articulated educational philosophy
  - a designated sustainable budget
  - identifiable program space

Candidacy status is granted by the Joint Accreditation Committee.

### 2. Letter of Intent for Accreditation Reviews

The education program submits a letter of intent to OTA & PTA EAP to participate in a full accreditation review (offsite and onsite). The Peer Review Team (PRT) is selected and the review is scheduled.

### 3. Program Self Study Report

The education program prepares the Self Study Report (SSR) which is submitted to the OTA & PTA EAP electronically.

### 4. Offsite Accreditation Review

The education program SSR is circulated to the four-member PRT (an occupational therapist, an occupational therapist OTA/PTA educator, a physiotherapist and a physiotherapist OTA/PTA educator). The PRT members review the evidence for compliance with all standards, with a focus on compliance with Standard 6. Compliance with 80% of the criteria in Standard 6 OTA and Standard 6 PTA based on submitted evidence is necessary in order to warrant proceeding to an onsite visit. Should there be insufficient evidence to

demonstrate 80% compliance with the criteria in Standard 6 OTA and Standard 6 PTA, the PRT may request that the program submit additional evidence before a decision to proceed with the onsite accreditation review can be made. Deferral of the onsite visit may be necessary (*ACC-16 Decision to Proceed Following Offsite Review*). An offsite review teleconference is held with the OTA & PTA EAP Program Manager and the PRT to draft the offsite review report. Within two weeks of the offsite review, the report is forwarded to the education program to assist in its preparation for the onsite visit, and, if necessary describe additional information /documentation requested by the PRT.

## 5. Onsite Accreditation Review

The PRT carries out the onsite accreditation review validating evidence of compliance with all standards. Standard 6 OTA and competencies are reviewed by the two occupational therapists of the PRT; Standard 6 PTA and competencies are reviewed by the two physiotherapists of the PRT. The report reflects the position of the PRT members on the level of validating evidence of compliance with profession specific Standard 6 and competencies.

Following the visit, the PRT does not make a recommendation regarding the program's overall accreditation award. Its role is to gather and verify evidence, and to identify compliance with individual criteria within the standards.

## 6. Peer Review Team (PRT) Submits Onsite Report to OTA & PTA EAP

Within two weeks of the onsite review, the PRT report is submitted to OTA & PTA EAP where it is formatted and edited for consistency.

## 7. Edited Report sent for Education Program Review

The edited report is sent to the education program. The program responds to the PRT report to correct any misinformation.

## 8. Joint Accreditation Committee

The Confidential Accreditation Dossier is prepared; the dossier consists of the program's Self Study Report, the PRT report, and the program's response to the PRT report, along with a copy of the Accreditation Standards and the decision-making policy *ACC-03B Accreditation Decisions*. Two members of the JAC are selected as the Primary Reviewers to prepare a summary of these documents for presentation at the next JAC meeting.

## 9. Accreditation Recommendation

The JAC makes an accreditation award recommendation following review of all documents in the Accreditation Dossier, including the Primary Reviewers' report (*ACC-03 Accreditation Decisions*).

- Accreditation:
  - Fully Compliant
  - Partially Compliant
  - Probationary
- Non-Accreditation

- Deferral

## 10. Accreditation Decision

The accreditation award recommendation is sent to the Boards of PEAC and CAOT for final approval.

The education program is notified in writing of the accreditation award decision and the required follow up in an official Accreditation Review and Status Report (AR & SR).

# ROLE AND RESPONSIBILITIES OF THE PEER REVIEW TEAM

## Composition and Role of the Peer Review Team

The OTA & PTA EAP maintains a list of qualified PRT members who can be appointed as members of a PRT. Each PRT comprises four members:

- one occupational therapist representing the Canadian Association of Occupational Therapists (CAOT)
- one occupational therapist OTA/PTA educator
- one physiotherapist representing Physiotherapy Education Accreditation Canada (PEAC)
- one physiotherapist OTA/PTA educator

The PRT for single-discipline programs (e.g.: PTA) will be composed of two members of the program's discipline.

The responsibilities of the members of the PRT are to:

- complete an offsite and onsite review of an OTA & PTA education program
- verify and supplement evidence provided by the education program in the Self Study Report
- assess the program within the context of its environment
- prepare and submit a report about the program's compliance with the OTA & PTA EAP accreditation standards

*The PRT does not make a recommendation concerning the program's overall accreditation status*, but does report regarding the level of compliance with individual standards and criteria.

PRT members are selected at least ten months in advance of the onsite review. PRT members are selected from the OTA & PTA EAP pool of trained reviewers, considering any specific needs of the education program and other factors such as geography, language preference and conflict of interest. Members of the PRT are directly accountable to the OTA & PTA EAP, and to the Boards of Directors of PEAC and CAOT.

## Eligibility for appointment to the pool of PRT members

The following general criteria are used to select individuals who can be appointed to the pool of PRT members (*ACC-01 Appointment to the Pool of PRT Members*).

All applicants must:

- be registered occupational therapists or physiotherapists
- OR
- be an individual with a background in occupational therapy or physiotherapy who was registered to practice the profession by a Canadian regulatory authority within the preceding ten (10) years and was in good standing at the time of resigning registration
  - have a minimum of five years' experience as an occupational therapist or physiotherapist
  - be willing to accept the responsibilities related to conducting the accreditation review including:

- commitment to the confidentiality policies
- acknowledgement of any conflict of interest
- review of the program’s SSR and all related materials
- ability to objectively collect, analyze, and communicate all pertinent data related to the offsite and onsite reviews
- acceptance of responsibility for own behaviour and actions

PRT members representing CAOT and PEAC must:

- be approved by their respective organization to be a PRT member
- have experience supervising and/or administering programs employing OTAs and/or PTAs

PRT members representing OTA/PTA educators must:

- have a minimum of five years’ experience as an OTA/PTA educator
- be working a minimum of 90 hours per year in an education program

OR

- have worked a minimum of 90 hours per year in an education program within the past 3 years

**NOTE:** Sessional or contracted instructors, as well as full- and part-time faculty in OTA/PTA education programs are eligible to apply to become PRT members.

## Selection and Appointment of Peer Review Team Members

### Peer Review Team Member

The OTA & PTA EAP Program Manager selects members of the PRT from the pool of eligible PRT members in consultation with PEAC and CAOT. Subsequently, the program coordinator of the education program undergoing review provides approval of all PRT members. An education program, for just cause, may request a replacement of any PRT member.

### Peer Review Team Chair

The PRT Chair is selected by the OTA & PTA EAP Program Manager from the pool of eligible PRT members in consultation with PEAC and CAOT.

The following specific criteria are used as guidelines for appointment of the Chair:

- proficiency in the language of instruction of the program, including both oral and written communication
- participation as a PRT member for at least one previous review
- positive past performance review(s) as rated by education programs and other PRT members

Every effort will be made to include an experienced PRT Chair as a member of the PRT the first time a reviewer acts as a PRT Chair. The experienced Chair will serve as a mentor to the less experienced Chair.

## Conflict of Interest – PRT Members

Individuals, including PRT members, who conduct business on behalf of the OTA & PTA EAP must be committed to the values of the organization. Equity is one such value whereby policies and processes are applied fairly, consistently and objectively at all times. In support of this value and good practices, the OTA & PTA EAP strives to avoid conflict of interest, or the appearance of conflict of interest, in all aspects of its activities (*ACC-02 Conflict of Interest*).

PRT members are expected to declare a conflict of interest in participating in an accreditation review if he or she:

- is or was an employee of the institution being accredited
- is serving or has recently served in the capacity as a consultant, or clinical or honorary faculty member of the institution being accredited
- has a monetary or personal interest in the outcome of an accreditation decision for institution being accredited
- has close personal or professional relationships with individuals in the program at the institution being accredited
- has or a member of his or her immediate family be involved with the education program of the institution being accredited either as a student, staff or faculty member

Individuals who participate in any aspect of OTA & PTA EAP activities (including PRT members) are expected to recognize relationships in which they have an actual, potential or perceived conflict of interest and disclose such conflicts to the OTA & PTA EAP.

A JAC member who was a PRT member for the review of the program for which accreditation status is being considered may participate in the discussion to clarify the PRT report and to answer questions. The member must avoid adding any new information during the meeting, and must abstain from voting regarding the program's accreditation status.

Upon appointment to the PRT, all members are asked to review the OTA & PTA EAP Conflict of Interest policy (*ACC-02 Conflict of Interest*) to carefully consider whether they are eligible to serve on the PRT. PRT members complete *FORM-09 Conflict of Interest Declaration*.

## The Paperless Process - Electronic Storage of Confidential Data

The OTA & PTA EAP strives to use a paperless process for all committee and accreditation business. Education programs provide their documentation electronically to the OTA & PTA EAP. PRTs receive accreditation documentation, and committee members receive meeting materials, through access to a secure file sharing system. Members can submit receipts for printing any necessary documents with their expenses following the onsite review or meetings.

The OTA & PTA EAP, including PRT members, gathers confidential organizational information including sensitive financial, educational, and academic data from programs and about individuals in those programs. It is the OTA & PTA EAP's responsibility to ensure that these data are securely stored and that security is at no time jeopardized by third-party service providers such as website servers, "cloud" servers and other data management strategies. Third-party data service providers being used by the OTA & PTA EAP and its representatives must be approved by



the OTA & PTA EAP. Any confidential documents sent via email must be password protected, with the password sent in a separate email. (*ACC-06 Electronic Storage of Confidential Documents*)

## Confidentiality

Participation in the offsite review, the onsite review, and all related processes and materials are considered to be of a highly confidential nature. Therefore, PRT members are not authorized to discuss activities of the specific review, or related documents and the findings of the review except with other members of the PRT, OTA & PTA EAP staff and other JAC representatives as appropriate. Documentation relating to an accreditation review must be protected through use of locked filing cabinets, password protection on computers/laptops, secure USB keys, and use of third party servers approved by the OTA & PTA EAP (*ACC-06 Electronic Storage of Confidential Documents*). Accreditation documents shared by the OTA & PTA EAP will be password protected at the file level with the password shared in a separate communication.

Any information or materials acquired through accreditation processes must not be used for purposes other than accreditation matters, unless permission is granted from the education program or institution and the OTA & PTA EAP.

Prior to being provided access to confidential materials, PRT members must return a signed Confidentiality Agreement (*FORM-04 Confidentiality Agreement – PRT*) confirming they have read and will adhere to the related policies.

## Document Destruction

PRT members are advised to maintain all documents related to the onsite accreditation review and preparation of the PRT report until advised by the OTA & PTA EAP, as the JAC may require additional information or clarification from the PRT. Once a decision is made regarding the accreditation status of an education program and the education program has been notified of its accreditation status, PRT members are advised of the decision and are asked to dispose of all materials related to the accreditation review by shredding paper copies, and/or deleting all electronic documents. PRT members will be required to provide a signature confirming they have complied with this policy and return the form to the OTA & PTA EAP (*FORM-06 Confirmation of Document Disposal - PRT*).

## Quality Monitoring Program

### Orientation and Training Programs

Orientation and training for PRT members is provided by OTA & PTA EAP and includes the following:

- i. completion of a generic online training program developed by the Association of Accrediting Agencies in Canada (AAAC) for accreditation assessors<sup>8</sup>
- ii. completion of an OTA & PTA EAP specific education module online
- iii. provision of the OTA & PTA EAP PRT Accreditation Handbook

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<sup>8</sup> Both the online training program developed by the Association of the Accrediting Agencies of Canada (AAAC) AND the OTA & PTA EAP online course must be completed by new PRT members prior to the orientation teleconference scheduled five months prior to the onsite visit; the fees to access the programs are paid by the OTA & PTA EAP.

- iv. teleconference orientation meeting prior to the accreditation offsite review for the purpose of team building, description of expectations for the offsite review, planning for the onsite review and delegation of PRT member responsibilities
- v. sample reports to guide report writing
- vi. ongoing access to resources, i.e., access to the online training programs for one year, PRT Handbook on the OTA & PTA EAP web site

## Performance Assessment

The OTA & PTA EAP ensures continued effectiveness and reliability of the accreditation program through an established quality monitoring program. To comply with the quality-monitoring program, all participants are required to complete evaluation surveys related to their participation in the accreditation process. The surveys are designed for education program faculty, staff, and students, and all PRT members to provide input and suggestions for improvement regarding the accreditation process and feedback about the performance of each PRT member.

The OTA & PTA EAP prepares summaries of all evaluations completed. PRT members will receive summaries of evaluations of their performance completed by the faculty, staff and students of the education program, as well as by their fellow PRT members. The JAC and staff of the OTA & PTA EAP will use results of the evaluations to monitor and improve the quality of accreditation processes. Staff will use results of the evaluations to guide changes in accreditation processes and ensure that quality services are provided.

The Chair of the JAC may choose to periodically send letters to PRT members who have conducted themselves in a manner worthy of special recognition. If negative issues are raised about the performance of a PRT member as a result of the assessment process, the information will be discussed with the reviewer and a letter may be sent, under the signature of the JAC Chair, outlining the concerns about the reviewer's performance. In addition, OTA & PTA EAP may request that the reviewer take one of the following actions:

- i. repeat the entire orientation and training program, at the expense of the reviewer
- ii. review a portion of the orientation and training program
- iii. conduct the next onsite accreditation review under the supervision of an appointed mentor

For repeated instances of poor performance, the reviewer will be removed from the list of reviewers.

## General Guidelines and Expectations for PRT Members

### Expectations

PRT members are members of an ad-hoc committee of both PEAC and CAOT, and represent the OTA & PTA EAP while conducting an accreditation review. The OTA & PTA EAP has the following expectations of PRT members in this role. The OTA & PTA EAP asks that members:

- represent the OTA & PTA EAP in a positive manner and be thoroughly familiar with the OTA & PTA EAP accreditation standards, including the associated criteria, and the accreditation processes
- conduct an objective and impartial assessment of the degree to which the program is in compliance with the accreditation standards
- schedule time to ensure uninterrupted participation in all PRT activities

- avoid participation in social activities with personnel at the accreditation review site

## Guidelines

The objectives for the PRT members while onsite are to:

- complete the onsite review of the OTA & PTA education program
- verify and supplement evidence provided by the education program in the SSR
- assess the program within the context of its environment
- prepare and submit a report about the program's compliance with the OTA & PTA EAP accreditation standards.

The OTA & PTA EAP provides a set of general guidelines for PRT members to follow while working towards completion of these objectives:

1. PRT members are privy to a great deal of highly confidential written and oral information. When participating in the accreditation process PRT members must:
  - consider all information and data associated with accreditation of a program to be confidential. Use or disclosure of information obtained as a result of participating in the accreditation process is not authorized and is considered a breach of confidentiality
  - refrain from discussing any aspect of a program, positively or negatively, with anyone other than persons directly involved with the accreditation process
2. PRT members shall strive to provide objective and unbiased judgements. If this is not possible a PRT member should declare a conflict of interest and should not accept the position as a member of the PRT.
3. PRT members must make every effort to avoid a situation which could be construed as/ lead to a potential basis for conflict of interest.
4. PRT members must not engage in personnel recruitment or job application activities during the onsite peer review visit, nor should they suggest their availability as consultants or guest lecturers. Should a PRT member apply for a position at the institution visited within one year of the onsite review he or she must contact the OTA & PTA EAP Program Manager to declare a conflict of interest.
5. When participating in accreditation activities, PRT members must not use the opportunity to discuss or promote their own personal theories or philosophies that are not specific to the OTA & PTA EAP accreditation standards.
6. PRT members should not use the onsite peer review visit or the PRT Report to discuss issues that can be resolved by the program's attention to minor details. The role of the PRT is to seek verification and validation of the evidence provided in the SSR, and to seek further evidence to demonstrate compliance with the accreditation standards and criteria. This role requires some skill in recognizing how global vs. how detailed the exploration of the program should be.
7. PRT members' attire should be conservative and business-like.

## Specific Responsibilities of the Peer Review Team Members

The time from recruitment to completion of responsibilities as a PRT member is approximately 12 months, with the majority of the work occurring in the last four to six months. The following are activities for which all PRT members are responsible.

### Prior to the orientation teleconference

- Sign confirmation of participation form, conflict of interest declaration, and confidentiality agreement, and submit to the OTA & PTA EAP.
- Complete the AAAC online training module.
- Complete the OTA & PTA EAP specific online education course.

### Prior to the offsite accreditation review teleconference

- Review any background information about the OTA & PTA EAP accreditation process
- Review the PRT Accreditation Handbook and the roles and responsibilities of the PRT members
- Thoroughly read and assess the SSR and associated evidence submitted by the program.
- Focus on standards assigned during the orientation teleconference, and determine if any additional information will be required from the program prior to the onsite review (or upon arrival onsite).
- Be prepared to discuss this information with the PRT members during the teleconference.
- Begin entering information into the draft of the offsite review report for standards assigned during the orientation teleconference.

### During the offsite accreditation review teleconference

- Determine in consultation with the Program Manager, PRT Chair and other PRT members whether the education program has provided adequate evidence of compliance with 80% of the criteria in Standard 6 OTA and Standard 6 PTA in order to proceed with the onsite visit.
- Collaboratively write the offsite report to be forwarded to the education program.

### Prior to the onsite accreditation review

- Book travel following receipt of the travel authorization memo.
- Prepare interview questions to verify evidence and to address gaps in the evidence, focussing on assigned areas of responsibility (sample interview questions are provided on page 31).
- Begin entering information into the draft of the PRT report for standards assigned during the teleconference, based on information discussed in the offsite review and the review of the SSR.

### During the onsite review

- Participate in the preparatory PRT meeting at the hotel on Day 1 of the review.
- Participate in/lead interviews as scheduled during the onsite review.
- Participate in PRT meetings in the evenings as scheduled by the PRT Chair.
- Collaboratively write the PRT report, taking responsibility for the standards assigned.
- Keep a record of all persons interviewed, including name and title, and take notes during interviews.

## Following the onsite review

- Finalize the PRT onsite report in collaboration with the PRT Chair and other PRT members.
- Submit an expense claim form (*FORM-08 Expense Form*) as soon as possible for reimbursement.
- Complete and submit the online post-accreditation survey.
- Participate in a follow-up teleconference, if required, regarding the accreditation review.

## Following the Accreditation Status Decision

- When informed by the OTA & PTA EAP of the program's accreditation award, destroy/delete/shred all materials related to the onsite review and submit a signed *FORM-06 Confirmation of Document Disposal - PRT* form to the OTA & PTA EAP.

## Specific Responsibilities of the Peer Review Team Chair

The PRT Chair is responsible for maintaining appropriate communication with OTA & PTA EAP throughout his or her tenure as the PRT Chair. The PRT Chair is responsible for all activities outlined above for PRT members and additional activities as described below.

### Prior to the offsite review teleconference

- Review the document *GUIDE-09 PRT Chair – Tips and Responsibilities*.
- Upon confirmation of PRT members, contact the team members by email as an introduction and to welcome them to the team.
- Review the specific responsibilities required of the PRT Chair and ask any questions or request clarification from the OTA & PTA EAP prior to the offsite review.
- Communicate with and answer questions from the other PRT members as they prepare for the review.
- During the orientation teleconference (and on site) assign responsibilities to each PRT member for completion of the offsite review and report, as well as the onsite visit and preparation of the PRT Report. The assignments should be made in consideration of the expertise of each PRT member. Although PRT members are responsible for reviewing the entire SSR and all evidence submitted by the program, the assignments will ensure that a focused review will be conducted of each of the components of the documentation.
- Decide how the PRT report will be written, assigning responsibilities for sections of the report to each PRT member.

### During the offsite accreditation review teleconference

#### Conduct the offsite review with the PRT members

- Lead the team in collaborating to complete the offsite review report
- Lead the team in determining the compliance of the education program with Standard 6 OTA and Standard 6 PTA in the decision-making process to proceed to an onsite visit.
- Establish responsibilities and next steps towards the onsite visit.

## Following the offsite accreditation review teleconference

- Submit the final offsite review report to the OTA & PTA EAP

## Prior to the onsite accreditation review

- Consult with the program coordinator and the OTA & PTA EAP to establish the schedule for the onsite visit. A sample schedule is included on page 25. The sample schedule should be adapted according to the needs and governance structure of the program.
- Plan the agenda for the PRT meeting to be held in the day and evening of Day 1 of the onsite visit in order to plan and organize the onsite review and review any relevant materials.
- Develop basic questions for each interview in collaboration with PRT members and designate an interviewer for each session.
- Communicate with and answer questions from the other PRT members as the onsite PRT report is being drafted and interview questions are being generated.

## During the onsite accreditation review

- Lead the PRT meeting on Day 1 at the hotel for the purpose of:
  - discussing important points identified during the offsite review
  - establishing the agenda for the first meeting with the program coordinator
  - reviewing the schedule for the onsite review and making any required adjustments. If any adjustments are considered, they must not in any way cause unnecessary burden on the program faculty and staff
  - reviewing the questions for each interview and designating responsibility for recording notes during each interview session
- Lead an initial meeting on Day 2 with the faculty and staff to provide information about the purpose of accreditation and the site visit, the philosophy and structure of the OTA PTA EAP, and planned activities during the onsite accreditation review.
- Maintain the established schedule as much as possible
- Lead or delegate leadership of the interview process for each interview session.
- Request any additional clarifying evidence as required from the program.
- Schedule evening PRT meetings as required to review the day's activities and the goals for the following day. At the end of the first day, review the assignment of responsibility for preparation of specific components of the PRT Report.
- Obtain signatures of all PRT members on the signature page of the PRT Report (this can also be done electronically once the PRT report is finalized.)
- Lead the closing meeting with the program coordinator and any others invited at the discretion of the program coordinator.

### After the onsite accreditation review

- Facilitate completion of the PRT report and submit the final PRT report to the OTA & PTA EAP within two weeks of the visit. The PRT report should include any additional evidence that was not included in the SSR and should also indicate if additional evidence will be forwarded by the program. The report should be submitted electronically.

# ARRIVING ONSITE – THE DETAILED SCHEDULE

## Day 1 - Team Meeting Prior to the Onsite Visit

The PRT Chair will facilitate a meeting of the PRT during the afternoon of Day 1 at the hotel prior to visiting the campus. The purpose of this meeting will be to:

- ensure that PRT members have an understanding of the OTA & PTA EAP, including the decision-making structure
- review the accountability, roles and general responsibilities of the PRT members
- distribute and discuss the final schedule for the visit as well as the specific assignments for each PRT member
- review the information discussed in the offsite accreditation review teleconference regarding the contents of the SSR and the related evidence submitted by the program
- meet with the program coordinator from 4:00 to 6:00pm for introductions, an overview of any issues raised in the offsite report, and a review of the overall schedule as well as the location for PRT members to meet with their assigned individuals and/or groups

Discussion about the offsite review report and the program's SSR and submitted materials will include matters that require clarification and issues of concern. Subsequently, some changes in the schedule may need to be made.

PRT members should arrive at the hotel having begun to draft the PRT report for their assigned standards and having developed draft interview questions for the areas within their assigned standards for the various interview sessions.

## Day 2 – Onsite Visit with the Program

Transportation to and from the hotel and the education program will be provided by the education program unless other arrangements have been made. Upon arrival, the PRT should be directed to the room in which they will be able to meet together and review evidence provided onsite.

The team will meet again with the program coordinator briefly and given a tour of the program and facility. The PRT should be then introduced to the other faculty and staff. During this meeting, the PRT Chair will provide an overview of the OTA & PTA EAP and the accreditation program, the value of accreditation and objectives for the onsite visit. Immediately following the meeting with the faculty and staff, PRT members should proceed to their concurrent meetings as scheduled.

The time that is scheduled for the PRT to have lunch during Day 2 will provide an opportunity for the PRT members to review their observations made during the morning meetings and also to review the evidence provided onsite.

During the evenings, PRT members will meet through dinner and immediately afterwards. This meeting may last the evening; it is an important opportunity for the members to review with each other the observations and findings they have made. The strengths of the program should begin to be discussed as well as any areas



identified for improvement. This is also an opportunity to review the schedule and determine if any changes will need to be made or if the PRT members will require any further evidence to review. At this time, the PRT should also begin to add components of the PRT Report.

### Day 3 – Onsite Visit with the Program

During the morning of Day 3, PRT members will conduct any final meetings that may be required. Subsequently, PRT members will meet to develop consensus about the findings that should be included in the PRT Report.

### Closing Meeting

At the end of the onsite review, PRT members meet with the program coordinator and others, as determined by the program coordinator, for a brief closing meeting.

The purpose of the closing meeting is to:

- thank those who participated in activities related to the onsite review
- provide examples of three strengths of the program and three concerns, as a brief summary of the visit (the program will receive a copy of the report once it is completed)
- provide information about the next steps that are involved in the accreditation review process

The purpose of the closing meeting is **NOT**:

- for the program to provide last-minute evidence or rebuttal of the PRT's summary
- for the PRT to make any recommendations or decisions about the program's overall accreditation status

The following is an outline of information which can be presented by the PRT Chair:

*“The role of the Peer Review Team is to gather information on behalf of OTA & PTA EAP about the education program, and to provide a report on the qualitative and quantitative aspects of the program identifying issues which may be of interest to OTA & PTA EAP.*

*“The Peer Review Team does not make any recommendations about the program's accreditation status. An accreditation recommendation will be made by the OTA & PTA EAP's Joint Accreditation Committee at its next Committee meeting, after which the recommendation will be reviewed by both PEAC and CAOT and an accreditation status decision made. The Accreditation Review and Status Report from the PEAC and CAOT is the only official position of OTA & PTA EAP about the program's accreditation status. Accordingly, any remarks by members of the Peer Review Team must not be construed as indicating accreditation status or the position of OTA & PTA EAP. The JAC treats the findings of the Peer Review Team confidentially. The OTA & PTA EAP urges the program and college/ university to treat the team's findings as confidential, pending receipt of the accreditation decision.”*

It is important to remind the program coordinator that the content of the PRT report is related to observations and evidence gathered by PRT members and that **the recommendation about accreditation status is made by the JAC members with the final accreditation decision coming from PEAC and CAOT.**

Subsequently, PRT members will meet to develop consensus about the findings that should be included in the PRT Report. The PRT meeting room will remain available to the team for the afternoon, and the PRT will continue to meet at the hotel that evening to allow a preliminary draft of the PRT Report to be finalized.

## Sample Schedule for Onsite Review

The schedule below is a guide to assist in planning the onsite visit. The timing, participants and order of activities may vary according to the characteristics and needs of individual programs.

### Day 1

Time	Place	Participants/Activity
14:00	Hotel	PRT coordination meeting
16:00	Hotel	Program coordinator (includes overview of curriculum, and discussion re. issues raised in the offsite report) <sup>9</sup>
18:00	Hotel	PRT coordination meeting

### Day 2

Time	Place	Participants
8:00-8:30	Onsite	Tour of program/ equipment/ lab/ library resources etc.
8:30-9:00	Onsite	Introductory meeting with the faculty (all in one group). PRT Chair introduces team, provides overview of accreditation program, purpose and value of accreditation, and objectives for the onsite visit <sup>10 11</sup>
9:00-9:45	Onsite	Meeting with those responsible for admissions
9:45-10:15	Onsite	BREAK
10:15-11:45 <sup>12</sup>	Onsite	OTA Faculty OTA Fieldwork coordinator PTA Faculty PTA Fieldwork coordinator
11:45-13:00	Onsite	LUNCH
13:00-13:30	Onsite	Administrative support staff
13:30-14:00	Onsite	Individuals responsible for learning resources (librarian, technology)
14:00-14:45	Onsite	Year 1 students <sup>13 14</sup>
14:45-15:30	Onsite	Year 2 students
15:30-16:00	Onsite	BREAK
16:00-17:00	Onsite	OTA Fieldwork preceptors <sup>15</sup> PTA Fieldwork preceptors

<sup>9</sup> Introductions, opportunity for PRT to gather information about the broad context of the program, includes overview of curriculum and discussion of issues raised in the offsite report, discuss any questions that the program coordinator may have.

<sup>10</sup> If the faculty/staff is small, this meeting may be omitted as all relevant faculty may have already met the team.

<sup>11</sup> Faculty meeting should not include the program coordinator or any individual to whom program faculty report to allow for more open discussion

<sup>12</sup> Some PRTs prefer to meet with all faculty + fieldwork coordinator(s) first and split into discipline-specific groups after 30 minutes

<sup>13</sup> Year 1 and Year 2 students may be interviewed concurrently by two groups of PRT members

<sup>14</sup> See program handbook for minimum required number of students from each year

<sup>15</sup> Scheduling this meeting at the end of the day facilitates preceptors' attendance. Providing food is also an incentive!

Time	Place	Participants
17:00–17:30	Onsite	Employers <sup>16</sup>
17:30	Onsite	Program coordinator (optional) <sup>17</sup>
18:00-22:00	Hotel	PRT coordination and report writing

### Day 3

Time	Place	Participants
8:00-8:30	Onsite	Program coordinator if required
8:30-9:00	Onsite	Recent graduates
9:00-10:00	Onsite	Program Advisory Committee (PAC) or representatives
10:00-11:00	Onsite	Meetings with faculty outside of the program who are involved in teaching OTA/PTA students <sup>18</sup>
11:00-12:00	Onsite	Meeting with the department Chair/Dean/Administrator
12:00-12:30	Onsite	Closing meeting <sup>19</sup> with program coordinator and others as determined
12:30-13:30	Onsite	LUNCH
13:30 -17:00	Onsite/ Hotel	PRT meeting - report preparation time
18:00-22:00	Hotel	PRT meeting – report preparation time

<sup>16</sup> Scheduling this meeting at the end of the day facilitates employers' attendance. Providing food is also an incentive!

<sup>17</sup> Opportunity to modify tomorrow's schedule if necessary based on today's interviews

<sup>18</sup> This group may include faculty from nursing etc. who teach the OTA/PTA students.

<sup>19</sup> Closing meeting is to thank the program and provide examples of three strengths and three areas of concern, next steps and timelines. No information regarding overall compliance or overall accreditation status is provided by the PRT.

# REPORT WRITING

The PRT writes a report collaboratively while visiting the education program and finalizes it within two weeks of the visit for submission to the OTA & PTA EAP.

## Purpose of the Written Peer Review Team Report

The PRT Report is used as one of the sources of information for the JAC when making an accreditation award recommendation. The contents of the report must therefore provide some indication of the quality of the program and not just whether evidence of compliance with the criteria is present or absent. The PRT Report will assist the reader's understanding of the program as a whole and within the context of the environment in which the program operates.

The PRT Report represents the findings of the team based upon its study of institutional documents and other materials provided by the program, along with information garnered during confidential interviews with program faculty, staff and stakeholders. All statements, findings and recommendations included in the report are made in good faith with a view toward enhancing the quality of the educational program. The report reflects only that information obtained as part of the evaluation process conducted in accordance with OTA & PTA EAP procedures.

In general, the team's report is an assessment of the program's compliance with the OTA & PTA EAP accreditation standards and associated criteria. In the PRT Report, PRT members are expected to make a determination about whether the program under review complies with each of the accreditation standards and criteria. The team does not formulate a recommendation about the program's overall accreditation status.

## PRT Report Template

A PRT report template is provided by the OTA & PTA EAP to assist in writing the report. For each criterion, there are several sections to complete.

1. Sources of Evidence – these sources include written information from the SSR (which can be entered prior to the onsite visit) and from additional documentation which may be provided onsite, as well as verbal information gathered from interviews.
2. Peer Review Team Description and Rationale – this section should include a summary of the team's observations with respect to compliance with the criterion, including evidence gathered through interviews. The summary should provide a rationale for the level of compliance (see below) assigned the criterion by the team.
3. Compliant (Issue/Weakness) or Non-Compliant (Deficiency) – the team should check the appropriate boxes based on its evaluation of the program's level of compliance with the criterion. To indicate a program is fully compliant with a specific criterion, check only Compliant (i.e.: Issue and weakness boxes to be left blank).

All comments in the PRT Report must directly relate to the criterion being addressed; and be substantiated by evidence provided by the program in its SSR, in documentation reviewed onsite, and/or during interviews. Please take the time to review the narrated PowerPoint presentation entitled: *“Writing the PRT Report”* which provides additional detail regarding how to write the report. The presentation will be shared with the team via prior to the Orientation Teleconference.

## Levels of Compliance

The PRT should determine the program’s level of compliance with each accreditation criterion.

Criterion Met:

- Met with no concerns; or
- Met with recommendations for continued improvement

The PRT may choose to include a commendation or offer recommendations for continued improvement. Any recommendations made are for the program’s consideration only. There is no requirement for the program to respond and no progress report will be requested.

Criterion Partially Met:

- Improvement is needed to fully meet the criterion

It is important that the team outlines what was amiss, and the improvement that is required. One or more progress reports will be scheduled.

Criterion Not Met:

- Requirement Not Met; or
- Required Improvements Not Made (Progress Report only)

It is important that the team outlines what was amiss, and the improvement that is required. One or more progress reports will be scheduled.

## CORE Evaluative Criteria

The OTA & PTA EAP considers compliance with eight CORE accreditation criteria essential for accreditation. An education program must demonstrate compliance with the established CORE criteria to be granted accreditation fully compliant or partially compliant. If one or more of the CORE criteria are assigned “Criterion Not Met”, the program will be granted probationary accreditation, or non-accreditation.

There are three versions of the Accreditation Standards (Pilot, 2012, and 2012 rev. 2016). CORE criteria are different in each version. The CORE criteria for the 2012 rev. 2016 are as follows:

Criterion 1.1      **CORE** The educational program is situated in an institution authorized under applicable law to provide postsecondary education in Canada.

- Criterion 1.4      **CORE** The program lead is a registered occupational therapist or physiotherapist who has the ability to provide leadership for the faculty, staff, and students and management of the program.
- 1.4.1      The program lead has adequate authority and resources to administer the program.
- Criterion 1.5      **CORE** The program has adequate financial resources to achieve its stated goals and objectives and assure its continuing operation.
- Criterion 2.1      The number and qualifications of faculty meet the program’s mission, goals, and objectives through education administration, curriculum development, instructional design and delivery, and evaluation of outcomes.
- 2.1.1      **CORE** The occupational therapy content of the curriculum is overseen and taught by a registered occupational therapist with relevant academic and professional qualifications.
- 2.1.2      **CORE** The physiotherapy content is overseen and taught by a registered physiotherapist with relevant academic and professional qualifications.
- Criterion 3.4      **CORE** The program provides clinical education/fieldwork experiences in occupational therapy and physiotherapy that enable students to achieve the learning outcomes.
- 3.4.1      **CORE** Clinical/fieldwork education includes a minimum of 500 hours in the clinical setting.
- 3.4.2      **CORE** Clinical/fieldwork education includes no less than 30% (150 hours) of the total time in each discipline for each student.
- 3.4.3      **CORE** A registered occupational therapist faculty advisor is available to students and preceptors on issues related to occupational therapy practice in fieldwork. Similarly, a registered physiotherapist faculty advisor is available to students and preceptors on issues related to physiotherapy practice in fieldwork.

**Criterion Met:**

Feedback to the program; a response is not required.

**Example**

**Standard 6 OTA/PTA Competencies**

**Criterion Met:**

The accreditation documentation clearly indicates that there are objectives and supporting evidence for all criteria in Standard 6. The program may wish to consider ways and means whereby these various objectives and their supporting evidence can be easily tracked for future reference and accreditation reviews.

### Criterion Partially Met:

This designation should be used when the team is able to confirm through a review of evidence that the program is in partial compliance with the criterion, and *improvement is needed to achieve full compliance*.

#### Example:

##### Criterion 1.5 (CORE):

**The program has adequate financial resources to achieve its stated goals and objectives and assure its continuing operation.**

##### Criterion Partially Met:

At the time of the accreditation review, a program's current budget is balanced but it is recognized that cuts to the program are imminent, and the budget next fiscal year will be in deficit.

#### Example:

##### Criterion 2.1:

**The number and qualifications of faculty meet the program's mission, goals, and objectives through education administration, curriculum development, instructional design and delivery, and evaluation of outcomes.**

##### Criterion Partially Met:

At the time of the accreditation review, a program relied on a small number of faculty for implementation of the curriculum, carrying out many committee responsibilities and for all the program development. While several additional instructors were engaged on contract to have a high level of involvement in program development and implementation, as well as to participate in various program committees, they had an insecure status as their contracts were renewed annually, thus putting the longer term quality of the program at risk.

### Criterion Not Met:

This designation should only be used when the team is unable to find sufficient evidence that supports a program's compliance or when the evidence provided does not demonstrate compliance with the criterion..

## Example

Criterion 3.4.2 (CORE):

**CORE**

Clinical/fieldwork education includes no less than 30% (150 hours) of the total time in each discipline for each student.

Criterion Not Met:

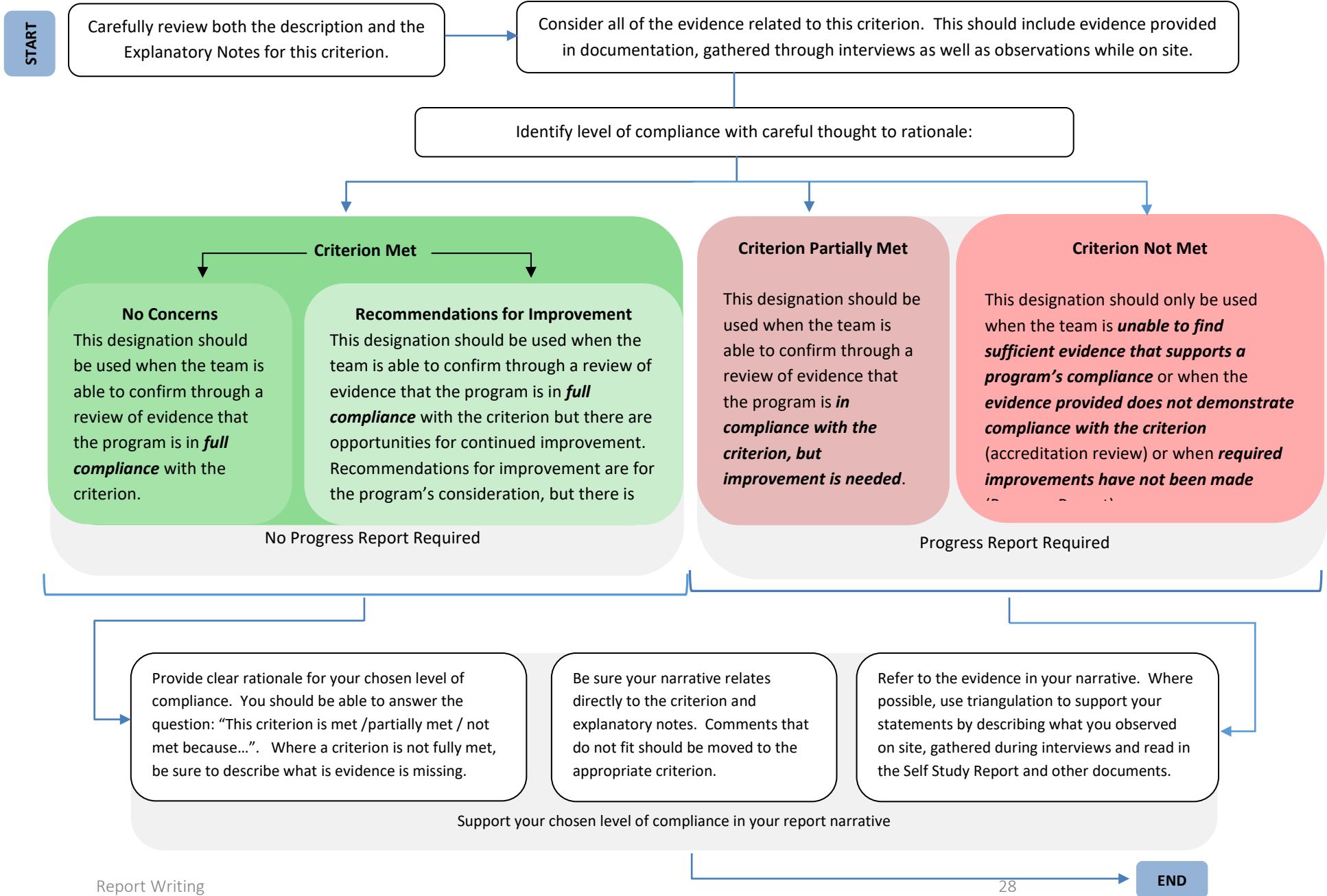
A program provides evidence that 4 students did not complete the minimum required 150 fieldwork hours in OTA-specific practice.

The team must provide rationale within the criterion for the determination made with respect to compliance. Detail of gaps in compliance must be clearly articulated. The JAC will rely on the report, the PRT's determination, and the rationale to assist in making an overall accreditation award recommendation. The committee will review the report in detail and will look to confirm that the evidence provided matches the level of compliance assigned. Each statement made by the PRT in the report must be supported with commentary and rationale. The following diagram may be used as a decision making guide.



# PRT Guide to Selecting Levels of Compliance – 2017 Compliance Language

## FOR EACH CRITERION UNDER REVIEW:



## Writing the Report

When developing the PRT Report, the PRT members should avoid:

- naming individuals; comment, if necessary, on the office, not the officeholder
- criticizing, as this is not the purpose of an accreditation review
- making gratuitous or trivial recommendations
- offering specific suggestions to remedy a perceived problem; instead, a brief diagnostic statement of the perceived problem, linked to the appropriate accreditation condition, is usually sufficient, leaving the specific solution to be worked out by the institution
- advocating personal interests of team members and individually favoured educational theories
- including satirical and accusatory statements

When writing the PRT Report, consider the following:

Internal Consistency	Is the report coherent and free of mixed or conflicting messages?
Clarity	Does the report say exactly what is intended, thus avoiding misinterpretation of information contained within the report?
Perspective	Does the report clearly represent the findings and recommendations coming from the team as a whole, and not just one member or point of view?
Comprehensiveness	Does the report note whether the program satisfies all the conditions for accreditation?
Tone	Does the report use diplomatic language, while being direct and clear as to its meaning?
Limits	Does the report include comments on advocacy matters that go beyond the requirements for accreditation?
Documentation	Do the findings clearly state the context or identify the evidence on which the statements are based?

## Resources for Report Writing

The OTA & PTA EAP has developed a number of resources for peer reviewers as they work to complete the accreditation review. The following resources will be shared with PRT members:

- an offsite review report template
- a sample, completed offsite review report for reference
- a narrated PowerPoint presentation entitled: “Writing the PRT Report”
- an onsite review report template
- a sample, completed onsite review report for reference
- individual interview sheets, with examples of questions which can be adapted/used for various groups of interviewees

- a checklist of concerns, to be used to track gaps/resolution of gaps as the accreditation visit proceeds

# GATHERING EVIDENCE AND INTERVIEWING: TIPS FOR PRT MEMBERS<sup>20</sup>

## Starting to Gather Evidence

- Before beginning to assess the documentation provided by the program, review the OTA & PTA EAP accreditation standards. Consider how each criterion might be understood in the context of an OTA and PTA education program.
- Set up a systematic note-taking format
- Read the program documents thoroughly.
- Look for evidence to support the standards and associated criteria. Some aspects of the documentation may provide evidence for more than one standard.
- Look for evidence that confirms compliance with the standards and associated criteria. Such evidence may be found in policies, staffing, facilities, funding, frequency of meetings, reviews of programs, etc.
- Make note where evidence is found
- Make note of lack of evidence preventing confirmation of compliance (e.g.: absence of documents, lack of funding, no mention, no will to implement).
- Make note of where evidence is found. Other PRT members may have missed the evidence, or may have other interpretations. Ensure that the location of that evidence can be found again upon request - careful notation of evidence facilitates final report-writing.

## General Comments about Evidence

- Any claims made through the accreditation process (both by the PRT and by the program) must be supported by evidence.
- Evidence needs to be widespread and representative before a claim can be made.
- One way to strengthen an evidence-based claim is to seek the evidence through a range of methods (observation, document review, interviews).
- A second way to strengthen claims is to seek evidence from various people involved in the program.
- A third way to strengthen claims is to actively seek negative instances and information that would disconfirm the team's interpretations.

## The Impact of Team Members' Beliefs and Values on Gathering Evidence

Team members bring differing strengths and perspectives to the accreditation process. The collective knowledge and experience of the PRT provides a range of lenses through which evidence can be analyzed, thus enhancing the strength of claims that are made.

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<sup>20</sup> Adapted from the College of Teachers of Ontario (2004).

Personal and professional beliefs and values shape how evidence is both seen and interpreted. What individuals note as valuable information can depend on life experience, knowledge base and values.

Therefore, when considering evidence, PRT members should:

- become attuned to both personal views (explicit and implicit) about occupational and physiotherapy practice and education, and about the nature of colleges/universities.
- be committed to monitoring the effects of their beliefs and values. Strategies for monitoring include:
  - actively noticing emotional and judgmental reactions at all phases of the evidence-gathering and report-writing processes
  - being open with other PRT members about strong beliefs and biases
  - actively seeking evidence that might disconfirm pre-existing biases
  - monitoring the tendency of personal beliefs to take them in directions that do not result in documenting evidence for standards

### Interviewing

The purpose of the interview is to probe for information in addition to that provided in the program’s Self Study Report or in the documentation provided onsite.

#### Types of Interview Questions

TYPES OF QUESTIONS	EXAMPLES
<i>Overview</i>	"Can you give me a sense of what it is like to be a student in this program?"
<i>Inventory</i>	"In what ways did you..." "To what extent do you..."
<i>Process clarification questions</i>	"Help me understand how this works..."  "Under what circumstances would this have occurred?"  "If I were a new faculty member, help me understand how'..." "To help me understand this, could you give me an illustration of how..."
<i>Probes for clarification</i>	"You just mentioned something about a conference/workshop that the faculty provides. Can you tell us more about that?"  "You mentioned that you believe technology is used in everyone's courses. Can you tell us more about that, and perhaps suggest where in the documentation we might look to find out about it?"  "You mentioned the term '_____'. Can you explain that term for us?"
<i>Probes for absences</i>	"So far today we haven't heard anyone talk about issues of informed consent in the curriculum and how this topic is introduced. Can you help us see where this might be discussed in the courses?"

TYPES OF QUESTIONS	EXAMPLES
<i>Probes for negative instances</i>	"In the evidence provided about program evaluation, we see that a policy exists to gather feedback from all stakeholders in the program. Can you help us see instances where the procedures work successfully and where they might break down?"

## Good Interview Questions

The OTA & PTA EAP expects interview questions to be:

- To the point: help build evidence required for making accreditation decisions
- Open-ended: do not result in dichotomous or yes/no answers
- Singular: help focus interviewee's thoughts
- Clear: provide enough explanation so that the interviewee understands why the question is being asked and why it is pertinent
- Not leading: avoid phrasing that leads towards the "expected" answer

PRT members should work to develop interview questions that reflect these qualities.

## When Conducting an Interview

### Opening the interview:

- Thank the participants for attending, outline the purpose of the interview, reiterate the confidential nature of the proceedings, and introduce members of the Peer Review Team – use the following standard introduction as a guide:

#### Standard introduction for interviews during OTA & PTA EAP accreditation onsite reviews

"Thank you for agreeing to participate in this interview for the accreditation review of the *OTA and PTA Program*.

The purpose of the interview is to confirm evidence about the education program's compliance with the OTA & PTA EAP accreditation standards and to ask for additional information where necessary.

In keeping with the transparency of the accreditation processes, notes of the comments will be made and some may be included in the Peer Review Team Report. The report will not specifically identify any individuals by name nor will it attribute comments to any one person."

### Tips for opening the interview:

- be aware of the anxiety that interviewees may have and try to make them feel comfortable
- keep the tone fairly formal, but if necessary, use small talk and tension-reducing language to put

- everyone at ease
- start with simple questions

### During the interview:

#### Remember to:

- Treat the interviewee as a colleague
- Use active listening skills
- Focus on the questions and on the interviewees' answers
- Use silence to give room for others to speak
- Demonstrate patience
- Use language that is polite but neutral (“we appreciate your efforts” or “thank you for your openness and candor”)

#### And avoid:

- Reacting to information provided by the interviewees
- Offering any opinions, even when asked
- Using judgmental language (e.g.: “this is a great program” or “I’m really impressed with this work”) When the PRT reconvenes later, the other evidence may not support such comments.
- Pursuing interesting but irrelevant answers
- Talking about one’s own experience
- Quoting other earlier interviewees who might have made statements contradicting the current interviewee
- Being confrontational

### Concluding the interview:

- Ask if there are things the interviewees want to add; conclude by thanking everyone for their participation.

## Suggestions for Interviewers

### The designated interviewer should:

- ✓ maintain eye contact with the speaker
- ✓ maintain a polite and respectful manner at all times
- ✓ be aware of his/her posture and body language
- ✓ ask clear, concise, one-part questions
- ✓ ask one question at a time
- ✓ use rephrasing of question where necessary
- ✓ probe but do not prompt the interviewee
- ✓ ask for clarification where necessary
- ✓ be able to explain what information is being sought
- ✓ separate the interesting answers from the useful ones, and move from interesting to useful

- ✓ provide silence to give room for others to speak
- ✓ organize the interview to allow all interviewees a voice
- ✓ observe the interviewee's non-verbal behaviour
- ✓ listen to all the interviewee says before responding or asking another question
- ✓ paraphrase what is heard from the speaker; clarify understandings
- ✓ summarize what was heard
- ✓ ask whether the interviewee has anything to add

## Note-Taking

### General Comments about Note-Taking

- Detailed note taking supports the process of triangulation, showing that the evidence is drawn from a variety of sources and through a variety of methods
- Evidence-based claims require details of evidence used; note taking from interviews and documents must be systematic and thorough.
- Detailed note-taking should include the location of the evidence, so that evidence can be traced back to particular interviews or particular documents.
- To assist in thorough note-taking, it is helpful for each PRT member to develop some method of short-hand note-taking, and a format that results in retrievable information to facilitate connection of evidence with the accreditation standards.

### Suggestions for Taking Notes During Interviews

Details	Even if you don't fully understand what is being said, write it down. Later, the information can be discussed and clarified with other PRT members during evening meetings.
Identification	Kept track of who said what by using initials, and listing full names at outset of interview.
Verbatim phrases	Where record is verbatim, put quotation marks around it for possible use in report writing.
Judgments	Be aware of effects of personal belief systems entering into note taking.
Format	Set up notebook pages to leave space for connecting to Standards and for writing comments about information to verify or additional questions to be asked.
Revisit	As soon after the interview as is possible, re-read your notes and add any information to add to the clarity of what you have recorded. If at all possible, interviews should be organized to provide PRT members with time for this between interviews.



# SAMPLE INTERVIEW QUESTIONS

The OTA & PTA EAP provides sample interview question templates for modification by PRT members as required – these will be shared via the secure PRT folder.

## Questions for Administrators, Faculty, Staff and Students

*Upper level administrators (i.e.: Dean or equivalent):*

- Where do you see the OTA / PTA program in five years?
- In its current form, how sustainable is this program?
- We've heard about the expansion plans for the program for a few years from now. In the interim, what are the plans to accommodate change, expansion, a degree program?
- How will the college/university support the program as it evolves in the future?
- Help us understand how the vision statement of the institution fits with that of the OTA & PTA program.
- The stability of the program is apparent. If you were looking for a new faculty member for the program, what kinds of qualifications, specific interests or service activities would you want that person to have to take the program to the next level?
- Tell us about the supply and demand studies regarding OTAs & PTAs that have been conducted to inform the admissions criteria for the program.
- The funding for the program appears to be a split between the college/university and the provincial government (if appropriate). Do you see this as a long-term formula for sustaining the program?

*Program Coordinator:*

- How are faculty evaluations/performance reviews conducted? How often?
- How are teaching/ service/other responsibilities or decisions made to be fair and equitable?
- Do you see gaps in content in the program?
- Help us to understand the conceptual framework for the curriculum
- Do you think the curricular content and the way it's taught will be responsive to the future practice of OTAs and PTAs? Is it up to the challenge of meeting future directions in the profession?

*Coordinator of Fieldwork/Clinical Education:*

- Have there been any reductions in the clinical placements available? If yes - how have you managed the reduction in placements?
- How do you evaluate new clinical sites? Describe the process.
- How does the first placement complement the program, and how are students prepared for it?
- Do you use any role emerging fieldwork placements? If so, how do you assess whether a particular student is suitable for these placements?
- How are students supervised and supported during role-emerging placements?
- Have you found any challenges with supervising role-emerging placements (on or off site)?
- How do you ensure that each student achieves the required placement hours in each discipline prior to graduation? Can you describe your contingency plans?

- Have you used “make-up” activities for students who are short of the minimum required hours? If so, can you tell us about the process for selecting/creating the activity?
- Describe the communication lines between the field placements and the school: complaints, evaluation, information, orientation.
- Are there course outlines for the clinical placement courses?

*Program Advisory Committee (or equivalent):*

- Describe the process for curricular development and the implementation of formal changes such as a change in the course structure.
- What is the conceptual framework for the curriculum?
- What is the rationale for curricular choices?
- What is the educational model for the curriculum plan?
- How does the program build on higher levels of knowledge, skills, attitudes?
- The SSR states “The curriculum ‘review and refresh’ process is excellent and perpetual.” How would we trace this process of review and renewal?

*All faculty:*

- Since the last accreditation review, what are the most significant changes to the program?
- Help us understand the balance between teaching and other requirements such as service to students and committee responsibilities.

*Individual Faculty:*

- In a small faculty as this one is, how do you manage all of the responsibilities for faculty that are outlined in the SSR—teaching, committees, service, etc.?
- What multiple sources of assessment are used to determine student success in the program?
- As a faculty member, how do you remain current?
- What recent professional development opportunities have you had or taken advantage of?
- How is the faculty involved in the governance of the program?
- As you know, there is an equity committee in the institution. What is your understanding of equity and how it is applied in this program?

*Part-time faculty/Sessional instructors:*

- Clarify your roles for us.
- How are you prepared for your roles?
- Are you evaluated?
- How are you oriented to the OTA & PTA program? What does the program offer to prepare you for the teaching role?
- How involved are you in the governance of the program?
- How are you informed or involved in updates in curriculum and/or changes to the program?

*First year students:*

- Describe the admissions process. If there is an interview, from your point of view, what is the value of the interview?

- How is the workload? Does it meet your expectations?
- Do you find that you have sufficient support—faculty support, advisor support?

*Second Year Students:*

- Did you have a first year fieldwork placement? Was it a valuable learning opportunity? Can you describe that placement and what you did?
- How is the workload? Does it meet your expectations?
- Do you find that you have sufficient support—faculty support, advisor support?
- Describe the role of the student advisor (if applicable). How do you interact with your student advisor?
- What could you tell us that would improve the course work in the academic program?
- Did you complete any non-traditional fieldwork placements or role-emerging placements? What was the setting? How were you supervised and supported during those placements?
- Could you tell us about what would happen if you were unable to complete the minimum fieldwork hours due to unforeseen circumstances such as illness? Could you explain what would happen in that situation?

*Admissions Processes (Program coordinator/Dean as applicable):*

- Help us understand the admissions process.
- Describe the criteria used to evaluate candidates for admission.

*Preceptors:*

- How do you maintain communication with the program?
- How have you found the support provided by the fieldwork/clinical education coordinator in resolving issues during placements?
- Do you feel well prepared for the role of preceptor?
- Do you feel that the academic program adequately prepares the students for the clinical experience?
- What are your suggestions for improving the clinical education program?

*Recent graduates:*

- Did the program adequately prepare you for the realities of clinical/fieldwork placement?
- What would you like to have learned more about?
- Were there areas of overlap in the program or insufficient content in the curriculum?
- Were you prepared in the program to be a self-directed lifelong learner? Can you give us some specific examples?
- Did you have a role in the governance of the program? Examples?
- Did the faculty adequately address concerns surrounding communication issues? What was the nature of the communication with faculty members?
- Did you complete any non-traditional fieldwork placements or role-emerging placements? What was the setting? How were you supervised and supported during those placements?
- Could you tell us about what would have happened if you were unable to complete the minimum fieldwork hours due to unforeseen circumstances such as illness? Could you explain what would happen in that situation?

*Library:*

- Is the budget adequate to meet the needs of the program?
- How often and regularly do students access the materials?
- Do technological facilities enable students to work off-site?
- Describe the audio-visual capacity and availability of materials to students.

*Computer Lab/ Technical Support:*

- Does the institution have a technology renewal program in place? If so, what is its effect on the OTA & PTA program?
- Is the technological infrastructure sufficient to operate programs, communication and research?
- Describe the level of technical support to programs and the OTA and PTA program in particular—computer and audio-visual.
- Is technological support evaluated? By whom? How? How often?

*Program support staff:*

- Are staff involved in the designation of responsibilities?
- Do you have job descriptions?

*Lab assistants:*

- How are you prepared for your roles?
- Are you evaluated?
- How are you oriented to the program?
- How involved are you in the governance of the program?

## Questions about Accreditation Review in General

*Conceptual Framework, Mission Statement, Brief History:*

- What do teaching and learning mean in this program?
- What evidence is there that the conceptual framework or mission statement is continuously evaluated?
- Can students, clinicians, and faculty members articulate the purpose or mission of the program?
- Do part-time and sessional instructors assist with the development of the conceptual framework?
- What is it that beginning students should know and be able to do?
- What is the institution's vision for the OTA/PTA program?
- If money were not an issue, what changes/additions to the program would you like to see?

*Technology:*

- What evidence is there of the faculty's level of comfort with technology?
- How do faculty use or incorporate technology in their teaching?
- How is technology integrated into governance and program delivery? Curriculum? Assessment?
- How is technology used to monitor and assess student performance?
- Is technological support evaluated? How? By whom? How often?
- Are there technology skill requirements for students?

- Are there clinical placements where students can implement technology into their practice?
- Does the college/university have a technology renewal program in place? If so, explain its effect on the program.

*Fieldwork:*

- How does the faculty stay abreast of what issues are affecting occupational therapists, physiotherapists, OTAs and PTAs in the field? Their priorities? Their politics?
- In the evaluation of students, whose evaluation carries the most weight: the clinician's or the faculty member's?
- Describe the faculty's responsibilities when they supervise clinical practice.
- Give two examples of how a student's knowledge and skills are assessed.

*Students:*

- What does the faculty do to mentor/encourage/advise students?
- What formal advisement policies or procedures are in place?
- How are students who are having difficulty with clinical placements or programs in general identified? Counselling? Advised?
- What are the multiple sources of data that a student's assessment is based on—observations, demonstrated competence, portfolios, research papers, examinations, clinical reports, etc.?
- Are there follow-up studies on graduates?
- What proportion of students is counselled out of the program?
- How is the success of the program measured?
- What strategies are used to attract underrepresented groups in society?
- In what areas do students have the greatest struggles?
- What is the profile of a student that the program is trying to attract?
- How does the admissions process facilitate the selection of this type of student?

*Faculty Personnel:*

- How is the faculty involved in the governance of the program?
- How do part-time faculty contribute to the development, maintenance, and evaluation of the mission statement and/or conceptual framework?
- Explain the rationale of the distribution of permanent faculty to part-time or seconded instructors in terms of interaction/exposure to students.
- When making faculty appointments, what are the criteria that the college/university seeks?
- How do faculty members stay current?
- What policies are in place to support professional development as it relates to student learning?
- How is the faculty committed to service to the community? What evidence is there? What role-modelling for students is evident?
- How does the faculty continue to support the refinement and implementation of ongoing professional learning? What governance policies are in place to support it? What resources are available?
- How are faculty involved in service to the local community?
- How do instructors in the program remain current in theory, practice, content, and methodology?

- What portion of the faculty's budget is allocated to faculty professional development?
- What examples are there of the faculty's engagement in professional development learning experiences in the past year?
- Give examples of the kinds of professional development activities that faculty have provided for clinicians.
- In making faculty appointments, what kinds of experiences and interests or backgrounds do you look for?

*Faculty Governance:*

- Are the resources available to do the job, for example: money, instructional and office space, technology resources, library resources?
- How many dollars per student does the faculty receive compared to the rest of the college/university?
- Does the college/university have a technology renewal program in place? If so, explain its effect on the program.
- Does the faculty anticipate in any partnerships with business, industry, other colleges/universities, etc., that will bring additional resources to the program?

*Library Resources:*

- Does the library and its resources reflect the numbers of students enrolled in the program, and the proportion spending on other faculties at the college/university?
- Explain how technology is included in the library budget.

# OVERVIEW OF TIMELINES AND RESPONSIBILITIES

## Timelines for Accreditation Activities

Information about the typical accreditation process and timelines for completion of related activities is provided in Table 1.

Table 1. Accreditation Program Activities and Timelines – all activities

Accreditation Activity	Timeline for Completion of Activity	Lead Responsibility
<b>Prior to onsite review</b>		
<b>1. Planning for accreditation</b>		
Submit Letter of Intent to OTA & PTA EAP	12 months prior to onsite review	Education Program
Provide consultation for accreditation activities	Throughout accreditation process	OTA & PTA EAP
Schedule date for on-site peer review in consultation with program	10 -12 months prior to on-site review	OTA & PTA EAP
Select members of PRT in consultation with program	10 months prior to on-site review	OTA & PTA EAP
<b>2. Program Self Study</b>		
Complete Self-Study Report and submit electronically to OTA & PTA EAP	5 months prior to onsite review	Education Program
Distribute to PRT members	2 months prior to offsite review teleconference	OTA & PTA EAP
<b>3. Offsite Review</b>		
Review Self Study Report and complete offsite review via teleconference	3 months prior to onsite review	PRT OTA & PTA EAP
Complete offsite report	2 weeks following offsite review teleconference	PRT
Forward offsite report to education program	Upon receipt of offsite report	OTA & PTA EAP
<b>4. Onsite Visit</b>		
Confirm schedule for site visit in consultation with the OTA & PTA EAP and PRT Chair	In time for offsite review teleconference	Education Program PRT Chair

Accreditation Activity	Timeline for Completion of Activity	Lead Responsibility
Prepare materials for review as requested in the offsite report	In time for onsite review	Education Program
Conduct onsite visit	At scheduled time	PRT
<b>Following Onsite Review</b>		
5. Post Review Survey		
Send evaluation survey link to program for completion	Immediately	OTA & PTA EAP
Complete post-review survey	Upon receipt of URL	Education Program
6. PRT Report		
Preparation of report and submission to the OTA & PTA EAP	Within 2 weeks of the onsite visit	PRT OTA & PTA EAP
Send evaluation survey link to PRT for completion	Immediately upon receipt of PRT report	OTA & PTA EAP
Complete post-review survey	Immediately upon receipt of URL	PRT
Forward report to education program for review	Immediately upon receipt of PRT report	OTA & PTA EAP
Respond to the report	2 weeks following receipt	Education Program
Prepare Accreditation Dossier	Immediately upon receipt of Program Response	OTA & PTA EAP
<b>Following PRT Report Completion</b>		
7. Decision-making re: Accreditation Status		
Review Accreditation Dossier and make accreditation award recommendation	At scheduled JAC meetings twice annually	JAC
Forward accreditation award recommendation and required documentation to PEAC and CAOT	Within 2 weeks of JAC meeting	OTA & PTA EAP
Review recommendation and make accreditation award decision	At next scheduled Board meeting	CAOT & PEAC



Accreditation Activity	Timeline for Completion of Activity	Lead Responsibility
Notify education Program, Program administration, Peer Review Team members, JAC members	Within 6 weeks of receipt of accreditation award decision	OTA & PTA EAP
Publish results	Within 2 weeks of receipt of accreditation award decision	OTA & PTA EAP
Destruction of all materials (electronic and hard copy) related to the review, and completion/ submission of FORM-06	Within 4 weeks of receipt of accreditation award decision Upon notification by the OTA & PTA	Education Program PRT JAC

### Responsibilities of the PRT

Information about the responsibilities of the PRT during the accreditation process and timelines for completion of related activities are provided in Table 2.

Table 2. Peer Review Team Responsibilities

Responsibility / Activity	Completion
<b>Before the onsite review</b>	<b>Time before visit:</b>
Complete two online training modules	5 months
Participate in an orientation teleconference	5 months
Receive and conduct general review of the SSR and participate in offsite review teleconference meeting	3-5 months
PRT Chair works with OTA & PTA EAP and education program coordinator to develop schedule for onsite visit	3-4 months
Prepare PRT offsite review report and submit to OTA & PTA EAP	2-3 months
Conduct review of the education program SSR and begin to draft PRT onsite review report	2-4 weeks
<b>During the onsite review</b>	
PRT Chair consults with education program coordinator throughout the visit about the schedule and any special arrangements	
Participate in PRT meeting Sunday (day before site visit begins)	
Conduct/participate in interviews and tours of facilities as required	

Responsibility / Activity	Completion
Participate in PRT meetings to discuss findings and reach consensus on PRT report	
Complete the draft of the PRT report	
<b>Following the onsite review</b>	<b>Time after visit</b>
Collaborate to prepare the final PRT report and submit to the OTA & PTA EAP	2 weeks
Complete the onsite review evaluation survey (link provided by the OTA & PTA EAP)	2 weeks
Destroy/delete copies of confidential material as instructed by OTA & PTA EAP	Following notification of final accreditation decision

### Responsibilities of OTA & PTA EAP

Information about the responsibilities of the OTA & PTA EAP during the accreditation process and timelines for completion of related activities are provided in Table 3.

Table 3. Responsibilities of the OTA & PTA EAP

Responsibility / Activity	Completion
<b>Before the onsite review</b>	<b>Time before visit:</b>
Receive Letter of Intent from program	12 months
Schedule date for onsite visit	12 months
Appoint PRT members and Chair	10 months
Forward PRT names to education program and receive approval	10 months
Ensure all forms (Confidentiality/Conflict of Interest) are signed and submitted by the PRT	9 months
Schedule date for offsite review teleconference	8 months
Provide access to OTA & PTA EAP education modules to PRT	8 months
Receive Self Study Report from education program	5 months

Responsibility / Activity	Completion
Distribute copy of Self Study Report to PRT members	4 months
Participate in offsite review teleconference	3 months
Organize travel and accommodation for PRT members (including meeting room at hotel for PRT)	3 months
<b>Following the onsite review</b>	<b>Time after visit</b>
Send post-visit evaluation survey link to program	Immediately
Receive PRT report from PRT	2 weeks
Send evaluation survey link to PRT for completion	2 weeks
Review/edit PRT report for consistency	2 weeks
Send PRT report to education program for review/clarification	2 weeks
Receive Program Response to PRT report from the education program	4 weeks
Prepare accreditation dossier for JAC, and Boards of PEAC CAOT	For respective meeting dates
Summarize evaluations	8 weeks
Notify program of accreditation award decision	Upon notification of accreditation award decision
Notify PRT of accreditation award decision and request destruction of confidential information	Upon notification of accreditation award decision

## Responsibilities of the Education Program

Information about the responsibilities of the education program during the accreditation process, and timelines for completion of related activities are provided in Table 4.

Table 4. Education Program Responsibilities

Responsibility / Activity	Completion
<b>Before the onsite review</b>	
	<b>Time before visit:</b>
Forward Letter of Intent to OTA & PTA EAP	12 months
Review PRT and approve member	10 months
Submit Self Study Report by due date	5 months
Review PRT offsite report and prepare for onsite review based on feedback	3 months
Develop schedule for onsite visit with PRT Chair and OTA & PTA EAP	4 months
Schedule all required meetings and interviews, including booking meeting rooms	At least 4 months
<b>During the Onsite Review</b>	
Meet with PRT at hotel Sunday at 4:00pm, day prior to onsite visit	
Provide transportation to and from the hotel/campus for PRT each day, or make alternative mutually agreed-upon arrangements.	
Provide orientation/tour for PRT to program site and introduce PRT to program faculty and staff.	
Provide secure room with Internet access for PRT to review materials	
Provide additional room to conduct interviews	
Discuss any special arrangements or revisions to schedule and adapt the schedule as required	
Facilitate adherence to the planned schedule	
Introduce PRT to personnel when visiting outside of the program	
Be available to provide information or other support to PRT as required	

Responsibility / Activity	Completion
Arrange for mid-day meal and breaks as required	
Arrange for transportation as required to clinical facilities, and/or other campus locations	
<b>Following the onsite review</b>	<b>Time after visit</b>
Distribute evaluation survey (provided by OTA & PTA EAP) to appropriate faculty and staff	1-2 weeks
Receive the PRT report for review	2 weeks
Submit Program Response electronically to the OTA & PTA EAP	4 weeks

