

PROGRAM ACCREDITATION HANDBOOK

2020 revision

Occupational Therapist Assistant & Physiotherapist Assistant
Education Accreditation Program



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PREFACE

This handbook provides information about the accreditation of occupational therapist assistant and physiotherapist assistant education programs in Canada including standards, and the policies and procedures of the accreditation program.

Occupational therapist assistant and physiotherapist assistant education program faculty, instructors and staff will find the information essential for guiding their accreditation review processes. Peer Reviewers or those interested in becoming reviewers may also find this handbook informative and are encouraged to read the Peer Review Team Handbook. This handbook can also help college or university administrators and members of the public to understand how accreditation advances quality occupational therapist assistant and physiotherapist assistant education in Canada.

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INTRODUCTION & BACKGROUND INFORMATION

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

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 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.

Accreditation: Values and Operational Principles

In its operations, the OTA & PTA EAP adheres to the Association of Accrediting Agencies of Canada (AAAC) Guidelines for Good Practice and 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 Education¹. 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).

¹ 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.

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 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 (JAC) 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 2009²
- Profile of Occupational Therapy Practice in Canada, CAOT 2007³
- Essential Competency Profile For Physiotherapist Assistants in Canada, NPAG 2012⁴
- Essential Competency Profile for Physiotherapists in Canada, NPAG 2009⁵
- PEAC Accreditation Standards, Policies & Procedures⁶
- CAOT Accreditation Standards, Policies & Procedures⁷

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

² Available on the [CAOT website](#)

³ Available on the [CAOT website](#)

⁴ Available on the [NPAG website](#)

⁵ Available on the [NPAG website](#)

⁶ Available on the [PEAC website](#)

⁷ Available on the [CAOT website](#)

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.

Historical and Current Roles Related to OTA & PTA Accreditation in Canada

CAOT, COPEC and PEAC were involved in the OTA & PTA EAP at its inception. Each organization had a unique role contributing to the initial development and ongoing implementation of this accreditation program as follows:

CAOT and PEAC jointly:

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

Education Programs:

- requested initiation of the accreditation program (COPEC)
- are the recipients of the accreditation process
- fund the program through annual accreditation fees

CAOT, PEAC and education programs jointly:

- volunteer as members of Peer Review Teams (PRT) for accreditation reviews
- volunteer as members of the Joint Accreditation Committee (JAC) who collaborate to:
 - review and make recommendations for revisions to accreditation standards
 - review accreditation reports and make accreditation award recommendations
 - develop, review, and make recommendations for revision policies and procedures related to the OTA & PTA EAP

PEAC:

- administers the accreditation program (financial oversight, insurance and legal obligations, and contracting staff/consultants)

Quality Monitoring of the Accreditation Program

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 evaluations related to their participation in the accreditation process. The surveys are designed for education program faculty and staff 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 receive summaries of evaluations of their performance completed by the faculty and staff of the education program, as well as by their fellow PRT members. The JAC and OTA & PTA EAP staff use results of the evaluations to monitor and improve the quality of accreditation processes. OTA & PTA EAP staff use results of the evaluations to guide changes in accreditation processes and ensure that quality services are provided.

Funding of the Accreditation Program

The only source of funding for the accreditation program is the annual fees paid by programs with accreditation status and by those seeking candidacy status. OTA & PTA EAP seeks additional support (e.g., grants), for special projects as required.

Services Offered by OTA & PTA EAP

The following services are offered by OTA & PTA EAP to assist programs through the accreditation process:

- OTA & PTA EAP Program Accreditation Handbook
- electronic copies of documents and forms
- consultation about accreditation processes and requirements
- training and consultation to assist development of Self Study Reports (SSRs)
- training for PRT members via online education modules and through personal contact with OTA & PTA EAP staff
- sample reports for education programs and for PRTs to guide report writing

In addition, the following services are offered for stakeholders in the accreditation process:

- a directory of accredited Canadian occupational therapist assistant and physiotherapist assistant education programs, and of programs with candidacy status
- a website to provide current information about the accreditation program and with links to other sites related to accreditation
- a central resource for education materials about accreditation and related issues

OVERVIEW OF THE ACCREDITATION PROCESS

The Accreditation Process

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 awarded by the Joint Accreditation Committee.

2. Letter of Intent for Accreditation Review

The education program submits a letter of intent to OTA & PTA EAP to participate in a full accreditation review (preliminary and site). A template Letter of Intent is available in Appendix 1. 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. Preliminary 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. There must be compliance with 80% of the criteria in Standard 6 OTA and Standard 6 PTA based on submitted evidence to proceed with a site 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 making their decision to proceed with the site accreditation review. Deferral of the site visit may be necessary (*ACC-16 Decision to Proceed Following Preliminary Review*). A preliminary review teleconference is held with the OTA & PTA EAP Program Manager and the PRT to draft the preliminary review report. Within two weeks of the preliminary review, the report is forwarded to the education program to assist in its preparation for the site visit, and, if necessary describe additional information/documentation requested by the PRT.

5. Site Accreditation Review

The PRT carries out the site 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 site review, 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 Site Report to OTA & PTA EAP

Within two weeks of the site 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 final PRT report is sent to the education program. The program responds to the PRT report to correct any misinformation.

8. Joint Accreditation Committee Review

The Confidential Accreditation Dossier is prepared; the dossier consists of the program's Self Study Report, the final 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 and a recommended accreditation award status for presentation and discussion 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*). The possible accreditation awards include:

- 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 review. The Boards of PEAC and CAOT review the recommendation and award an accreditation status.

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).

COMPONENTS OF THE ACCREDITATION REVIEW

Candidacy Status

Application for candidacy status is a pre-requisite for occupational therapist assistant and physiotherapist assistant education programs to enter the accreditation process. While candidacy status denotes a formal affiliation of the education program with the OTA & PTA EAP, it does not assure future attainment of accreditation status.

Education programs interested and prepared to begin the accreditation process by applying for candidacy status (*ACC-14 Candidacy Status*) must complete the necessary application form (*FORM-01*), preliminary report for candidacy status (*FORM-02*) and evidence as described on the OTA & PTA EAP website, along with the candidacy status fee (*GUIDE-03 Fee Schedule*). In the preliminary report for candidacy status, the program must provide evidence that:

- a certificate/diploma is granted by the educational institution
- the education program is affiliated with an institution authorized under applicable law to provide post-secondary 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 fieldwork 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

The purpose of the preliminary report for candidacy status is for the program to demonstrate its compliance with the criteria for candidacy status, and to provide early indications of readiness to proceed to a full accreditation review. The preliminary report should provide evidence (not only narration) that addresses each of the above criteria. It is submitted electronically to the OTA & PTA EAP and will be reviewed by OTA & PTA EAP staff within one month of submission to ensure there is sufficient evidence of the program's compliance with the criteria. The program may be requested to submit additional information based on this review.

The preliminary report for candidacy status will be then reviewed by the JAC to determine the program's compliance with the criteria. While no judgment of the likelihood of accreditation will be made, one of the following decisions will be made:

a) The program demonstrates compliance with the criteria and candidacy status is awarded

OR

b) The program does not demonstrate compliance with the criteria and candidacy status is not awarded

Programs who do not meet candidacy status criteria will be given feedback regarding areas of non-compliance. The candidacy status application fee will not be returned. If the program still wishes to participate in the accreditation process, it must re-submit its preliminary report for candidacy status to address the areas where deficiencies were identified. Re-submission of a preliminary report within two years of the initial submission must be accompanied by a \$200 administrative fee. If re-submission occurs more than two years after the initial submission, it must be accompanied by a second full candidacy status application fee.

As per *ACC-09 Disclosure* and *ACC-14 Candidacy Status*, should programs with candidacy status choose to publish their candidacy status, the following text **must** be used:

The (name of program/institution) has candidacy status and can now take the next step towards accreditation by the OTA & PTA EAP. Having candidacy status does not mean that the (name of the program) will be accredited once the process is finished, but the first step is complete.

OR

The (name of program/institution) is seeking accreditation by the Occupational Therapist Assistant & Physiotherapist Assistant Education Accreditation Program (OTA & PTA EAP) of the Canadian Association of Occupational Therapists and Physiotherapy Education Accreditation Canada. The program has been awarded candidacy status, which denotes an affiliation with the OTA & PTA EAP and is a pre-requisite for accreditation of the education program. Candidacy status does not assure that the (name of program) will be awarded accreditation status once the program undergoes a full accreditation review.

Letter of Intent

It is the responsibility of the program coordinator of the education program to submit, following receipt of confirmation of candidacy status AND 12-18 months before the end of an accreditation term, a Letter of Intent indicating that the program will participate in the accreditation review process. Upon receipt of the Letter of Intent, OTA & PTA EAP will collaboratively set the dates for the site review with the

education program, and set the due date for the Self Study Report. A template for the Letter of Intent is provided in [Appendix 1](#).

Self Study Report

Preparation and submission of the Self Study Report (SSR) is a requirement for an education program prior to an accreditation review. The main purpose of the SSR is to provide an opportunity for the education program to:

- provide evidence about the program's compliance with accreditation standards
- systematically review the program and assess its outcomes
- identify areas of strength
- identify areas where strategies may need to be developed to improve or maintain program quality

The SSR will also be used by:

- members of the PRT during preparation and completion of the preliminary and site reviews
- members of the JAC in the decision-making process about the program's accreditation status
- faculty and staff of the education program to assist with program and curriculum development

The SSR is submitted to OTA & PTA EAP electronically.

Guidelines for the Preparation of the Self-Study Report

The SSR provides the key source of evidence upon which the OTA & PTA EAP determines the program's compliance with the standards. This is substantiated by interviews and observation during the site review conducted by the PRT. It is therefore essential that in developing the content of the SSR, every effort is made to describe, clearly and explicitly, the specific evidence showing how the program meets each standard/criterion.

The SSR should be considered as a guide to the program; it assists the reader in understanding the program in its environmental context and shows how the evidence provided is linked and integrated to demonstrate compliance. It is not sufficient just to provide a list of links, appendices or documents related to each criterion. The SSR must provide the program's 'story', in narrative or descriptive terms, explaining how the evidence provided demonstrates the program's compliance with the criterion.

Preparation of the SSR is not intended to be labour-intensive. It is intended that the program has an on-going system of evaluation and quality assurance. In this way preparation of the SSR should involve compilation of existing documents or relevant excerpts from documents to serve as evidence of compliance with the accreditation standards rather than creation of the documents themselves. Many programs find, especially with the preparation of their first SSR, that it takes approximately 10-12 months to compile all the evidence necessary to complete the SSR by the due date

Preparation of the SSR should involve all stakeholders in the education program, including permanent faculty and contract instructors, staff, students and preceptors. Completion of the SSR (or sections of it) is often delegated. OTA & PTA EAP staff will be available for consultation as required. However, it is the responsibility of the education program to submit the completed SSR electronically to OTA & PTA EAP on or before the due date, approximately five months prior to the scheduled site review. Some generic tips for creation of the SSR are available in [GUIDE-10 – General Tips for Preparing an SSR](#) on the OTA & PTA EAP website.

Content of the Self Study Report

The SSR is a narrative report. The SSR must be based on the OTA & PTA EAP accreditation standards and indicate the outcomes of the program's self-study. The following sections must be included in the SSR and are described in more detail below:

Introduction/Overview

Standards and criteria

Summary

List of evidence and appendices

It is in the best interest of the program to create a document which is easily navigated and which has clear labels and/or links to relevant appendices. This will facilitate the PRT members' review of the document and help make their experience as reviewers as effortless as possible.

- Introduction/Overview

A brief overview of the education program and its context/environment can be included in this section as well as the overall perception about the compliance of the program with the accreditation standards and criteria from the point of view of those involved in the report preparation.

Some, if not all, readers of the SSR may not be from the same province as the education program. It is helpful to those readers to include within the Introduction such information as the program's ministerial and provincial contexts if it is relevant to compliance with accreditation standards. For example, be sure to note whether the program's choices in providing evidence are due to ministry requirements and, as such, may be less flexible in terms of making change. Also, be sure to describe the regulatory standards for assignment of task/scope of practice for OTAs and PTAs in the program's province as they may differ from those familiar to the reader.

This section of the SSR must include commentary about how the program has addressed any issues identified in past Accreditation Review and Status Reports (AR & SRs) since the previous accreditation review (if applicable).

Standards and Criteria

This section is where the program **must address each accreditation standard, criterion by criterion**. The criteria in each standard must be addressed in this section in a narrative or descriptive format. The program is expected to provide evidence (usually in the form of appendices) with regards to each criterion and a narrative explaining how the evidence demonstrates compliance. The PRT members should understand from the narrative why the particular piece of evidence was chosen for inclusion. The program, in this section, has an opportunity to reflect upon its compliance and identify any areas where compliance is weak. Activities or plans that are underway to address these weaker areas should be described. Through the narrative description, the reader should be able to understand clearly how the evidence provided demonstrates the program's compliance with the criterion.

In the Accreditation Standards document, each criterion includes the following:

Criterion description and indication of whether this is a CORE criterion.

Key indicator of compliance which is the main thing you would expect to see if a criterion was met.

Explanatory Notes which provide additional information such as rationale and linkages between the standards, criteria, and evidence.

Examples of Evidence with options of evidence to guide programs in demonstrating compliance.

Required Evidence

In 2018, improvements were made to the 2012 Accreditation Standards document to add a list of Required Evidence for the following Standards and Criteria:

Standard 3:	3.4	Standard 6 OTA
Standard 4:	4.1, 4.2, 4.3, 4.4	Standard 6 PTA

Required Evidence are pieces of evidence that education programs **must** provide to demonstrate compliance with the criteria in the Self-Study Report, the Report appendices, or on-site during the accreditation review. Required evidence was added to the Standards document to provide guidance to programs about the evidence needed to meet these criteria. Required evidence is listed only for criterion where specific pieces of evidence, common across all programs, demonstrate compliance.

When providing evidence, it is helpful to PRT members when the program provides only the **most applicable** evidence for a particular criterion, rather than an exhaustive list of appendices and evidence. It is recognized that evidence for some criteria, especially those in Standard 6, may span several (or all) courses. When completing the SSR for Standard 6 please read the SSR-06 Forms package carefully for details.

Programs often find that content is repetitive when creating the narrative for the standards. It is important to recognize that when the PRT members are focussing their review of the SSR in preparation for the site visit, they will divide the sections/standards of the SSR between them, and while each member will read the entire document, a primary PRT member will be assigned to one or more standards for a more detailed review. Therefore, repetition between standards will not be as obvious, and in fact, creating the SSR in a way that allows the narrative for each standard to stand alone can create a document that is better understood by the PRT members.

It is essential that the content is written in a narrative or descriptive style explaining clearly how/why the evidence provided demonstrates the program's compliance with each criterion and an easy way for the reader to immediately access the identified supporting documents or links.

Example:

Standard 1, Criteria 1.1:

The educational program is situated in an institution authorized under applicable law to provide postsecondary education.

Key Indicator

The program resides in an institution authorized to provide post-secondary education.

The OTA and PTA Program situated in the Faculty of Health Sciences at Western Memorial College, is authorized under the Educational Law of Specific Province to provide postsecondary education. This is confirmed by the following link xxxxxxxxx to the Provincial website with the list of education institutions authorized to provide postsecondary education. This is further demonstrated by the letter from the province (see Appendix 1.1) which confirms the status of this program within this legislation.

It is essential that the content is written in a narrative or descriptive style explaining clearly how/why the evidence provided demonstrates the program's compliance with each criterion and an easy way for the reader to immediately access the identified supporting documents or links.

Summary

This section provides an opportunity for the program to summarize information about its compliance with the accreditation standards, to reflect upon the program, and to indicate its strengths and future plans.

List of Evidence and Appendices (SSR Form C)

A list of the documents submitted as evidence of compliance with the accreditation standards and criteria must be provided in SSR Form C. The list should indicate materials that will be made available in the PRT meeting room during the site review or in the case of a virtual site visit, uploaded just prior to the online meeting or through a screen share.

A document may be listed as evidence for more than one criterion. Therefore, each document should be numbered and the document number can be used to cross-reference the evidence to a criterion and the SSR.

It is recognized that some materials the program provides as evidence for compliance may be confidential. All PRT members are bound by a confidentiality agreement to respect the OTA & PTA EAP policies relating to protection of private information and confidentiality.

Format of the Self Study Report

The Self Study Report represents a permanent record of the status of the program at the time of application for accreditation. It should be a single, self-contained document that can be archived for future reference by the OTA & PTA EAP, and shared easily and securely among peer reviewers and Joint Accreditation Committee members. The SSR and all related documentation must be available throughout the six-year accreditation cycle in the format it was provided at the time of submission, and with the identical content. Document retention policies require an archived version in its entirety to be held securely by the OTA & PTA EAP. For this reason, the OTA & PTA EAP can no longer accept SSRs that are created within or linked to the institutions Learning Management System (LMS) or other online platforms. Screen snaps can be used to provide a permanent record of what may have been present in the LMS.

It is the role of the education program to lead the PRT members clearly to the evidence available. The SSR must be formatted in a way that is easily navigable for the PRT. Reviewers do not always progress through the Self Study Report in a linear fashion as they often return to different sections, passages, and documents as they complete the full review. It is important that the PRT can find the information they are looking for as quickly and easily as possible.

For this reason, the OTA & PTA EAP requires the Self Study Report be formatted according to the requirements below. The reference [*Guide to Formatting the Self Study Report*](#) offers programs step-by-step guidance.

File Type and Structure

- The SSR should be presented as a **single PDF file**. Appendices themselves may be in other formats within a PDF portfolio. It is recommended that programs source a PDF expert for assistance in formatting as applicable.
- The body of the SSR is a narrative with easily navigable links to relevant appendices
- Tables and graphs should be used when they are helpful for clarity and conciseness in presenting data related to the criteria.
- There should be clear and concise instructions to reviewers about how to open and navigate through the SSR.
- Each document/link should be quick to open and easy to read.
- Complex, colorful background patterns and images can obstruct the readability of text on a page and should be avoided.
- Scanned documents should be saved as PDF or easily accessed image files rather than text files.

Font Size, Margins and Spacing

- The font size should be no smaller than 11 point

- Line spacing should be set at no less than 1.15sp to ensure readability
- The page margins of the narrative should be set at one (1) inch

Table of Contents

- Include a Table of Contents with ready links to the different parts of the SSR
- Create a shortcut to return to the Table of Contents from any point in the SSR.
- The electronic cover page or a page in the Table of Contents must include the following information:
 - The date the report was created.
 - The software and version(s) used to create the self study.

Linking Parts of the SSR

- Provide direct links to all evidence/documentation provided for each criterion/standard.
- Ensure that links to supporting documents open the documents in their own separate window.
- Establish links that enable reviewers to easily transition back and forth through the sections, appendices, specialty areas, and documentation in the SSR. If, when clicking the link, the reader is taken to a new location in the document or to a new document altogether, it must be made clear how to return to the original location once review is complete.
- When referencing and linking to an appendix in the narrative, use the file name of the appendix as it appears in the document tree. (e.g., “as evidenced in 1.2.1 ABC College Organizational Chart). The reader should be able to find to locate an appendix by its title in the list of documents if necessary.
- Include the file name (e.g., 1.2.1 ABC College Organizational Chart) on the document itself to allow easy identification should the reader choose to print some documents.
- When linking to a specific section of an appendix, establish links that take the reader directly to the specified section of the document (i.e., if referencing a specific exam question, link to the location in the document that displays that question rather than to the top of the exam document).
- Ensure that hyperlinks remain active following transfer to the OTA & PTA EAP. Hyperlinks to documents which are separate from the main document, on a memory key or elsewhere on a computer or server, will not work when the main document is saved on a new computer/memory key or uploaded to the OTA & PTA EAP’s secure file sharing system. Hyperlinks must be set up to link to locations within the single PDF file and its appendices. It is the program’s responsibility to ensure that any links within the SSR remain active following submission.

Security

- The SSR and any related appendices must be password protected at the document level prior to submission and the password must be shared with the OTA & PTA EAP in a separate email.

A sample of selected sections of an SSR is available on the OTA & PTA EAP website.

Self Study Report Form

There are 6 SSR forms that must be completed and submitted along with the Self Study Report:

- i) SSR-Form A: Signature Form
- ii) SSR-Form B: Program Contact Information
- iii) SSR-Form C: Inventory of Evidence Submitted / Available site
- iv) SSR-Form D: Competency Matrix (optional)
- v) SSR-Form 4: Program Evaluation
- vi) Combined SSR-Form 6 Occupational Therapist Assistant & Physiotherapist Assistant (SSR-6 OTA & PTA)

In addition, the following must be included in the submission (usually as appendices to the SSR):

- i) Financial summary (criterion 1.5 – CORE)
- ii) All course outlines for most recent complete academic year
- iii) A current institutional calendar
- iv) Curriculum Vitae of academic faculty
- v) List of faculty members/instructors who hold part-time and sessional appointments

Submission of the Self Study Report

The program should submit both the SSR (Self Study Report) and SSR Forms electronically to the OTA & PTA EAP on or before the due date provided. There are 2 options available for electronic submission of your documents:

- a) By uploading to an institution server (or DropBox-type cloud site) and providing OTA & PTA EAP staff with access temporarily to allow for download of the document.

OR

- b) By requesting a secure link from OTA & PTA EAP staff which allows temporary access to upload the completed SSR to the OTA & PTA EAP's secure file sharing system, Sync.

The Accreditation Review

The Peer Review Team (PRT), a group of trained reviewers, conducts the accreditation review (preliminary review + site review) of the education program. More detailed information regarding the PRT is available in Section 5.0.

The Preliminary Review

The team conducts a preliminary review and, approximately 12 weeks later, a site review of the education program. The primary purpose of the preliminary review is to review evidence provided in the SSR for compliance with all standards, and to recommend whether the program is prepared to move forward with the site review. If, upon review of the documents, the PRT deems that the education program is likely to meet at least 80% of the criteria in Standard 6 in each discipline, the PRT will recommend that the program proceeds to the site review (*ACC-16 Decision to Proceed Following Preliminary Review*). A preliminary review report is prepared and sent to the education program coordinator with the goal of highlighting those areas to be verified during the site review, and to request any additional information as determined by the PRT.

Deficiency in Standard 6 OTA and PTA

If the PRT's review of the SSR and documentation reveals that the program is not likely to meet at least 80% of the criteria in Standard 6 in both disciplines, the program will be informed that the site review will be delayed until there is evidence to indicate that the Standard 6 criteria are sufficiently met (*ACC-16 Decision to Proceed Following Preliminary Review*). The program will be given up to one year to provide the required evidence to fulfill these criteria. A schedule will be set for the program's submission of a report addressing the identified deficiencies. The program's report will be reviewed by the PRT, and its results will be communicated to the program via the Program Manager. Once the Standard 6 criteria are deemed to be sufficiently met, the date of the site visit is scheduled. If, after a period of one year, there is insufficient evidence to indicate that the program is likely to meet at least 80% of the criteria in Standard 6, the accreditation process will be terminated and the program will be required to re-apply for candidacy status and accreditation review.

The Site Review

The site review conducted by the PRT can take place on campus or virtually. If on campus, the schedule usually spans over two and a half days, typically Sunday afternoon to Tuesday. If, however, the site review is held virtually using an online meeting platform, the review could spread out over four or five, half days.

The purpose of the site review is for the PRT to:

- 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 to the JAC about evidence of the program's compliance with the OTA & PTA EAP accreditation criteria

The PRT does not provide a recommendation about the program's overall accreditation status. This is the responsibility of the JAC.

Components of the site review include interviews with:

- faculty, staff, students and graduates of the education program
- college/university administrators and other faculty involved in teaching OTA and PTA students
- practitioners/preceptors who provide clinical education placements
- employers of graduates

The site review also provides the opportunity for PRT members to assess components of the education program that are not conducive to the written word.

A schedule for the site review is developed by the education program, with input from OTA & PTA EAP staff and the Chair of the PRT. Sample schedules for site reviews are provided in [Appendix 2](#). A draft of the schedule should be prepared approximately four months prior to the site review in time for discussion by the PRT during the preliminary review videoconference. The final schedule is due two weeks prior to the review and should include the full names and titles (if applicable) of all attendees. The schedule may be modified as the scheduled visit approaches, and in some cases, during the visit itself.

Tips to prepare for the site review held on campus

The following are suggestions to facilitate the planning and success of the site review. These have been gathered from the experiences of PRT members and education program faculty and staff.

- OTA & PTA EAP arranges all travel and accommodation for the PRT members and may ask the education program for hotel recommendations near the program.
- It is the responsibility of the education program to arrange transportation for the PRT to and from the hotel to the college/university each day of the visit. This can be by taxi, personal vehicle, or walking (by mutual consent). These arrangements will be facilitated by OTA & PTA EAP staff.
- It is the responsibility of the education program to provide snacks and lunch for the PRT during the time the members are on campus. OTA & PTA EAP staff will provide information regarding any dietary preferences or restrictions.
- If possible, ensure that at least two rooms are available at the college/university for the PRT throughout the site visit:
 - i) a secure room where computers and other personal items can be left, where food will be

served, and where any documentation provided as evidence of compliance with OTA & PTA EAP standards and criteria can be made available. Internet should be available.

ii) a second room to be used for scheduled interviews

- Appoint a faculty or staff person to be the time-keeper, responsible for giving the team a five-minute warning at the end of an interview, and available to gather the next interviewees for a quick transition into the interview room.
- Ensure travel time to interviews/visits is accommodated in the schedule (e.g.: after a break or lunch, or with travel clearly marked in the schedule).

Tips to prepare for the site review held virtually

Conducting a virtual site review requires an online meeting platform. In the same way that the program under review prepares and organizes meeting space for a campus review, the preferred option for a virtual review is for the program to invite participants and the peer reviewers through their own virtual meeting platform and to ensure adequate program-based technology support throughout the review.

The OTA & PTA EAP recognizes that this is not always possible, feasible, or practical for several reasons and therefore offers these four options below *in order of preference*. The online meeting platform selected for each program's review will be determined on a case-by-case basis in consultation with the program, the peer reviewers and the OTA & PTA EAP.

1. (preferred) The education program uses its own meeting platform and provides technology support throughout the visit. Program staff or technology support are responsible to cross-reference participant lists prior to admitting participants from the waiting room. Peer reviewers wait in the breakout room and join the main room with participants present at the time of the scheduled meeting.
2. The education program is given login privileges to access OTA & PTA's meeting platform (Zoom) and provides technology support throughout the visit. Education program staff or their technology support are responsible to cross-reference participant lists prior to admitting participants from the waiting room and to welcome participants to the meeting. Peer reviewers wait in the breakout room and join the main room with participants present at the time of the scheduled meeting.
3. The peer reviewers are given login privileges to access OTA & PTA's meeting platform (Zoom) and OTA & PTA staff are available by cell at all times to troubleshoot if necessary. In this situation, the peer reviewers will be required to play several roles, including moderating, cross-referencing participant lists prior to admitting participants from the waiting room, and navigating breakout rooms between meetings.

4. OTA & PTA EAP staff manage the meeting platform, attend each meeting, cross-reference participant lists prior to admitting participants from the waiting room, welcome participants to the meeting, and cue peer reviewers when it is time for them to join the main room from the breakout room at the time of the scheduled meeting. OTA & PTA EAP staff remain in the room as technology support throughout every meeting.

The following are suggestions to facilitate the planning and success of a virtual visit. These have been gathered from the experiences of PRT members and education program faculty and staff:

- The online meeting platform chosen to host the virtual review (see above) should allow more than one host to be assigned (in case of Internet or power interruptions) and be such that if the host unexpectedly leaves the meeting, the remaining host(s)/co-host(s) can remain and the meeting can continue.
- The platform should include breakout rooms. These will be used to allow the peer reviewers a private space to debrief from one meeting and prepare for the next, while participants gather in the main room.
- The platform should allow for controlled access (such as a waiting room) to each meeting such that only those scheduled to participate are permitted entry to the meeting room.
- As the program confirms interview dates, times, passwords and other details with the participants, they should ensure that all participants have the required Internet connection strength and hardware to allow for use of a webcam throughout all interviews.
- When inviting participants and providing login information, the program should request that once a participant has accessed the platform and is in the waiting room, they edit their display name to indicate the first and last names as listed in the virtual review schedule.
- Participants should be advised to safeguard privacy and maintain confidentiality by choosing environments where they will not be interrupted and eavesdropping cannot occur (headsets or earbuds are recommended). The OTA & PTA EAP will ensure that peer reviewers do the same.
- **Interviews conducted virtually should never be recorded.**
- Offer the opportunity/time to test the technology and for participants (including PRT members) to practice using the technology and troubleshoot difficulties. This time should include demonstration and practice in showing materials using a shared screen in case that is required. If the OTA & PTA EAP is providing the meeting platform (options 3 or 4 above), staff will work with the program to organize testing times as required. If the program is providing the platform, they should ensure there is an opportunity for peer reviewers to test their access and troubleshoot issues ahead of the review.

- Participants (and peer reviewers) should have alternative devices available in case technological issues arise, and the ability to connect by telephone should the devices fail or in the event of an Internet or power interruption.
- The meeting schedule should include the first and last names of each participant and their email address. This will allow for easier cross-referencing of participants in the waiting room and ensure only the invited participants are allowed access to the interview.
- Allow 60 minutes between longer interviews and at least 15 minutes between shorter ones to allow for peer reviewer bio breaks, snacks, stretches, and debriefs.
- Include a 5-10-minute connection window at the beginning of each meeting to allow time for participants to join the meeting link, be provided access, and troubleshoot any audio, video, or connection issues.
- Ensure that an appropriate faculty/staff person is accessible to the peer reviewers and/or OTA & PTA EAP at all times to troubleshoot. There may be situations where scheduled participants do not arrive, or schedules need to be adjusted unexpectedly, or it is unclear whether a participant in the waiting room should be permitted access. Other unforeseen events may also arise.
- Ensure that technology support is available throughout the scheduled interview times. If the OTA & PTA EAP is providing the meeting platform (options 3 or 4 above), staff can be available to play this role.
- The OTA & PTA EAP will provide a secure upload link for documents to be submitted to the peer reviewers should they be requested during interviews.

General Tips

- Meetings with students and student executive members should include students from all years of the program, and the student leadership representatives from each year. The PRT will expect a minimum of 20% of the students from each year of the program at the student meeting.
- Meetings with recent graduates of the program should include graduates no more than three years from their graduation.
- Meetings with groups of faculty members should not include the program coordinator or others in supervisory roles, in order to facilitate open conversation.
- Faculty meetings/interviews should include contract and sessional faculty in addition to permanent/core faculty. Meetings with faculty members should include *all* non-supervisory faculty, including those who may have been interviewed previously as a representative of a different component of the program (Fieldwork Coordinator, Curriculum Committee chair, etc.). Discussions in the faculty member group meeting will cover new topics.

- Providing some information to potential interviewees (especially students, new graduates, employers, clinical preceptors who may be unfamiliar with the goal of accreditation) may be helpful in diffusing the anxiety they have regarding the group interview. The *Interview Participant Guide* provides basic information for those participating in the interview process. Suggested information to share:

The purpose of the group interview is to validate information that the program has provided in its Self Study Report, to explore areas where there may be gaps or additional information required. Depending on the participants, members of the Peer Review Team will ask questions about the nature of the program, committees and processes; the students/ graduates; the support received from the program when supervising students; and the nature of the relationship of the program with faculty, administration, the college as a whole, etc. The questions will be related to the accreditation standards and criteria looking for validation and additional information. The tone of the group interviews is very collaborative, informal, and non-threatening.

Closing Meeting

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

The purpose of the closing meeting is to:

- i) thank those who participated in activities related to the site review
- ii) 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 complete)
- iii) provide information about the next steps in the accreditation review process

The purpose of the closing meeting is NOT:

- i) for the program to provide last-minute evidence or rebuttal of the PRT's summary
- ii) for the PRT to make any recommendations or decisions about the program's overall accreditation status. Any remarks by members of the PRT must not be construed as indicating accreditation status or the position of the OTA & PTA EAP

Final Peer Review Team Report

Members of the PRT prepare a final report following the site visit and submit it to the OTA & PTA EAP. Included in the report is information about evidence of the program's compliance with accreditation standards, identified strengths, areas for improvement, and related compliance concerns. Comments will also be included.

The Final PRT Report expands on the SSR by describing the PRT’s verification of evidence listed in the SSR, and by describing evidence gathered by the PRT in documents and interviews during site review. The PRT report does not include any recommendation about the program’s overall accreditation status, but provides their analysis of the program’s strength of compliance with each individual standards and criteria. The submitted Final PRT report is included as one document within the accreditation dossier provided to the JAC for decision-making.

Once submitted to the OTA & PTA EAP by the PRT Chair, the Final PRT Report is reviewed by OTA & PTA EAP staff for formatting and consistency, and is then forwarded to the education program for review.

Program Response to the Final Peer Review Team Report

Faculty and staff of the program being accredited are provided an opportunity to review the PRT report and provide a narrative response. The review of the PRT report by the program is intended for the program to correct factual errors (spelling, errors in names or attendees at meetings, other grammar errors) in the report, and not to provide new, updated, or more detailed information available since the visit date. It is acceptable for the education program to direct the JAC to evidence contained within the Self Study Report that provides evidence not identified in the Final PRT Report. The Program Response is a stand-alone narrative document and is essential to the decision-making process. A sample Program Response is available on the OTA & PTA EAP website.

The program submits its response to OTA & PTA EAP electronically. The submitted Program Response is added to the accreditation dossier for review by the JAC.

Decision-making Regarding Accreditation Status

OTA & PTA EAP staff prepares the confidential accreditation dossier, which includes the education program’s Self Study Report, the Final Peer Review Team Report, and the Program Response to the PRT Report, for review by JAC members.

The JAC is a standing committee of both PEAC and CAOT. Its membership (*TOR-02 Joint Accreditation Committee*) comprises individuals nominated from the following groups or organizations:

- Canadian Association of Occupational Therapy (CAOT) (2)
- Physiotherapy Education Accreditation Canada (PEAC) (2 – one member representing the physiotherapy regulators)
- Canadian Occupational and Physical Therapy Educators Council (COPEC) (2)
- OTA/PTA educator in a privately funded institution (1)
- Recent (within three years) OTA/PTA graduate (1)
- The public (1)
- Non-voting – OTA & PTA EAP Program Manager (1); CAOT staff liaison (1); PEAC staff liaison (1)

One additional member may be appointed to the JAC if required. A member may be removed from the JAC by the Chair (or Chair-designate/Chair-Elect) and the Program Manager in collaboration with the member's nominating organization (if applicable).

The JAC meets twice a year. Recommendations about a program's accreditation status are made based on information included in the confidential accreditation dossier.

A copy of the confidential dossier for each program being reviewed is distributed to JAC members prior to the meeting at which an accreditation award recommendation will be made. It is the JAC's role to review all relevant information provided in the accreditation dossier and make a recommendation about the program's accreditation status.

The JAC appoints two committee members to act as Primary Reviewers for each program's accreditation dossier for which a recommendation is being made. The Primary Reviewers receive the confidential accreditation dossier and a summary template. The role of the Primary Reviewers is to:

- review the program's confidential dossier
- present a summary of the PRT's views about the program's compliance with the accreditation standards and criteria
- present a summary of the education program's response to the PRT report
- present a summary about their views of the program's compliance with the accreditation standards and criteria
- make an initial determination of the level of the program's compliance with each accreditation criterion

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.

Key Indicator

Program delivery is financially sustainable and can support two complete cycles of students from admission to graduation.

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.

Key Indicator

The number and qualifications of faculty meet the program's administrative, curriculum, teaching, and evaluation needs.

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):

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

Key Indicator

Every student completes a minimum of 150 hours of clinical/fieldwork education in each discipline.

Criterion Not Met:

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

Following a discussion which takes into consideration all documents relevant to a program's accreditation review, the JAC's accreditation status recommendation is recorded as a motion in the JAC meeting minutes. The accreditation status recommendation will be forwarded from the JAC (through the Program Manager) to the Boards of PEAC and CAOT, which award accreditation status ([ACC-03B Accreditation Decisions](#)).

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 awarded full or partial accreditation. Non-compliance with one or more of the CORE criteria will result in probationary accreditation, or non-accreditation.

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.

Accreditation Status Awards

There are three options for accreditation decisions (*ACC-03B Accreditation Decisions*):

- i) **Accreditation**
 - a. Fully Compliant
 - b. Partially Compliant
 - c. Probationary
- ii) **Non-Accreditation**
- iii) **Deferral of Decision**

Decisions about these options are made based on the following parameters about a program’s compliance with the OTA & PTA EAP evaluative criteria:

- Criterion Met

The program is in full compliance with the criterion. Recommendations for continued improvement may be shared. There is no requirement for a response via a Progress Report.

- Criterion Partially Met
Improvement is needed in order to achieve full compliance with the criterion. One or more Progress Reports will be required.
- Criterion Not Met
There is insufficient evidence to demonstrate compliance with the criterion OR required improvements have not been made (Progress Reports only). One or more Progress Reports will be required.

Accreditation Decisions

The decision options and related conditions are outlined in [ACC-03 Accreditation Decisions](#) and include:

Accreditation – Fully Compliant

A program meets 100% of the evaluative criteria in each of the eight standards (i.e., no Criterion Not Met).

Award: Accreditation

Options: Progress report required only in the event that one or more criteria are identified as Partially Met, and until all criteria are fully Met

Accreditation – Partially Compliant:

A program meets all of the established CORE criteria (i.e., there is evidence to indicate that all CORE criteria have been fully or Partially Met)

AND

A program demonstrates compliance with 80% of the evaluative criteria in Standard 6 (OTA)

AND

A program demonstrates compliance with 80% of the evaluative criteria in Standard 6 (PTA)

AND

A program demonstrates compliance (i.e., fully or Partially Met) with 80%-100% of the evaluative criteria in a minimum of three of the remaining standards and 50-79% of the evaluative criteria in a maximum of two standards

Award: Accreditation

Options: Progress reports required until the all criteria are fully Met. Failure to demonstrate evidence of progress towards full compliance may result in a change to probationary accreditation. Progress reports are required in 6 to 24 months from the date of the accreditation decision.

Accreditation – Probationary

A program demonstrates compliance with less than 100% of the established CORE criteria (i.e., one or more CORE criteria are Not Met).

OR

Fewer than 50% of the evaluative criteria in one standard are fully or Partially Met (i.e., more than 50% of the evaluative criteria in one standard are Not Met).

OR

A program demonstrates compliance with 80% of Standard 6 but fewer than 80% of the evaluative criteria in three or more remaining standards are fully or Partially Met (i.e., more than 20% of the evaluative criteria in three or more standards are Not Met).

OR

A program fails to demonstrate evidence of progress from partial towards full compliance.

OR

A program fails to demonstrate evidence of progress from probationary towards partial or full compliance.

Award: Accreditation

Options: The maximum length of time a program can maintain probationary accreditation status is two years. Failure to demonstrate evidence that all evaluative criteria are fully or Partially Met by the end of this time period will result in non-accreditation status. The timeframe may be extended by the OTA & PTA EAP if the program is able to demonstrate significant progress toward becoming compliant with accreditation standards and criteria.

A Progress Report will be required within 3 to 12 months of the accreditation award depending on the severity of the identified deficiencies. When a program demonstrates significant progress towards resolution of all outstanding areas, the OTA & PTA EAP may modify the program's accreditation status to partially or fully compliant.

Failure to demonstrate significant progress within the period specified in the Accreditation Review and Status Report will result in non-accreditation status at any time in the two-year probationary period. If an additional site review is required, the program will be responsible to pay any related expenses, and will be invoiced a \$2500 administrative fee.

Non-Accreditation

A program does not meet the requirements for probationary accreditation

OR

A program with probationary accreditation has failed to demonstrate sufficient progress within the specified period (i.e. fails to meet requirements as outlined in the AR & SRs)

Options: A program may re-apply to initiate a full accreditation review at any time following the notice of non-accreditation status. When a program re-applies for a full accreditation review, it will have to provide evidence in its application that the identified areas of non-compliance have been addressed. A program remains non-accredited until a full accreditation review is completed and a change in accreditation status is made.

Deferral of Decision

A decision will be deferred if it is deemed that further information is required from the program before a decision can be taken, or when extenuating circumstances impact upon the program or accreditation process. If an additional site review is required, the program will be responsible to pay for any related expenses, and will be invoiced a \$2500 administration fee.

Accreditation of New Education Programs

If a new program wishes the first class of students to be considered as graduates from an accredited program, the accreditation process must be completed and an accreditation award decision made and awarded before any students graduate from the program. For this reason, at the time of the accreditation review, the program will be unable to fully comply with evaluative criteria 3.4, 4.2, 4.3, and 4.4. New programs may be awarded probationary accreditation status while accumulating evidence to demonstrate stronger compliance with the evaluative criteria.

Notification of Decisions Made about a Program's Accreditation Status

Following any decisions made by the Boards of Directors of PEAC and CAOT in relation to a program's accreditation status, an official report and letter will be prepared by the OTA & PTA EAP and forwarded to the program. The report, in the form of an *Accreditation Review and Status Report (AR & SR)*, will include the following information:

- name of the program, and the institution
- accreditation status
- effective date for the accreditation status
- explanation of the reasons for the decision about accreditation status
- the extent to which the program is in compliance with the OTA & PTA EAP accreditation standards and criteria, including an explanation for the findings
- commendations
- action required by the program

This report will be addressed to the institution administrator responsible for the program (e.g., Dean/Director of the department) with a cc to the program coordinator. The letter accompanying the AR & SR will contain an acknowledgement form, to be copied onto institutional letterhead, signed and

returned electronically to the OTA & PTA EAP, within two weeks of receipt of the AR & SR, acknowledging receipt of the accreditation decision and required action.

≈Accreditation – Probationary

This is awarded when a program has been found to have significant areas of non-compliance and/or partial compliance with the accreditation standards and criteria or when the program has not addressed required actions as outlined in the previous AR & SR.

The OTA & PTA EAP will provide the program coordinator, the administrator to whom the program coordinator reports and the administration with written documentation about the probationary accreditation status. This documentation will include specific information about how the program is judged to be in non-compliance or partial compliance and a deadline date for the program to become compliant with the accreditation standards and criteria. Within two weeks of receipt of the AR & SR, the program coordinator and the administrator to whom the program coordinator reports are required to inform the faculty, instructors, staff, students enrolled in the program and students seeking enrollment in the program about the probationary accreditation status. The OTA & PTA EAP will request evidence of notification.

The required language to be used to notify students, and potential students, of the probationary accreditation status is:

The Occupational Therapist Assistant and Physiotherapist Assistant Education Accreditation Program (OTA & PTA EAP) is responsible for accrediting OTA/PTA education programs. The (Program NAME at Institution NAME), following the most recent (Accreditation Review visit/Progress Report submission), has received notice from the OTA & PTA EAP that the program has been awarded Accreditation Status – Probationary. Probationary status is awarded when deficiencies are identified with respect to compliance with some of the accreditation standards and criteria.

(Program NAME) will be working towards fixing these identified deficiencies, with the goal to be awarded Partial or Full Accreditation status. In the unlikely event that the (Program NAME) is awarded non-accreditation status in the future, students in their graduating year who successfully complete the program within the original time frame scheduled for their graduation, will be considered as graduates of an accredited program. All other students enrolled in the program will not be considered graduates of an accredited program if (Program NAME) is awarded non-accreditation status before their graduation.

Details regarding accreditation decisions, including probationary accreditation status, can be found on the OTA & PTA EAP website (otapta.ca). Any questions can be directed to (Program NAME) (faculty member name).

The maximum length of time a program can maintain probationary accreditation status is two years. The program will be required to submit Progress Reports, at specified times, to indicate progress towards becoming compliant with the accreditation standards and criteria. A focused site review may be required to assess the program's compliance. If this is the case, the program will pay the expenses of the site review, and will be invoiced a \$2500 administration fee.

Accreditation – Probationary → Accreditation – Partially or Fully Compliant:

A change of status from probationary to partially or fully compliant would occur when a program demonstrates significant progress towards resolution of all outstanding areas. This change can take place at any time within the two years.

Accreditation – Probationary → Non-Accreditation

The OTA & PTA EAP may withdraw the program's probationary accreditation status if the following situations occur:

1. The program fails to demonstrate evidence of substantial compliance with the accreditation standards and criteria within the specified reporting time; or
2. The JAC receives clear evidence that circumstances exist that further jeopardize the capability of the program or the institution to provide an acceptable educational experience for the students.

This change can take place at any time within the two-year probationary period.

Non-Accreditation

When non-accreditation status is being awarded, the following conditions will apply:

1. **Effective Date of Decision**

The decision shall become effective thirty (30) days after the date on which the official notification of the decision is sent to the institution. If the institution appeals the accreditation decision (see ACC-04 Accreditation Decision Appeal Process), the effective date of the decision shall be the date upon which the appeal process is completed.

2. **Notification regarding non-accreditation**

The OTA & PTA EAP will provide written notification to the program coordinator, the administrator to whom the coordinator reports, and the administration, that will include specific information about where the program is judged to be non-compliant and/or in partial compliance with the accreditation standards and criteria and the basis for the decision of non-accreditation.

The written notification of the change in accreditation status will: a) advise the institution that it has the right to appeal the decision; and b) provide institution with a copy of policy ACC-04 Accreditation Decision Appeal Process.

Within two weeks of the effective date of the decision, the program coordinator and the administrator to whom the program coordinator reports are required to individually inform the faculty, instructors, staff, students enrolled in the program and students seeking enrollment in the program about the Non-Accreditation status. The OTA & PTA EAP will request evidence of notification.

The required language to notify students of the non-accreditation status decision is:

The Occupational Therapist Assistant and Physiotherapist Assistant Education Accreditation Program (OTA & PTA EAP) is responsible for accrediting OTA/PTA education programs. The (Program NAME at Institution NAME), following the most recent (Accreditation Review visit/Progress Report submission), has received notice from the OTA & PTA EAP that the program is deemed non-accredited, due to lack of compliance with the Accreditation Standards and criteria.

Students in their graduating year who successfully complete the program within the original time frame scheduled for their graduation will be considered as graduates of an accredited program. All other students enrolled in the program will not be considered graduates of an accredited program upon graduation.

Details regarding accreditation decisions can be found on the OTA & PTA EAP website (otapta.ca). Any questions can be directed to (Program NAME) (faculty member name).

Within two weeks of the effective date of the decision, the program must remove any statement identifying the program as accredited by the OTA & PTA EAP from its website and in all publications.

3. Impact of Non-Accreditation on students

If a program with accreditation, fully or partially compliant loses accreditation status, students who started in the program will be considered as graduates of an accredited program, if the program respects certain conditions. The conditions, may, for example, specify requirements for academic education of fieldwork and will be specified by the JAC on a program-by-program basis.

If a program with probationary accreditation loses accreditation status, the impact on students enrolled in the program on the effective date of the non-accreditation is as follows:

- Students in their final year of study will be considered to be graduates of an accredited program, if they successfully complete the program within the original time frame scheduled for their graduation
- Students not in their final year of study will not be considered graduates of an accredited program

If a program admits students while under probationary accreditation and the program moves to non-accreditation status, those students will be considered as graduates of a non-accredited program. Therefore, it is critical that those students seeking enrollment in the program are informed of the program's probationary accreditation status as required by the OTA & PTA EAP (see p 34).

4. Re-application for accreditation

Should a program awarded non-accreditation status wish to re-apply for accreditation, the program will be required to wait a minimum of one year from the effective date of the decision. Following the one-year wait period, the program must re-apply for and be awarded candidacy status before being scheduled for a full accreditation review and accreditation decision.

Upon formal request, the JAC may consider an expedited review. The formal request should outline in detail how the program has addressed the deficiencies identified in the notice of non-accreditation. An administrative cost of \$200 to file a formal request will apply.

Publication of Accreditation Decisions

Publication by OTA & PTA EAP

All final decisions made in the fiscal year (January 1 to December 31) about candidacy status and accreditation awards will be published in the PEAC Annual Report. The list will include start/end dates of candidacy status awards, and start/expiry dates of accreditation awards.

The full list of education programs affiliated with the OTA & PTA EAP will be published on the OTA & PTA EAP website and will include start/end dates of candidacy status awards, and start/expiry dates of accreditation awards.

Publication by the Education Program

Education programs are required to publish their accreditation status, as part of their responsibility to maintain compliance with the accreditation standards. This information must be easily accessible for prospective and current students and other stakeholders/partners in the education program, and must be visible on the program's website.

As per ACC-09 Disclosure, the required text for publishing this information is

The (name of program) at (institution) has been accredited by the Occupational Therapist Assistant and Physiotherapist Assistant Education Accreditation Program, in collaboration with Physiotherapy Education Accreditation Canada (PEAC) and the Canadian Association of Occupational Therapists (CAOT). The status of Accreditation was awarded to the program on (date decision was taken) for the period until (the end of the accreditation cycle).

When and wherever an education program makes public disclosure of its accreditation status, it must include the full name, address and contact information for OTA & PTA EAP as: *Occupational Therapist Assistant and Physiotherapist Assistant Education Accreditation Program, c/o PEAC, Suite 26, 509 Commissioners Road West, London, Ontario, N6J 1Y5, (226) 636-0632, www.otapta.ca.*

OR

The full name, i.e., “Occupational Therapist Assistant and Physiotherapist Assistant Education Accreditation Program” with a direct link to its website of: www.otapta.ca.

Should the program choose to make public the contents of its accreditation reports, including the *Accreditation Review and Status Report*, the report must be published in full.

Publication of Decision – Non-Accreditation

When non-accreditation is awarded to a program, the program and the institution must publish the fact that the program received a non-accreditation status. This must include:

- individual notification to all prospective students, and to all students (see required text p.35) enrolled in the program at the time the non-accreditation status was awarded
- publication on the program’s web site

The required language to notify students of the non-accreditation status decision is:

The Occupational Therapist Assistant and Physiotherapist Assistant Education Accreditation Program (OTA & PTA EAP) is responsible for accrediting OTA/PTA education programs. The (Program NAME at Institution NAME), following the most recent (Accreditation Review visit/Progress Report submission), has received notice from the OTA & PTA EAP that the program is deemed non-accredited, due to lack of compliance with the Accreditation Standards and criteria.

Students in their graduating year who successfully complete the program within the original time frame scheduled for their graduation, will be considered as graduates of an accredited program. All other students enrolled in the program will not be considered graduates of an accredited program upon graduation.

Details regarding accreditation decisions can be found on the OTA & PTA EAP website (otapta.ca). Any questions can be directed to Program NAME faculty member.

The OTA & PTA will identify the education program as non-accredited on the list of affiliated education programs on the OTA & PTA EAP website. Notice of non-accreditation will be included in PEAC’s Annual Report.

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	Lead Responsibility
Prior to site review			
1. Planning for accreditation			
	Submit Letter of Intent to OTA & PTA EAP	12 months prior to site review	Education Program
	Provide consultation for accreditation activities	Throughout accreditation process	OTA & PTA EAP
	Schedule date for site review in consultation with program	10 -12 months prior to site review	OTA & PTA EAP
	Select members of PRT in consultation with program	10 months prior to site review	OTA & PTA EAP

Accreditation Activity		Timeline for Completion	Lead Responsibility
2. Program Self Study			
	Complete Self Study Report and submit electronically to OTA & PTA EAP	5 months prior to site review	Education Program
	Distribute to PRT members	2 months prior to preliminary review teleconference	OTA & PTA EAP
3. Preliminary Review			
	Review Self Study Report and complete preliminary review via videoconference	3 months prior to site review	PRT OTA & PTA EAP
	Complete preliminary report	2 weeks following preliminary review teleconference	PRT
	Forward preliminary report to education program	Upon receipt of preliminary report	OTA & PTA EAP
	Review PRT preliminary report and submit any requested documents based on feedback	1-2 months	Education Program
4. Site Visit			
	Confirm schedule for site review in consultation with the OTA & PTA EAP and PRT Chair	In time for preliminary review videoconference	Education Program PRT Chair
	Prepare materials for review as requested in the preliminary report	In time for site review	Education Program
	Conduct site review	At scheduled time	PRT
Following Site Review			
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. Final PRT Report			
	Preparation of report and submission to the OTA & PTA EAP	Within 2 weeks of the site visit	PRT OTA & PTA EAP
	Send evaluation survey link to PRT for completion	Immediately upon receipt of the Final PRT Report	OTA & PTA EAP

Accreditation Activity		Timeline for Completion	Lead Responsibility
	Complete post-review survey	Immediately upon receipt of URL	PRT
	Forward PRT report to education program for review	Immediately upon receipt of PRT report	OTA & PTA EAP
	Respond to the PRT report	2 weeks following receipt	Education Program
	Prepare Accreditation Dossier	Immediately upon receipt of Program Response	OTA & PTA EAP
Following PRT Report Completion			
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
	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

Site Review: Responsibilities of the Education Program

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

Table 2. Education Program Responsibilities

Responsibility / Activity	Completion
Before the site review	Time before site review:
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 preliminary report and prepare for site review based on feedback	3 months
Develop schedule for site visit with PRT Chair and OTA & PTA EAP	4 months
Schedule all required meetings and interviews, including booking meeting rooms	At least 4 months
During the site review on campus	
Meet with PRT at hotel Sunday at 4:00pm, day prior to site 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	
During the site review - Virtual	
Facilitate adherence to the planned schedule	
Facilitate adjustments to the planned schedule if necessary	
Ensure an appropriate faculty/staff person is within contact at all times to assist the PRT if necessary	
Assist in cross-referencing participant names for each interview as needed	
Following the site review	Time after visit
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

Site Review: Responsibilities of OTA & PTA EAP

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

Table 3. Responsibilities of the OTA & PTA EAP

Responsibility / Activity	Completion
Before the site review	
	Time before visit:
Receive Letter of Intent from program	12 months
Schedule date for site visit	12 months
Appoint PRT members and Chair	10 months
Forward PRT names to education program and receive approval	10 months

Responsibility / Activity	Completion
Ensure all forms (Confidentiality/Conflict of Interest) are signed and submitted by the PRT	9 months
Schedule date for Preliminary 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
Lead PRT orientation teleconference	5 months
Distribute copy of Self Study Report to PRT members	5 months
Participate in preliminary review teleconference	3 months
Review Preliminary Report and forward to education program	3 months
Organize travel and accommodation for PRT members (including meeting room at hotel for PRT)	3 months
Receive any submissions from the program that were requested in the Preliminary Report, and share with PRT	2 months
Following the site review	Time after visit
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

Responsibility / Activity	Completion
Notify PRT of accreditation award decision and request destruction of confidential information	Upon notification of accreditation award decision

REQUIREMENTS FOR MAINTAINING ACCREDITATION STATUS

It is the responsibility of the education program to maintain compliance with the candidacy status criteria and/or accreditation standards. To maintain candidacy or accreditation status once awarded, education programs must ensure compliance with the following requirements:

- i) submission of Progress Reports as required in the AR & SR (accredited programs only)
- ii) submission of an annual accreditation report (online survey)
- iii) payment of an annual fee (invoiced by the OTA & PTA EAP in mid-December each year, payment due by February 28) (*GUIDE-03-Fee Schedule*)
- iv) reporting of any substantive change in an education program which may affect compliance (*ACC-07 Substantive Change*)
- v) publication of accreditation status using required text (*ACC-09 Disclosure*)
- vi) use of approved text to publicly disclose candidacy status, if choosing to publish candidacy status (*ACC-09 Disclosure, ACC-14 Candidacy Status*)

Failure to comply with these requirements will result in a program being placed on administrative probation, and may result in non-accreditation status, or, in the case of a program with candidacy status, termination of the program's affiliation with the OTA & PTA EAP (*ACC-11 Administrative Probation*).

Progress Reports

The AR & SR serves as the official position of the OTA & PTA EAP regarding the accreditation status of an education program. The OTA & PTA EAP will request that a program submit a Progress Report when the decision is made that a program has:

- accreditation status, fully compliant, with one or more criteria identified as Partially Met
OR
- accreditation status, partially compliant
OR
- probationary accreditation

Programs requested to submit Progress Reports are provided a due date for submission.

Content of Progress Reports

The Progress Report is a narrative report. The AR & SR will include information about the required content of the Progress Report. The AR & SR includes comments about each evaluative criterion that the program must address and a request for information and examples of evidence to indicate the program's compliance with the criterion – programs should refer to the accreditation standards for

examples of evidence. The program must provide a significant level of detail and analysis about the evidence it provides in the Progress Report to indicate how the evidence demonstrates the program's compliance with the accreditation standards. A sample Progress Report is available on the OTA & PTA EAP website. If there is a question about content of the AR & SR, it is the program's responsibility to request clarification from the OTA & PTA EAP.

Submission of Progress Reports

The AR & SR will indicate the date by which the Progress Report is to be submitted electronically to OTA & PTA EAP.

Failure to Submit a Progress Report

Failure to submit the Progress Report by the specified date will result in a program being placed on administrative probation, and may result in non-accreditation status (*ACC-11 Administrative Probation*).

Accreditation Decisions Based on the Progress Report

Progress Reports will be reviewed at JAC meetings twice annually on a schedule similar to that of full site accreditation reviews. The accreditation dossier provided to JAC members and the appointed Primary Reviewers will include the most recent AR & SR outlining the requested content of the Progress Report, the submitted Progress Report, and the Primary Reviewers' report. Assessment of program's compliance with accreditation standards will be based on the accreditation Standards document used at the time of the original site accreditation review (Pilot or 2012 or 2012 (2016 revision)).

The accreditation award decisions which could be made by the OTA & PTA EAP following review of the accreditation dossier include:

Accreditation – Fully Compliant

Request: A second Progress Report will be required if one or more criteria are identified as Partially Met. Failure to adequately address the responses required in the first Progress Report may result in a change to partially compliant, probationary or non-accreditation status.

Accreditation – Partially Compliant

Request: Progress Reports will be required until a program demonstrates evidence of full compliance with all of the evaluative criteria. Failure to demonstrate progress towards full compliance may result in a change in accreditation status to probationary or non-accreditation.

Accreditation – Probationary

The maximum length of time a program can maintain probationary accreditation status is two years. Failure to demonstrate evidence that all evaluative criteria are fully or Partially Met by the end of this time period will result in non-accreditation status. The timeframe may be extended by the OTA & PTA EAP if the program is able to demonstrate significant progress toward becoming compliant with accreditation standards and criteria

A Progress Report will be required within 3 to 12 months of the accreditation decision. When a program demonstrates significant progress towards resolution of all outstanding areas, the OTA & PTA EAP may modify the program's accreditation status to partially or fully compliant any time within the two-year probationary period.

Failure to demonstrate significant progress within the period specified in the AR & SR will result in non-accreditation status at any time within the two-year probationary period. If an additional site review is required, the program will be responsible to pay any related expenses, and will be invoiced a \$2500 administrative fee.

For all reviews of submitted Progress Reports, the accreditation decision will be provided to the education program in a new AR & SR, addressed to the institution administrator responsible for the program (e.g. Dean/Director of the department) with a copy to the program coordinator.

Annual Reports

Each year education programs with either candidacy status or accreditation status submit an annual report by completing an online survey as part of the administration requirements for maintaining accreditation status. The survey gathers up-to-date contact information from the programs; and provides programs with an opportunity to check that there were no substantive changes in the last year that would affect their candidacy or accreditation status.

OTA & PTA EAP will notify each program once a year and provide the necessary survey link for completion.

Annual Fee

Programs are invoiced each year by the OTA & PTA EAP. Payment is due within 60 days of receipt of the invoice (typically by February 28). There are no additional fees charged at the time of the site review, with some exceptions (e.g., those with distributed education sites).

After the due date, the annual accreditation fee increases by 10%, and failure to submit the annual accreditation fee + 10% within 45 days of the due date will result in the program being placed on administrative probation (*GUIDE-03 Fee Schedule*).

Reporting a Substantive Change

If a program undergoes changes that impact its compliance with candidacy criteria or accreditation standards, the OTA & PTA EAP must be notified within two months of the implementation of the change. Any change which alters the circumstance under which the program was accredited will necessitate a reassessment. Categories of substantive change include:

1. Change in contact information.
2. Change that impacts on compliance with candidacy status criteria:
 - a. Change in authorization/registration status of affiliated institutions to provide post-secondary education
 - b. Change in program leadership
 - c. Change in fieldwork resulting in fewer than 500 OTA/PTA fieldwork hours
 - d. Major curriculum revision, including pedagogy
 - e. Change in financial resources
 - f. Change in physical location or space
3. Change that impacts on compliance with accreditation standards:
 - a. Change in program governance or administrative structure
 - b. Change in program leadership
 - c. Change in financial resources
 - d. Substantive curriculum revision⁸
 - e. Change in fieldwork resulting in fewer than 500 OTA/PTA fieldwork hours
 - f. Substantive change in faculty complement
 - g. Change in physical location or space
 - h. Change in diploma, degree or program offered
 - i. Decision not to admit a class of students
 - j. Plans for temporary or permanent closure of the program
4. Change in number or nature of distributed sites or addition of new programs (*ACC-08 Distributed Education*)

⁸ Curriculum is defined as the list of subjects composing a structured training and/or educational program organized into a course, courses or work experiences that develop the knowledge, skills and abilities of learners. The curriculum has an implicit or explicit set of goals and objectives with respect to learning outcomes. This could be a pictorial model or figure identifying concepts and links between concepts (CAOT, 2005).

Failure to notify OTA & PTA EAP of substantive changes within the required time period will result in the program being placed on administrative probation (*ACC-11 Administrative Probation*). In many cases, submission of documents may be sufficient for the reassessment. Procedures describing the written information required when submitting a report of substantive change are provided in policy *ACC-07 Substantive Change*.

Publication of Accreditation Status

Accredited education programs are required to publish their accreditation status; this information must be easily accessible for prospective and current students and other stakeholders/partners of the education program (see p.37 for required text) (*ACC-09 Disclosure*).

Failure to publish accreditation status as per these requirements will result in the program being placed on administrative probation.

Use of Approved Text to Publish Candidacy Status

The publication of candidacy status is optional for an education program. However, should the education program choose to publish its candidacy status, the required text (see p. 12) must be used (*ACC-14 Candidacy Status*).

Failure to use the approved text will result in the program being placed on administrative probation.

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 (*TOR-01 Peer Review Teams*):

- 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 a preliminary and site 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 site 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.

PRT Member Nomination

The OTA & PTA EAP maintains a list of qualified PRT members who can be appointed when needed to a Peer Review Team. Each PRT for OTA/PTA education programs consists of four members, including one physiotherapist OTA/PTA educator and one occupational therapist OTA/PTA educator.

In order to ensure availability of PRT members at the time of an accreditation review, it is necessary that education programs with candidacy status or accreditation status strongly encourage and support their educators who meet the PRT member eligibility criteria (*GUIDE-05 Eligibility to Become a PRT Member*)

to submit the required application form and documentation in order to be included in the pool of PRT members.

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 responsibility for conducting the accreditation review including:
 - commitment to the confidentiality policies
 - declaration of any real or perceived 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 preliminary and site reviews
 - professional behaviour and actions

PRT members representing CAOT and PEAC must:

- be approved by their respective organization
- 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 – Peer Review Team 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.

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*.

Confidentiality

Participation in the preliminary review, the site 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, password protected USB keys, and use of only those third-party service providers 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*)

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

Once a decision is made regarding the accreditation status of an education program by PEAC and CAOT, PRT members are advised of the decision and are asked to dispose of all materials related to the accreditation review by shredding hard copies, and/or deleting all electronic documents. PRT members are required to sign a form confirming they have complied with this policy and return the form to the OTA & PTA EAP (*FORM-06 Confirmation of Document Disposal - PRT*).

PRT members (prior to each accreditation review) and JAC members (annually) sign a confidentiality agreement with the OTA & PTA EAP (*FORM-04 Confidentiality Agreement – PRT* and *FORM-05 Confidentiality Agreement – JAC*).

Roles of the PRT Members

The PRT members have responsibilities to:

- review the PRT Handbook including the accreditation standards
- review the education program's SSR and all supporting documentation prior to the preliminary review
- complete two online training/education programs
- participate in an orientation teleconference with the PRT members shortly after receipt of the SSR for review
- participate in the preliminary review teleconference and collaborate to write the preliminary review report
- participate in a PRT meeting at the hotel the day before the review to discuss the schedule for the site review, areas of compliance requiring clarification, development of a plan for verification, and selection of questions for the site interviews
- participate and/or lead interviews with program faculty, staff and students, clinicians, and administrators
- collect required data and make observations
- collaboratively write the PRT report

In addition to the general PRT responsibilities, the PRT Chair has the overall responsibility for completion of the accreditation review and specifically has responsibilities to:

- act as the official spokesperson for the PRT
- work with the program coordinator and the OTA & PTA EAP to establish the schedule for the site review; consult with the program coordinator regarding any required changes to the schedule during the site review
- allocate responsibilities for PRT members for required activities to complete the site review
- lead the PRT meetings before, during and, if necessary after the site review
- be familiar with any previous reports and accreditation decisions related to the program being reviewed
- collaboratively write and submit the final PRT report

Additional tips and suggestions for the PRT Chair can be found in [GUIDE-09 PRT Chair – Tips and Suggestions](#).

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 of Canada (AAAC) for accreditation assessors⁹
- ii) completion of an OTA & PTA EAP specific education module online
- iii) provision of the OTA & PTA EAP PRT Accreditation Handbook
- iv) videoconference orientation meeting prior to the accreditation preliminary review for the purpose of team building, description of expectations for the preliminary review, planning for the site 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.

Site Review: Responsibilities of the PRT

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

Table 4. Peer Review Team Responsibilities

Responsibility / Activity	Completion
Before the site review	Time before visit:
Complete two online training modules, and set up Sync for PRT file sharing	5 months
Participate in an orientation teleconference	5 months
Receive and conduct general review of the SSR and participate in preliminary review teleconference meeting	3-5 months
PRT Chair works with OTA & PTA EAP and education program coordinator to develop schedule for site visit	3-4 months
Prepare PRT preliminary review report and submit to OTA & PTA EAP	2-3 months
Conduct review of the education program SSR and begin to draft PRT site review report	2-4 weeks
During the site review	
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)	

⁹ 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 site visit; the fees to access the programs are paid by the OTA & PTA EAP.

Responsibility / Activity	Completion
Conduct/participate in interviews and tours of facilities as required	
Participate in PRT meetings to discuss findings and reach consensus on PRT report	
Complete the draft of the PRT report	
Following the site review	Time after visit
Collaborate to prepare the final PRT report and submit to the OTA & PTA EAP	2 weeks
Complete the site 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

Appendix 1 – Template Letter of Intent

(this template should be copied onto the program’s institutional letterhead for submission)

The Program Name at *Institution Name* intends to initiate the OTA & PTA EAP accreditation review process.

Date of expiry of current accreditation status (if applicable):

Date

In order to initiate the process, the *Program Name* at *Institution Name* acknowledges the following:

- Review and understanding of the Program Accreditation Handbook
- Review of the examples of a Self Study Report for reference
- Review and understanding of the format, content, and method of submission required for the Self Study Report and Self Study Inventory
- Acceptance of the timelines for submission of key documentation in the accreditation process including:
 - confirmation of PRT members
 - Self Study Report and Self Study Inventory
 - site review schedule
 - receipt of PRT preliminary report and necessary follow up
 - receipt of Final PRT report
 - submission of Program Response
- Responsibilities of the program with respect to the site review:
 - arrangement of all interviews and interviewees as outlined in the site review schedule
 - transportation of the PRT between the hotel and campus each day
 - provision of snacks and lunch for the team day
 - booking of meeting space for the PRT as described in the Program Accreditation Handbook
- Availability of OTA & PTA EAP staff to provide assistance/guidance when required

The *Program Name* at *Institution Name* acknowledges that if it does not comply with the timelines and responsibilities referred to above, the review will not proceed and any costs associated with travel arrangements by the accreditation team will be reimbursed to the OTA & PTA EAP by the *Program Name* at *Institution Name*.

Name of Education Program Coordinator

Title of Education Program Coordinator

Signature

Date

Name of Administrator

Title of Administrator

Signature

Date

Appendix 2 - Sample Site Review Schedules

Campus Review

The schedule below is a guide to assist in planning a site review conducted on campus. The timing, participants and order of activities may vary according to the characteristics and needs of individual programs.

Day 1

Time	Place	Participants/Activity	Success Tips
14:00	Hotel	PRT coordination meeting	
16:00	Hotel	Meeting with Program Coordinator	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 preliminary report, discuss any questions that the program coordinator may have
18:00	Hotel	PRT coordination meeting	

Day 2

Time	Place	Participants	Success Tips
8:00-8:30	Campus	Tour of program/ equipment/ lab/ library resources etc.	
8:30-9:00	Campus	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 site review	If the faculty/staff is small, this meeting may be omitted as all relevant faculty may meet the PRT in the next meeting.
9:00-9:45	Campus	Meeting with those responsible for admissions	
9:45-10:15	Campus	BREAK	
10:15-11:45	Campus	OTA Faculty OTA Fieldwork Coordinator	Faculty meeting should not include the program

Time	Place	Participants	Success Tips
		PTA Faculty	coordinator or any individual to whom program faculty report to allow for more open discussion
		PTA Fieldwork Coordinator	Some PRTs prefer to meet with all faculty + fieldwork coordinator(s) first and split into discipline-specific groups after 30 minutes
11:45– 13:00	Campus	LUNCH	
13:00– 13:30	Campus	Administrative support staff	
13:30– 14:00	Campus	Individuals responsible for learning resources (librarian, technology)	
14:00– 14:45	Campus	Year 1 students	Year 1 and Year 2 students may be interviewed concurrently by two groups of PRT members
14:45– 15:30	Campus	Year 2 students	See program handbook for minimum required number of students from each year
15:30– 16:00	Campus	BREAK	
16:00– 17:00	Campus	OTA Fieldwork preceptors PTA Fieldwork preceptors	Scheduling these meetings at the end of the day facilitates preceptors' attendance.
17:00– 17:30	Campus	Employers	Providing food is also an incentive!
17:30	Campus	Program Coordinator (optional)	<i>Opportunity to modify tomorrow's schedule if necessary based on today's interviews</i>
18:00– 22:00	Hotel	PRT coordination and report writing	

Appendix 2 - Sample Site Schedules

Day 3

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

Virtual Review

Note that actual times are intentionally left blank to accommodate time zone differences. Please build the review schedule based on the information provided by the OTA & PTA EAP regarding the peer reviewers' availability. Remember to:

- Allow 60 minutes between longer interviews and at least 15 minutes between shorter ones to allow for peer reviewer bio breaks, snacks and stretches.
- Include a 5-10 minute connection window at the beginning of each meeting to allow time for participants to join the meeting link, be provided access, and troubleshoot any audio, video, or connection issues.
- Build the schedule with consideration given to the various time zones of the peer reviewers and the program.
- Consider that some programs and PRTs may prefer a schedule that spans two weeks.

The following sample schedule outlines three, 4-hour plus breaks held over three days which is the maximum recommended and possible if there are participants from across Canada. If the PRT is amenable, the schedule could be spread out to four, 3-hour blocks plus breaks, spread out over four days which may be less tiring and allow for more debriefing by the PRT in between blocks.

Pre-meeting – or add to Block 1

Time	Suggested Length	Participants/Activity	Success Tips
	45 mins.	PRT meets with Program coordinator	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 preliminary report, discuss any questions that the program coordinator may have
	15 mins.	Review tour of program/ equipment/ lab/ library resources etc.	Tour can be recorded ahead of time for PRT review and uploaded to Sync folder

Total: 1 hour

Appendix 2 - Sample Site Schedules

Block 1 – if no pre-meeting

Time	Suggested Length	Participants/Activity	Success Tips
	30 mins.	PRT meets with Program Coordinator	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 preliminary report, discuss any questions that the program coordinator may have
	15 mins.	Review of virtual tour of program/ equipment/ lab/ library resources etc.	Recommend tour be recorded ahead of time for PRT review
	15 mins.	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 site review	If the faculty/staff is small, this meeting may be omitted as all relevant faculty may meet the PRT in the next meeting.
	2 hours	OTA Faculty OTA Fieldwork coordinator PTA Faculty PTA Fieldwork coordinator	Faculty meeting should not include the program coordinator or any individual to whom program faculty report to allow for more open discussion Some PRTs prefer to meet with all faculty + fieldwork coordinator(s) first and split into discipline-specific groups after 30 minutes
	30 mins.	Meetings with faculty outside of the program who are involved in teaching OTA/PTA students	
	15 mins.	Touch base with Program Coordinator (optional)	Opportunity to discuss next day's schedule, changes to attendees or other logistics

Total: 4 hours + breaks

Block 2

Time	Suggested Length	Participants/Activity	Success Tips
	45 mins.	Administrative support staff	
	45 mins.	Individuals responsible for learning resources (librarian, technology)	
	45 mins.	Meeting with those responsible for admissions	
	1 hour	Year 1 students	Year 1 and Year 2 students may be interviewed concurrently by two groups of PRT members
	1 hour	Year 2 students	
	15 mins.	Touch base with Program Coordinator (optional)	See program handbook for minimum required number of students from each year Opportunity to discuss next day's schedule, changes to attendees or other logistics

Total: 4.25 hours + breaks

Block 3

Time	Suggested Length	Participants/Activity	Success Tips
	1 hour	Meeting with the department Chair/Dean/Administrator	
	30 mins.	OTA Fieldwork preceptors	Scheduling these meetings at the end of the day facilitates preceptors' attendance.
	30 mins.	PTA Fieldwork preceptors	
	1 hour	Employers	
	1 hour	Recent graduates	
		Program Advisory Committee (PAC) Closing meeting with program coordinator and others as determined	

Total: 4 hours + breaks