



CONDUCTING A VIRTUAL SITE VISIT

Welcome to the American Psychological Association’s presentation “Conducting a Virtual Site Visit.”

As you are likely aware, all APA accreditation site visits scheduled to occur in-person during 2020 were postponed. The CoA voted to approve the temporary implementation of virtual site visits for a subset of applicant programs. Due to the success of those virtual site visits and the ongoing impact of the pandemic, the CoA will continue with virtual site visits until July 1, 2021. Based on a variety of factors (including staff resources, site visitor availability, and training) the CoA has determined that accredited programs originally scheduled for a winter 2020 visit and applicant programs will be eligible for a virtual site visitor in the first half of 2021.

This presentation is primarily geared to help site visitors conduct a virtual visit; however, it will also be useful to program directors as they prepare and coordinate site visit specifics with their visitors.

AGENDA

- Aspects of the visit that remain the same
- Aspects of the visit that will be different
- Guidance on creating a visit schedule
- Zoom platform overview
- FAQ's

In this presentation, we will go over:

1. Aspects of the site visit that remain the same
2. Aspects of the site visit that will be different
3. Guidance on creating a virtual visit schedule
4. An overview of how Zoom will be used to conduct the visit, and
5. We'll touch on a few frequently asked questions

ASPECTS OF THE VISIT THAT REMAIN THE SAME

- Length of the visit (2 days)
- Self-study review in the CoA Portal prior to the visit
- Content covered during the visit, including individuals to be interviewed
 - Refer to the Site Visitor Manual for more guidance
<https://www.accreditation.apa.org/current-site-visitors>

A virtual site visit will follow the same general format as an in-person visit, consisting of 2 full days of interactive audio/video interviews, facility verification, and record review. Much of the process will be the same, including reviewing the program's self-study in advance of the visit, interviewing all relevant faculty, staff, and students, and reviewing a subset of files to ensure appropriate documentation mechanisms are in place. The Site Visitor Manual continues to be your best resource for organizing the visit, identifying who to interview and what to ask, and providing guidance in writing the site visit report. A PDF of the manual is available on the accreditation website at the link listed on the slide.

Virtual site visits will be conducted following APA's Standards of Accreditation, and the policies and procedures related to the conduct of site visits. Site visitors will still be representing the CoA while conducting the virtual visit and are expected to act as they would during an in-person visit in regard to professionalism and confidentiality.

ASPECTS OF THE VISIT THAT REMAIN THE SAME

- Program Director and site visit team chair collaborate on the visit's schedule
- Site visit report due 30 days after conclusion of virtual visit

Like an in-person visit, the program director and site visit team chair should work together to create the site visit schedule. In general, the schedule should be very similar to an in-person visit. While aspects of the schedule will be a bit different to accommodate the virtual format – the basic schedule of activities should mirror an on-site review.

Finally, just like an in-person visit, the site visit report will be due 30 days after the conclusion of the virtual visit. The site visit report should address all aspects of the SoA, just as it would following an in-person review.

ASPECTS OF THE VISIT THAT WILL BE DIFFERENT

- Virtual instead of in-person
- Timing of the visit each day
 - Account for different time zones
 - Each day of the visit should be no longer than 6 hours long

The main aspect of the virtual visit that will be different, is the use of technology to conduct interviews, review files, and tour the facility. In advance of the visit, both the site visitors and all program participants must confirm they have access to the technology needed to participate in the virtual visit. This includes internet connection, the capability for both audio and video, and access to the Zoom video conference platform.

The timing of the visit each day will be unique as well. Each day of the visit should have a start and stop time that accounts for differing time zones and is comfortable for all participating in the visit. For example, we recommend scheduling the visit for 11am – 5pm eastern when participants are across multiple time zones. If all participants are in the eastern time zone, 9am – 3pm eastern would be acceptable. As will be discussed later, a member of APA staff will participate in each visit – assisting with technology and assuring smooth transitions from meeting to meeting. Since these staff are all in the eastern time zone, all visits **MUST** accommodate eastern time. When creating the final schedule, we advise that you include all applicable time zones.

Each day of the visit should be no longer than 6 hours long. We understand that

Zoom fatigue is real, and that limiting the time will make the process more manageable for all involved. We also understand that given the differences in program size, two 6-hour days may not be sufficient to complete all the required interviews. As such, an additional visit day may be permitted, if necessary. If the program and site visitors determine that additional time will be needed, please contact the accreditation office to formally extend the visit. You must receive approval from the Office to add an additional site visit day.

ASPECTS OF THE VISIT THAT WILL BE DIFFERENT

- File Review
 - Method of transmitting
 - Specific files requiring review

One of the key functions of the site visit team is to review program files to ensure appropriate documentation methods and processes are being followed. For obvious reasons, the file review portion of the virtual visit will be a bit different from an in-person review; however, there is an expectation that certain files are reviewed during the course of the remote visit.

The program will be asked to securely share files without sending or transmitting them directly to members of the SV team. The Accreditation Office will provide a secure file sharing location and make the link available to the program and visitors. The program may opt to provide an alternative method of sharing files. This will be coordinated between the office and the program well in advance of the visit to ensure all members of the site visit team can gain access to the appropriate files in a secure manner.

Since posting ALL program files may not be a feasible option for many programs, the Commission advises site visitors to review a specific subset of files.

Like an in-person visit, all grievances and complaints from the past 10 years (or since the program's inception), if any, must be uploaded and reviewed.

Site visitors are also expected to review a subset of trainee records from the past 10 years (or since the program started). Site visitors are asked to select for review, at a minimum, one trainee file/record from each cohort the program has had over the past 10 years. To ensure a random sample, we are asking site visitors to identify for the program the ID #s of the trainees the team has selected. Visitors should do so at least one week prior to the visit to provide the program adequate time to prepare/upload the files.

For doctoral programs: site visitors should also select for review, at a minimum, three student dissertations. As with the trainee files, site visitors should identify for the program the ID #s of the students the team has selected. Again, visitors should do so at least one week prior to the visit to provide the program adequate time to prepare the files.

ASPECTS OF THE VISIT THAT WILL BE DIFFERENT

- Facility tour
 - Locations
 - Format

Another key aspect of a site visit is the ability to see the physical resources available to the program. Part of the remote site visit must consist of a virtual tour of the program's facilities. This will be conducted to confirm accessibility as well as to get a sense of whether the program has what is necessary to provide proper training, such as faculty/trainee office space, clinical rooms, classrooms, libraries, etc. The route and format of the facility tour will be planned prior to the visit by the program. The most basic method would be to have the program do a live stream tour via cell phone; however, we understand that some locations may not allow recording of any kind during certain times. Given this, a pre-recorded tour is also acceptable. If the tour is pre-recorded, the recording should not be more than 1 month old. We ask site visitors to work with the program to determine the specific locations that should be included on the tour, and the format for the tour – so that it can be appropriately integrated into the schedule.

Since the file review and facility tour are likely the most complicated parts of the visit to conduct virtually, we encourage you to contact the Accreditation Office with any specific questions and/or guidance on how best to navigate these aspects of the visit.

ASPECTS OF THE VISIT THAT WILL BE DIFFERENT

- APA staff involvement
 - Acting as Zoom meeting host and facilitator

Although APA Accreditation staff are usually not involved in in-person visits, they will be the Zoom meeting host and facilitate this virtual format to ensure technology runs effectively for the duration of the visit. Accreditation staff will not be actively participating in the content of the visit. APA staff role will be to monitor and admit participants, create breakout rooms, and move individuals to the appropriate breakout rooms for scheduled meetings. APA staff are also there to assist the site visitors with any technological or logistical problems that might arise.

APA staff will need to be kept in the loop on the scheduling of the visit and will assist, as needed, with any scheduling or technology problems.

GUIDANCE ON CREATING A VISIT SCHEDULE

- Include breakout sessions for “drop-ins”
- Include hard breaks
- Include all applicable time zones on the schedule
- Include SV team’s pre- and post- visit meeting
 - Team should meet the day before the visit, as usual

As previously discussed, the visit should consist of two 6-hour days, accounting for varying time zones. While, in general, the schedule should mirror an in-person visit, there are certain aspects of a virtual visit that must be considered in the creation of the final schedule. For example, We advise Including at least a session for unscheduled “drop-ins.” This should be scheduled during a time when the Program Director is not be present on the Zoom call. During a virtual site visit there is limited ability to have more informal interactions with participants. We therefore strongly encourage working time into the schedule to allow for informal interactions with faculty and trainees.

We also advise Including hard breaks into the formal schedule to accommodate for lunch, personal breaks, etc. Also, to avoid any confusion, for every meeting on the schedule, we advise marking the timeframe in all applicable time zones (e.g., trainee interviews: 8-9a pacific; 9-10a mountain; 10-11a central; 11a-12p eastern).

When meetings with a large number (30+) of individuals are planned, please include extra time in the schedule to to admit all attendees and separate everyone into their designated “meeting spaces” on the Zoom platform. APA staff must confirm all participants are on the list before admitting them to the meeting, and create

breakout rooms as needed. This cannot be done until participants join the session, and it may take 10-15 minutes to admit all participants and organize them into assigned breakout rooms.

Finally, while not part of the formal schedule, be sure to Include the site visit team's pre- and post- visit meeting. While this is not part of the formal site visit, we encourage the visitors to have a call or Zoom session the day prior to touch base and confirm the general game plan. Likewise, at the end of the visit the team should debrief and make a plan for the writing of the site visit report. If requested, APA staff will leave the Zoom meeting open to the site visit team for up to 30 minutes after the visit's closing session to allow the team time for private discussion.

ZOOM PLATFORM OVERVIEW

- Zoom platform basics
- APA OPCA staff role
- Ensuring confidentiality

Accreditation staff will provide every virtual site visit team with written guidance on navigating Zoom. If you require additional Zoom guidance, or just have general questions related to the virtual format, APA staff will provide synchronous Q&A sessions (via Zoom) prior to your visit, upon request.

As noted throughout this presentation, the APA will host the virtual site visit using Zoom. APA staff will initiate the Zoom meeting and will assist with the logistics of the platform. Group meetings such as the opening and closing sessions will take place in the “main session” and breakout rooms will be created to allow for participants to remain in the main session while site visitors interview select groups/individuals. APA staff will be present in the Zoom main session for the duration of the visit – and can assist you, as needed.

To ensure confidentiality during the virtual site visit, APA will request the list of participants to be submitted at least one week in advance of the visit. Only those individuals identified ahead of time will be admitted (by APA staff) to the password protected Zoom session. For this reason, we ask all participants to ensure their visible Zoom name is aligned with the name provided on our participant list. We ask that all site visitors ensure they have a secure/private location to conduct the site visit in

order to ensure confidentiality. If concerned about privacy during the meeting, we advise using earbuds/headphones for privacy. Please note that APA staff will disable all recording functions, including chat, local, automatic and cloud recording.

ZOOM PLATFORM OVERVIEW

- General tips on virtual meetings/interviews
- Technology issues may occur

Since many of you have likely already been using Zoom or other similar platforms in the past few months, you are likely already familiar with the basics of such applications. That said, here are a few general tips on conducting a virtual meeting:

1. Update the Zoom application prior to the start of the site visit and ensure it is working as expected. Also, consider arriving early to ensure you're able to log in and work the technology. APA staff will begin the meeting 10-15 minutes prior to the start-time of the visit on both days to allow for this.
2. Always keep your audio on mute when you are not speaking, in order to reduce background noise for other participants. Feel free to tell other participants to do this as well, if it becomes difficult to hear due to background noise.
3. Adhere to the schedule of the virtual site visit. Because participants will be logging in and out from different locations, it is extremely important to stick to the schedule as best you can.
4. Finally, be flexible and understanding of technological glitches. The APA understands that technology challenges may arise during the course of the visit that may impact the ability to complete the visit as scheduled. Telephone interviews may be substituted if deemed appropriate by all parties. However, the APA may request an additional day be added to complete interviews, etc. as needed. The date would be determined pending approval by the site visitors and

the program.

FAQ'S

WILL I STILL RECEIVE CE CREDITS FOR THE VIRTUAL VISIT?

- Yes

WHAT IS THE TIMEFRAME FOR THE VIRTUAL VISITS?

- February 1 through July 1, 2021
- Excludes:
- Feb 3-5 (CoA Meeting)
 - Feb 15 (Presidents' Day)
 - April 8-9 (CoA Meeting)
 - May 31 (Memorial Day)

DO I HAVE TO BE IN ATTENDANCE OF THE IN-PERSON FOLLOW-UP SITE VISIT?

- While the hope is that the visitor(s) participating in the in-person visit for a program will be a subset of the virtual site visit team for that program, visitors are not obligating themselves to do an in-person visit by agreeing to do the virtual visit.
- Timing and participant(s) in the in-person follow-up visit is TBD.

Here are a few frequently asked questions we have heard from site visitors related to the virtual site visit process:

Regarding CE credit – Yes, you will still be able to receive CE credits for completing a virtual site visit.

Visits will take place February 1st through July 1, 2021, excluding the dates identified here. Of note, APA resources can only allow for a certain number of visits to occur on a given day. As such, the Office will provide a link to a read-only calendar that will be updated in real time, so that programs and site visitors can track what dates are available.

Also, as you may already know, each virtual site visit will be followed up with a brief in-person site visit to meet the statutory and regulatory requirements to perform regular on-site inspections. While we hope the visitor or visitors participating in the in-person visit for a program will be a subset of the virtual site visit team, the remote visitors are not obligated to do the in-person visit. We will provide more information on the in-person follow-up visits as information is available.

FAQ'S

HOW DO WE HANDLE/ADDRESS PROGRAM CHANGES RELATED TO COVID-19?

- The CoA is allowing for flexibility in maintaining operations in a manner that reduces risk of exposure to the COVID-19 virus.
- The visit and report should focus on the program as it was originally submitted.
- The formal FAQ from CoA related to COVID-19 can be found here: <https://www.accreditation.apa.org/covid-19>

We understand site visitors will likely ask how best to handle program changes due to COVID-19. The CoA is allowing for flexibility in programs maintaining operations in a manner that reduces risk of exposure to the COVID-19 virus.

Programs are expected to provide you with a summary of any changes made as a result of COVID-19. However, as site visitors, you do not need to focus on temporary program changes made due to COVID. We ask that you include a very brief summary of such changes in your site visit report; however, the visit and report should focus on the program as it was originally submitted and reported in the self-study.

Please read the FAQ provided in this link for more information related to the Commission's responses to COVID-19 questions.

FAQ'S

WILL PROGRAMS THAT HAD DELAYED SITE VISITS BE ASKED TO UPDATE THEIR SELF-STUDY WITH CURRENT INFO/DATA?

- No. However, programs will be asked to provide site visitors with a brief written summary of any changes that have occurred since their self-study submission.

Finally, we recognize that due to COVID the majority of visits taking place this winter/spring have been delayed up to a year. It is likely that these programs have changes to report from their initial self-study submission. Changes might include revised coursework/didactics, new faculty/supervisors, and updated student/trainee data. While we are not requiring an updated self-study or updated tables, we do ask that programs provide a brief summary of changes and any relevant attachments. In addition to providing this information to site visitors, APA will ask programs to upload this update as part of their response to the site visit report.



CLOSING

The Office of Program Consultation and Accreditation staff will work closely with the program and site visitors to ensure a useful and productive virtual site visit.

Thank you for your participation on a virtual APA site visit!

Accreditation staff will work closely with the program and site visitors to ensure a useful and productive virtual site visit. Once you have agreed to serve on a virtual team, OPCA will be in touch to assist with the logistics and answer any remaining questions you may have.

Thank you for your patience during these unprecedented times and adapting with us to continue our higher education efforts.