Commission on Dental Accreditation
Dental Education Site Visitor Update

95th ADEA Annual Session
Sunday, March 18, 2018
Site Visitor Update

- To review policies/procedures particularly relevant to site visitors
- To bring you up-to-date with Accreditation Standards
- To recap Site Visitor Report writing
- To remind you of travel reimbursement and other logistics
Commission Policies in the Spotlight
Modification of Status: Withdraw

- CODA added the statement below to its definition of “withdraw”:

**Upon withdrawal of accreditation by the Commission, the program is no longer recognized by the United States Department of Education.**
Accreditation Status Definitions

• Modification of Status: Approval (with reporting requirements)

• An accreditation classification granted to an educational program indicating that specific deficiencies or weaknesses exist in one or more areas of the program. Evidence of compliance with the cited standards or policies must be demonstrated within a timeframe not to exceed eighteen (18) months if the program is between one and two years in length or two years if the program is at least two years in length. If the deficiencies are not corrected within the specified time period, accreditation will be withdrawn, unless the Commission extends the period for achieving compliance for good cause. Identification of new deficiencies during the reporting time period will not result in a modification of the specified deadline for compliance with prior deficiencies.
Policy on Integrity

• Integrity is expected throughout the accreditation process

• New language: All program changes will be reported in a timely manner and in accordance with the Commission’s Policy on Reporting Program Changes
Reporting Program Changes in Accredited Programs

• All program changes must be reported; CODA staff can advise whether the change requires prior CODA approval or, alternately, will be reviewed at the next site visit.

• On occasion, the Commission may learn of program changes which may impact the program’s ability to comply with accreditation standards or policy. In these situations, CODA will contact the sponsoring institution and program to determine whether reporting may be necessary. Failure to report and receive approval prior to the program change may result in further review by the Commission and/or a special site visit, and may jeopardize the program’s accreditation status.
Program Change

• Substantial increase in program enrollment as determined by preliminary review by the discipline-specific Review Committee Chair. Programs are reminded that resources must be maintained even when the full complement of students/residents is not enrolled in the program. (Specialty programs see Policy on Enrollment Increases In Advanced Specialty Programs; Predoctoral programs see Guidelines for Requesting an Increase in Enrollment in a Predoctoral Dental Education Program and Postdoctoral General Dentistry Education programs see Guidelines for Reporting Enrollment Increases in Postdoctoral General Dentistry Education Programs)
Clarification added that CODA’s assistance to students/residents transferring from a discontinuing or closing program to another accredited program will be provided in the form of guidance with reporting program changes to CODA for review.
Policy Statement on Principles of Ethics in Programmatic Advertising and Student Recruitment

• Under Advertising, Publications, and Promotional Literature, CODA clarified that:

The sponsor of the educational program must be clearly identified when referencing the program’s accreditation status with CODA.
Policy Statement on Reporting and Approval of Sites Where Educational Activity Occurs

• Major Activity Sites:
  – Clarification that a site used for “competency assessment or comparable summative assessments” is a major site

• Minor Activity Sites:
  – Clarification that a site used for “no competency assessment or comparable summative assessments” is a minor site. Though other evaluations (daily evaluation, for example) may occur.
Reporting Sites Where Educational Activity Occurs

Is the educational activity at the site supplemental and not required for accreditation or program requirements?  
- YES: No site visit required; no report required; no approval of site required
- NO: Is the activity site owned by the sponsoring institution?
  - YES: Report required to CODA at least 36 days prior to using site, using Guidelines for Reporting Sites Where Educational Activities Occur; Acknowledged by CODA; May be visited at the time of the next site visit
  - NO: Are Students/Residents assessed using competency assessments or comparable summative assessments at this site?
    - YES: (This is a Major Site)
      - Report required to CODA by June 1 for Summer meeting or December 1 for Winter meeting, using Guidelines on Reporting and Approval of Sites Where Educational Activity Occurs; Must be approved before using; CODA may direct special focused site visits; Site may be visited during future site visit
    - NO: (This is a Minor Site)
      - Report required to CODA 30 days prior to using site, using Guidelines on Reporting and Approval of Sites Where Educational Activity Occurs; Acknowledged by CODA; May be visited at the time of the next site visit

Definitions:
Supplemental Activity Site: Students/Residents choose to visit the site outside of the educational program, and the site is not used to fulfill program or accreditation requirements (e.g., volunteer mission trips, health fair, etc.).

Major Activity Site: Students/Residents are required to complete an experience at this site to meet a program requirement or accreditation standard, and competency assessments or comparable summative assessments are performed at the site.

Minor Activity Site: Students/Residents are required to complete an experience at this or another site to meet a program requirement or accreditation standard, and no competency assessments or comparable summative assessments are performed at the site. Evaluation may occur.
Complaints Against Educational Programs

• Establishment of a process for consideration of “anonymous” comments/complaints (unsigned comments/complaints)
  – Complaint with sufficient evidence of probable cause of noncompliance with standard(s) or policy(ies) will be handled like a formal written complaint.
  – Complaint without sufficient evidence of probable cause of noncompliance with standard(s) or policy(ies) will be added to program’s file for review at next accreditation site visit.

• Once a complaint is submitted and reviewed by CODA staff, it becomes the property of CODA and may not be withdrawn by the complainant for the purpose of CODA review.
Conflict of Interest Policy

• Clarifying that the state board representative may be a graduate of the program or reside in the state; however, this individual is held to all other conflict of interest requirements as would be expected for the site visit team members.
Confidentiality Policy

• Clarifying that CODA may share program information in instances related to USDE re-recognition or responding to state or federal legal requirements, as appropriate.
Policy and Procedure Related to Compliance with HIPAA (Privacy and Data Security)

• CODA has increased the penalty fee from $1000 to $4000 per program submission, effective with any documents submitted to CODA postmarked or emailed on or after February 19, 2018.

• Resubmissions that continue to contain PHI/PII will be issued an additional $4000 per program submission.

Policy on Third Party Comments

• Programs with special focused visits are expected to solicit third party comments as soon as the program is notified of the visit by CODA, if posting 90 days prior to the visit is not possible

• CODA will consider signed and unsigned third-party comments
Due Process – Review Committee Special Appearances

• Programs that may request review committee special appearance at its next meeting are programs that, at its prior meeting, CODA granted the status of:
  – “approval with reporting requirements,”
  – “approval with reporting requirements, intent to withdraw,” or
  – denied a requested program change, and the program submits a subsequent program change report for the next CODA meeting
Due Process – Review Committee Special Appearances

• Additional written materials for the Review Committee must be submitted at least one (1) week prior to the meeting, absent documented extraordinary circumstances

• No additional information may be provided on the day of the special appearance at the Review Committee meeting
NEW - Policy on Preparation and Submission of Reports to the Commission (effective 8/17)

- All institutions offering programs accredited by the Commission are expected to prepare reports that adhere to guidelines set forth by the Commission on Dental Accreditation, including required verification signatures by the institution’s chief executive officer. The Commission’s various guidelines for preparing and submitting reports, including electronic submission, can be found on the Commission’s website or obtained from the Commission staff.
- In addition, all institutions must meet established deadlines for submission of requested information. Any information that does not meet the preparation or submission guidelines or is received after the prescribed deadline may be returned to the program or held for consideration at the following meeting in accordance with the wishes of the program. The Commission’s timelines for demonstration of full compliance with the cited standards will not be modified as a result of the delayed review. See the Commission’s Policy on Missed Deadlines.
Electronic Submission of Self-Study and Reports

• The Commission must retain an accurate record of the program’s submission; therefore, links in accreditation documents (self-study, reports, etc.) must be avoided.

• Provide screen capture, download, “embedded” file, or scanned copy of content that is found at the link.
CODA’s Development of Electronic Accreditation System

- Electronic accreditation tool is currently under development
- Will provide access to institutional personnel for upload of Self-Study, program reports, and other communications to CODA
- Will allow site visitor review of Self-Study and completion of SVER online
- Will allow CODA staff to transmit communications and information to programs
- More information to come…
New On-Demand Webinar

• An Introduction to CODA: A Briefing on the Commission on Dental Accreditation for Program Directors

New Documents Available

• CODA Fees Schedule 2017 - 2019
  https://www.ada.org/en/coda/accreditation/fees
  – Remember, annual fee is doubled in the year of a site visit

• Evaluation and Operational Policies and Procedures
Site Visitor Expense Reimbursements

• Expense reports must be submitted electronically through Concur, no exceptions

• CODA on-demand webinar on how to submit concur expense reports
  – Visit ADA Connect | Site Visitor Materials | 3-Concur Reimbursements | Concur Webinar Download to View
Coming Soon – Mandatory Annual Site Visitor Training

- CODA has identified a need for mandatory annual retraining and calibration of CODA site visitors
- Staff directed to initiate development of web-based training programs with a progress report to the Commission, through the Quality Assurance and Strategic Planning Committee, for consideration in Summer 2018
- Training will be web-based, on-demand and will include mechanisms for tracking completion and acquisition of knowledge
Consulting: Mock Site Visits

• Active site visitors may independently consult with educational programs accredited by CODA or applying for accreditation
  – All consulting roles must be disclosed to the Commission
  – Site visitors must file a declaration form signed by themselves and the institution/program with whom they consulted
  – Contact the Commission office for the declaration form
Consulting

• Individuals who provide consultation services do not represent CODA

• If your program uses a CODA site visitor for consultation services, the program must identify that individual on the screening list

• Site Visitors to international programs must not provide consultation services to those programs
What’s New at CODA?
Revised Standards

• Most CODA educational standards have revisions taking effect July 1, 2018 to implement standards on management of programs related to sites where educational activity occurs

Revised Standards

• January 1, 2018 implementation
  – Dental Education, areas of oversight at sites where educational activity occurs

• Immediate implementation
  – Dental Hygiene, definition of sponsoring institution
  – Dental Therapy, areas of oversight at sites where educational activity occurs

• July 1, 2018 implementation
  – Dental Assisting
  – Pediatric Dentistry
  – Endodontics
  – Periodontics
  – Orthodontics and Dentofacial Orthopedics
  – Clinical Fellowship in Craniofacial and Special Care Orthodontics
Revised Standards

• July 1, 2018 implementation cont.
  – Oral and Maxillofacial Surgery
  – Clinical Fellowship in Oral and Maxillofacial Surgery
  – Oral and Maxillofacial pathology
  – Dental Public Health
  – Oral and Maxillofacial Radiology
  – Prosthodontics
  – Advanced Education in General Dentistry
  – General Practice Residency
Revised Standards

• July 1, 2018 implementation cont.
  – Dental Anesthesiology
  – Oral Medicine
  – Orofacial Pain
Proposed Standards: Comments Due

- Comment Due June 1, 2018:
  - Dental Hygiene*
    - Definition of Terms, Standards 2-8d and 2-13
    - Standards 2-1 and 2-24
  - Dental Education
    - Standard 2-8e
    - Standard 3-1

* Hearing to be held at ADHA
Proposed Standards: Comments Due

- Comment Due December 1, 2018:
  - Dental Education
    - Standard 6
    - Standard 2-17
  - Endodontics
    - Standard 4-8e
  - Oral and Maxillofacial Surgery
Operative Dentistry Request

Summer 2017: CODA directed that an ad hoc committee composed of Commission members be appointed to further study the request for establishment of an accreditation program for dental education programs in operative dentistry, in accordance with the Commission’s Policies and Procedures for Accreditation of Programs in Areas of Advanced Training in General Dentistry, with a report at the Summer 2018 meeting.
Summer 2017: CODA directed that an ad hoc committee composed of Commission members be appointed to further study the request for establishment of a Review Committee for Dental Anesthesiology Education, in accordance with the Commission’s Policy on Changes to the Composition of Review Committees and the Board of Commissioners, and to consider the impact, implications and logistics of this request, with a report at the Summer 2018 meeting.
International Sites for US-Based, CODA-Accredited Programs

Winter 2018: CODA directs staff to survey Dental School Deans and all U.S. based Advanced Education in General Dentistry (AEGD) program directors to identify interest, and resource and governance issues, that may impact CODA’s decision to establish an accreditation process for the use of international sites where educational activity occurs for U.S.-based, CODA-accredited dental schools offering predoctoral (DDS/DMD) and Advanced Education in General Dentistry (AEGD) programs, with a report to the Standing Committee and Commission in Summer 2018.
CODA Review of National Council on Disability Issue Brief

Elimination of “Specialty” Terminology

• Considered by CODA in Summer 2017 and Winter 2018

• The Commission concluded that its current terminology for advanced education programs (i.e., “advanced” and “advanced specialty”) may unintentionally dictate which dental discipline is a “specialty.”
Elimination of “Specialty” Terminology: Rationale for Change

- The terminology CODA uses is a carryover of the vocabulary used since 1975, when CODA assumed the policies of the Council on Dental Education and designated postdoctoral dental education programs as specialty programs, or general dentistry programs, based solely on the American Dental Association (ADA) Specialty Recognition Process. This does not reflect the changing environment of dental specialty recognition.

- The terminology change comports with the scope of the Commission, as recognized by the United States Department of Education (USDE), which does not include specific language to distinguish between “advanced” and “advanced specialty” disciplines within dentistry.
Elimination of “Specialty” Terminology: Rationale for Change

• The Commission is aware that there are misconceptions among many in the communities of interest of the role, if any, that the Commission plays in regards to specialty recognition. The change in terminology clarifies that the Commission accredits education programs, but does not designate which disciplines in dentistry are “specialties.”

• Public announcement found at: https://www.ada.org/en/coda/accreditation/accreditation-news
Elimination of “Specialty” Terminology: CODA Directives

Winter 2018: Staff directed to work with the Standing Committee on Documentation and Policy Review to identify all necessary revisions to CODA’s Rules, the policies and procedures found in the Commission’s Evaluation and Operational Policies and Procedures (EOPP) manual, the Accreditation Standards and supporting documents, and the CODA website to eliminate terminology that unintentionally dictates which advanced education program is a dental specialty, with an action plan for revision of all documents for consideration by the Commission at its Summer 2018 meeting.
Elimination of “Specialty” Terminology: CODA Directives

Winter 2018: CODA directed an immediate communication to inform the communities of interest, including dental education programs, dental organizations and dental boards, that the Commission has directed development of a plan to revise its documents to eliminate terminology that dictates which advanced education program is a dental specialty. In doing so, the Commission will terminate its use of separate references for advanced programs in dental specialties and advanced dental programs in general dentistry.
Elimination of “Specialty” Terminology: CODA Directives

Winter 2018: CODA directed staff to work with the Standing Committee on Documentation and Policy Review to develop an ongoing communication plan to inform the Commission’s communities of interest about the Commission’s progress to eliminate terminology in CODA documents that unintentionally dictates which advanced education program is a dental specialty for consideration by the Commission at its Summer 2018 meeting.
Call for Nominations: Review Committees

• CODA seeks nominations for various positions on review committees.

• Nomination Deadline is June 1, 2018

• List of Positions, Nomination Criteria, and Nomination Form found at https://www.ada.org/en/coda/accreditation/accreditation-news/call-for-nominations
Policy on Planning and Implementing PACV and International Accreditation Site Visits

• New policy that covers international travel logistics related to safety, health, or other concerns, which may alter CODA’s plans to conduct international trips.

• See EOPP
Site Visitor Report Writing: RECAP
Writing a Recommendation

- A recommendation is written when an area of non-compliance has been identified.
- A rationale must be included. Why are you writing a recommendation?
- May help to answer the following questions:
  - What precisely is the issue?
  - What does the program currently provide?
    - How is it provided?
    - How well does it work?
  - To what extent are students gaining the required training and experience?
  - What training and experiences are the students not gaining?
Writing the Recommendation

- The narrative/recommendation cannot be prescriptive. Tell the institution what the deficiency is, not how to “fix” it.

- Provide as much detail as possible.

- **Restate the standard**, use the “stem.” “It is recommended…..” Include only those aspects of the standard that are not being met.

- Treat each circled NO as a separate issue and provide rationale for each.

- Cite multiple sources
Writing a Suggestion

• Program is in compliance, but could be improved.
• Emphasis is on *enhancing* compliance; not to provide a “favor”
• **Watch prescriptiveness**
• Program is **not** obligated to address in response.
• Written in the basic format of a recommendation:
  • Must relate to a Standard
  • Cite multiple sources, if applicable
  • Provide the “story.”
  • Begin with “It is suggested…..”
Other Information re: Site Visit Report

- No written commendations
- No written “strengths”
- May include comments that document a specific situation that could be useful for future site visits (e.g., new clinic under construction)
After the team approves the Site Visit Report:

• Forwarded to the institution. Directed to prepare a response, if applicable
• Review committee considers the site visit report, along with the program’s response
• Makes a recommendation to the Commission regarding accreditation status
• Suggestions cannot become recommendations
• Recommendations can become suggestions or be removed if RC deems appropriate
• CODA makes final accreditation decision
• What to Review: Policies and Procedures
Conflict of Interest (Reminder)

• The site visitor is obligated to report any conflict of interest – real or perceived

• If you think you have a conflict of interest, contact Commission Staff

• See the entire Conflict of Interest Policy, found in Evaluation and Operational Policies and Procedures manual
Conflict examples include a site visitor who...

- is a graduate of a program at the institution;
- has served on the programs visiting committee within the last 10 years;
- Has served as an independent consultant, employee or appointee of the institution;
- has a family member who is employed or affiliated with the institution;
- has a close professional or personal relationship with the institution/program or key personnel in the institution/program which would, from the standpoint of a reasonable person, create the appearance of a conflict;
- Manifests a partiality that prevents objective consideration of a program for accreditation;
- Is a former employee of the institution or program;
- Previously applied for a position at the institution within the last five (5) years;
- is affiliated with an institution/program in the same state; and or
- is a resident of the state.
Confidentiality

• A **FOUNDATION** of the Commission’s process of program evaluation

• Covers..
  – All site visit materials received prior to the visit
  – All written information obtained on site
  – All patient protected health information
  – All meetings and discussions related to the program’s accreditation

• Has **NO** expiration date - - It lasts forever
Confidentiality, continued

• All materials generated and received in the accreditation process are confidential
• All sessions within the site visit are confidential
• No audio or video recording is permitted
• Oral comments made by site visitors during the visit are not to be construed as official site visit findings unless documented within the site visit report and may not be publicized
• Publication of site visit team members’ names and/or contact information is prohibited.
Program Change Policy

• When reviewing program background and on-site material, you will be noting whether the program has complied with CODA’s policy on reporting program changes.

• Some changes must be reported at least 30 days prior to anticipated implementation (such as Program Director changes that comply with all program director qualification requirements) and are reviewed at the next site visit.

• Reporting on the Annual Survey does not preclude the requirement to report directly to CODA.

• Contact CODA staff for guidance and review program change policy for more information.
Examples of Program Changes that Need Prior Commission Approval-Reminder

- Transfer of sponsorship from one institution to another;

- Moving a program from one geographic site to another; including but not limited to geographic moves within the same institution;
Examples of Program Changes that Need Prior Commission Approval-Reminder

• Change in the nature of the program’s financial support that could affect the ability of the program to meet the standards;
• Curriculum changes that could affect the ability of the program to meet the standards;
• Change in the required length of the program;
• Reduction of program dental facilities that could affect the ability of the program to meet the standards;
• Addition of advanced standing opportunity (e.g., policies and procedures to accept transfer students/residents);
• See Policy for more details.
Program Change Policy-Recent Clarifications

• Reduction in faculty or support staff time commitment *that could affect the ability of the program to meet the standards*
  – Must be reviewed and approved by the Commission prior to implementation
Policy on Reporting and Approval of Sites Where Educational Activity Occurs

- The Commission expects programs to follow the EOPP guidelines and accreditation standards when developing, implementing and monitoring activity sites used to provide educational experiences.

- The Commission must ensure that the necessary education as defined by the standards is available, and appropriate resources (adequate faculty and staff, availability of patient experiences, and distance learning provisions) are provided to all students/residents enrolled in an accredited program.

- Generally, only programs without reporting requirements will be approved to initiate educational experiences at major activity sites.
Does this Site Need Prior Approval?

- Prior approval required:
  - Establishing Off-Campus sites **not owned by the sponsoring institution** used to meet accreditation standards or program requirements

- Prior approval not required:
  - Establishing Off-Campus sites **owned by the sponsoring institution** used to meet accreditation standards or program requirements
Complaint Policy

• Two (2) parts…
• Part 1: Demonstrate that students/residents are notified, at least annually, of the opportunity and the procedures to file complaints with the Commission
• Part 2: Maintain a record of student/resident complaints
• Provide evidence of notification and records to the visiting committee
Anonymous Complaints

- Unsigned comment/complaint submitted to CODA
  - Complaint with sufficient evidence of probable cause of noncompliance with standard(s) or policy(ies) will be handled like a formal written complaint.
  - Complaint without sufficient evidence of probable cause of noncompliance with standard(s) or policy(ies) will be added to program’s file for review at next accreditation site visit.

- The program will have an opportunity to respond; response will be considered during the site visit evaluation.

- Site visit team will be informed of the anonymous comment/complaint at the time of the site visit

- Section on SVER to complete relative to anonymous complaints
Distance Education

- Related to Off-Campus Sites but separate & distinct policy
- Technology-driven
- Expectation is that programs using this modality must comply with accreditation standards; must have a student identity verification process, and must alert students to possible associated charges
- Programs are reviewed at time of site visit for compliance with Distance Education policy
- Site Visitor Evaluation Report (SVER) includes questions on Distance Education in the Compliance with Commission Policies section
Distance Education Policy

• Distance education means education that uses one or more of the technologies listed below to deliver instruction to students who are separated from the instructor and to support regular and substantive interaction between the students and the instructor, either synchronously or asynchronously. The technologies may include:

  – the internet;
  – one-way and two-way transmissions through open broadcast, closed circuit, cable, microwave, broadband lines, fiber optics, satellite, or wireless communications devices;
  – audio conferencing; and/or
  – video cassettes, DVDs, and CD–ROMs, if the cassettes, DVDs, or CD–ROMs are used in a course in conjunction with any of the technologies listed above.
Distance Education Policy, Continued

- Programs that offer distance education must have processes in place through which the program establishes that the student who registers in a distance education course or program is the same student who participates in and completes the course or program and receives the academic credit.
  
  - Programs must verify the identity of a student who participates in class or coursework by using, at the option of the program, methods such as a secure login and pass code; proctored examinations; and/or new or other technologies and practices that are effective in verifying student identity
  
  - The program must make clear in writing that processes are used that protect student privacy and programs must notify students of any projected additional student charges associated with the verification of student identity at the time of registration or enrollment
Third Party Comments

• Programs must solicit comment through appropriate notification of communities of interest and the public such as faculty, students, program administrators, specialty and dental-related organizations, patients, and consumers.

• Programs must solicit third-party comments at least ninety (90) days prior to their site visit. The notice should indicate the deadline of sixty (60) days for receipt of third-party comments in the Commission office.
Third Party Comments, continued

- Identification of the individual making comment will be removed prior to referral to the site visitors and program
- Third Party Comment and program’s response provided to team 15 days prior to site visit
- Site Visitor Evaluation Report (SVER) includes questions on Third Party Comments in the Compliance with Commission Policies section
Site Visit Logistics and Reimbursement
Fox World Travel 24/7 Reservations

Follow the link to Fox World Travel:

ada@foxworldtravel.com

• Fox agents are available 7:00am-7:30pm central time to assist with business needs
  – CODA/ADA Local Number: 312-361-0144
  – CODA/ADA Toll Free Number: 844-319-2892

• To make online travel reservations and hotel reservations go to: www.concursolutions.com
Fox Travel After Hours

• Travel with the Fox World Travel after-hours emergency number and CODA staff number
  – CODA/ADA Local Number: 312-361-0411
  – CODA/ADA Toll Free Number: 844-319-2892
  – After-Hours CODE: A10MN

• Refer to Travel Policy for clarification on reimbursements

• After hours phone number is only for cancellations and flight delays
Complete Traveler Profile

• Note that the **first, middle, and last name** fields should exactly match your government-issued photo ID
• Input loyalty programs
• TSA Pre Check Number and/or Global Entry Number
• Seating Preferences
Sign Up for Fox World Travel Trip Alert

- Free trip alert messaging service, ALTITUDE, powered by FlightStats
- To receive flight messages, complete personal Trip Alert Profile with Fox World Travel
- ALTITUDE updates include:
  - Cancellations or diversions
  - Departure delays
  - Gate changes
  - Flight connections
Travel Days

- Arrive day before site visit ("travel day")
- Return final day of site visit (see site visit schedule for departure time)
- Keep staff and site visit chair contact numbers with you when traveling
Travel Approval

- Prior to in-person meeting, CODA staff will authorize your travel
- **All** CODA travel reservations **must** be through Fox World Travel, otherwise you may not be reimbursed
- Driving, car rentals, or unusual itineraries need **prior** approval from staff
- Airfare will be prepaid by CODA
- Contact CODA staff prior to making arrangements if:
  - Flights deviate from home-site-home
  - Any personal coordinated travel plans
  - If return travel is not possible on the final day of the meeting
  - Plan to drive rather than fly to site visit
- To drive instead of fly, contact Fox World Travel for airfare quote
  - Must submit quote with travel reimbursement
  - Reimbursed for actual mileage, up to cost of flight
Air Transportation Reservations

- Book flights early
- Minimum 21 day advance purchase on domestic flights
- 60+ day advance purchase on international flights
- Economy class service on all domestic flights, if you upgrade, this is a personal out of pocket expense
- Southwest Early Bird Check-in fees are reimbursable
Lodging

• For Dental School Comprehensive site visits with **less than 11 site visitors** on the site visit team, site visitors are to make their **hotel reservation** when making flight reservation with Fox travel.

• For Dental School Comprehensive site visits with **11 or more** individuals on the site visit team, CODA will make the hotel arrangements and provide a confirmation number.
Lodging

- Site visitors must stay at the designated hotel. If for any reason you have to extend your hotel stay due to flight reasons, you must get approval from the Commission office prior to making your reservation.

- We STRONGLY encourage site visitors to make their travel and hotel reservations as soon as possible and by the given deadline. Hotels, especially during peak periods, sell out quickly in some cities. If you delay in booking hotel increases the nightly rate and you may be responsible for the difference.

- Site visitor pays for hotel on personal credit card*
  - Obtain zero-balance receipt upon checkout (no folios)

- If you have any questions, contact CODA Site Visit Coordinators for clarification or help

- For delayed flights, recommend calling hotel for arrivals after midnight
Reimbursements

• The ADA Travel and Expense Reporting policy requires that all travel reimbursements be submitted within 30 days of the travel return date.

• Travel reimbursements after 60 days will need special approval and must provide a reason for the delay.
Electronic Expense Reimbursement Process

• Electronic through Concur and upload appropriate receipts (anything that we would reimburse)

• Expenses $50 or more require a receipt

• Reimbursement processing time is 1-3 weeks with optional email updates

• Direct Deposit is preferred to speed up your reimbursement
Reimbursed Expenses

- Hotel-submit original zero-balance receipt
- Taxi expenses to/from airport, home, hotel
- Mileage to/from airport: $0.54/mile
- Stipend: $75/day for # of meeting days plus one travel day
- Airport parking
- Rental car/gasoline (if approved for a rental car)
- 1st checked bag fee
Stipend

Stipend $75.00 per day

- Meals
- Gratuities
- Second bag
- Personal items
- Exercise facility
- Pay-per-view

*No receipts required*
Refer to CODA Concur Travel Quick Reference for step-by-step instructions

- Log-in at www.concursolutions.com
- Create a new expense report
### Create a New Expense Report

**Report Header**

- **Report Name/Business Purpose**: be specific
- **Example**: “XXX Site Visit”
- **Business Purpose**: could be same as report name
- **Travel Start & End**: travel start & end date
- **Business Unit**: “ADA”
- **Cost Center**: Commission on Dental Accreditation
  “160-0050-005-81606400”
- **Project ID**: “CODA (Accreditation)”
- **Business Purpose**: could be same as
CODA Site Visit to Program

- Click "New Expense"
Site Visit Expense Options

...Other Travel-Site Visit

SV-Auto Expense-Parking
SV-Auto Expense-Tolls
SV-Hotel
SV-Hotel-Internet Charges
SV-Meals
SV-Meals-Business/Hospitality/Entertainment
SV-Miscellaneous Travel Expense
SV-Other Transportation-Rail/Bus Fare
SV-Other Transportation-Taxi/Car Service/Shuttle
SV-Other Transportation In Lieu of Mileage
SV-Rental Car
SV-Rental Car-Gasoline

Other Travel-Site Visit

SV-Airfare
SV-Airfare Baggage Fees
SV-Auto Expense (Mileage Calculation)
CODA Site Visit to Program

### Expenses

<table>
<thead>
<tr>
<th>Date</th>
<th>Expense Type</th>
<th>Amount</th>
<th>Requested</th>
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**Adding New Expense**

**New Expense**

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

**Recently Used Expense Types**

- SV-Hotel
- SV-Meal
- SV-Airfare Baggage Fees

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SV-Auto Expense (Mileage Calculation)

SV-Auto Expense-Parking
Fill in required fields and select “attach receipt” or “itemize,” if applicable
CODA Site Visit to Program

Exceptions

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Date</th>
<th>Amount</th>
<th>Exception</th>
</tr>
</thead>
<tbody>
<tr>
<td>SV-Hotel</td>
<td>05/16/2017</td>
<td>$845.00</td>
<td>Itemizations are required for this entry.</td>
</tr>
</tbody>
</table>

Fill in required fields
Must separate out hotel by nightly rate
Must include additional charges
Note: orange icon means receipt is needed
If there is a personal charge on hotel bill:
Red exclamation will pop up = requires more info
Click on item to insert additional info
Transaction date = date of purchase
Must check “personal expense” box
Enter all reimbursable expenses
Check for grey boxes or red exclamation
Click “Submit Report"
Key Notes for Concur

• Hotel bill must be itemized
• Meals are covered by stipend and are not reimbursed – do not include meals
• Meals listed on hotel bill should be itemized and marked as “Personal Expense
Tips for Concur

• Ensure Concur email updates don’t go to spam - AutoNotification@concursolutions.com
• Receipts can be emailed to Receipt Store: receipts@concur.com
• Red exclamation indicates incorrect entry
• Grey exclamation indicates receipt is needed
• You will be emailed if revisions are required
• Make sure the receipt is clear, readable, and includes all information
• Items under $50 do not require receipt
• Include your stipend (1 for travel day & 1 for each day of business travel)
• Contact Concur Customer Service for additional questions and help:
  – 24/7 Phone Support: 866-793-4040
• www.concurtraining.com
Concur App

- Download app on smart phone
- Create & complete reimbursement on phone
- Take photos of receipts through phone app
Online resources
http://www.ada.org/en/coda/site-visits/prep-for-dds-dmd-site-visit

- Provides narrative information on site visit process
- Site visit related documents are downloadable
Site Visit information: What’s Included?

• The Site Visit Process
  – Introduction

• Left navigation to…
  – Predoctoral program
  – Advanced education programs
  – Allied education programs
Site Visit information: What’s Included?

• **Information about the site visit**
  – Before the visit
  – During the visit
  – After the visit

• **Documents**
  – Standards
  – Self-study guide
  – Site Visitor Evaluation report (SVER)
  – Frequency of citings
  – Materials to be available onsite
Commission Policies and Procedures

- **Policies and Procedures**
  - Evaluation and Operational Policies and Procedures Manual (EOPP), including
    - Complaint Policy
    - Policy and Guidelines for reporting a change, off-campus sites, enrollment
    - Distance Education
Accreditation Updates

http://stage.ada.org/en/coda/accreditation/accreditation-news

- Provides updates policies, procedures and documents resulting from CODA Meetings
- Meeting dates
- Reports of major actions
- Minutes of past meetings
- Hearing information
- Site Visit Schedules (U.S. and International)
Other CODA Communications

- CODA Communicator E-Newsletter
  - Distributed twice per year, following each Commission meeting

- Commission Alerts Emails
  - Hearings
  - Review Committee Openings
  - Nominations for Site Visitors
To contact CODA staff

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QUESTIONS?

Thank You!