Commission on Dental Accreditation
Allied Dental Education
Site Visitor Update

96th American Dental Education Association
Annual Session
Sunday, March 17, 2019
Michelle Smith, RDH, MS
Doreen Johnson, RDH, MA. Ed.
Site Visitor Update Objectives

- Review current activities of the Commission
- Review required privacy and data security training and CODA paperwork
- Review policies/procedures particularly relevant to site visitors
- Review site visit report writing
- Review travel reimbursement and other logistics
- Review current technology as it relates to site visits
What’s New at CODA
Revised Standards


• August 3, 2018 implementation
  – Dental Public Health
  – General Practice Residency
  – Advanced Education in General Dentistry
Revised Standards

• January 1, 2019 implementation
  – Dental Hygiene
  – All Advanced Dental Education Programs

• February 8, 2019 implementation
  – Predoctoral Dental

• July 1, 2019 implementation
  – Predoctoral Dental
  – Clinical Fellowship in Oral and Maxillofacial Surgery
  – Oral and Maxillofacial Surgery Residency
Revised Standards

• July 1, 2019 implementation (cont.)
  – Periodontics
  – Endodontics

• January 1, 2020 implementation
  – Predoctoral Dental

• July 1, 2020 implementation
  – Oral and Maxillofacial Surgery Residency
Proposed Standards: Comments Due

Comment Due June 1, 2019:

- Dental Education, 2-24d
- Dental Education, 2-25
- Dental Anesthesiology, 3-2
- Dental Assisting, 2
- Dental Assisting, 2-13
- Dental Hygiene, 2-12
- Orthodontics and Dentofacial Orthopedics, 4-3.4
- Dental Education, 2-3
Proposed Standards: Comments Due

Comment Due December 1, 2019:

• Orthodontics and Dentofacial Orthopedics
• Periodontics, 4-12e
Proposed Standards: Comments Due

Comments Due June 1, 2019:

Dental Assisting

• Dental Assisting Standard 2-5 related to curriculum sequence and includes elevation of student performance
• New Standard 2-6 related to curriculum management plan
• Revised Standard 2-7 (formerly 2-6) related to course syllabi
• Revised Standard 2-8 (formerly 2-7) related to objective evaluation methods
• Revised Standard 2-14 related to content at the familiarity level in Pharmacology-drug addiction including opioids
Proposed Standards: Comments Due

Comments Due **June 1, 2019:**
Dental Hygiene

- Definition of Terms Related to Patients with Special Needs and Standard 2-12
2019 Validity and Reliability Studies of the Standards

Spring 2019
- Dental Hygiene
- Dental Laboratory Technology
- Endodontics
- Oral and Maxillofacial Radiology
- Oral Medicine

Fall 2019
- Periodontics
- Oral and Maxillofacial Surgery (Residency and Fellowships)
- Orthodontics and Dentofacial Orthopedics (Residency and Fellowships)
Changes in CODA Governance

1. American Dental Association Constitution and Bylaws and Governance and Organizational Manual

Chapter IX Commissions, Section 130 Duties: The ADA Constitution and Bylaws describe the duties of the Commission on Dental Accreditation as follows:

a. Formulate and adopt requirements and guidelines for the accreditation of dental, advanced dental and allied dental educational programs.
b. Accredit dental, advanced dental and allied dental educational programs.
c. Provide a means for appeal from an adverse decision of the accrediting body of the Commission to a separate and distinct body of the Commission whose membership shall be totally different from that of the accrediting body of the Commission.
d. Submit an annual report to the House of Delegates of this Association and interim reports, on request, and the Commission’s annual budget to the Board of Trustees of the Association.
e. Submit the Commission’s articles of incorporation and rules and amendments thereto to this Association’s House of Delegates for approval by majority vote.

In October 2018, sole authority to revise the Rules of the Commission on Dental Accreditation was granted to the Commission on Dental Accreditation by the ADA House of Delegates.
Terminology Related to Advanced Dental Education Programs

• In February 2018, the Commission directed that all accreditation standards and supporting documents, the Commission website, and other accreditation policies and procedures eliminate terminology that unintentionally dictates which advanced dental education program is a dental specialty.

• Revisions were posted on CODA’s website in January 2019.
Call for Nominations: Review Committees

• CODA seeks nominations for various positions on review committees.

• Nomination Deadline is June 1, 2019

• List of Positions, Nomination Criteria, and Nomination Form found at https://www.ada.org/en/coda/accreditation/accreditation-news/call-for-nominations
Call for Nominations: Review Committees

Dental Assisting Review Committee

- 2 Dental Assisting Educators
  - must have experience as a CODA site visitor & F/T or P/T appointment

Dental Hygiene Review Committee

- 2 Dental Hygiene Educators (DH RC)
  - must have experience as a CODA site visitor & F/T or P/T appointment
- 1 Dentist (General or Advanced Discipline)
- 1 Dentist Educator
- Public Member (No affiliation with dentistry/Represents the consumer)
CODA Fees and EOPP

• Annual Fees [https://www.ada.org/en/coda/accreditation/fees](https://www.ada.org/en/coda/accreditation/fees)
  – Annual fee increased 4% for 2020
  – Annual fee is doubled in the year of a site visit
  – $4,000 HIPAA administrative fee
  – Special Focused Site Visit Administrative Fee ($4,320 in 2019; $5,000 in 2020)

What’s New and What to Review: Policies and Procedures
Site Visitors - Appointments

• The Commission reviews nominations received from its communities of interest, including each specialty discipline-specific sponsoring organizations and certifying boards. Individuals may also self-nominate.
Site Visitors - Appointments

- Site visitors are appointed/reappointed annually and asked to sign the Commission’s Conflict of Interest Statement, the Agreement of Confidentiality, the Copyright Assignment, Licensure Attestation, and the ADA’s Professional Conduct Policy and Prohibition Against Harassment. Site visitors must also complete annual training and will receive periodic updates on the Commission’s policies and procedures related to the Health Insurance Portability and Accountability Act (HIPAA). The Commission office stores these forms for seven (7) years. In addition, site visitors must comply with training requirements, the ADA’s travel policy and other CODA Rules and Regulations. The Commission may remove a site visitor for failing to comply with the Commission’s policies and procedures, continued, gross or willful neglect of the duties of a site visitor, or other just cause as determined by the Commission.
Site Visitors – Criteria for Nomination

- Dentist site visitors are no longer required to be members of a professional organization.
  - For advanced specialty dental education programs, the Commission solicits nominations for site visitors from the recognized dental specialty discipline-specific sponsoring organizations and their certifying boards. Dentist site visitors must be members of the ADA and their ADA-recognized specialty organizations.
  - All predoctoral dental education site visitors, who are eligible, must be members of the American Dental Association.
Policy Statement on Site Visitor Training

• New site visitors attend a two-day formal workshop.

• All active site visitors must complete mandatory annual web-based retraining in order to retain appointment. Those who have not been assigned on a site visit during the previous two years must re-attend the in-house training provided to new site visitors, observe a site visit in the appropriate discipline, or review the training materials of the American Dental Education Association (ADEA) Annual Meeting, before being assigned to evaluate a program on a site visit.
Conflict of Interest – Site Visitors

Modifications include:

• is a resident of or owns property in the state; and/or;
• is in the process of considering, interviewing and/or hiring key personnel at the institution.
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.
Enrollment Increases in Advanced Dental Education

• The following advanced dental education disciplines have authorized total complement enrollment: dental public health, endodontics, oral and maxillofacial pathology, oral and maxillofacial radiology, oral and maxillofacial surgery (per year enrollment is authorized), orthodontics and dentofacial orthopedics, pediatric dentistry, periodontics, and prosthodontics. Programs with authorized enrollment must use the discipline-specific Guidelines to request and obtain approval for an increase in enrollment prior to implementing the increase.

• The following advanced dental education disciplines do not have authorized enrollment: advanced education in general dentistry, general practice residency, dental anesthesiology, oral medicine, and orofacial pain. Programs must use the discipline-specific Guidelines to request an increase in enrollment prior to implementing the increase. Upon submission of the program change report, a substantial increase in program enrollment as determined by preliminary review by the discipline-specific Review Committee Chair will require prior approval by CODA.
Reporting Program Changes

- Changes to Off-Campus Sites not owned by the sponsoring institution that impacts the use of the site (e.g. minor site to major site, or termination of enrollment at or discontinued use of major site)
Reporting Sites Where Educational Activity Occurs

Flow Chart Available

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 30 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 visit; 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.
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.
Sites Where Educational Activity Occurs

Reporting Requirements:

• The Commission on Dental Accreditation must be informed when a program accredited by the Commission plans to initiate educational experiences in new settings and locations. Off-Campus training sites that are owned by the sponsoring institution or where the sponsoring organization has legal responsibility and operational oversight do not need prior approval before utilization but must be reported to the Commission in accordance with the Policy on Reporting Program Changes in Accredited Programs.

• Sites (whether major or minor) will be reviewed by CODA if the change could impact the programs ability to comply with Standards.
Reporting Sites Where Educational Activity Occurs

**MAJOR Site**
- Owned by institution/report required 30 days prior to using site – students required to attend
- Not owned by institution/competency assessments performed – students required to attend
- Report required by June 1 or Dec. 1
- Approval required by Commission prior to implementation – May direct special focused site visit prior to or after approval
- Commission may review site at future site visits

**MINOR Site**
- Students required to complete an experience to meet program requirements or accreditation standards
- No competency assessment performed; evaluation may occur
- Report required 30 days prior to planned implementation
- Commission acknowledgement; reviewed at next site visit
- Commission may visit minor site during program’s next site visit

**SUPPLEMENTAL Site**
- Student chooses to visit this site *outside of the educational program (mission trip, health fair)*
- No report required
- No approval required
- No site visit required
- Sites used for community service and service learning are exempt
### Educational Activity Sites Form

**For Programs with additional educational activity sites (within or off-site from sponsoring institution):**

<table>
<thead>
<tr>
<th>Name of Site:</th>
<th>Meadowbrook Manor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>112 Minor Site Lane, Chicago, IL 60540</td>
</tr>
<tr>
<td>Distance from sponsoring institution:</td>
<td></td>
</tr>
<tr>
<td>Are students/residents required to rotate to this site to gain accreditation or program requirements?</td>
<td>Yes</td>
</tr>
<tr>
<td>Is the site owned by the sponsoring institution?</td>
<td>YES</td>
</tr>
<tr>
<td>Are competency assessments or other comparable summative assessments performed?</td>
<td>Yes</td>
</tr>
<tr>
<td>Do primary program faculty travel with students/residents to the site?</td>
<td>Yes</td>
</tr>
<tr>
<td>Do all students/residents rotate to this site?</td>
<td>Yes</td>
</tr>
<tr>
<td>How many days per year does a student/resident use this site?</td>
<td>Days per year: 3 days per term</td>
</tr>
<tr>
<td>Purpose of affiliation (detail experiences gained):</td>
<td>To gain experience working with patients with special needs</td>
</tr>
<tr>
<td>Is this the only location where a particular experience is provided?</td>
<td>YES</td>
</tr>
<tr>
<td>If YES to question above, what experience?</td>
<td></td>
</tr>
</tbody>
</table>

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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.
Confidentiality

- Site Visit Reports:

  Oral comments made by site visit team members during the course of the site visit are not to be construed as official site visit findings unless documented within the site visit report and may not be publicized. Further, publication of site visit team members’ names and/or contact information is prohibited.
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
Coming Soon: On-Demand Webinar

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


• (Note: as of March 2019, the videos on this webpage are being updated – please check this page occasionally for their re-posting)
New Documents Available

• CODA Fees Schedule 2018-2020
  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 for implementation in Fall 2019

• Training will be web-based, on-demand and will include mechanisms for tracking completion and acquisition of knowledge
NEW: Policy on Reprints

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Adopted: 8/18
Distance Education

• Related to Off-Campus Sites but separate and 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 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.
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, site visit chair, and Fox emergency 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 an out-of-pocket expense
- Southwest Early Bird Check-in fees are reimbursable
Lodging

• For Allied site visits, site visitors are to make their hotel reservation when making flight reservation with Fox travel. Fox will take your personal credit card for the hotel.

• 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 book room and stay at the designated hotel. If you have to extend your hotel stay due to flight delays/cancellations, you must get approval from the Commission office prior to extending your reservation.
- For delayed flights, recommend calling hotel for arrivals after midnight.
- 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
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.
Rental Car- National Rental Car

- Chair or staff responsibility to obtain car
- Must book through Fox Travel
- **Do not** purchase additional insurance
- **Do not** pre-pay for gas, you must **return car with full tank**

**National Rental Car Emerald Club**

- Must add Emerald Club number to Fox Travel Profile to earn points
- National will match status of other rental car companies [https://statusmatch.emeraldclub.com/usen](https://statusmatch.emeraldclub.com/usen)
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*
Hello, Catherine

- Refer to CODA Concur Travel Quick Reference for step-by-step instructions
- Log-in at www.concursolutions.com
- Create a new expense report
• Report Name - 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)”
• 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)
Fill in required fields and select “attach receipt” or “itemize,” if applicable
### CODA Site Visit to Program

**Exceptions**

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Expense Type</th>
<th>Amount</th>
<th>Requested</th>
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<tr>
<td>05/16/2017</td>
<td>SV-Hotel</td>
<td>$845.00</td>
<td>$845.00</td>
</tr>
<tr>
<td></td>
<td>Althoff Hotels, Milwaukee, Wisconsin</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Recurring Charges (each night)**

- **Room Rate**
- **Room Tax**
- **Other Room Tax 1**
- **Other Room Tax 2**

**Available Receipts**

### Notes:
- 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

<table>
<thead>
<tr>
<th>Date</th>
<th>Expense Type</th>
<th>Amount</th>
<th>Requested</th>
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<td>05/16/2017</td>
<td>SV-Hotel</td>
<td>$845.00</td>
<td>$761.49</td>
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<tr>
<td>05/15/2017</td>
<td>Hotel Tax</td>
<td>$28.83</td>
<td>$28.83</td>
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<tr>
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<table>
<thead>
<tr>
<th>TOTAL AMOUNT</th>
<th>TOTAL REQUESTED</th>
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</thead>
<tbody>
<tr>
<td>$845.00</td>
<td>$761.49</td>
</tr>
</tbody>
</table>
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
CHRONOLOGY OF LOGISTICS

BEFORE, DURING AND AFTER THE SITE VISIT
Reminders: Prior to Site Visit

- Plan for *entire* travel day (day prior to visit)

- Review Off-Campus Sites Form (If applicable, will be provided in team email)
  - Identify, in advance, sites to be visited
  - If additional visit time needed, let us know

- All communication through staff/site visit chair

- Prepare SVER for 1st executive session
Reminders: Prior to Site Visit (Self-Study)

- Early: read through entire self-study document
- Check for HIPAA compliance and PII
- Indicate areas or pages of general concern
- Second read-through
- Focus on specifics
- Indicate comments on sticky notes/post-its
E-Mail from CODA to Site Visitor: Prior to Site Visit

Site visit forms and logistical information is E-Mailed

• Previous site visit report and background information*

• Program history (Data Profile)*

• Online flight and hotel booking procedures

* Destroy after site visit
Site Visitor Material Available on ADA Connect

Site visit forms and logistical information available on ADA Connect. These are not sent via email.

• Standards and SVER
• Fox Travel Protocol
• EOPP
• Site Visitor site visit manual, including HIPAA/PII reminders
• And others
E-Communication from Institution to Site Visitor

• Programs asked to send paper and electronic copy of self-study to Site Visit Team. E-SSG may be sent by CD or USB drive.
  – Site visitor must maintain materials securely per CODA’s Privacy and Data Security policy.

• *E-mail delivery is not acceptable for self-study.*

• Check “spam” filters if missing communication from CODA or program.
Site Visitor Planning for Site Visit

Once CODA materials and self-study are received:

• Communicate with fellow site visitor(s).
• Review agenda and off-campus sites to visit (plan travel accordingly).
• Review self-study for completeness and PII and PHI.
• Chair/Staff communicates with program to initiate pre-visit planning.
Request additional information (before or during the visit)

– Through Commission staff (if staff attends visit)

– Through the Chair (if staff not attending visit)
Additional Reminders

• Institutional personnel at a level above the program director must be at initial and final conferences.

• ALL students should be interviewed unless they are off-site or on rotation and cannot attend.

• The program director and administrators should NOT attend the faculty interviews.
Suggested Agenda/Schedule of Conferences

- Use appropriate agenda
  - Single discipline visit
  - Multiple discipline visit
- Follow suggested agenda as closely as possible
- Variations should be discussed with staff/site visit chair
- Due with self-study (60 days prior to the visit)
- Staff/Site visit chair may discuss revisions until team approves
- Finalized version hard copies available on-site
Final Conference

- **MUST** attend

- Cannot depart conference early for plane departure

- Make reservations accordingly

- Program/Institution makes decision as to who attends other than program director
## Composition of Visiting Committee

### Single Discipline Visit

- Site Visit Chair
- 2<sup>nd</sup> Site Visitor
- Allied Dentist*
- NADL Representative*
- State Board Representative
  - (if invited)
- Silent observer
  - (if requested by CODA)
- Review Committee member and/or Commissioner observer
  - (if requested by CODA)
- 1.75 days in length ends at **3:00PM** second day
- Book flights after 5:00pm

### Combined Visit

- Staff or Site Visit Chair
- Discipline Site Visitors
  - (1 for each discipline)
- Allied Dentist
- State Board Representative
  - (if invited)
- NADL Representative*
- Silent observer
  - (if requested by CODA)
- Review Committee member and/or Commissioner observer
  - (if requested by CODA)
- 2.5 days in length ends at **10:00AM** third day
- Book flights after 1:00pm
State Board Representative

• The state board member participates in an accreditation site visit in order to develop a better understanding of the accreditation site visit process and its role in ensuring the competence of graduates for the protection of the public.

• The state board member is expected to be in attendance for the entire site visit, including all scheduled conferences and during executive sessions of the visiting committee. While on site the state board member:
  – provides assistance in interpreting the state’s dental practice act and/or provides background on other issues related to dental practice and licensure within the state
  – In the event the chair of the site visit committee determines that a vote is necessary to make a recommendation to the Commission, only team members representing the Commission will be allowed to vote.
Post-Site Visit Survey

- Confidentially distributed
- Request feedback on logistics
- Request feedback on process
- Request feedback on co-visitor(s)
- Results reviewed to assess areas where training and process can be strengthened
The Site Visit Report
Please remember:

• Must use the electronic SVER when returning the SVER to CODA Staff.

• Handwritten SVERs will not be accepted.

• Please make sure you are using the most current SVER.
Site Visitor Evaluation Report (SVER)

- SVER is the “official” record of the site visit team’s evaluation of the site visit.

- Important that all sections of the SVER be completely filled out and returned to the Commission office in its entirety.

- Completed, comprehensive SVER is due to the Commission office within five (5) days of the site visit, via Email to appropriate CODA manager.
Site Visitor Evaluation Report (SVER)

• **All sections/questions must be answered**

• **Compliance with Commission Policies**
  
  – Third Party Comments
  – Complaint Policy
  – Program Changes
  – Distance Education
  – Program Effectiveness
Program Length Example

Curriculum

a. Name of term (semester, module, quarter): Semester
b. Number of terms: Five
c. Number of weeks per term: 4-15 week semesters and 1-8 week summer
d. Total number of weeks: 68
e. Award granted at completion: Associate of Applied Science
f. Total number of credits: 64 - will vary according to program
g. Total program hours: 

lecture: ________; laboratory: ________; clinic: ________________

Standard 2. Educational Program

The dental hygiene program is presented in insert number week terms and insert number summer terms. Upon completion of the program, graduates are awarded insert degree degrees. The curriculum has been defined in terms of program goals, general instructional objectives, learning experiences designed to achieve the goals and objectives and evaluation procedures to assess student attainment of the goals and objectives.
Program Effectiveness

- Three (3) important sections of the SVER under the Program Effectiveness Section

- Program Effectiveness questions are found immediately after the Distance Education section in the SVER
Program Effectiveness

Program Effectiveness Question #1

– Document the tools programs are using to assess student/resident achievement.
– Provide an analysis of the program’s performance with regard to student/resident achievement.

Program Effectiveness Question #2

– Document the outcomes, both positive and negative.
– Document Program changes, made as a result of the outcomes assessment process.
Program Effectiveness

Program Effectiveness Question #3

- Identify suggestions or recommendations cited in their report, which relate to program effectiveness.

The program has/has not documented its effectiveness using a formal and ongoing outcomes assessment process to include measures of dental assisting student achievement. Based on a review of the program’s outcomes assessment process and student achievement measures, the visiting committee found the program uses the following student achievement measures: [insert measures used]. The program has demonstrated positive programmatic student achievement outcomes through [include positive outcomes measures]. The program has not demonstrated positive student achievement outcomes in [insert negative outcome areas]. The visiting committee noted the program recently made enhancements to [insert examples where program change made based on OA process] based on the student achievement data collected and analyzed in the outcomes assessment plan. (Or conversely, the visiting committee did not identify areas within the program where student/resident achievement data has been utilized to affect change.)
“Must” statements in “YES” and “NO” format.

• If you mark NO, the program is not in compliance with this standard and you must write a recommendation.
  – Programs must respond to recommendations.

• If you mark YES, you have two options:
  – Make no comment
  – Write a suggestion
Site Visitor Evaluation Report (SVER)

- The SVER includes a blank text box following each Standards section for the team to insert its written report on suggestions and recommendations.

- A separate team report isn’t necessary if all information is in the SVER.
Return of Site Visit Material

• Site Visitor Evaluation Report (SVER) including any written narratives should be returned to appropriate staff by e-mail for all non-dental school single program visits within 5 days after the visit.

• Return SVER to staff on-site on all dental school based and non-dental school multi-discipline visits in which staff attends.
The Written Report: Review of the Basics

• Information taken from the SVER

• The “bridge” between the site visit and review by the Review Committee and Commission.

• Your report, along with the program’s response (if there is one) is the only information the Review Committee will have to make a recommendation to the Commission. They will not have the self-study.

• The report must contain enough background and details in order to make decisions.
Writing a 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 that…..” Include only those aspects of the standard that are not being met.
• Treat each 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”
• Program is not obligated to address in response
• Written in the basic format of a recommendation:
  – Must relate to a Standard
  – Cite multiple sources
  – Provide the “story.”
  – Begin with “It is suggested that…..”
Other Written Comments

- Remember: no written commendations
- Don’t include “strengths”
- Can include comments that document a specific situation that could be useful for future site visits.
- Vague comments on the SVER are confusing. All comments should be tied to a suggestion or a recommendation.
Clarity and Completeness

- Be simple and direct.
- The report should be a straightforward and detailed explanation of your findings.
- Keep your audience in mind.
- Your report is a record of the site visit. When the Commission meets it relies on your report. It is crucial that it is complete and detailed.
Tips for Report Writing

• Use multiple sources to verify findings.
• Note the audience for whom you are writing.
• Write in short, concise and clear sentences.
• Remember: the language for the recommendation is already written for you (the Standard); you cannot make up your own language.
• Every recommendation and suggestion must be accompanied by a rationale.
Tips for Report Writing

• Move from general to specific in the writing of the rationale.
• Note recommendations that have been previously cited at the last site visit.
• Be sure to comment only on those areas determined to be recommendations or suggestions.
Site Visitor Do’s

• Remember you are a “fact finder.”
• Consult CODA staff if substantial changes to the visit agenda are desired.
• Inform the program early in the process of all materials to be reviewed on-site and maintain communication early and throughout the process.
• Be sensitive to how your comments/questions, tone, and decorum may be perceived.
Site Visitor Do’s

• Assess the program according to established, current Accreditation Standards, not according to personal preferences.

• Utilize multiple sources when verifying information and determining compliance with Standards.

• Consider all information gathered before, during and after the site visit to be confidential.

• Interview all students of the program.

• Promptly leave the institution at the conclusion of the site visit.
Site Visitor Do’s

• Appropriately delete/destroy all site visit materials following approval of the draft report.

• Promptly respond to staff requests for clarification; each member of the team must approve the written draft report even if there are no recommendations or suggestions.

• Note when the report is due to staff and be aware of your obligation to the Commission regarding the report after you have completed the site visit.

• Complete the post-site visit survey.
Site Visitor Don’ts

- Don’t be overly critical, negative or judgmental.
- Don’t bring your biases on the site visit.
- Don’t use your cell phone, iPad or other devices (even for checking messages or texting) during sessions with the program or interviews.
- Don’t compare the program to your own.
- Don’t be prescriptive when writing the report.
Site Visitor Don’ts

• Don’t make suggestions and/or recommendations as a “favor” to the program.
• Don’t qualify the results of the site visit (e.g., “the recommendations are “tiny”, “easy to fix”).
• Don’t use outside information to determine if the program is in compliance; only use the information presented to you.
• Don’t accept social invitations or gifts from the hosts.
Site Visitor Don’ts

• Don’t make plans to visit with a colleague after the site visit, even if unrelated to the site visit.
• Don’t leave the self-study at the institution if you have made notes in it. Suggestion: use “post it” notes that can be removed.
• Don’t try and move the schedule up to leave early or shorten faculty interviews.
• Don’t leave the institution prior to the final conference.
After the Team Approves the Site Visit Report:

- Report is forwarded to the institution. Institution is directed to prepare a response, if applicable.
- Review Committee (RC) considers the site visit report, along with the program’s response.
- RC makes a recommendation to the Commission regarding accreditation status.
- Suggestions cannot become recommendations.
- The **Commission** makes final accreditation decision.
Frequently Asked Questions of Site Visitors
What will happen to our accreditation status?

- Site visit team members serve as “fact-finders.”
- The team will present its findings at the final conferences in a verbal report.
- Report may include recommendations or suggestions.
- The Commission grants the accreditation status.
When will we receive the written report of the team’s findings?

- Preliminary Draft Site Visit Report in 6-8 weeks

- Program has 30 days to respond to factual inaccuracies or differences in perception

- Program may choose to report progress made toward meeting any recommendations (due by June 1 or December 1)
Can we start working on the recommendations right away?

- The program can begin work immediately on any identified areas of non-compliance.
- Can submit evidence to show compliance.
- The program should not submit their response until the preliminary draft of the site visit report has been sent to the program.
- Will be reviewed by Commission before making accreditation decision.
Can we lose our accreditation if we have recommendations?

• Accreditation will not automatically be withdrawn
• Due process is followed
• Programs are given time to demonstrate compliance with the Standards
  – One-year programs: up to 18 months
  – Longer programs: up to 24 months
Do we need to respond to suggestions?

- A recommendation is made when the program does not comply with a standard. The program must report changes made to bring the program into compliance.

- A suggestion is made when a program complies with the standard, but an area could be enhanced. The program is not obligated to respond.
How does our program compare with other accredited programs?

• The Commission does not rank programs.

• The Annual Survey Report contains an analysis of reported statistical data from accredited programs.

• Current accreditation statuses are posted on the Commission website.
When will we know the Commission’s accreditation decision?

• **Winter Meeting:** The Commission considers reports from site visits conducted between May 1 and October 31.

• **Summer Meeting:** The Commission considers reports from site visits conducted between November 1 and April 30.

• A letter with the accreditation decision is sent within 30 days of the meeting.
Can we accept invitations to dinner by program administrators?

• Site Visitors must **not** accept social invitations from anyone affiliated with the program, even if the site visit is over

• Site Visitors must **not** accept gifts

• Restaurant and other recommendations are appreciated
Discussion Scenarios
DA Scenario 1

Through review of the self-study document, on-site interviews and observations, the visiting committee confirmed the faculty/student ratio in lectures and laboratory instruction is sufficient. However, the visiting committee noted that the faculty/student ratio for radiography clinics are one (1) instructor to nine (9) students. Additionally, the visiting committee noted that only one (1) instructor has the qualifications to teach didactically and teaches all lectures. It was noted that the program’s ability to function continually is impacted when the faculty must be away for any reason, be it illness, university business, or professional development. The institution has a working plan to hire additional instructors, but implementation could not be verified.

1. It is recommended that the number of faculty positions be sufficient to implement the program’s goals and objectives. It is recommended that the faculty/student ratio during radiography and clinical practice sessions does not exceed one instructor to six students. During laboratory and preclinical instruction in dental materials and chairside assisting procedures, the faculty/student ratio does not exceed one instructor for each twelve students. (DA Standard 3-8)
Correct Narrative and Recommendation

Through review of the self-study document, on-site interviews and observations, the visiting committee confirmed the faculty/student ratio in lectures and laboratory instruction is sufficient. However, the visiting committee noted that the faculty/student ratio for radiography clinics are one (1) instructor to nine (9) students. Additionally, the visiting committee noted that only one (1) instructor has the qualifications to teach didactically and teaches all lectures. It was noted that the program’s ability to function continually is impacted when the faculty must be away for any reason, be it illness, university business, or professional development. The institution has a working plan to hire additional instructors, but implementation could not be verified.

1. It is recommended that the number of faculty positions be sufficient to implement the program’s goals and objectives. It is further recommended that the faculty/student ratio during radiography and clinical practice sessions does not exceed one instructor to six students. During laboratory and preclinical instruction in dental materials and chairside assisting procedures, the faculty/student ratio does not exceed one instructor for each twelve students. (DA Standard 3-8)
DH Scenario 1

After a review of the self-study documents and on-site interviews, the visiting committee learned that the dental hygiene program does have a formal, written curriculum management plan but shows no evidence of input from faculty such as curriculum management faculty minutes, periodic workshops and in-service sessions to assess the outcomes, disseminate curriculum information, modify and implement changes that address the curriculum review and evaluation process.
DH Standard 2-24

2-24 The dental hygiene program must have a formal, written curriculum management plan, which includes:

a) an ongoing curriculum review and evaluation process with input from faculty, students, administration and other appropriate sources;

b) evaluation of the effectiveness of all courses as they support the program’s goals and competencies;

c) a defined mechanism for coordinating instruction among dental hygiene program faculty.

d) a defined mechanism to calibrate dental hygiene faculty for student clinical evaluation.

Here’s what was written in the report:

It is recommended the program show evidence that the curriculum management process include documented faculty input and coordination using the results for program improvement. (DH Standard 2-24)
The Correct Recommendation Should Read

It is recommended that the dental hygiene program have a formal, written curriculum management plan, which includes:

a) an ongoing curriculum review and evaluation process with input from faculty. Show evidence that the curriculum management process include documented faculty input and coordination of using the results for program improvement. (DH Standard 2-24,a)
The visiting committee notes the institution’s accreditation through Southern Association of Colleges and Schools commission on Colleges (SACSCOC) is on probationary status.

Which standard applies?
Standard 1-5

Programs must be sponsored by institutions of higher education that are accredited by an institutional accrediting agency (i.e., a regional or appropriate* national accrediting agency) recognized by the United States Department of Education for offering college-level programs. (Standard 1-5)
Standard 1-5

What should the visiting committee do?

1. Nothing
2. Write a recommendation
3. Write a suggestion
4. Write a special note to CODA staff
DA and DH Faculty Qualifications

DA Standard 3-5; DH Standard 3-7
Require “current knowledge”

• What questions might a SV team ask?
• Why would a SV team question “current knowledge”?
• In what ways can faculty demonstrate “current knowledge”? 
CODA Contacts

Doreen Johnson, manager, Allied Dental Education (DH)
   312-440-2695   johnsond@ada.org

Michelle Smith, manager, Allied Dental Education (DA & DLT)
   312-440-4660   smithmi@ada.org

Sherin Tooks, director, CODA
   312-440-2490   tookss@ada.org

Daniel Sloyan, senior project assistant
   312-440-2718   sloyand@ada.org

Bernadette Molina, site visit coordinator
   312-440-2668   molinab@ada.org
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