



Committee on Accreditation of Canadian Medical Schools
Comité d'agrément des facultés de médecine du Canada

GUIDE FOR THE CONDUCT OF CACMS ACCREDITATION VISITS

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Committee on Accreditation of Canadian Medical Schools

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GENERAL STEPS IN THE ACCREDITATION PROCESS

The general steps in the accreditation process are as follows:

1. Completion of a Data Collection Instrument (DCI)
2. Completion of an Independent Student Analysis (ISA)
3. Completion of a Medical School Self-Study (MSS)
4. 2-stage accreditation visit (initial virtual visit followed by an on-site visit) by an *ad hoc* visit team appointed by the CACMS Secretariat Throughout this document, unless otherwise specified, the term “**visit**” refers to the two-stage accreditation process (virtual visit and on-site in-person follow-up visit).
5. Action on accreditation by the CACMS.

OTHER DOCUMENTS RELATED TO THE ACCREDITATION PROCESS

Schools and visit teams should review accreditation documents on the CACMS webpage, in particular the *CACMS Standards & Elements*. Since many of the documents are revised annually, the school must ensure that it uses the documents for the academic year (spring or fall) in which the accreditation visit will take place. These documents are available at <https://cacms-cafmc.ca/>.

- The ***CACMS Rules of Procedure*** describes the CACMS organization and function, the visit process, the accreditation actions that the CACMS can take, the process for development and revision of standards, complaint and appeal procedures, and other policies and procedures of the CACMS.
- The ***CACMS Standards and Elements*** describes the accreditation standards and their associated elements. This document also includes a lexicon of terms used by the CACMS.
- The ***Guide to the Independent Student Analysis (ISA)*** outlines the roles and responsibilities of students in the accreditation process, and it provides core questions that must be included in the student survey for the ISA of the medical school. The school should ensure that the student leaders entrusted with responsibility for managing the ISA are aware of and know where to access this guidebook.
- The ***Guide to the Medical School Self-Study (MSS)*** describes the process for conducting the self-study, includes instructions on the evaluation of the accreditation elements and the other information to be included in the MSS Report.
- The ***CACMS Accreditation Visit Report Writing Guide*** describes the content and format of visit report for full visits. Medical schools undergoing an accreditation visit may also find it helpful to review this document. In addition, the pre-populated Accreditation Visit Report Template is made available to accreditation visit teams in advance of visits.

Faculty members involved with their school's accreditation process are encouraged to contact the CACMS Secretariat at any time via email or telephone, and to attend the preparation sessions available to schools with upcoming visits. These sessions provide general information about accreditation and give participants an opportunity to discuss specific issues with members of the Secretariat. Designated school personnel will automatically receive invitations to these events.

GENERAL INFORMATION

The purpose of this document is to provide accreditation visit teams and medical education programs with a summary of the steps in preparing for and conducting a CACMS accreditation visit. Sections of the document provide this information from a variety of perspectives (e.g., the visit team in general, specific team member roles, the medical school), so the reader should select the sections that are most relevant. The document is a synthesis of other information available on the CACMS webpage. Consult the website for the most recent information.

ACCREDITATION AND THE CACMS

Accreditation is widely used in higher education to assure the public, government agencies, and professional groups that educational programs and institutions meet or exceed nationally accepted standards of quality for educational process and student outcomes.

The CACMS is sponsored by the Canadian Medical Association (CMA) and the Association of Faculties of Medicine of Canada (AFMC) and accredits M.D.-granting medical education programs in Canada.

TO CONTACT THE CACMS SECRETARIAT

Enquiries should be sent to the CACMS at:

Committee on Accreditation of Canadian Medical Schools
cacms@afmc.ca.

The members of the CACMS Secretariat welcome the opportunity to respond to questions and comments.

OVERVIEW OF THE ACCREDITATION PROCESS

A. PURPOSES OF ACCREDITATION

The accreditation process has two general and related aims: to promote medical school self-evaluation and quality improvement efforts, and to determine whether a medical education program meets prescribed standards.

Accreditation processes seek to answer three general questions:

1. Has the medical school clearly established its mission and goals for the educational program?
2. Are the program's curriculum and resources organized to meet the mission and goals?
3. What is the evidence that the program is currently achieving its mission and goals and is likely to continue to meet them in the future?

B. ACCREDITATION STANDARDS

The standards for accreditation of Canadian medical schools are contained in the publication *CACMS Standards and Elements (S&E)*. These standards have been reviewed and endorsed by the medical education community, including the organizations that sponsor the CACMS.

Medical schools must use the version of *S&E* applicable to the academic year in which they will be visited.

Medical schools are expected to achieve compliance with each of the 12 standards. Compliance with a standard will be based on satisfactory performance in the elements associated with the standard.

FULL ACCREDITATION VISITS

Overview of the Steps in a Full Accreditation Visit

Full accreditation visits typically occur on an eight-year cycle. The CACMS Secretariat, in consultation with the dean of the medical school, establishes the visit dates approximately 18-24 months before the visit. Once the dates are established, the following steps take place (see Appendix A):

1. Completion of the data collection instrument (DCI) and compilation of supporting documents by the medical school.
2. Completion of the Independent Student Analysis (ISA) by the medical school's students
3. Completion of the Medical School Self-Study (MSS)
4. Submission of school documentation to the visit team and the CACMS Secretariat
5. 2-stage accreditation visit (initial virtual visit followed by an on-site visit) by an *ad hoc* visit team appointed by the CACMS Secretariat
6. Action on accreditation by the CACMS.

Each of the steps is summarized below.

About four months prior to the accreditation visit, the school and visit team members receive from the CACMS Secretariat background information for the visit, including a list of team members with their contact information, a copy of the prior visit report (and any limited visit reports, if applicable), copies of any status reports, any validated complaints against the school considered by the CACMS since its last full accreditation visit, and an accreditation history table with the accreditation actions taken by the CACMS since the last full visit. In the case of a limited visit, a copy of the letter to the school describing the mini-DCI to be submitted prior to the visit also will be appended.

1. COMPLETION OF THE DCI AND COMPILATION OF SUPPORTING DOCUMENTS

The dean designates a core team of faculty and staff to manage the aspects of the visit preparation process. The faculty accreditation lead manages the data collection and self-study processes; the accreditation visit coordinator typically manages visit logistics and may assist with data collection.

The questions in the DCI are directly linked to specific elements. **The absence of a document, data, and/or information specifically requested in the DCI will be taken by the visit team and the CACMS to mean that the document, data, and/or information do not exist.** The DCI must be completed with all requested historical data. The time period covered by the data must be clearly indicated.

Because the DCI was likely drafted several months before the visit, certain quantitative information might need to be updated prior to submission. The team will need current financial information, student enrollment data, updates on changes in the educational program, and any other significant new information. These updates should be made before the DCI is finalized and submitted (i.e., three months before the scheduled virtual visit). The Association of Faculties of Medicine of

Canada (AFMC) will update the financial information, student enrollment, faculty and resident numbers with the most recent information provided by the medical school. Schools are responsible for updating the responses to other questions, as needed. No school-generated updates/materials will be accepted at any point beyond 30 calendar days before the initial virtual visit unless requested by the team secretary.

2. INDEPENDENT STUDENT ANALYSIS

About 18 months prior to the visit, the student leadership begins the process of launching the student survey. The survey is administered to all enrolled students to develop a comprehensive picture of students' perceptions of their medical school. Mandated survey questions are provided in the document entitled, *The Guide to the Independent Student Analysis*. Students conducting the ISA must read the *Guide to the ISA* for complete details.

The survey covers the following areas:

- I. Student-Faculty Administrative Relationships;
- II. Learning Environment;
- III. Facilities;
- IV. Library and Information Technology Resources;
- V. Student Services;
- VI. Medical Education Program; and
- VII. Opportunities for Research and other Scholarly Activities and Service-Learning.

Students may add questions (maximum of 10) to the survey while keeping in mind that additional questions will increase the data analysis work required. The data derived from the survey are needed by the medical school to complete the DCI and the Medical School Self-Study. In addition, the student leadership submit to the CACMS a report that includes the administered survey, a description of how the survey was conducted, an analysis of the participation of students across all years of the program and by campus if the medical school has more than one campus and summarizes the key findings and conclusions based on the survey data.

Although medical school officials can provide students with technical advice (to help them **design** additional survey questions, provide correct terminology, conduct their survey and assist with data analyses), and logistical support (implementing the survey, collecting data and performing statistical analysis), the faculty **must** not participate in the decision-making process regarding the **subject** of the additional questions or revisions to other survey questions, in the interpretation of survey data, or in the preparation of the report of the ISA

A well-conducted student survey, with a high response rate, and a thoughtful analysis of the data provides important information for the deliberations of the visit team. See Appendix A for information about the timing and use of the Independent Student Analysis during the school's self-study process.

3. MEDICAL SCHOOL SELF-STUDY AND REPORT

The medical school self-study (MSS) process requires time and effort on the part of the medical

school's educational leadership, faculty members, students, administrative support staff and others associated with the medical school, its clinical affiliates, and, if relevant, its parent university. The MSS committee should be broadly representative of the constituencies of the medical school. It should, therefore, include some combination of the following: medical school senior and administrative leaders (academic, fiscal, managerial), department chairs and heads of sections, junior and senior faculty members, medical students, medical school graduates, faculty members and/or administrators of the general university, representatives of clinical affiliates, and trustees (regents) of the medical school/university. Additionally, the MSS committee could include graduate students in the basic biomedical sciences, residents involved in medical student education, and community physicians. Although the general guidelines about the composition of the committee should be followed, each school must make its own decisions about membership based on its specific environment and circumstances.

The MSS committee and its subcommittees are responsible for conducting the self-study. This process is described in detail in the CACMS *Guide to the Medical School Self-Study*. The subcommittees initially provide their evaluation of each element based on the evidence presented in the DCI (subcommittee reports). In addition, the evaluation forms include recommendations for the continuous quality improvement regarding each element. The MSS committee analyzes the subcommittee reports, along with the supporting documentation and any new information such as the final ISA report and other data collected by the medical school, and then produces the committee report with the final element evaluation forms.

The final Medical School Self-Study Report is submitted as part of the accreditation package three months prior to the initial virtual visit.

4. SUBMISSION OF PRE-VISIT MATERIALS AND UPDATES FOR FULL VISITS

DCI Submission: Three months prior to the initial virtual visit, the dean's office will submit a copy of the DCI and its appendices, the ISA report, the MSS report and the visit report core appendix.

Schools will submit the complete accreditation visit package to the CACMS Secretariat and to visit team members, electronically. The CACMS Secretariat will provide instructions on how to upload the files in advance of the visit.

Updates to the DCI: The visit team members will review the submitted documentation as soon as practical after receipt to ensure that the materials are complete and up-to-date. If any updating is required prior to the visit, the team secretary will communicate the details to the faculty accreditation lead; updated materials will be sent to the team and the CACMS Secretariat electronically in a single submission as per CACMS Secretariat instructions.

All updates, as well as the updated core appendix should be compiled and sent electronically to the team secretary and to the CACMS Secretariat at the conclusion on the on-site visit (stage 2). Note that no additional updates will be accepted after the visit has concluded.

The only communication permitted between the school and team is through the team secretary and the Faculty Accreditation Lead.

5. THE ACCREDITATION VISIT AND PREPARATION OF THE VISIT REPORT

Accreditation Visit Team Size and Composition

The CACMS Secretariat is responsible for appointing the members of accreditation visit teams. The team for a full accreditation visit of a medical education program typically consists of five to six members drawn from a pool of experienced medical educators and physician practitioners, including professional members of the CACMS, to ensure consistency in the evaluation process.

The composition of a typical full accreditation visit team is as follows:

Team Chair: The team chair, typically a current or recent medical school dean, functions as the official voice of the team during the visit and leads its deliberations.

Team Secretary: The team secretary and is responsible for visit preparations and logistics, functions as the main liaison with the school and compiles the visit report.

Accreditation Advisor: The accreditation advisor is an experienced CACMS visitor and provides mentorship to the team.

Student member: A student member will participate in all full accreditation visits when possible (i.e., when the timing of the visit does not interfere with prior student commitment). The visit will still take place if the student member withdraws for any reason before the visit.

“Faculty fellows” (1 or 2 faculty members from other medical schools whose expenses are covered by their school): The faculty fellow typically has not been on a full accreditation visit previously and has been designated by the fellow’s school to gain hands-on experience before the school begins its own self-study process; the ‘faculty fellow’ is a full member of the team, evaluates assigned elements and contributes to the visit report.

Observer: The team may include an observer. The observer is appointed by the CACMS Secretariat at the request of his or her school or by another organization with an interest in accreditation but does not participate in the work of the team or the report. The Dean of the visited school must approve the presence of observers at the visit.

A description of the specific duties corresponding to each role can be found in Appendix C. A template for assignment of elements to team members is provided in Appendix F.

In appointing full visit teams, the CACMS Secretariat will make all reasonable efforts to balance the team in terms of accreditation experience, gender, professional expertise, practitioner/educator status, and familiarity with the type of medical school being visited.

Visit Structure:

Full visits are conducted in 2 stages, stage one being conducted virtually over a 3-4 day period and stage two being an on-site (in person) visit when possible. Should an in-person on-site visit not be possible, stage two will be conducted virtually. A description of the two-stage accreditation visit process is provided in Appendix B.

Shortly after receiving the DCI, MSS Report, and the ISA, the team secretary will contact the faculty accreditation lead about the visit schedule, which should be planned along the lines of the model schedule contained in Appendix D of this guide but customized for the characteristics of the medical school. When the schedule is finalized, the team secretary should send a copy to each member of the visit team.

The starting time of the visit should be scheduled well in advance (around the time that the date of the visit has been set), so that that the dates and times can be “locked” into the dean’s schedule. Other individuals with whom the visit team will likely meet (e.g., directors of required learning experiences, chairs of the curriculum committee and its subcommittees) should also be informed about the visit dates and that their participation is expected.

The administrators of affiliated clinical facilities should be advised that team members may be visiting patient care units during stage 2 of the visit but will not be viewing patient records or other confidential information. The team will not meet with the directors of these facilities during the tours, unless the team secretary agrees that a meeting is required as part of the visit schedule. Student guides will conduct the tours.

The initial virtual visit begins with a meeting with the dean. Generally, the team meets privately with the dean although the dean may include others with advance notice to the team.

During the visit, the team will meet with those persons or groups who can provide or verify information, including faculty, students, administrators, and representatives of clinical affiliates. Although meetings with faculty members and students typically take place without the presence of institutional leaders, the dean’s participation is appropriate during the team’s meetings regarding finances and relationships with clinical affiliates. The team will successively develop and refine its list of summary findings, during working sessions and leading up to the exit report. The findings will be organized in order of elements of the CACMS Standards and Elements.

During the visit, the visit team reviews and revises the element evaluation forms for each element based on any new evidence provided by the school and discussions with relevant individuals at the medical school. The team provides a recommendation on the elements for consideration by the CACMS however, it makes neither recommendations nor decisions regarding the medical school’s compliance with accreditation standards or the accreditation status of the medical school. These are the purview of the CACMS.

Following the visit, the Team Secretary, in consultation with the team, will finalize an exit report detailing the team’s positive observations (if any) and the team findings (no mention of the standard or element number and no mention of recommended rating). A copy of the exit report will be provided to the dean by email within one week of the conclusion of the on-site visit with a copy

emailed to the CACMS Secretariat. This exit report is not subject to review by the CACMS Secretariat prior to its submission to the dean.

After the visit, a draft visit report will be prepared by the visit team. The visit report evaluates each element based on information contained in the DCI, the MSS Report, the ISA, as well as information obtained by the team during the visit. The visit report expresses the team's judgment about the extent to which the medical education program meets the requirements of each element, which will be rated as: 1) Satisfactory, 2) Satisfactory with a need for Monitoring, or 3) Unsatisfactory.

The draft version of the report is subject to review by the CACMS Secretariat and the medical school prior to submission of the final report to the CACMS. The review process is described in detail later in this guide.

6. ACCREDITATION DECISIONS AND FOLLOW-UP

The visit report is reviewed by the CACMS at its next regular meeting (typically in September, January, or May), at which time the element ratings are finalized and a formulated decision about the program's accreditation status and follow-up is made.

The team's final report, along with the CACMS action on accreditation and request for follow-up, will be transmitted to the university chief executive, with a copy to the dean. Once the letter of accreditation arrives, the dean and the university chief executive may release the accreditation visit report and the letter of accreditation at their discretion.

LIMITED VISITS

Overview of the Steps in a Limited Accreditation Visit

Limited accreditation visits are conducted in person when possible and take place when mandated by the CACMS. The CACMS Secretariat, in consultation with the dean of the medical school, establishes the visit dates approximately 18 months before the visit. Once the dates are established, the following steps take place:

1. Completion of the mini-data collection instrument (mini-DCI) and compilation of supporting documents by the medical school.
2. Completion of medical student surveys as needed
3. Submission of school documentation to the visit team and the CACMS
4. Visit by an *ad hoc* visit team and preparation of the visit report for review by the CACMS.
5. Action on accreditation by the CACMS.

Each of the steps is summarized below.

1. COMPLETION OF THE MINI-DCI AND COMPILATION OF SUPPORTING DOCUMENTS

The questions in the mini-DCI are directly linked to the specific elements that were found to be unsatisfactory and satisfactory with a need for monitoring, and which led to the requirement for a limited visit. Instructions for preparing the mini-DCI are sent to the school by the CACMS Secretariat. The school is to send the completed materials to the limited visit team members and to the CACMS Secretariat office approximately eight weeks prior to the visit. **The absence of a document, data, and/or information specifically requested in the mini-DCI will be taken by the visit team and the CACMS to mean that the document, data, and/or information do not exist.**

Because the mini-DCI was likely prepared several months or more before the accreditation visit, certain quantitative information might need to be updated prior to the visit.

2. MEDICAL STUDENT SURVEYS

Depending on the elements being assessed during the limited visit, data derived from student surveys may be needed for the medical school to complete the mini-DCI. Well-conducted student surveys, with high response rates, provide important information for the deliberations of the visit team. A limited visit does not require an Independent Student Analysis.

3. SUBMISSION OF PRE-VISIT MATERIALS

Mini-DCI Submission. Approximately eight weeks prior to the accreditation visit, the dean's office will submit a copy of the mini-DCI, its appendices and the visit report core appendix.

Schools should submit the complete accreditation visit package electronically to the CACMS Secretariat and to visit team members. The CACMS Secretariat will provide instructions on how to upload the files in advance of the visit. Schools do not submit a print copy of the visit package.

Updates to the Mini-DCI. The visit team members will review the mini-DCI as soon as practical after receipt to ensure that the materials are complete and up-to-date. If any updating is required prior to the visit, the team secretary will communicate the details to the faculty accreditation lead; updated materials will be provided electronically to the team and to the CACMS Secretariat in a single submission.

All updates, including those provided to the team on site, as well as the updated core appendix should be compiled and sent to the team and to the CACMS Secretariat electronically in a single submission as per CACMS Secretariat instructions. Note that no additional updates to information will be accepted after the conclusion of the visit.

4. THE ACCREDITATION VISIT AND PREPARATION OF THE VISIT REPORT

Limited Visit Team Size and Composition

The CACMS Secretariat is responsible for appointing the members of visit teams. The team for a limited accreditation visit of a medical education program typically consists of three to four members drawn from a pool of experienced medical educators and physician practitioners, including professional members of the CACMS, to ensure consistency in the evaluation process.

One of the team members is designated as **Chair** of the team. The team Chair, typically a current or recent medical school dean, functions as the official voice of the team during the visit and leads its deliberations. Another member is designated as team **secretary** and is responsible for visit preparations and logistics, functions as the main liaison with the school and compiles the visit report. Additionally, there may be an **accreditation advisor** who is an experienced CACMS visitor and provides mentorship to the team, a **team member** and a **student** member when possible (i.e., when the timing of the visit does not interfere with prior student commitments - the visit will still take place if the student member withdraws for any reason before the visit). A description of the specific duties corresponding to each role can be found in Appendix C.

In appointing limited visit teams, the CACMS Secretariat will make all reasonable efforts to balance the team in terms of accreditation experience, gender, professional expertise, practitioner/educator status, and familiarity with the type of medical school being visited.

Visit Structure

Limited visits typically are two and one-half days in duration. This can vary depending on the number and type of elements to be reviewed. If teams need to visit several campuses, the duration of the visit may be extended accordingly.

Shortly after receiving the school documentation, the team secretary will contact the faculty accreditation lead about the visit schedule. When the schedule is finalized, the team secretary should send a copy to each member of the visit team.

The starting time of the visit should be scheduled well in advance (around the time that the date of the visit has been set), so that the dates and times can be “locked” into the dean’s schedule. Other individuals with whom the visit team will likely meet (e.g., directors of required learning experiences, chairs of the curriculum committee and its subcommittees) should also be informed about the visit dates and that their participation is expected.

The first meeting of the visit is generally an entrance conference with the dean. The team may choose to hold a team caucus prior to this. Typically, the team meets privately with the dean although the dean may include others with advance notice to the team.

The limited visit involves meetings with faculty members, students, educational leaders and representatives of affiliated institutions among others, as needed to address the elements being followed-up during the visit. The visit report prepared following a limited visit is focused on conveying the team’s findings regarding the elements previously identified as unsatisfactory or satisfactory with a need for monitoring. Additional elements may be identified by the team as unsatisfactory or satisfactory with a need for monitoring as a result of the limited visit. The team will successively develop and refine its list of summary findings, beginning before the visit and continuing during working sessions each evening leading up to the final exit report which will be emailed to the dean and the CACMS Secretariat within 1 week of the conclusion of the visit. The findings will be organized in order of elements of the CACMS Standards and Elements. This exit report is not subject to review by the CACMS Secretariat prior to its submission to the Dean.

During the visit, the visit team reviews and revises the element evaluation forms for each element being reviewed based on any new evidence provided by the school and discussions with relevant individuals at the medical school. The team provides a recommendation on the elements for consideration by the CACMS however, it makes neither recommendations nor decisions regarding the medical school’s compliance with accreditation standards or the accreditation status of the medical school. These are the purview of the CACMS.

A template of the exit report can be found in Appendix E of this guide. After the visit, a draft visit report will be prepared by the visit team. The visit report evaluates each element based on information in the mini-DCI and information obtained during the visit. The visit report expresses the team’s judgment about the extent to which the medical education program meets the requirements of each element, which will be rated as: 1) Satisfactory, 2) Satisfactory with a need for

Monitoring, or 3) Unsatisfactory.

The draft version of the report is subject to review by the CACMS Secretariat and the medical school prior to submission of the final report to the CACMS. The visit report draft review process is described in detail later in this guide.

5. ACCREDITATION DECISIONS AND FOLLOW-UP

The visit report is reviewed by the CACMS at its next regular meeting (typically in September, January, or May), at which time the element ratings are finalized and a formulated decision about the program's accreditation status and follow-up is made.

The team final report, along with the CACMS's action on accreditation and request for follow-up, will be transmitted to the university chief executive, with a copy to the dean. Once the letter of accreditation arrives, the dean and the university chief executive may release the visit report and the letter of accreditation at their discretion.

THE REPORT OF AN ACCREDITATION VISIT

REPORT PREPARATION AND REVIEW BY THE TEAM

Confidentiality of Information. Information about the school, whether contained in the DCI, the ISA and MSS report, or obtained during the visit, is confidential and must not be disclosed to other parties. A confidentiality statement must be signed by all team members and returned to the CACMS Secretariat before the visit. Team members must hold the team findings confidential. Either at the end of the visit or after reviewing the report, team members must dispose of materials related to the visit in a way that ensures it remains confidential. Once the team secretary has submitted the team’s final report, team members must destroy any remaining documents, including the draft report, related to the accreditation visit.

Timeline for Completing the Visit Report. The following chart gives the important deadlines for completion of the visit report. Detailed explanations follow this chart.

1-2 months before the visit	Visit team members review the material submitted by the school, start drafting the report on the accreditation elements assigned to them, prepare preliminary element ratings and compile a list of information to request from the school.
7-10 days before the visit	At the very latest, visit team members submit their list of additional information to request from the school and their draft element evaluation forms to the team secretary
7-10 days following visit	Visit team members submit their element evaluations to the team secretary at the close of the visit or within 7-10 days thereafter.
4 weeks following visit	After review by the team Chair, the team secretary sends the initial draft of the visit report to the CACMS Secretariat.
6 weeks following visit	CACMS Secretariat provides feedback on the draft report to the team Secretary
8 weeks following visit	After consultation with the team Chair, the report is revised in response to Secretariat comments, as deemed appropriate. The team secretary sends the revised draft visit report to the CACMS Secretariat who forwards to the dean of school for comment.
10 weeks following visit	Dean submits comments (errors and/or omissions) on the draft report within 10 business days to the CACMS Secretariat who forwards to the team secretary

12 weeks following visit	The team secretary finalizes the visit report after consultation with the Chair and team members as needed and resubmits it to the CACMS Secretariat. The CACMS Secretariat sends the final visit report to the dean.
12 weeks following visit	CACMS Secretariat provides dean with final visit report. Any remaining concerns may be addressed by the dean in a letter to the CACMS within 10 business days.
4-5 weeks prior to CACMS meeting	CACMS Secretariat makes the visit report (and the dean's letter if any) available to CACMS members for review prior to the next CACMS meeting.
4 weeks following CACMS meeting	CACMS Secretariat notifies school of accreditation decision and includes a copy of the final visit report.
4-8 weeks following the CACMS meeting	CACMS Secretariat provides feedback to team members on the CACMS' response to the team findings.

Content and Compilation of the Visit Report. The content and information regarding compilation of the visit report is found in the *Accreditation Visit Report Writing Guide* available on the CACMS website. All team members contributing to the report must read the Report Writing Guide for the fine details and requirements of the report. For a limited visit, the report template is prepared by the CACMS Secretariat and is tailored to the standards and elements being assessed during the visit. The team's summary findings must be amply supported by documentation in the element evaluation forms, the core appendix and information obtained during the visit and included in the supplemental appendix. The report forms the basis upon which the CACMS makes its decisions regarding rating of standards and elements, accreditation status and follow-up. The CACMS does not have access to the material submitted by schools; the report must present all necessary evidence to support the visiting team's recommendations.

Preparing the Draft Visit Report. To ensure prompt consideration of the medical education program's accreditation status, it is essential that the draft visit report be completed as quickly as possible. Team members should submit their final element evaluation forms for their assigned standards to the team secretary no later than seven to ten days following the visit, if not by the visit's conclusion. The draft visit report should be completed within two weeks of the conclusion of the visit and should be sent to team members for review and comment. Team members should ensure that the report accurately represents their findings and the consensus assessment of the team. Subsequently, the team secretary will send a copy of the draft report (including the core and supplemental appendices) to the CACMS Secretariat for review. The CACMS Secretariat will provide feedback to the team secretary on the draft visit report regarding internal consistency, and thoroughness in evaluation of all of the elements and summary of team findings and in providing sufficient documentation related to each finding.

Upon receiving the comments from the CACMS Secretariat, the team secretary in consultation with

the chair should make any needed revisions; send the revised visit report to the team members for review and comment. After review by the team and any subsequent revisions, the team secretary sends the draft visit report to the CACMS Secretariat who will forward it to the dean of the medical school. The dean has 10 working days to review the report and return comments to the Secretariat who will forward them to the team secretary for consideration and final revision. The dean will be instructed to check the team's report for factual errors and concerns about tone. No new information may be provided by the dean that was not included in the DCI (or mini-DCI for limited visits), the MSS report (for full visits), the ISA (or student data for limited visits) or provided to the team during the visit. After considering feedback from the dean, the team secretary in consultation with the team chair and other team members as needed, revises the draft as deemed appropriate and submits the final version of the report to the CACMS Secretariat. The CACMS Secretariat then sends the final version of the report to the dean, who, should concerns remain about the tone of the report or the process of the visit, may write a letter within 10 business days to the CACMS Secretariat for inclusion in the CACMS' consideration of the school's accreditation status; the process is described in detail later in this document and in *CACMS Rules of Procedure*.

Timeline for the Submission of the Final Version of the Visit Report. Instructions for preparing and submitting the final report are available in the *Accreditation Visit Report Writing Guide*. The CACMS typically meets in September, January, and May. The final visit report must be received by the CACMS Secretariat no later than six weeks before the next scheduled CACMS meeting to allow adequate time for review by CACMS members. The CACMS Secretariat should be promptly notified if the team secretary anticipates any delays in providing the final report.

Notice of CACMS Action. During the CACMS meeting, members review the visit report (and eligible correspondence submitted by the dean), develop the final element ratings and list of findings, judge compliance with accreditation standards, determine the status of accreditation of the medical education program, and identify any requirements for follow-up.

After the CACMS meeting, schools will be notified of the CACMS action in a letter of accreditation from the CACMS Secretary to the president of the university (or the equivalent chief executive of the academic university), with a copy to the dean of the medical school. CACMS holds confidential the accreditation status, follow-up, visit report and its findings. The medical school is at liberty to make public the visit report and the details of the CACMS decision as it deems appropriate.

Feedback to Team Members. The Secretariat will provide, as feedback to visit team members, the CACMS final list of findings with regards to elements. Such feedback is one component of visit team training that will assist in developing consistency across teams in the interpretation of *CACMS Standards and Elements*.

ACCREDITATION VISIT LOGISTICS FROM THE PERSPECTIVE OF THE VISIT TEAM

SUGGESTED SCHEDULE FOR A FULL ACCREDITATION VISIT

A model visit schedule is included as Appendix D. The medical school in consultation with the team secretary should feel free to modify the model schedule, as necessary, to accommodate the distinctive characteristics of the school being visited, being mindful of the need to assess all the accreditation elements during the visit. Sessions may be expanded, shortened, or altered, but all topics to be addressed in the visit report must be reviewed.

The school, in consultation with the team secretary, should select the most relevant individuals to participate in each session. The number of participants in any session should be limited to those who are most directly involved or knowledgeable about the topic to be discussed.

SUGGESTED SCHEDULE FOR A LIMITED ACCREDITATION VISIT

Limited accreditation visits begin an entrance conference with the dean. The organization of each day of the visit will depend on the specific accreditation elements to be reviewed. The visit team secretary should work closely with the faculty accreditation lead to determine the content of and participants in individual sessions.

EXPENSE CLAIM PROCESSING

Costs of CACMS full visits, including reimbursement of visitors (excluding faculty fellows and observers), are borne by the CACMS. The expenses of the faculty fellow and of the observer are covered by his or her home medical school or organization. For limited visits, the CACMS is reimbursed by the medical school for team member expenses.

Three months before the visit, team members receive information about making travel arrangements for the on-site component of the visit and about the submission of expense claims. Team chairs, secretaries, and members will be reimbursed for all reasonable out-of-pocket expenses incurred during the visit, in accordance with CACMS travel policies (see below). Requests for reimbursement are handled through the CACMS office. Any questions regarding reimbursable expenses should be directed to the CACMS Secretariat.

All participants are expected to arrange their own (economy) air travel. The school will reserve hotel accommodations for team members, but team members are responsible for paying all hotel charges on check-out. Team members should obtain receipts for cab fares or any other applicable expenses. Hotel and travel expenses for faculty fellows and observers are the responsibility of their own institutions or organizations and will not be reimbursed by the CACMS.

CACMS TRAVEL REIMBURSEMENT POLICY

The CACMS travel reimbursement policy is described in the visit team instructional mailing. Requests for reimbursement must be submitted within 30 days of an accreditation visit. Significant departures from the policy must be justified before travel reimbursement will be made.

Requests for reimbursement must be accompanied by the following receipts:

- The itinerary for electronic tickets and boarding passes (economy fare up to and including Flex fare)
- Hotel charges
- Any other expenditure, including taxi fares

MEDICAL SCHOOL RESPONSIBILITIES

This section is designed to orient both medical schools and visit teams to the roles and responsibilities of individuals and groups at the medical school.

ROLES OF MEDICAL SCHOOL PARTICIPANTS IN THE ACCREDITATION PROCESS

There are two critical positions that should be appointed by the dean no later than 18-24 months prior to the date of the visit (Appendix A).

Faculty Accreditation Lead. The faculty accreditation lead should be a senior faculty member, who may also hold an administrative position, who is knowledgeable about the medical school and its educational program. This individual should be able to identify institutional policies and information sources and ensure participation by members of the administration, faculty, and student body before and during the visit. Ideally, the faculty accreditation lead will be familiar with CACMS visit processes and will have served on a visit team as a faculty fellow or team member.

The school must ensure that the faculty accreditation lead has appropriate administrative support, financial resources, and release time from other duties in order to accomplish the responsibilities associated with this role. The faculty accreditation lead will be expected to:

- Contact the CACMS Secretariat with questions about DCI preparation (or mini-DCI for limited visits) and answer accreditation-related questions from individuals at the school;
- Assign specific questions/sections of the DCI (or mini-DCI for limited visits) to individuals with the appropriate institutional knowledge;
- Ensure factual accuracy and typographical/grammatical clarity in the DCI (or mini-DCI for limited visits);
- Ensure that all questions in the DCI (or mini-DCI for limited visits) are fully-addressed;
- Synthesize all narrative DCI (or mini-DCI for limited visits) responses into a cohesive, factually and stylistically consistent document that accurately reflects the institution;
- Coordinate the activities of self-study subcommittees (for full visits);
- Staff the self-study task force (for full visits);
- Develop the accreditation visit agenda in collaboration with the team secretary; and
- Serve as the school's primary point of contact for the CACMS Secretariat and team secretary.

Visit Coordinator. The visit coordinator should be an experienced senior staff member who will manage the logistics of the visit and other administrative functions such as formatting and submitting required documents. The visit coordinator will make hotel reservations for the team, coordinate ground transportation during the visit, and schedule the necessary faculty and staff identified for sessions during the visit.

The names and contact information of the faculty accreditation lead and visit coordinator should be provided to the CACMS Secretariat as soon as possible using the designation form (See Appendix G).

VISIT PREPARATION AND LOGISTICS

Reviewing the Composition of the Visit Team. Upon receiving the visit team composition, the dean should inform the CACMS Secretariat promptly if any team member is deemed to be inappropriate due to conflict of interest or other valid reasons.

Hotel Arrangements (for stage 2 on-site or limited visits). The school should select a full-service hotel, preferably near the campus and convenient to restaurants, taxi service, etc. The hotel should be of appropriate quality, but not extravagant in cost.

The school should instruct the hotel to guarantee the rooms for late arrival and to send a reservation confirmation directly to each team member. The hotel also should be notified that team members will be paying their own bills. Each team member will need a single room, with either a suite for the Chair or a conference room for the team to work in during the evenings of the visit.

Transportation. Team members will make their own travel arrangements. Instructions about transportation options from airport to hotel should be provided by the school. At times, it may be necessary for the dean's office to arrange ground transportation between the airport and hotel. If so, these arrangements should be coordinated with the team secretary.

The dean's office is responsible for transportation of the team each day between their hotel and the medical school and to any instructional sites (e.g., affiliated hospitals, several campuses) it will visit. The team secretary and the medical school's visit coordinator should determine where and when the team will be picked up or met at the hotel, and this information should be included in the visit schedule.

Meals. The visit coordinator should consult with the team secretary regarding the meals that the school will provide during the visit. The cost of meals not provided by the school will be reimbursed to team members by CACMS.

Suggestions for restaurants for team dinners are appreciated. Restaurant suggestions may be provided to the team secretary.

Visit Team's "Home Room" at the School. The visit team will need a "home room" at the school equipped with a computer, printer compatible with the operating system used by the team secretary and a shredder or access to these items in an adjacent area. Team members should be provided with access to the internet and an ID and password for the medical education program's website. The home room should have a table large enough to accommodate team meetings.

It is helpful to provide tent cards for each team member and for those persons with whom they will meet, to assist with introductions as they converse around the conference table. Team members should also have name tags.

Gifts to Visit Team Members. The school may not provide gifts to team members (e.g., food baskets at the hotel, school memorabilia).

STUDENT INVOLVEMENT

For information about the roles students play in the accreditation visit process, see *Guide to the Independent Student Analysis (ISA)*, found on the CACMS website. Students should be provided access to this document. All full visit teams and almost all limited visit teams meet with students. Students should be selected and briefed well in advance of the visit so they may provide meaningful student input. A broad range of students should meet with team members to ensure that the team has access to truly representative information from students. The visit team will seek student opinions about a variety of topics, including the quality and adequacy of the educational program, student academic and personal counseling, health services, financial aid services and debt counseling, and the role of students in medical school policy-making and feedback. Students should serve as guides on the tours that occur during the visit (e.g., to the library, classrooms and clinical facilities).

APPENDIX A TYPICAL TIMELINE FOR A CACMS FULL ACCREDITATION VISIT

Months/weeks +/- Visit	Activities
-18-24 months	CACMS Secretariat establishes visit dates with the medical school dean. A committee of students responsible for the Independent Student Analysis (ISA) is formed and begins drafting questions for the ISA survey of the student body.
-15 months	ISA survey is distributed to the student body. Note that data from the ISA survey are needed for completion of the DCI, so the survey should be timed accordingly.
-18-24 months	The CACMS Secretariat publishes the DCI on the CACMS webpage. Dean designates the school's core visit personnel and notifies the CACMS using the form provided by the CACMS Secretariat The faculty accreditation lead initiates data collection activities.
-15/-12 months	School appoints members of the Medical School Self-Study (MSS) committee. The committee establishes its objectives, scope of study, and methods of data collection, and establishes various subcommittees. The students charged with conducting the ISA provide survey data to the faculty accreditation lead and begin independent analysis of the data. Various individuals or groups begin responding to questions in the DCI.
-12/-6 months	Students provide the final ISA to the faculty accreditation lead. Faculty accreditation lead distributes the ISA report and completed DCI sections to the self-study task force and appropriate subcommittees. Subcommittees review and analyze the relevant sections and prepare reports that are forwarded to the task force. If not begun already, action should be taken to correct issues identified by the various subcommittees.
-4/-3 months	The CACMS Secretariat sends background information and instructions to visit team. The CACMS Secretariat send the faculty accreditation lead instructions for the visit and a final list of visiting team members is sent to the dean. The faculty accreditation lead reviews the DCI, self-study summary report, and other required documents and makes any required updates/corrections.
-3 months	The final accreditation package, consisting of the DCI and supporting documentation, the ISA report, and the MSS report is submitted according to the instructions provided by the CACMS Secretariat.
-3/2.5 months	Shortly after receiving the school's accreditation materials: <ul style="list-style-type: none"> • The CACMS Secretariat will contact the visit team to schedule a team training session • The secretary of the visit team will contact the faculty accreditation lead to begin work on the visit schedule and will contact the staff visit coordinator to discuss logistical planning. • The faculty accreditation lead drafts a visit schedule based on the sample visit template in this document and sends it to the team secretary for review. Based on initial review of the accreditation package, the team secretary may request additional information/materials and/or that additional sessions with specific faculty or staff be added to the schedule.
-2 month	If necessary, corrections and/or updates to the DCI are bundled and sent to the team secretary. The team secretary and school finalize the visit schedule.

-1 month	If necessary, a final set of bundled corrections and/or updates to the DCI are sent to the team secretary
0	<p>Team conducts the virtual visit followed, four to six weeks later, by the on-site in person visit.</p> <p>The faculty accreditation lead submits one bundled update to the CACMS Secretariat containing any supplementary material provided to the team before or during the visit, and any corrections or updates provided to the team after the initial submission (at -3 months). This includes updates/corrections made at the time of the visit. These are submitted electronically following instructions provided by the CACMS Secretariat.</p>
+4 weeks following on-site visit	The team secretary sends a first draft of the report to the CACMS Secretariat for review;
+6 weeks	Secretariat sends feedback to team secretary – report revised as the team deems appropriate
+8 weeks	Final draft of the report is sent to the CACMS Secretariat who forwards to the dean for review of factual errors and omissions
+10 weeks	The dean provides feedback within 10 business days; feedback is incorporated into the final report at the discretion of the team secretary and chair.
+12 weeks	The report is finalized. The team secretary sends the final report to the CACMS Secretariat. The Secretariat sends final report to the dean and circulates it to CACMS members for review prior to the next CACMS meeting.
+3-6 months	The CACMS determines an accreditation decision at its next regularly scheduled meeting (typically in January/May/September).

APPENDIX B

DESCRIPTION OF CACMS TWO-STAGE ACCREDITATION PROCESS

Introduction

In 2020, as a result of the restrictions imposed by the COVID-19 pandemic, the CACMS conducted the scheduled 2020 visits using a two-stage virtual accreditation process with the inclusion of a Field Secretary (now called the Accreditation Advisor) as a pilot project. This project was evaluated by an independent research team, the results of which were presented to the CACMS on September 15, 2021. Based on the evaluation and comments received, the CACMS voted to continue with the inclusion of the Accreditation Advisor (see Role Description) and to continue with a two-stage process that would include an on-site component as the second stage. The on-site visit is contingent on the lifting of pandemic restrictions.

Stage 1 - Initial Virtual Visit

Preparation

1. School generated materials must be submitted to the CACMS Secretariat the Accreditation team no later than 12 weeks prior to the first day of the virtual visit.
2. Updates to school generated materials may be submitted up to 30 calendar days before the initial virtual visit.
3. The accreditation advisor, in consultation with the team secretary, undertakes an initial review of the school's submission to identify:
 - elements which appear to be satisfactory and may not require in-depth review by the Team
 - three elements appearing to be "Satisfactory" selected randomly (omitting elements never cited) to be reviewed as a quality control measure.
 - elements that have been rated Unsatisfactory (U) or Satisfactory with a need for Monitoring (SM) at the time of, or since, the last full visit and to which the team member assigned the element should pay particular attention
 - any missing or additional information needed from the school
4. The team secretary, in consultation with the team chair and the accreditation advisor, assigns writing responsibilities. The accreditation advisor will provide team members with the list of elements requiring particular attention.
5. Each team member reviews the MSS evaluation forms, DCI and ISA for elements that have been assigned to them.
6. Team members complete their sections of the draft report using the element evaluation forms before the initial virtual visit and submit them to the team secretary, who, in collaboration with the accreditation advisor, prepares a complete and cohesive draft document.
 - Any team member who feels that additional information is needed contacts the team secretary as soon as possible and provides the rationale behind the request.

- The accreditation advisor, upon request, may assist a team member in determining a rating, providing evidence to support that rating and formulating the finding.
7. Team members will meet (teleconference or videoconference) to determine which Elements can be considered satisfactory based on the documentation provided and which Elements require further attention.
 8. The team secretary will contact the accreditation lead at the school to identify those topic areas requiring further attention. Elements identified as complete and satisfactory will not be included in the schedule for the virtual visit.
 9. The team secretary and accreditation advisor, in collaboration with the accreditation lead at the school, draft the virtual visit schedule allowing time following each session for an in-camera meeting of the team to draft preliminary findings and determine areas requiring further follow-up.
 10. The school should also be given an opportunity to add 2 or 3 elements to the draft schedule they would like reviewed in addition to those identified by the team. These may be elements the school wishes to showcase or those for which they would like to receive feedback.

The Initial Virtual Visit

11. The team meets using video conference with individuals or groups from the school as per the schedule.
12. The team meets *in camera* following each virtual meeting session to draft preliminary findings and to determine areas for further follow-up.
13. Once all the scheduled virtual meeting sessions are complete, the team reconvenes by videoconference to finalize a list of elements that will be scheduled for review during the on-site visit (Stage 2). Elements on this list include those for which performance appears less than satisfactory or those Elements for which the team needs more information to be able to provide a definitive recommendation.
14. In addition to those elements identified by the team, a list of elements that require on-site evaluation is provided by the CACMS Secretariat (See model schedule template in Appendix D).

Stage 2 – On-site Visit

Preparation

15. Using the list of required elements for on-site review provided by the CACMS Secretariat, the accreditation lead prepares an initial draft schedule for the on-site visit, allowing sufficient time between meetings for the team to discuss impressions and to finalize findings.
16. No later than one week following the end of the virtual visit, the team secretary (with the accreditation advisor as needed), consults with the accreditation lead at the school to finalize the schedule for the on-site visit incorporating the final list of elements identified by the team for further review.

17. The team secretary and accreditation advisor, on behalf of the team, may ask the school for additional materials at any point up to and including the conclusion of the on-site visit. However, no school-generated updates/materials will be accepted at any point beyond 30 calendar days before the initial virtual visit unless specifically requested by the team secretary.

The On-site Visit

18. During the on-site visit, all team members (if possible) meet in person with identified groups to confirm their initial evaluations and summary of findings or modify these accordingly.
19. After each scheduled meeting (or group of meetings), the team meets to finalize a list of positive observations and findings.

The Exit Report

20. The team secretary prepares an exit report detailing the team's positive observations (if any) and the team findings (no mention of the standard or element number and no mention of recommended rating). A copy of the exit report is provided to the dean by email within one week of the conclusion of the on-site visit with a copy emailed to the CACMS Secretariat.
21. The content of the team report and team findings is based on the information available at the time of the initial virtual visit and any clarification of information as sought by the team up to and including the on-site visit.

Post-Visit Process

22. The remainder of the post-visit process (i.e., finalization of the visit report by the team secretary, internal Secretariat review, discussion of potential changes with the Team, draft to the dean) occurs as usual (see *Guide to CACMS Accreditation Visits*).

APPENDIX C ACCREDITATION VISIT TEAM MEMBER DUTIES

DUTIES OF THE TEAM CHAIR

Overview. The team chair serves as the leader of the team’s activities during the visit and speaks for the team during the visit. Like any other team member, the chair will evaluate the elements to which he or she has been assigned prior to the visit and contribute to the preliminary list of findings prior to the visit. During the visit, the team chair should see that the team paces its work, consolidating its observations and findings at the end of each session so that the team’s findings related to the evaluation of the accreditation elements are refined each day. The chair should ensure that individual team members are introduced at meetings with various groups and that the purpose and focus of the accreditation visit are stated briefly.

Preparation Before the Visit

Review of Pre-visit Materials and Evaluation of Elements. The team chair should, as soon as possible, review the entire MSS report, the DCI, and the ISA. Elements identified as potentially unsatisfactory or satisfactory with a need for monitoring should be communicated to the team secretary before the visit begins so that they can be compiled into a preliminary set of summary findings to be discussed at the initial team caucus. The chair should also note any elements for which additional information is needed and should communicate these to the team secretary. Like any other team member, the chair will complete the element evaluation forms for the elements assigned to him or her. The chair will send the summary of findings for any elements rated as satisfactory with a need for monitoring or unsatisfactory to the team secretary for inclusion in the preliminary team findings at least one week prior to the initial team caucus at the beginning of the visit.

The Visit Schedule. The team chair should consult with the team secretary prior to the visit about the organization of the visit and development of the visit schedule. The team chair should review the draft schedule with the team secretary to ensure that all relevant issues related to the accreditation elements are appropriately explored during the visit.

During the Visit.

The chair will lead the discussion at the initial meeting with the dean, introduce the team and explain purpose of the visit at each session. If the team is divided into groups during the visit, the chair should lead one group and the secretary the other.

The Visit Report. The team chair, like any other team member, is responsible for completing the element evaluation forms for his or her assigned elements. The team chair should carefully review the draft visit report to confirm that the summary findings are sufficiently documented and supported in the element evaluation forms and appendices and that the report is of high quality and complete.

The chair will work with the team secretary (in consultation with other team members as needed) to determine what revisions to the draft visit report should be made based on the feedback provided by

the CACMS Secretariat.

If the dean has concerns about the tone or accuracy of the draft visit report, the team secretary should review the concerns with the team chair and other team members as needed. The chair and secretary will revise the draft visit report as they deem appropriate based on the information provided by the dean. The chair will review the final visit report before it is submitted to the CACMS Secretariat.

DUTIES OF THE TEAM SECRETARY

Mentoring the Team

The team secretary, along with the accreditation advisor, are generally the most experienced members on the team and as such will serve to mentor all team members in particular those with limited or no prior experience including the chair. The secretary should set expectations and provide feedback to members as needed before, during and after the visit.

Before the Visit

- **Pre-visit Materials.** The team secretary reviews all the pre-visit materials for completeness. If important omissions are discovered, the team secretary asks the school's faculty accreditation lead to supply the missing information. The team secretary works with the faculty accreditation lead to obtain missing or additional information requested by team members.
- **Initial Contact with the School.** Immediately after receipt of the pre-visit material, the team secretary should contact the school's faculty accreditation lead to discuss the visit logistics.
- **Visit Schedule.** The team secretary works with the faculty accreditation lead to develop a draft schedule soon after reviewing the pre-visit materials. The team secretary should be familiar with the DCI, MSS report and the ISA and the school's accreditation history since the previous full accreditation visit. Early study of the pre-visit materials will assist in modifying the sample schedule outlined in the "Model Schedule for Full Accreditation Visits" (Appendix D) included in this document. The team secretary will review the draft schedule with the team chair, who may wish to propose changes to reflect areas of emphasis during the visit.
- **Hotel Reservations (for Stage two on-site visit and limited visits).** The team secretary will confirm that the visit coordinator has booked accommodation for each member of the team, with all reservations guaranteed for late arrival. A suite for the chair (or a meeting room) must be reserved for daily team meetings. The hotel will have been instructed to send reservation confirmations directly to each team member. Any questions or concerns about the appropriateness of accommodation costs should be conveyed to the CACMS Secretariat for resolution early in the planning of the visit.
- **Transportation (for Stage two on-site visit and limited visits).** The visit coordinator will arrange for the team's transportation during the visit, including transportation between the hotel and the campus each day. The team secretary will ask team members for their travel itineraries. After reviewing the team members' travel arrangements, it may be possible to

arrange for group transportation to or from the airport.

- **Logistics.** The team secretary will contact the members of the team soon after receiving the pre-visit materials to inform them about arrival and departure times, accommodations, element assignments, and any other preparations required for the site visit. The team secretary will ensure that members have received their hotel confirmations.

It is also helpful to know team members and their cell phone numbers. The team secretary will provide his or her telephone number and e-mail address to the team members and communicate any special travel instructions or arrangements necessary for reaching the hotel. The team secretary will also coordinate the activities of any observer.

- **Element Evaluation Assignments.** The team secretary, in consultation with the chair, will assign elements to each team member including the chair and secretary. A suggested template for element assignments can be found in Appendix F.
- **Element Evaluations.** The team secretary, like all other team members, is expected to review in detail the MSS element evaluations, the DCI, and the ISA and complete the element evaluation forms for elements assigned to the secretary prior to the visit.
- **Preliminary Findings.** The team secretary will ask all team members to review and analyze the MSS Element Evaluation forms and the DCI data, narrative responses and appendices and to complete the evaluation forms for their assigned elements prior to the visit. The questions from the AFMC Graduation Questionnaire (AFMC GQ) and the ISA pertaining to a specific element are provided in the DCI for that element. The team secretary should instruct team members to read the ISA to identify concerns of the students that are relevant to their assigned elements. At least one week before the initial virtual visit, the secretary will gather from team members a list of elements with a preliminary rating of unsatisfactory or satisfactory with a need for monitoring and the associated findings. The secretary will create a preliminary element rating summary table and a preliminary list of findings.
- **Work with Faculty Fellows and Inexperienced Team Members.** The teams for full accreditation visits usually include up to two CACMS Faculty Fellows who may be new to the role of team member. The team secretary should contact such members prior to the visit to provide a briefing about expectations and assignments. Inexperienced members should be informed about relevant materials to bring along to the visit. Faculty fellows and new team members will be responsible for evaluating elements contributing to the decision-making process. During the visit, the team secretary along with the accreditation advisor should provide mentoring and constructive feedback.

During the Visit

- **Developing Team Findings.** The team secretary is responsible for ensuring that the team evaluates each element. The team secretary also compiles, revises and updates the team's summary findings and element rating summary table at the end of each day. The secretary compiles a list of positive team observations. The findings and positive observations will

form the content of the exit report.

- **Contacting the CACMS Secretariat.** Any problems arising before, during and after the visit that cannot be resolved by the team Chair and secretary, should be communicated immediately to the CACMS Secretariat by phone or e-mail.

After the Visit

- **Developing the Visit Report.** The team secretary will instruct team members to finalize their element evaluation forms during the visit or within 7 to 10 days following the visit. If needed, the team secretary will create a supplemental appendix comprised of materials received during the visit and necessary to substantiate the team's ratings and findings. A table showing the timetable for completing the accreditation visit report can be found in Appendix A of this document.

The team secretary will send the initial visit report and accompanying appendices to the CACMS Secretariat within four weeks of the conclusion of the visit. After receiving comments from the CACMS Secretariat and making needed changes, the team secretary will submit a final draft to the CACMS Secretariat who will forward to the medical school dean. The subsequent review of the draft visit report by the dean is described earlier in this document

If the dean finds errors of fact in the draft report or has concerns about the report's tone, the team secretary will review the issues with the team chair and other team members as needed. After considering the concerns of the dean, the team secretary in consultation with the chair will finalize the report and send it to the CACMS Secretariat.

DUTIES OF THE ACCREDITATION ADVISOR

Throughout the process, the accreditation advisor will:

- provide guidance to the team as to the spirit of the CACMS elements and how to evaluate them
- help mentor other team members with less accreditation experience
- participate in all team meetings
- help the team secretary collate team writing assignments and contribute to the review of the visit report
- be prepared to fill-in for any team member unable to fulfill their commitment
- identify best practices during this process for future reference

Before the visit: the accreditation advisor will undertake an initial review (triage) of the school's submission to:

- Identify elements which appear to be satisfactory and may not require in-depth review by the team
- review elements which are frequently cited (list provided by the CACMS secretariat) and

- flag any concerns for additional review by the team member assigned that element
- review elements that have been rated Unsatisfactory (U) or Satisfactory with a need for Monitoring (SM) at the time of or since the last full visit and to which the team member assigned the element should pay particular attention
- identify any missing or additional information needed from the school
- help the team secretary draft the initial visit schedule in collaboration with the accreditation lead at the school

During the visit, the accreditation advisor will:

1. participate in all sessions with the school (virtual or in-person)
2. ensure that additional questions are asked if they feel something has been left unanswered or is unclear
3. help the team identify elements that require further follow-up during the second stage of the visit
4. participate in the second stage of the visit
5. help the team formulate its findings and draft the exit report

After the visit, the accreditation advisor will:

1. help the team formulate its recommendations to the CACMS
2. review the draft report which will have been prepared by the team secretary
3. at the request of the team secretary, participate in the report review process (secretariat review and dean's review)
4. at the request of the team secretary, participate in the final review of the report prepared by the team secretary

DUTIES OF VISIT TEAM MEMBERS

Logistics. The team secretary will provide information to team members about the hotel arrangements (for on-site in person or limited visits), visit schedule, and element evaluation assignments. It is expected that team members will participate in the initial meeting with the dean, and they will remain available until the last day of the virtual visit. It is also expected that team members will be present for the on-site follow-up visit unless otherwise instructed.

Before the Visit

- **Review of Pre-visit Materials and Evaluation of Elements.** Each team member will review and analyze the MSS Element Evaluation form and the DCI data, and complete the evaluation forms for their assigned elements prior to the visit. The questions from the AFMC Graduation Questionnaire (AFMC GQ) and the ISA pertaining to a specific element are provided in the DCI for that element. Team members should also read the ISA to identify concerns of the students that are relevant to their assigned elements.

If omissions or inconsistencies are noted, team members must inform the team secretary to request additional information from the school before the visit. Team members must not

communicate directly with the school for any reason. Team members will send a list of elements with a preliminary rating of Unsatisfactory or Satisfactory requiring monitoring and the associated findings to the team secretary **at least one week before the visit begins.**

- **Team Preparations.** The team will meet to prepare the virtual visit and to prepare for the on-site visit to make any adjustments in the schedule, confirm responsibilities and review ground rules and timelines, and prioritize areas needing particular attention over the course of the visit (e.g., potential elements that are unsatisfactory or satisfactory with a need for monitoring).

Main Responsibilities During and After the Visit. All team members (includes the chair, the secretary, and the accreditation advisor) are expected to:

- Interact with other team members and school representatives in a professional manner
- Prepare for and participate in the virtual and on-site visit sessions in particular for their assigned elements
- Revise and refine the element evaluation forms and list of findings for all assigned elements based on new information provided by the school and/or discussions with relevant individuals during the visit
- Ensure that new information provided by the school is given to the team secretary
- Contribute to team deliberations to reach consensus on all accreditation elements not only their assigned elements
- Contribute to the development of the summary of findings for all elements rated as satisfactory with a need for monitoring and unsatisfactory
- Contribute to the team's positive observations
- Provide the team secretary with the final evaluation forms for their assigned elements either at the conclusion of the visit or within seven to ten days thereafter
- Promptly review and correct any errors in the draft visit report compiled by the team secretary
- Respond to requests from the team secretary to revise assigned element evaluations following reviews by the CACMS Secretariat and the medical school dean prior to the finalization of the visit report.

APPENDIX D
MODEL SCHEDULE TEMPLATE – TWO-STAGE CACMS ACCREDITATION VISITS

Stage 1- Initial Virtual Visit

Day 1

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
Initial meeting with dean		09:00 – 09:50							
	Break	09:50 – 10:00							
Initial meeting with students		10:00 – 10:50							
	Break	10:50 - 11:00							
STD 1		11:00 – 12:00							
	1.1								
	1.1.1			X					
	1.2		X						
	1.3		X						
	1.4								
	1.5		X						
	1.6		X						
	Team meeting	12:00 – 12:30							
	Break	12:30 – 13:00							

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
STD 2		13:00 – 14:00							
	2.1		X						
	2.2		X						
	2.3								
	2.4		X						
	2.5		X						
	2.6		X						
	Team meeting	14:00 – 14:45							
	BREAK	14:45 – 15:00							

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
STD 3		15:00 – 16:30							
	3.1		X						
	3.2								
	3.3			X					
	3.4		X						
	3.5								
	3.6			X					
	Team meeting	16:30 – 17:30							

Day 2

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
STD 4		09:00 – 10:00							
	4.1		X						
	4.2		X						
	4.3		X						
	4.4								
	4.5								
	4.6		X						
	Team meeting	10:00 – 10:15							
	BREAK	10:15 – 10:30							

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
STD 5		10:30 – 11:30							
	5.1			X					
	5.2								
	5.3		X						
	5.4		X					X	
	5.5							X	
	5.6		X					X	
	5.7		X					X	
	5.8							X	
	5.9							X	
	5.10		X						

	5.11			X				X	
	5.12		X						
	Team meeting	11:30 – 12:00							

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
STD 6		13:00 – 14:30							
	6.1		X						
	6.2		X						
	6.3								
	6.4		X						
	6.4.1		X					X	
	6.5		X						
	6.6								
	6.7	Currently there is no element 6.7							
	6.8		X						
	6.9								
	6.10								
	Team meeting	14:30 – 15:00							
	BREAK	15:15 – 15:45							

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
STD 7		15:45 – 17.15							
	7.1			X					
	7.2								
	7.3		X						
	7.4		X						
	7.5		X						
	7.6		X						
	7.7		X						
	7.8		X						
	7.9								
	7.10		X						
	Team meeting	17:15 – 18:00							

Day 3

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
STD 8		9:00 – 10:30							
	8.1								
	8.2		X						
	8.3			X					
	8.4								
	8.5		X						
	8.6								
	8.7								
	8.8								
	Team meeting	10:30 – 11:00							

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
STD 9		11:00 -12:15							
	9.1								
	9.2			X					
	9.3								
	9.4			X					
	9.5								
	9.6		X						
	9.7								
	9.8			X					
	9.9								
	9.10		X						
	Team meeting	12:15 to 12:45							
	BREAK	12:45 – 13:30							

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
STD 10		13:30 – 14:30							
	10.1		X						
	10.2								
	10.3								
	10.4		X						
	10.5		X						
	10.6		X						
	10.7		X						
	10.8	Currently there is no element 10.8							
	10.9		X						

	10.10	Currently there is no element 10.10						
	10.11		X					
	Team meeting	14:30 – 15:00						

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
STD 11		15:00 – 16:00							
	11.1			X					
	11.2			X					
	11.3								
	11.4		X						
	11.5		X					X	
	11.6		X					X	
	Team meeting	16:00 – 16:15							
	BREAK	16:15 – 16:30							

Stage one: Initial virtual visit								Stage two: on-site visit	
Meeting	Element	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible on-site review	Flagged by Team for possible on-site review
STD 12		16:30 – 17:30							
	12.1			X					
	12.2		X						
	12.3			X					
	12.4								
	12.5							X	
	12.6								
	12.7		X						
	12.8								

	Team meeting	17:30 – 18:00							
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Stage 2 – on-site visit

Day 1

Stage two: on-site visit							
Meeting	Potential elements for discussion	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments
Initial meeting with the Dean and/or UG dean		08:30 – 09:00					
Team meeting		09:00 – 09:15					
Meeting with junior faculty	1.3	09:15 – 10:15	X				
	3.3			X			
	4.2		X				
	4.3		X				
	4.4						
	4.5						
Team meeting and BREAK		10:15 – 10:45					
School-identified or team-identified elements to review	Element ?	10:45 – 11:30					
	Element ?						
Lunch with Pre-clerkship students:	2.4	11:30 – 12:30	X				
	3.5						
	3.6				X		
	5.7		X				
	6.5		X				
	6.6						
	8.4						
	9.5						
	9.7						
	9.8					X	
	11.1					X	
	11.2					X	
	11.6			X			
	12.1					X	
	12.3					X	
	12.4						
12.5							
12.6							
12.8							

	Other topics (add rows as necessary)						
Lunch with clerkship students:	2.4	12:30 – 13:30	X				
	3.5						
	3.6			X			
	5.7		X				
	5.11			X			
	6.1		X				
	6.4.1						
	6.5		X				
	8.4						
	8.8						
	9.5						
	9.7						
	9.8				X		
	11.1				X		
	11.2				X		
	11.3						
	11.6		X				
	12.1				X		
	12.3				X		
	12.4						
12.5							
12.6							
12.8							
	Other topics (add rows as necessary)						
Student-led tour of educational facilities (library, study space, lounge, storage space, clinical skills teaching and assessment)	5.4	13:30 – 14:30	X				
	5.7		X				
	5.8						
	5.9						
	5.11			X			
Student-led hospital tour (focus on areas identified as potentially problematic)	5.6	14:30 – 15:30	X				
	5.7		X				
	5.11			X			
Team-identified elements to review or recall	Element ?	15:30 – 17:00					
	Element ?						
Courtesy meeting with dean (optional) if no Day 2		17:00 – 17:15					
Team meeting		17:30 – 18:00					

Day 2 (if needed for additional site)

Stage two: on-site visit							
Meeting	Potential elements for discussion	Schedule* start/end times depend on team time zones	Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments
School-identified or team-identified elements to review	Element ?	10:00 – 11:30					
	Element ?						
Lunch with Pre-clerkship students:	2.4	11:30 – 12:30	X				
	3.5						
	3.6				X		
	5.7			X			
	6.5			X			
	6.6						
	8.4						
	9.5						
	9.7						
	9.8					X	
	11.1					X	
	11.2					X	
	11.6			X			
	12.1					X	
	12.3					X	
	12.4						
	12.5						
	12.6						
	12.8						
Other topics (add rows as necessary)							
Lunch with clerkship students:	2.4	12:30 – 13:30	X				
	3.5						
	3.6				X		
	5.7			X			
	5.11					X	
	6.1			X			
	6.4.1						
	6.5			X			

	8.4							
	8.8							
	9.5							
	9.7							
	9.8			X				
	11.1			X				
	11.2			X				
	11.3							
	11.6		X					
	12.1			X				
	12.3			X				
	12.4							
	12.5							
	12.6							
	12.8							
	Other topics (add rows as necessary)							
Student-led tour of educational facilities (library, study space, lounge, storage space, clinical skills teaching and assessment)	5.4	13:30 – 14:30	X					
	5.7		X					
	5.8							
	5.9							
	5.11				X			
Student-led hospital tour (focus on areas identified as potentially problematic)	5.6	14:30 – 15:30	X					
	5.7		X					
	5.11			X				
Team-identified elements to review or recall	Element ?	15:30 – 17:00						
	Element ?							
Courtesy meeting with dean at end of visit (optional)		17:00 – 17:15						
Team meeting		17:30 – 18:00						

APPENDIX E

Exit report for accreditation visit to the

[NAME OF UNIVERSITY and MEDICAL SCHOOL]

[DATES OF VISIT]

During this accreditation visit, team members assessed the medical education program at the [name of the medical school] using the relevant standards outlined in the *CACMS Standards and Elements* for medical schools. The primary purpose of this exit report is to provide the team's preliminary findings. The preliminary findings form the basis of the team's recommendations to the CACMS for their review and determination of outcome.

The team expresses its sincere appreciation to [name of the dean] and the staff, faculty, and students of the [name of the medical school] for their many courtesies and accommodations during the visit. [Insert the names of individuals who] merit special recognition and commendation for their thoughtful visit preparations and generous support during the conduct of the visit.

The visit team bases its recommendations to the CACMS on its review of the extent to which, in its professional judgement, the requirements of the elements of the CACMS accreditation standards are being met by examining the information provided by the medical school throughout the visit process. This exit report provides you with an overview of the team's preliminary findings for elements that are not deemed Satisfactory. **No element numbers, titles or ratings will be provided here** but will appear in the draft visit report.

The dean of [name of the medical school] will receive the draft visit report for review and comment. The Team Secretary will consider these comments prior to finalizing the report. The CACMS receives the final visit report from the team and reviews the report in detail. The appointed CACMS reviewers summarize the report and present their recommendations. The CACMS deliberates and makes decisions around each standard and element, the accreditation status of the program, and any required follow up. In addition, the CACMS may change the rating assigned to an element, delete a finding, or add new findings based on its review of the visit report. Details of this process may be found in the *CACMS Rules of Procedure*. Simply, the team makes recommendations and the CACMS renders a final decision.

Team Summary of Preliminary Findings:

*See Accreditation Visit Report Writing Guide
Section 5.4 Writing Preliminary Findings*

Examples of findings for elements 4.4 and 9.7 are provided below:

Finding: Full-time faculty members in the departments of internal medicine and surgery at campus X do not receive annual feedback from departmental or medical education program or university leaders on their academic performance, progress toward promotion or, when applicable, progress

toward tenure. This element was previously rated as Unsatisfactory (U) at the time of the last full accreditation visit.

Finding: The medical school recently implemented a new system to ensure that: 1) Formal feedback occurs at least at the mid-point of each required learning experience and 2) Formal feedback occurs approximately every six weeks for the clinical skills course that is one year long and for the longitudinal integrated clerkship. The school provided evidence that the system has been effective for the last 6 months. The system requires monitoring to show that satisfactory results can be sustained for a minimum of one year.

The visit team was impressed with:

- Insert positive observation here and add bullet points as necessary

If there are questions or concerns about the exit report or the next steps in the process, please contact the CACMS Secretariat: cacms@afmc.ca.

Insert name of team secretary
On behalf of the visit team

Date of report

APPENDIX F

TEAM ASSIGNMENT TEMPLATE

The following template provides suggestions for team assignments. The team members take primary responsibility for completing their assigned element evaluation forms. All members should contribute to the evaluation of elements (participate in team discussions and serve as a resource to the responsible team member) for the sessions in which they participate even if those elements have not been assigned to them. Should the team include one or more faculty fellows, these suggested assignments should be redistributed accordingly. The accreditation advisor is not assigned any specific standards or elements.

Team Chair	Team Secretary	Team Member	Team Member	Student Member
Standard 1	Comments on the DCI, MSS, ISA Section 11 Curriculum Description Section 12 Comments on Key Parameters Overview Summary Table Element Rating Summary Table Summary of Visit Team Findings and positive observations Standard 8 Standard 9	Standard 3	Standard 6	Standard 12
Standard 2		Standard 10	Standard 7	
Standard 4		Standard 11		
Standard 5				

APPENDIX G

Faculty accreditation lead and visit coordinator designation form

Please complete and email this page to: the Accreditation Manager, CACMS Secretariat, cacms@afmc.ca

Full CACMS Accreditation visit of _____
School name and Faculty

NAME AND CONTACT INFORMATION FOR DESIGNATED “FACULTY ACCREDITATION LEAD”

The Faculty Accreditation Lead* (typically a faculty member/ senior administrator) is the main point of contact with the CACMS Secretariat and the visit team secretary. The Faculty Accreditation Lead oversees the school’s institutional self-study process, coordinates data collection for the school’s Data Collection Instrument, and develops the visit agenda with the team secretary.

Type full name, title, and complete mailing address for the Faculty Accreditation Lead:

Name:	
Title:	
School:	
Address:	
Phone:	
Email:	
Name and contact information of Assistant:	

NAME AND CONTACT INFORMATION FOR DESIGNATED “ACCREDITATION VISIT COORDINATOR”

The Visit Coordinator * (typically an experienced staff person) is responsible for all logistics of the visit, including hotel reservations and transportation for the team and restaurant recommendations. The Visit Coordinator often handles the production and transmittal of the completed Data Collection Instrument.

Type full name, title, and complete mailing address for the Visit Coordinator:

Name:	
Title:	
School:	
Address:	
Phone:	
Email:	
Name and contact information of Assistant:	