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

GUIDE FOR THE CONDUCT OF CACMS ACCREDITATION VISITS
(Academic year 2027-2028)

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Committee on Accreditation of Canadian Medical Schools

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1. INTRODUCTION

The *Guide for the Conduct of CACMS Accreditation Visits* provides key information that medical school personnel and visit team members need to know to prepare for and undergo a full or limited accreditation visit by the Committee on Accreditation of Canadian Medical Schools (CACMS). Much of the information in this *Guide* is also found in the *CACMS Rules of Procedure*. Whenever the two documents conflict, the *CACMS Rules of Procedure* shall prevail. For information related to CACMS accreditation visits for new medical schools, please refer to the relevant documentation available from the CACMS Secretariat.

Throughout the *Guide*, as appropriate, the duties and responsibilities of the medical school, those of the visit team and its members as well as the CACMS Secretariat and the CACMS are identified. A more detailed description of student roles is provided in the *Guide to the Independent Student Analysis* (ISA), found on the CACMS website. All full visit teams and often limited visit teams meet with students; however, neither the ISA questionnaire nor ISA report is required for a limited visit.

The *Guide for the Conduct of CACMS Accreditation Visits* is structured according to sections followed by several appendices.

The first section provides general information/instructions that apply to both full and limited accreditation visits. The two subsequent sections contain specific information/instructions that are unique to full visits followed by limited visits. The final section deals with completion of reports and applies to both full and limited visits.

Appendices provide further specific information on topics including: the two-stage accreditation process, timelines, responsibilities, visit team composition, model schedule for full visits, exit report template, introductory remarks template, model full visit team assignments and various information on team logistics including visit team reimbursement instructions.

2. GENERAL INFORMATION

In the CACMS accreditation process, the CACMS determines whether an undergraduate medical education program ("medical school") meets accreditation requirements. Medical schools are expected to achieve compliance with each of 12 standards. The CACMS bases its compliance judgements on the assessment of satisfaction with accreditation elements that are linked to each accreditation standard.

During full and limited accreditation visits, visit teams evaluate whether a medical school meets the requirements of the elements and recommend to the CACMS a satisfaction rating for each element. The accreditation standards and elements for Canadian medical schools are contained in the publication *CACMS Standards and Elements,* which is regularly revised and updated.

Medical schools and visit teams must use the version of *CACMS Standards and Elements* applicable to the academic year in which the accreditation visit occurs.

Visit team members sign a confidentiality statement and agree to hold confidential all information gained through the review of documents and all discussions (including written communication) during the visit and throughout the accreditation process. Likewise, all sessions scheduled with the visit team are deemed *in camera* and limited to the visit team, and those listed on the visit schedule for a given session. Sessions with the team or other team meetings cannot be recorded or subject to others otherwise observing or in any way monitoring the proceedings.

Visit team members are asked to refrain from using ChatGPT or other AI tools in the preparation for the visit and the writing of the visit report.

2.1 THE CACMS SECRETARIAT

The affairs of the CACMS are managed by a group of professional and non-professional staff known as the CACMS Secretariat. The CACMS Secretariat provides the official interface between the CACMS and the public, the CACMS and medical schools, and the CACMS and visit teams.

In addition, the CACMS Secretariat prepares all accreditation documents and official accreditation guides and members of the CACMS Secretariat conduct accreditation preparation workshops for medical schools and conduct training sessions for team members.

Members of the CACMS Secretariat attend all meetings of the CACMS, but they are not members of the committee and therefore do not vote on accreditation decisions.

Medical school officials responsible for their medical school's accreditation process (specifically, the Dean, the Associate Dean of UGME (or equivalent), and/or the faculty undergraduate accreditation lead (FUAL)) are encouraged to contact the CACMS Secretariat at any time via email. Likewise, team secretaries and team accreditation advisors are also encouraged to contact the CACMS Secretariat via email at any time. Other individuals at the medical school are encouraged first to consult with the school's FUAL. Visit team members, other than the team secretary or team accreditation advisor, are asked to first consult with the team secretary who can bring their question(s) or concern(s) to the CACMS Secretariat.

2.2 CONTACTING THE CACMS OR THE CACMS SECRETARIAT

All enquiries for the CACMS or the CACMS Secretariat are to be emailed to the CACMS Secretariat at: cacms@afmc.ca.

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

2.3 PREPARATION FOR ACCREDITATION VISITS

Designated school personnel and all team members will automatically receive invitations to preparatory sessions offered by the CACMS Secretariat. Please review Appendix C for details of the medical schools' roles and responsibilities. Key areas are outlined in this section.

Preparatory sessions for medical schools
Approximately two years in advance of a full visit, the CACMS Secretariat will contact the dean and FUAL to arrange dates for a school preparation workshop. Students, faculty members and administrative staff with key roles are especially invited to attend at the discretion of the FUAL. School preparatory workshops are typically conducted virtually. For limited visits, in lieu of a preparation workshop, a Secretariat Consultation may serve this purpose.

Preparatory sessions for visit teams
Approximately three months before a full (stage 1) or limited visit, the CACMS Secretariat will contact the team to arrange dates for a visit team orientation. Visit team orientations are conducted virtually.

Visit schedules
The details of developing preliminary and final visit schedules are detailed in the sections for full and limited visits below.

For in person visits (full and limited)

For in person visits, team members make their own travel arrangements to the location of the medical school following the travel policies outlined by the CACMS Secretariat. The medical school is responsible for arranging the specific lodging location and the team's travel between the lodging and the medical school. The medical school is expected to arrange lodging in a hotel that: 1) has well-equipped accessible rooms for any team member with a disability, 2) is in a safe and convenient location (including taxi access), 3) is of high quality, but not extravagant in cost. The hotel should also have conference room facilities for private visit team meetings (if requested).

Team members will pay for their lodging, meals and travel costs and will be reimbursed by the CACMS Secretariat following an in person visit. The CACMS Secretariat will invoice the medical school for reimbursement of visit team costs (for limited visits only). Expense claims with receipts and boarding passes are to be filed with the CACMS Secretariat within 10 business days following the conclusion of the in person visit.

Visit Team's "Home Room" at the Medical School

The visit team requires a private room at the school with wireless access. IT support should be available in case visit team members have difficulty with internet connections. The room should have a conference table large enough to accommodate visit team meetings.

For virtual and in person visits

Team members should inform the team secretary of any disability-related or other personal (including religious) accommodation (for in person or virtual visits) and/or dietary restrictions required (for in person visits). This information will be important in ensuring that the agreed upon scheduling of the visit works for all team members. The team secretary is tasked with communicating these team member requirements to those responsible for visit logistics at the medical school.

2.4 ACCREDITATION DOCUMENTS AVAILABLE FROM THE CACMS WEBSITE

Three classes of documents related to the CACMS accreditation process can be accessed from the Accreditation Documents tab on the CACMS website (https://cacms-cafmc.ca/).

2.4.1 Documents to be completed by the medical school/students in advance of the visit

Documents in this section are regularly revised and are posted on the CACMS website according to the academic year corresponding with the timing of the scheduled accreditation visit.

The medical school and visit team **must** ensure that the documents used are dated for the academic year in which the accreditation visit is scheduled.

2.4.1.1 Data Collection Instrument (DCI)

For full visits, the DCI is comprised of one overview document and twelve accreditation standard-specific files. These files are available from the CACMS website under the Accreditation Documents tab.

The overview file (DCI Overview Data and Context) contains requests for background information including data tables and maps. The remaining twelve files, one for each accreditation standard, contain the elements of the standard, their requirements, and associated data indicators.

In the case of a limited visit, a focused DCI, known as a mini-DCI, will be provided to the medical school by the CACMS Secretariat.

2.4.1.2 Independent Student Analysis (ISA) report

The ISA questionnaire is identical for all schools. This questionnaire is supported by the AFMC data unit hosted on an AFMC server. A link to the questionnaire must be distributed to all students at all campuses between January and March. Questionnaire responses are tagged by campus and curricular year within the program. Tabular data obtained through the ISA process are needed for completion of the DCI and the final ISA report must be considered in the school's self-study process. Detailed information and instructions for the ISA are found in the *Guide to the Independent Student Analysis.* Neither the ISA questionnaire nor the ISA report are required as part of a limited visit.

2.4.1.3 Medical School Self-study (MSS) report

The MSS report is comprised primarily of a series of MSS evaluation forms, one per element organized within an accreditation standard. Instructions on preparing the MSS report, including completion of the MSS evaluation forms, are found in the *Guide to the Medical School Self-study*. The MSS report is not required as part of a limited visit.

2.4.2 Guidance documents

2.4.2.1 Instructions for completing the Data Collection Instrument (DCI)

Provides technical instructions and a checklist table for ensuring completion of the DCI.

In the case of a limited visit, a focused DCI, known as a mini-DCI, will be provided to the medical school by the CACMS Secretariat. The technical instructions are similar for a mini-DCI, but there is no checklist table. Contact the CACMS Secretariat for guidance as needed.

2.4.2.2 Guide to the Independent Student Analysis (ISA)

Outlines the roles and responsibilities of students in the accreditation process and provides the 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 guide. The ISA is only required in the full accreditation visit process.

2.4.2.3 Guide to the Medical School Self-Study (MSS)

Describes the process for conducting the medical school's self-study and includes instructions on the evaluation of the accreditation elements along with other information to be included in the MSS Report. The MSS is only required in the full accreditation visit process.

2.4.2.4 CACMS Accreditation Visit Report Writing Guide

Describes the content and format of the visit report for full and limited visits and provides critical guidance to visit teams for completing team evaluation forms, rating element satisfaction, and writing of findings.

The entire document is required reading for a team secretary and team accreditation advisor. Team members, although advised to read the entire document, must read those sections related to

completing team evaluation forms. Medical school officials responsible for an accreditation visit may also find it helpful to review this document.

In advance of full and limited visits, the visit team also receives an accreditation visit report template that is pre-populated with historical accreditation data and, as appropriate, select information from other sources.

2.4.3 Additional CACMS documents

Documents in this category were approved by the CACMS according to the *CACMS Rules of Procedure*.

2.4.3.1 CACMS Standards and Elements

The complete approved listing of all accreditation standards and their associated elements. Includes a lexicon of terms used by the CACMS.

Subsets of standards and elements are found in a variety of other accreditation documents, but the *CACMS Standards and Elements* is the only complete listing. Reviewing this listing as a whole can be helpful for school officials responsible for accreditation visits and the team secretary and team accreditation advisor in planning team assignments and preparing schedules.

- Lexicon
  Although officially part of the CACMS Standards and Elements document, the Lexicon is also made available on the CACMS website as a separate document. Lexicon entries are terms or phrases that have special definitions in the context of accreditation. School officials responsible for completing accreditation documents and visit team members are advised to review the Lexicon.

- Standard and element titles
  A list of titles provided for quick reference.

2.4.3.2 CACMS Rules of Procedure

These rules describe:
- the CACMS membership, organization, and function
- processes for development and revision of standards
- visit processes
- accreditation actions and follow-up
- complaint and appeal procedures
- requirements for notifications
- other policies and procedures
- eligibility criteria for CACMS accreditation and processes for the development of new medical schools

The *Rules of Procedure* are not required reading for medical school officials or visit team members preparing for a visit.   General knowledge of the Rules of Procedure however, may benefit medical school officials and team members.

3. FULL ACCREDITATION VISITS

3.1 OVERVIEW

Full accreditation visits typically occur in two stages on an eight-year cycle. Stage 1 is a virtual visit, conducted synchronously by video. Stage 2, scheduled approximately 4 – 6 weeks later, is designed as an in person visit, but may rarely occur as a virtual visit when circumstances do not allow for face-to-face meetings (at the discretion of the CACMS Secretariat). The two-stage process is explained in greater detail in Appendix A.

Details of a limited visit are described in Section 4 of this guide.

Activities occurring after the end of the stage 2 visit, including details on the exit report, and finalizing the accreditation visit report, are found in Section 5 of this guide.

The typical timeline for a full accreditation visit is shown in Appendix B, where at various stages of the timeline, specific activities are identified by the party responsible for the action.

Reading the next few subsections while following steps outlined in Appendix B may help the reader better understand how the activities link to individuals or groups. An overall listing of medical school roles and responsibilities is provided in Appendix C and a description of visit team member duties is given in Appendix D.

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. Minimally, students should be provided access to this document and the *Guide to the Independent Student Analysis*.

All full visit teams and almost all limited visit teams meet with students, and meetings with students are included in the visit schedule. Participating students should be identified and briefed well in advance of the visit so they may provide meaningful student input. In the case of full visits, designated students should attend school preparatory workshops offered by the CACMS Secretariat. During the accreditation visit, a broad range of students should meet with team members to ensure that the team has access to representative input from students. The visit team will seek student opinions about a variety of topics. Students are also to serve as guides on any tours that occur during the visit (e.g., to the library, classrooms, and clinical facilities). The team secretary may request the inclusion of specific facilities to be visited on the tour.

3.2 ACTIVITIES IN ADVANCE OF THE STAGE 1 VISIT

3.2.1 Early organizational steps (~ 2 years in advance of the stage 1 visit)

The CACMS Secretariat contacts the dean of the medical school and together, accreditation visit dates are established, considering the number of campuses to be visited. Once the visit dates are established, the dean is advised to inform faculty members, administrative staff and others who are likely to be involved in the accreditation visit, of their need to be available on those dates. Those individuals should be aware that the exact times that they are needed will be provided closer to the visit date.

The dean, using the form provided in Appendix E, must ensure that they have designated the responsible individuals (a faculty undergraduate accreditation lead [FUAL] and a visit coordinator) and notify the CACMS Secretariat of their names and contact information.

Around this time, and no later than 18 months ahead of the visit, the CACMS Secretariat publishes on the CACMS website the documents that a school needs to complete to fulfill the required

accreditation processes (e.g., the DCI and MSS). The FUAL is advised to begin the process of DCI completion at this time by assigning sections of the DCI to the appropriate individuals or offices that are in the best position to provide complete and accurate responses to the information requests. The FUAL must take care to ensure versions of DCI forms used by the school are aligned with the year in which the accreditation visit will occur. Although the process of DCI completion is organized and led by the FUAL, this is not the FUAL's sole responsibility (see Appendix C for details of medical school roles and responsibilities).

No later than 18 months ahead of the visit, medical students need to be informed of the accreditation visit dates and process and of their obligation to provide an independent student analysis (ISA) report. An early step in the ISA process is for the students to form and convene an ISA steering committee. The ISA steering committee must consult with the undergraduate dean and the FUAL to determine mutually agreeable timelines for ISA completion, and details of survey administration must be worked out by the ISA steering committee with the AFMC data team. A full guide on the ISA process is available from the Accreditation Documents tab of the CACMS website.

3.2.2 Distribution of the ISA questionnaire

The ISA questionnaire must be distributed to all medical students at all campuses between the months of January and March starting in the calendar year ahead of the scheduled visit (i.e. if the visit is scheduled for spring 2028, the ISA will be conducted January-March 2027).

3.2.3 Initiation of the Medical School Self-study (MSS) process

No later than 15 months in advance of the accreditation visit, the dean (or delegate) appoints members of the medical school self-study (MSS) steering committee. An early step for the MSS steering committee is to meet and develop an understanding of the committee's objectives, scope of study, data collection methods, and need for MSS subcommittees. Although the FUAL is recommended to be a member of the MSS steering committee, the dean may choose another person, often a senior faculty member, to chair the steering committee, leaving the FUAL free to serve as the liaison between the MSS steering committee and the medical school administration.

3.2.4 Completion of the draft version of the DCI for use in the MSS

Before the MSS steering committee and subcommittees can start their work, the school must have prepared a draft version of the DCI for their use. The entire draft DCI should be available to the MSS steering committee no later than twelve months in advance of the accreditation visit. The FUAL, throughout this process so far, and as necessary, should remind the individuals or groups of their obligations to complete their draft DCI entries.

3.2.5 Supply tabular data from ISA to DCI

Answers to yes/no type questions of the ISA questionnaire are supplied to the ISA steering committee soon after the ISA questionnaire survey closes (survey closes no later than March 31st). The data are sent from the AFMC data team to the FUAL and the ISA steering committee simultaneously so that the data tables can be inserted into the draft DCI.

3.2.6 Draft preliminary stage 1 visit schedule

The dean (or delegate), FUAL, and visit coordinator should, no later than twelve months in advance of the visit, meet to draft a provisional visit schedule. Appendix F of this guide provides a typical

full visit schedule and Appendix G provides another option for the virtual visit. The model schedule can be modified as necessary, to accommodate the distinctive characteristics of the school being visited. Following the model schedule is recommended, as this is the schedule template that the visit team will expect to use. However, other examples have been used successfully.

The final schedule will be confirmed no later than one month ahead of the visit in consultation with the team secretary. Schools may choose to develop a provisional timetable early on to ensure that curricular timetables allow for unopposed time for participation of students and faculty in required meetings with the visit team. The provisional schedule can be helpful in arranging the participation of people from outside of the medical school, such as hospital administrators.

3.2.7 Medical students complete ISA report

The ISA steering committee needs to complete its final ISA report no later than 6 months in advance of the accreditation visit. The final ISA report is submitted to the FUAL, who provides it to the MSS steering committee/taskforce. The MSS steering committee/taskforce reviews the ISA report and distributes key findings to appropriate subcommittees for follow-up.

3.2.8 MSS subcommittees file preliminary reports

Once the ISA final report is received, the MSS subcommittees are able to finalize their work by submitting completed MSS element evaluation forms to the MSS steering committee. The process between the MSS steering committee and the subcommittees may be iterative, in that either the subcommittee may request direction from the steering committee, or the steering committee may request further revisions of MSS element evaluation forms from the subcommittees. Regardless, the FUAL in reviewing preliminary or final MSS element evaluation forms should identify any issues that need follow-up in advance of the accreditation visit and especially before the final DCI is submitted to the CACMS Secretariat.

3.2.9 Team members identified and reviewed by the dean

At least 6 months before the visit, the CACMS Secretariat will have identified prospective visit team members and forwarded their names to the dean for review. The dean should identify to the CACMS Secretariat, any legitimate perceived or real conflicts of interest that may exist between any prospective visit team member and the medical school. The CACMS Secretariat informs the dean of the names of the confirmed visit team members.

After the visit team membership is finalized, the CACMS Secretariat provides accreditation process information to each team member and team training sessions are scheduled.

3.2.10 Conduct final DCI review prior to submission of accreditation package

Approximately 4 months before the visit, the CACMS Secretariat sends additional visit instructions to the FUAL and visit coordinator to aid, among other things, the submission of required accreditation documents.

The FUAL should review and edit the DCI, MSS summary report and other required documents before submission to the CACMS, to ensure their completion, consistency of language (especially of committee names and acronyms), and accuracy.

3.2.11 Submit accreditation package to the CACMS

No later than three months before stage 1 of the accreditation visit, the FUAL or visit coordinator

submits the final accreditation documents according to the instructions provided by the CACMS Secretariat.

The complete package is comprised of:

- all thirteen DCI files (Word) and related appendices (pdf)
- the ISA report
- the MSS final report including MSS evaluation forms for all accreditation elements (pdf)
- individual MSS evaluation forms by standard (Word)
- the core appendix, due one month before stage 1 of the accreditation visit
  - CACMS Secretariat provides Table of Contents
  - Core Appendix is submitted as a single pdf document, no weblinks, only links from the Table of Contents to each document

3.2.12 Visit team reviews accreditation package and holds preparatory meetings

Soon after the accreditation package is submitted by the school, the CACMS Secretariat undertakes a training session with the visit team.

At this time, with the assistance of the team accreditation advisor, the team secretary reviews the school's submission for completeness and informs the FUAL of any information requests.

3.2.13 Visit team given review assignments and hold preparatory meetings

The team secretary, in consultation with the team chair and accreditation advisor, assigns review and writing assignments to team members considering their knowledge of specific accreditation areas and, when possible, their preferences (see full visit team assignment of standards & elements template in Appendix H).

The team secretary, team chair and accreditation advisor work together to establish a schedule of team meetings to be held both in advance of and during the stage 1 visit.

As team members must submit their preliminary team element evaluation forms to the team secretary no later than one week in advance of the stage 1 visit, at least one virtual team meeting is required before their submission. A pre-visit meeting occurring after their submission to the team secretary can be used by the chair to organize the team's approach to a given element during the visit.

The stage 1 (virtual) visit

1. The visit team meets (using a school-provided video conference system) with individuals or groups from the school as per the schedule. The school will be responsible for providing the team secretary with the meeting login information. The team secretary (or alternate designated visit team member) will be given co-host access to manage the team's participants.

2. The visit team meets *in camera, in a separate private breakout room* (using the school's video conference system) following each virtual meeting session to draft preliminary findings and to determine areas for further follow-up. The designated visit team member will manage the private breakout room. No one from the school can enter this room.

3. It is suggested (but not required) to set up two additional breakout rooms. One can be utilized for the school's required attendees to join prior to the meeting (to ensure everyone joins the meeting at the same time) and the other could be used for the school's required attendees for a debrief after the meeting (to ensure any visit team requests are noted and actioned). The school

will be the host of these rooms and responsible for managing them. No one from the visit team can enter these rooms.

3.2.14 Finalize the visit schedule

Approximately two or two and half months ahead of the stage 1 visit, the team secretary meets virtually with the accreditation advisor to determine the list of elements that need to be included in the stage 1 visit.

No later than two months in advance of the stage 1 visit, the team secretary along with the designated representative(s) of the medical school meet virtually to discuss and finalize the visit schedule. Included in the discussion are the names and roles of the people who the medical school proposes attend. The team secretary may ask for the participation of specific people or those with specific roles within the sphere of the medical school. During this meeting, the school describes the security and privacy relating to its chosen virtual conferencing platform for review by the team secretary. At a minimum, participant control features must be enabled for every meeting.

The visit schedule must include breaks for the team. These breaks should be sufficient in number and length to include biological and meal breaks, virtual check-in times, and visit team blocks for work in addition to the scheduled meetings. A ten-minute buffer between meetings and time built into each meeting for introductions is also recommended. Visit team members should inform the team secretary of any disability-related or other personal (including religious) accommodation (for in person or virtual visits) and/or dietary restrictions required (for in person visits). The team secretary is tasked with communicating these visit team member requirements to those responsible for visit logistics at the medical school.

Once the schedule is finalized, the medical school advises participants (other than the visit team) of their obligation to participate and arranges their attendance and any required technological needs to ensure their participation.

The team secretary distributes the final schedule to each visit team member and ensures that each visit team member has the necessary technology and venue to participate in a secure and confidential manner. The CACMS Secretariat must be apprised of any concerns that cannot be resolved by the team secretary.

3.2.15 Submit updates

The school may update its submission until one month before the start of the stage 1 visit. The school is requested to bundle its corrections and updates and submit a single update prior to the cutoff date. The school should use track changes, highlighting and/or add comments to indicate what changes have been made when submitting an update. The FUAL or visit coordinator is asked to inform the CACMS Secretariat and the team secretary that an update was submitted.

The team secretary may ask for updates at any time, but after the one-month pre-visit deadline, the school may only submit updates that are specifically requested by the team secretary.

3.3 ACTIVITIES AND STRUCTURE OF THE STAGE 1 VISIT

3.3.1 Visit team conducts stage 1 virtual visit

All members of the visit team participate in the stage 1 visit following the final schedule. The virtual visit is typically conducted over the course of three days.

During meetings with school-related personnel, the team will use the virtual conferencing platform provided by the medical school.

Visit team meetings are to be held in camera, in a separate private breakout room (using the school's video conference system. No member of the school can join these meetings. The team is to contact the CACMS Secretariat if assistance is required in making these arrangements.

The team secretary may request additional information from the school at any time during the stage 1 visit.

3.4 ACTIVITIES BETWEEN THE STAGE 1 AND STAGE 2 VISITS

3.4.1 Scheduling of the stage 2 (in person) visit

As soon as feasible following the conclusion of the stage 1 visit, the team secretary, in consultation with the accreditation advisor, team chair and other team members as appropriate, meet to discuss the stage 2 visit schedule. The team uses the model schedule found in Appendix F as a guide.

By no later than one week after the conclusion of the stage 1 visit, the team secretary meets with the designated school representative to finalize the stage 2 visit schedule.

The visit schedule must include breaks for the visit team. These breaks should be sufficient in number and length to include biological and meal breaks and visit teamwork blocks in addition to the scheduled meetings. A ten-minute buffer between meetings and time built into each meeting for introductions are also recommended. Visit team members should inform the team secretary of any disability-related or other personal (including religious) accommodation (for in person or virtual visits) and/or dietary restrictions required (for in person visits). The team secretary is tasked with communicating these visit team member requirements to those responsible for visit logistics at the medical school.

The medical school then advises participants (other than the visit team) of their obligation to participate and arranges for their attendance and, as pre-arranged with the team secretary, any required technological needs to ensure the participation for those who cannot travel to the location of the stage 2 visit.

The team secretary distributes the finalized schedule to each visit team member and ensures that each visit team member has the instructions related to: booking their transportation to the location, accommodations, and filing for expense reimbursements. Details are outlined in Appendix I. The CACMS Secretariat must be apprised of any scheduling or travel concerns that cannot be resolved by the team secretary.

3.5 ACTIVITIES AND STRUCTURE OF THE STAGE 2 VISIT

3.5.1 Visit team conducts stage 2 (in person) visit

The team starts the first meeting with the dean and/or undergraduate dean and continues to follow the agreed upon schedule that is based on the models presented in Appendix F. If no additional campuses are to be visited, the in person portion may be completed in one day. One day is allotted for each additional campus to be visited.

During an in person stage 2 visit, the school provides meals (as per the schedule) and refreshments throughout the day.

Students conduct all scheduled tours of facilities for the visit team. During the tours, visit teams do not meet with administrators of facilities unless such a visit is requested by the team secretary.

During the stage 2 visit, and before the end of the day, the FUAL ensures that the team secretary receives any additional information that was requested by the team secretary. When requested, the FUAL submits: 1) a core appendix if any of its contents were updated and 2) a bundled update of all corrections, updates, or supplementary material provided after the initial package submission to the CACMS Secretariat.

The visit ends when the team leaves the final scheduled meeting.

4. LIMITED ACCREDITATION VISITS

4.1 OVERVIEW

Limited accreditation visits typically occur as follow-up to various accreditation actions that are described in the CACMS *Rules of Procedure*. Limited accreditation visits are also scheduled for a new campus(es). Limited accreditation visits are designed to be held in person but can occur as a virtual visit when circumstances do not allow for face-to-face meetings.

Details of full accreditation visits are described above in Section 3 of this guide.

A typical timeline for a limited accreditation visit can be found in Appendix J, where at various stages of the timeline, specific activities are identified by the party responsible for the action. Following Appendix J while reading the next few subsections will help to understand how the activities link to individuals or groups.

An overall listing of medical school roles and responsibilities is provided in Appendix C and a description of visit team member roles and responsibilities is given in Appendix D, recognizing that both Appendices C and D are based on a full visit and include an additional stage.

This section of the guide (Section 4) covers specific limited visit accreditation activities from the time that a school receives its accreditation letter requiring a limited visit through to the end of the limited visit. Details on the exit report and finalizing the accreditation visit report are found in Section 5 of this guide.

4.2 ACTIVITIES IN ADVANCE OF THE LIMITED VISIT

4.2.1 Early organizational steps in advance of the limited visit to be taken by the school

Within 30 days of a CACMS meeting, the mandate for a limited visit is provided in an official accreditation letter. The letter details the standards and elements that require follow-up during the limited visit and the requirements for a secretariat consultation and an action plan.

A focused data collection instrument (DCI) referred to as a mini-DCI is prepared shortly afterwards, or may be provided later (March-April), if the publication is not yet available. The mini-DCI is organized similarly to the DCI for a full visit, but its contents are restricted only to the standards and elements that were rated other than C or S, respectively. The data requests for the elements are typically similar to those of the DCI but may be customized for the CACMS finding.

Once the school is informed of the need for a limited visit, the CACMS Secretariat will contact the dean to arrange the dates for the limited visit (as per the *CACMS Rules of Procedure*) and a secretariat consultation. Typically, the secretariat consultation will occur within three months of the date of the accreditation letter, but depending on circumstances, may occur earlier. The secretariat

consultation is *in lieu* of a school preparation workshop. During the secretariat consultation, the CACMS Secretariat will focus on the standards and elements identified in the mini-DCI. Early in the process, the dean is encouraged to identify a faculty undergraduate accreditation lead and a visit coordinator and communicate their names and contact information to the CACMS Secretariat using the form found in Appendix E.

4.2.3 Required accreditation documents in advance of the visit

The CACMS Secretariat will communicate with the school to provide instructions for submitting required accreditation documents.

The following documents are required from the school in advance of the visit:
- designation form for the faculty undergraduate accreditation lead (FUAL) and the accreditation visit coordinator (Appendix E) – to be submitted as soon as possible, but no later than 15 months in advance of the visit.
- action plan – to be submitted no later than 6 months after the date of the accreditation letter
- mini-DCI – to be submitted no later than 3 months in advance of the limited visit.

All required forms/documents are to be submitted by the date and method specified in the instructions provided by the CACMS Secretariat.

The FUAL should review and edit the min-DCI and other required documents before submission to the CACMS, to ensure their completion, consistency of language (especially of committee names and acronyms), and accuracy.

Neither the ISA nor the MSS are required for a limited visit, although some student surveys will typically be needed to satisfy the requirements of specific elements. The school is advised to determine the need for and plan any student surveys soon after receiving the mini-DCI.

4.2.4 Preliminary limited visit logistical requirements from the school

The school is advised to draft a preliminary limited visit schedule soon after receipt of the accreditation letter. The model schedule provided in Appendix F can be easily adapted to schedule the elements identified in the accreditation letter. The preliminary schedule must be discussed with the team secretary and revised as appropriate.

A limited visit team will be identified as soon as feasible and at least 3 months in advance of the visit. The dean will be asked by the CACMS Secretariat to review the slate of limited visit team members and comment on any legitimate perceived or real conflicts of interest among those listed.

As limited visits are planned as in person visits (unless a virtual visit is advised by the CACMS Secretariat), the pre-visit logistics are similar to those for stage 2 in a full visit. Schools must make hotel reservations, plan meals and refreshments, provide meeting space and arrange with students to provide tours (as required) similar to the responsibilities described in the **Preparation and logistics for stage 2 (in person) visits** of Appendix C.

Limited visit team composition consists of a team chair and a team secretary in addition to at least one other member selected from those described in Appendix D. When possible, a limited visit team will include a student member but does not typically include an accreditation advisor.

The FUAL must be prepared to respond to any information requests made by the team secretary.

4.2.5 Pre-visit responsibilities of the limited visit team

Soon after the team is appointed and the final mini-DCI is made available to the limited visit team

(three months before the visit), the team secretary must consult with the team chair to assign review and writing responsibilities and schedule pre-visit team meetings (virtually and/or face-to-face). The template found in Appendix H can be considered when making assignments, especially for the team chair (typically a dean or former dean) and a medical student member.

The team secretary must review the final mini-DCI for completeness as early as possible. The team secretary must establish communication with the FUAL (and delegates) before the visit to refine and approve the visit schedule. The team secretary is the sole team member permitted to communicate with the school, so any team member wanting additional information must ask the team secretary for any such request.

Before the visit, and at a minimum, all limited visit team members are expected to:
- attend a team training workshop provided by the CACMS Secretariat
- read the mini-DCI related to their specific assignments
- complete a preliminary draft team element evaluation form for each assigned element (forms are part of the limited visit report template)
- submit all preliminary draft team evaluation forms to the team secretary no later than one week before the visit.

4.2.6 Pre-visit logistical considerations for the limited visit team

Before the visit, presuming the limited visit is to be held in person, team members must have arranged their travel to the location and confirmed with the team secretary that hotel accommodations are secured. Please see Appendix C for details.

4.3 ACTIVITIES DURING THE LIMITED VISIT

During the limited visit, team members will participate in scheduled meetings with school representatives and student-led tours (as applicable).

Throughout the visit, team members will refine their lists of positive observations and the team element evaluation forms for their assigned elements.

Some limited visit team members may be able to finalize their team element evaluation forms by the end of the visit, and if so, they are encouraged to submit these to the team secretary upon completion.

4.4 LIMITED VISITS FOR NEW CAMPUS(ES)

A new campus will be visited ideally during the campus' students' year of graduation. The mini-DCI for this visit is based on the new campus notification document. The mini-DCI may also include other standards and elements required by the CACMS. For example, the CACMS may include elements needing a status report; or combine a limited visit of a new campus with a planned school visit where feasible. This type of limited visit does not necessarily have a mandated secretariat consultation or action plan.

5. REPORTS FOLLOWING FULL/LIMITED ACCREDITATION VISITS

5.1 GENERAL INFORMATION ON EXIT AND VISIT REPORTS

The visit team is responsible for creating, revising, and submitting two reports: 1) the exit report and 2) the visit report.

The exit report is not subject to any required review by the CACMS Secretariat prior to its submission. It must be submitted to the Dean (cc to the CACMS Secretariat) by the visit team no more than one week after the conclusion of the limited visit.

A first draft visit report must be submitted for review and comment by the CACMS Secretariat. After this, a second draft of the visit report is completed by the team secretary in consideration of CACMS Secretariat comments. It is submitted to the CACMS Secretariat who sends for review by the dean. The <u>final</u> visit report is completed and submitted by the team secretary to the CACMS Secretariat after the dean's comments are considered. The CACMS Secretariat then sends the final visit report to the Dean and to the CACMS for consideration at the scheduled meeting. Please see the CACMS *Accreditation Visit Report Writing Guide* for important processes and timelines.

Although the exit report and the visit report each provide findings for elements the visit team plans to recommend as SM or U, the reports differ in that the exit report: 1) may include a listing of positive observations, 2) does not identify findings by element name or number, and 3) does not include an SM or U element recommendation.

Both the exit report and the visit report are based on the review of materials submitted by the school and observations made during the visit. As such, work on the reports technically begins when team members receive their materials months before the stage 1 or limited visit begins. Many report writing processes are similar between a full and limited visit and are independent of the visit being virtual or having an in person component.

All team members contributing to an exit or visit report must read the CACMS *Accreditation Visit Report Writing Guide.* The writing guide provides the fine details and requirements for the reports.

Visit reports follow templates that are supplied by the CACMS Secretariat. The visit report for a limited visit is tailored to the standards and elements being assessed during the visit. The exit report uses a template that is provided in Appendix L of this document.

5.2 CONTENT AND COMPILATION OF THE EXIT REPORT

Although the exit report is never seen by the CACMS, the findings of the visit team, whether appearing on the exit report or the final visit report, are expected to be supported by documentation that is addressed in the team element evaluation forms and supported by materials in the DCI, the supplemental and core appendices, or information obtained during the visit. A copy of the exit report must be sent to the CACMS Secretariat.

The exit report must follow the exit report template provided in Appendix L of this guide. Specific and additional guidance on report writing is found in the *CACMS Accreditation Visit Report Writing Guide.*

5.3 CONTENT AND COMPILATION OF THE VISIT REPORT

The final report forms the basis upon which the CACMS makes its decisions regarding rating of standards and elements, accreditation status and follow-up. <u>The CACMS does **not** have access to the school's submitted DCI, its appendices (aside from the core appendix), or MSS report.</u> The CACMS will have access to those tables and documents provided in the core appendix (note: the ISA report is provided as a core appendix) and any letter from the dean to the CACMS addressing the final report. Thus, the final visit report must present all the necessary evidence to support the visiting team's findings and recommendations.

The visit report must follow the visit report template that is provided to the visit team by the CACMS Secretariat. Specific and additional guidance on report writing is found in the *CACMS*

Accreditation Visit Report Writing Guide.

The table below provides a summary of the report preparation and submission timelines for full and limited visits. See Appendices B and I for full timelines of the full and limited visits, respectively.

5.4 EXIT AND VISIT REPORT TIMELINES

1-3 months before the visit	Visit team members:
	
	• review the material submitted by the school
	    ◦ read the entire ISA report
	    ◦ read the entire MSS report
	    ◦ read DCI and appendices for all assigned elements
	• complete preliminary team element evaluation forms for assigned elements
	• meet with team/team secretary as mutually agreed

No later than 7 days before the visit	Visit team members: • submit preliminary team element evaluation forms to team secretary • record positive observations Team secretary: • collates preliminary team element evaluation forms • prepares a preliminary summary of team findings • prepares a preliminary element rating summary table • compiles draft record of positive observations
During a stage 1, stage 2, or limited visit	Visit team members: • record positive observations • revise team element evaluation forms Team secretary: • collates updated team element evaluation forms • updates summary of team findings • updates element rating summary table • updates record of positive observations
As early as possible within a week of the end of the stage 2 or limited visit	Visit team members: • submit to the team secretary, accurate and documented team element evaluation forms ensuring that their recommendations reflect the consensus opinion of the visit team
Within one week of the end of the stage 2 or limited visit	Team secretary: • submits the exit report to the dean

2-4 weeks following visit	Team secretary, team chair, accreditation advisor, and other team members as appropriate:
	• review a preliminary draft version of the visit report
4 weeks following visit	Team secretary:
	• sends a preliminary draft of the visit report to the CACMS Secretariat that includes core and supplemental appendices
6 weeks following visit	CACMS Secretariat:
	• Approximately two weeks after receiving the preliminary draft visit report, provides feedback to the team secretary regarding: o findings o sufficiency of documentation o element recommendations o internal consistency o errors (factual or typographical) o tone o completeness of the report and clarity
6-8 weeks following visit	Team secretary, team chair, accreditation advisor, and other team members as appropriate:
	• Consult on revisions to be made on the visit report in response to commentary and suggestions made by the CACMS Secretariat
8 weeks following visit	Team secretary:
	• sends the revised draft visit report to the CACMS Secretariat
	CACMS Secretariat:
	• forwards the revised draft visit report to the dean of school for comment.
10 weeks following visit	Dean:
	• submits to the CACMS Secretariat within 10 business days of being provided the draft visit report, comments (identifying factual errors and/or omissions and issues with the tone of the report) keeping in mind that no new information may be provided, only information 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
	CACMS Secretariat:
	• provides the dean's comments to the team secretary

10-12 weeks following visit	<u>Team secretary, team chair, accreditation advisor, and other team members</u> as appropriate: • considers the dean's comments for incorporation into the final visit report
12 weeks following visit	<u>Team secretary:</u> • submits the final team report to the CACMS Secretariat • notifies the CACMS Secretariat if any delays in receiving the final report are anticipated <u>CACMS Secretariat:</u> • provides the final visit report to the dean
14 weeks following visit	<u>Dean:</u> • Submits, within 10 business days of being provided with the final visit report by the CACMS Secretariat, a letter addressing any remaining concerns related to factual correctness or tone. This step is optional. • The information referenced in the letter must be contained within the DCI or provided to the visit team during the visit • No new information can be provided and no attachments to the letter will be accepted

5.5 CACMS REVIEW OF FINAL REPORT

The table below describes the typical timeline for the CACMS review of the final visit report.

≈ 6 weeks before CACMS meeting (or earlier, if visit report is available)	CACMS Secretariat: • makes the final visit report (and the dean's letter, if applicable) available to CACMS members for review prior to the next CACMS meeting • assigns reviewers
≈ 3/6 weeks before CACMS meeting (or earlier, if visit report is available)	CACMS assigned reviewers: • Review final visit report • Prepare draft reviewer worksheet • Revise worksheet considering comments from CACMS Secretariat
CACMS meeting	CACMS: • Reviews visit report, eligible correspondence and reviewer worksheet • Determines ratings of standards and elements • Determines accreditation status • Determines required follow-up
≈ 1 month after CACMS meeting	CACMS Secretariat: • notifies university (with copy to the dean) of accreditation decision and includes a copy of the final visit report University executive officer: • may make public the visit report and the details of the CACMS decision as it deems appropriate
≈ 4-8 weeks after CACMS meeting	CACMS Secretariat: • provides feedback to team members on the CACMS' response to the team findings of the final visit report • reminds team members to destroy and discard all confidential materials, documents and reports gained through the accreditation process in a manner that maintains their confidentiality throughout the disposal and destruction process

APPENDIX A: Description of the two-stage process for full accreditation visits

Description of the two-stage process for full accreditation visits

Introduction

For full accreditation visits, the CACMS uses a two-stage process, whereby the first visit (stage 1) is conducted virtually and, conditions permitting, the second visit (stage 2) occurs in person. The visit team includes an accreditation advisor, whose role is outlined in Appendix D of this document. The following pages highlight the roles of the accreditation advisor and changes to the full-visit accreditation process unique to the two-stage process that arose starting in 2020.

Stage 1 - Virtual Visit

Preparation

1. Required school generated materials must be submitted to the CACMS Secretariat for distribution to the visit team no later than three months prior to the first day of the virtual visit.

2. The school may update its data collection instrument (DCI) up to one month 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 that appear to be satisfactory and may not require in-depth review by the visit team

   - three elements appearing to be "Satisfactory" selected randomly (omitting elements never cited) to be reviewed as a quality control measure.

   - elements that were 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. The CACMS Secretariat will schedule a visit team training session. Although the completion of team evaluation forms is reviewed during the training and explained in the CACMS Accreditation Visit Report Writing Guide, the team secretary may wish to schedule a discussion with team members to ensure a common understanding prior to team members completing their team element evaluation forms.

6. Each visit team member reads the entire MSS and the ISA reports, and the DCI responses and appendices for all elements that are assigned to them.

7. Team members complete their sections of the draft report using the team 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 may assist a team member in determining a rating, providing evidence to support that rating and formulating the finding.

8. 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.

9. The team secretary will contact the faculty undergraduate accreditation lead at the school to identify those topic areas requiring further attention during the stage 2 visit. Elements identified by the visit team as complete and satisfactory will not be included in the schedule for the virtual visit other than the three elements selected for quality control purposes (see item 3 above).

10. The designated school official and faculty undergraduate accreditation lead at the school, in collaboration with the team secretary and accreditation advisor, review the virtual visit schedule allowing time following each session for an *incamera* meeting of the team to draft preliminary findings and determine areas requiring further follow-up.

11. The school should also be given an opportunity to add 2 or 3 elements to the draft schedule that the school would like reviewed in addition to those identified by the visit team. These may be elements the school wishes to showcase or those for which the school would like to receive feedback.

The stage 1 (virtual) visit

12. The visit team meets (using a school-provided video conference system) with individuals or groups from the school as per the schedule.

13. The team meets in camera in a separate private breakout room (using a school-provided video conference system) following each virtual meeting session to draft preliminary findings and to determine areas for further follow-up.

Stage 2 – In Person Visit

Preparation for the stage 2 (in person) visit

14. Once all scheduled stage 1 virtual meeting sessions with school representatives are complete, the team must prepare the list of elements to be scheduled for review during the stage 2 (in person) visit. If this list was not completed by the end of the stage 1 visit, the team must reconvene by videoconference and finalize the list in time for the team secretary to provide the list to the school within one week (see item 15). Elements to be considered in the stage 2 schedule, include:
    - those for which performance appears other than Satisfactory
    - those for which the team needs more information to be able to provide a definitive recommendation
    - those identified *a priori* by the CACMS Secretariat as benefiting from in person evaluation (see right-hand column Stage 1 model schedule template in Appendix F)

15. The team secretary must provide the list of elements, required meeting attendees, tour locations, and recommendations for length of meetings to the faculty accreditation lead **no later than one week following the end of the virtual visit** such that the schedule for stage 2 can be drafted by the school in a timely manner (see item 17).

16. The designated school personnel draft a stage 2 schedule (a model template is provided for consideration, see Appendix F) that includes all elements, required attendees, and locations as suggested by the team secretary. Sufficient time between meetings for the visit team to discuss

impressions and to finalize findings must be scheduled.

17. The designated school personnel and the team secretary (with the accreditation advisor as needed), meet to finalize the schedule for the stage 2 (in person) visit as early as possible, but no later than one week before the start of the stage 2 visit.

18. The team secretary may ask the school for additional materials at any point up to and including the conclusion of the stage 2 (in person) visit. No school-initiated updates/materials will be accepted at any time after one month before the stage 1 (initial virtual) visit unless specifically requested by the team secretary.

During the stage 2 (in person) visit

19. All visit team members (if possible) meet in person with scheduled individuals or groups to review identified elements. As appropriate, initial team element evaluations and findings are revised.

20. After each scheduled meeting (or group of meetings), the visit team meets to refine its list of positive observations, findings and element rating summary table.

The exit report and post-visit processes

Exit report preparation and submission

21. The team secretary prepares an exit report detailing the visit team's positive observations (if any) and the team findings that were based on the information gathered throughout the 2-stage visit process. See Appendix L for the exit report template and some additional information included in the *CACMS Accreditation Visit Report Writing Guide*.

22. The team secretary e-mails the exit report to the dean by email within one week of the conclusion of the stage 2 (in person) visit. The CACMS Secretariat is copied on the e-mail.

Post-visit process

23. The remainder of the post-visit process (i.e., finalization of the visit report by the team secretary, internal CACMS Secretariat review, discussion of potential changes with the team, draft to the dean) occurs as described elsewhere in this document (*Guide for the Conduct of CACMS Accreditation Visits*) and in the *CACMS Rules of Procedure*.

APPENDIX B: Typical timeline for a full accreditation visit

Typical timeline for a full accreditation visit

This timeline shows key interactions among the CACMS Secretariat, the school, and the visit team. Detailed descriptions of duties related to this timeline for the medical school and for the team are found in Appendices C and D, respectively.

Months/weeks -/+ Visit (-=before stage 1 visit; +after stage 1 visit)	Activities
-18 to -24 months (i.e., 18 to 24 months prior to stage 1 visit)	CACMS Secretariat • establishes visit dates with the medical school dean considering the number of campuses to be visited. • publishes on the CACMS website the DCI and MSS for the academic year of the visit. Dean (or delegate) • informs medical school faculty members, administrative staff and others who will be involved with the accreditation visit of the dates identified and apprises them of the need to be available for the visit. • designates the school's core visit personnel and notifies the CACMS using the form provided by the CACMS Secretariat (see Appendix E). • informs students of the need to establish an ISA steering committee (see Guide to the Independent Student Analysis for details). • plans, in consultation with the FUAL and the CACMS Secretariat, a school preparation workshop offered by the CACMS Secretariat. Faculty undergraduate accreditation lead (FUAL) • initiates processes to complete the DCI. ISA steering committee • consults with the undergraduate dean and faculty undergraduate accreditation lead (FUAL) to determine mutually agreeable timelines and confirms these timelines with the AFMC Data Team.
-15 to -22 months	ISA steering committee • ISA survey distribution should occur between January and March of the year before the accreditation visit so that all students have at least a semester's experience with their program year and data from final year students can be obtained.

-15 to -12 months	<u>Dean (or delegate)</u> • appoints members of the Medical School Self-Study (MSS) committee/taskforce. <u>MSS committee/taskforce</u> • establishes its objectives, scope of study, and methods of data collection, and establishes various subcommittees. <u>ISA steering committee</u> • provides tabular survey data to the FUAL and begins independent analysis of the data. <u>FUAL</u> • ensures that various individuals or groups are completing draft DCI assignments on schedule. <u>Dean (delegate)/FUAL/Visit coordinator</u> • draft a provisional visit schedule (see model in Appendix F)
-12 to -6 months	<u>ISA steering committee</u> • provides the final ISA report to the FUAL. <u>FUAL</u> • distributes the ISA report and completed DCI sections to the MSS committee/task force and appropriate subcommittees. <u>MSS subcommittees</u> • review and analyze the relevant sections and prepare reports that are forwarded to the task force. <u>FUAL</u> • ensures actions are taken to correct issues identified by the various subcommittees. <u>CACMS Secretariat</u> • sends a list of proposed visit team members to the dean. <u>Dean</u> • reviews the list of proposed visit team members to identify conflicts of interest and notifies the CACMS Secretariat of any concerns.
-4 to -3 months	<u>CACMS Secretariat</u> • sends background information and instructions to visit team. • sends visit instructions to the dean • contacts the visit team to schedule a team training session shortly after receiving the school's accreditation package. <u>FUAL</u> • reviews the DCI, self-study summary report, and other required documents and ensures that any required updates/corrections are made.

-3 months	FUAL/Visit coordinator
	
	• submits, according to instructions provided by the CACMS Secretariat, the final accreditation package consisting of:
	   ◦ DCI and related appendices
	   ◦ ISA report
	   ◦ MSS

-3 to -2.5 months	Team Secretary
	
	• requests additional/missing information/materials
	• contacts the FUAL to discuss revisions to the visit schedule.
	   ◦ to add/delete specific sessions
	   ◦ to request attendance of specific faculty members or staff members.
	• contacts the visit coordinator to discuss logistical planning.

-2 months	Dean (or delegate)/FUAL/Visit coordinator and team secretary • finalize the stage 1 visit schedule.
-1 month	FUAL/visit coordinator • bundle and submit, as per the instructions provided by the CACMS Secretariat, any corrections and/or updates to the DCI. • Core appendix.
0 months (stage 1 visit begins)	Visit team • conducts the stage 1 (virtual) visit. FUAL • supplies team secretary with supplementary material requested by the team secretary Dean • informs the CACMS Secretariat of any concerns regarding the conduct of the visit

+1 week
(after stage 1 visit)
	Team secretary
	
	• provides FUAL with requirements for stage 2 visit including:
	   ◦ list of elements to be discussed
	   ◦ any required meeting attendees
	   ◦ any required tour locations
	   ◦ recommendations on meeting lengths

+1 week after stage 1 visit/-1 week before stage 2 visit	Dean's designated personnel/FUAL • draft the stage 2 (in person) visit schedule
-1 week from stage 2 visit	Team secretary in consultation with the designated school personnel • finalize the stage 2 visit schedule

+1/1.5 months (during stage 2 visit)	<u>Visit team</u>
	• conducts the stage 2 (in person) visit (See Appendix D)
	<u>FUAL</u>
	• supplies team secretary with supplementary material requested by the team secretary at any time during the visit
	• submits (before team leaves final scheduled session) as per instructions of the CACMS Secretariat:
	  o updated core appendix (if changes were made)
	  o one bundled update of all corrections, updates, or supplementary materials provided after the initial package submission made at – 3 months.
	<u>Dean</u>
	• informs the CACMS Secretariat of any concerns regarding the conduct of the visit

0/+1 week (after stage 2 visit)	<u>Team secretary</u> • submits finalized exit report as per instructions provided by the CACMS Secretariat
+4 weeks (after stage 2 visit)	<u>Team secretary</u> • sends a first draft of the visit report to the CACMS Secretariat for review
+6 weeks (after stage 2 visit)	<u>CACMS Secretariat</u> • sends Secretariat feedback to team secretary <u>Team secretary/visit team</u> • revise visit report having considered secretariat feedback
+8 weeks (after stage 2 visit)	<u>Team secretary</u> • sends final draft of the visit report to the CACMS Secretariat. <u>CACMS Secretariat</u> • forwards final draft visit report to the dean for review of factual errors, omissions, and tone.
+10 weeks (after stage 2 visit)	<u>Dean</u> • provides feedback to the CACMS Secretariat within 10 business days. <u>CACMS Secretariat</u> • forwards dean's feedback to team secretary <u>Team secretary/visit team</u> • incorporate dean's feedback as appropriate into the final visit report

+12 weeks (after stage 2 visit)	**Team secretary** • finalizes the visit report • sends the final visit report to the CACMS Secretariat **Dean** • writes CACMS Secretariat of any remaining concerns related to errors of fact or tone **CACMS Secretariat** • sends final visit report to the dean • provides final visit report to CACMS members for review prior to the next CACMS meeting
+3 to +6 months (after stage 2 visit)	**CACMS** • determines an accreditation decision at its next regularly scheduled meeting (typically in January/May/September). **CACMS Secretariat** • sends accreditation decision letter.

APPENDIX C: Key medical school roles and responsibilities for accreditation visits

Key medical school roles and responsibilities for accreditation visits

This appendix consolidates information from elsewhere in this guide and from other available documents to provide an abridged list of key roles and responsibilities within the medical school. As appropriate, reference is made to other sections of this guide or other documents that provide greater detail.

Much of the information in this appendix is also found in Appendix B, where medical school responsibilities are integrated along with those of the CACMS, the CACMS Secretariat, and the visit team.

The information presented in this section refers to full accreditation visits. For **limited visits**, many of the roles and responsibilities are the same, but limited visits do not follow a two-stage process. Contact the CACMS Secretariat if further clarification is needed.

Key individual roles in a two stage (full) accreditation visit

Dean

Although the dean has the privilege of delegating accreditation responsibilities, typically, the dean is signatory to all official communications that are addressed to the dean by the CACMS Secretariat and typically, the dean, (optionally joined by one or two others), meets with the visit team at the opening sessions of the stage 1 and stage 2 visits. If the dean wishes to delegate any signatory responsibilities to another individual, the CACMS Secretariat must be informed by the dean in writing.

Decanal responsibilities -24 to 18 months before the accreditation visit occurs

- Determine mutually acceptable accreditation visit dates with the CACMS Secretariat

- Inform medical school faculty members, administrative staff and others of the visit dates

- Advise those likely to be involved with the accreditation visits of the need to make themselves available on any of the visit dates

- Designate the faculty undergraduate accreditation lead (FUAL) by submitting the form found in Appendix E

- Designate the accreditation visit coordinator by submitting the form found in Appendix E

- Plan, in consultation with the FUAL and the CACMS Secretariat, a school preparation workshop offered by CACMS Secretariat.

- Inform students of their responsibility to establish an ISA steering committee – see *Guide to the Independent Student Analysis* for details

Decanal responsibilities -15/-12 months before the accreditation visit

- Appoint the chairperson and members of the Medical School Self-study (MSS) committee/task force

- Draft a provisional visit schedule in consultation with the FUAL and visit coordinator. This function is typically delegated.

Decanal responsibilities -12/-6 months before the visit

- Review the list of proposed accreditation visit team members to identify conflicts of interest
- Notify the CACMS Secretariat of any concerns with proposed team members

Decanal responsibilities -2 months before the visit

- Finalize the stage 1 visit schedule. Deans typically delegate this responsibility.

Decanal responsibilities during the stage 1 visit

- Meet (virtually) with the visit team as the first session of the stage 1 visit. The dean is typically offered the opportunity to present a general overview of the medical school. The format and time allotted to this overview should be discussed with the team secretary.
- Participate in only those sessions where a dean's presence is needed by the visit team (e.g., budget, relationships with clinical affiliates, other sessions by specific request of the team secretary)
- Inform the CACMS Secretariat immediately of any concerns regarding the conduct of the visit.

Decanal responsibilities between the stage 1 and stage 2 visit

- Finalize the stage 2 visit schedule with the team secretary, and in consultation with the FUAL and visit coordinator. Deans typically delegate this responsibility.

Decanal responsibilities during the stage 2 visit

- Meet with the visit team at the opening session of the stage 2 visit
- Meet with the visit team when specifically requested by the team secretary
- Meet with the visit team as the last session of the stage 2 visit (optional)
- Inform the CACMS Secretariat immediately of any concerns regarding the conduct of the visit.

Decanal responsibilities +1 week after the stage 2 visit

- Receive the exit report

Decanal responsibilities +10 weeks after the stage 2 visit

- Review the draft accreditation visit report
- Send any comments on factual inaccuracy or tone to the CACMS Secretariat within 10 business days.

Decanal responsibilities +12 weeks after the stage 2 visit

- Receive the final accreditation visit report
- Send any remaining comments on factual inaccuracy or tone to the CACMS Secretariat within 10 business days.

Faculty Undergraduate Accreditation Lead (FUAL)

The FUAL should be a senior faculty member who is knowledgeable about the medical school and its educational program. The FUAL may hold another administrative position. The FUAL should be able to identify institutional policies and information sources and ensure, with the backing of the dean, participation by members of the administration, faculty, and student body before and during the accreditation visits. Ideally, the FUAL 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 provide the FUAL with appropriate administrative support, financial resources, and release time from other duties to accomplish the responsibilities associated with this role.

FUAL responsibilities throughout the process:

- Serve as the official liaison between the medical school and the CACMS Secretariat
  - By answering accreditation-related questions from individuals at the school
  - By contacting the CACMS Secretariat for assistance:
    - when does not know the answer to a question
    - when is unsure of the answer
    - when is unsure about a process or deadline

FUAL responsibilities early in the process (starting 24 months before the stage 1 visit):

- Plan, in consultation with the CACMS Secretariat and dean, a school preparation workshop to be offered by the CACMS Secretariat;
- Assign specific questions/sections of the DCI to individuals with the appropriate institutional knowledge;
- Ensure that all questions in the DCI are fully-addressed and completed;
- Ensure factual accuracy and typographical/grammatical clarity in the DCI;
- 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);
- Support 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.

The FUAL ensures that all <u>required</u> documents (i.e., DCI and appendices, MSS report, ISA report) are complete and submitted on time to the CACMS Secretariat. The dean may ask the FUAL to assist in other tasks that are the primary responsibility of the dean (e.g., filing the designation form (Appendix E), informing students of ISA responsibilities, scheduling stage 1 and stage 2 visits, reviewing visit reports).

Visit Coordinator

The visit coordinator should be an experienced senior staff member who will work closely with the FUAL and assist the FUAL as requested throughout the accreditation process. Typically, the visit coordinator will manage the logistics of the visit and conduct other administrative functions such as formatting and submitting required documents. The visit coordinator will also make hotel reservations for the visit 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 FUAL and visit coordinator must be provided to the CACMS Secretariat using the designation form (see Appendix E) no later than 18 months before the start of the stage 1 visit.

Key committees

ISA steering committee

The ISA steering committee is comprised entirely of medical students and has the responsibility to manage the distribution of the ISA survey/questionnaire and write an ISA report. Tabular data from the ISA survey/questionnaire become an integral part of the DCI and the ISA report must be considered in the school's self-study process. The dean (or delegate) convenes a meeting of students early on in the accreditation process (-24/-18 months) to advise students of their responsibility to strike an ISA steering committee to lead the ISA process. Early on, and at a minimum, the students need to be made aware of the *CACMS Guide to the Independent Student Analysis* and the *Guide for the Conduct of a CACMS Accreditation Visit* (i.e., this Guide).

The ISA steering committee is responsible for ensuring that the ISA questionnaire/survey is distributed to all students at all campuses between the months of January and March so that tabular data are available for incorporaton into the DCI at least twelve months in advance of the start of the stage 1 visit. The ISA report must be available to the MSS steering committee no later than six months before the start of the stage 1 visit. The complete ISA report appears as an appendix in the final visit report that will be reviewed by the CACMS. The ISA process is not required for a limited visit.

ISA steering committee key deliverables:

- Tabular data for inclusion in the DCI
- ISA report

MSS steering committee/task force

The *Guide to the Medical School Self-study* provides detailed information on the required self-study process that a medical school must undertake as part of the full accreditation visit process. The dean (or delegate) is responsible for appointing the leadership and membership for this committee. The MSS steering committee/task force convenes an organizational meeting approximately 15-12 months in advance of the stage 1 visit and strikes required subcommittees around that time so that review of the draft DCI can commence as soon as the DCI is available. The MSS process is not required in a limited visit.

MSS steering committee/task force key deliverables:

- Completed MSS evaluation forms for each accreditation element
- MSS report

Preparation and logistics for stage 2 or limited (in person) visits

Accommodations. Team members should inform the team secretary of any disability-related or other personal (including religious) accommodation and/or dietary restrictions required (for in person visits). The team secretary is tasked with communicating these team member requirements to those responsible for visit logistics at the medical school.

Hotel Arrangements. The medical school is expected to arrange lodging in a hotel that: 1) has well-equipped accessible rooms for any team member with a disability, 2) is in a safe and convenient location (including taxi access), 3) is of high 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 visit team member. The hotel also should be notified that visit team members will be paying their own bills unless instructed otherwise by the CACMS. Each visit team member requires a single room, with either a suite for the team chair or a conveniently located conference room for visit team meetings during the evenings of the visit.

Transportation. Visit team members will make their own travel arrangements unless otherwise instructed by the CACMS Secretariat. Information on transportation options from airport to hotel is to be provided by the school to the team secretary. Depending on circumstances, such as proximity to an airport or availability of services, the dean's office may need 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 visit team each day between their hotel and the medical school and to any instructional facilities (e.g., affiliated hospitals, additional campuses) to be visited. The team secretary and the medical school's visit coordinator should determine where and when the visit team will be picked up or met at the hotel, and this information is to be included in the visit schedule.

Breaks. The visit schedule must include breaks for the team. These breaks should be sufficient in number and length to include biological and meal breaks, virtual check-in times, and visit teamwork blocks in addition to the scheduled meetings. A ten-minute buffer between meetings and time built into each meeting for introductions is also recommended.

Meals and refreshments. The visit coordinator should consult with the team secretary regarding the meals and refreshments that the school will provide during the visit. The cost of meals not provided by the school will be reimbursed to visit team members either by the CACMS or, for observers or fellows, as per the agreement with their sponsor organizations.

Visit teams appreciate receiving suggestions for restaurants that they might patronize for visit team dinners. Restaurant suggestions may be provided to the team secretary.

Visit team's 'home room' at the school. Barring exceptional circumstances, subject to approval by the CACMS Secretariat, a 'home room' is provided at the medical school for the in person visit team. The room is typically provided with a printer compatible with the operating system used by the team secretary, a shredder, or access to these items in an adjacent area. The room must not be under video or audio surveillance while used by the visit team, and the school must assure the team that confidential conversations can be held in the room without any concern about eavesdropping or monitoring. 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 needs to be suitable for accommodating the visit team and invited school representatives in a standard boardroom meeting setting. Any alternative to this needs to be approved in advance by the team secretary.

Each visit team member and each person meeting with the visit team should be provided with tent cards printed using a font size large enough so that names are easily visible across the room. Visit team members should also be provided with name tags that can be worn while on tour or for gaining access to the medical school facilities.

Gifts/remuneration. The school may not provide personal gifts or any remuneration to visit team members (e.g., elaborate food baskets at the hotel, school memorabilia, money, or other monetary gifts). At the request of the team secretary, the school may provide standard meeting items such as pens, pencils and notepads. If unsure about the appropriateness of any supplies, contact the CACMS Secretariat for guidance.

APPENDIX D: Accreditation visit team descriptions and duties

Accreditation visit team descriptions and duties

The team duties in writing the exit report and the visit report are provided in detail in the *CACMS Accreditation Visit Report Writing Guide.* All team members are strongly advised to read the report writing guide.

Accreditation visit team size and composition

In appointing full visit teams, the CACMS Secretariat considers professional expertise, accreditation experience, language skills, conflict of interest, geography, gender role, areas of specialty and familiarity with the type of medical school/program being visited.

Typically, the team for a full accreditation visit consists of a medical student and four to five other members drawn from a pool of experienced medical educators and physician practitioners. Professional or student members of the CACMS may be included. For a limited visit, team size is typically four individuals.

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 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.

Team member: One or more professional members as defined in the CACMS *Rules of Procedure*.

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 the student's educational obligations).

Faculty fellow: The team may include one or two faculty members from other medical schools who typically have not been on a full accreditation visit but are nominated by their respective institutions to gain accreditation experience often before the start of their schools' self-study. The faculty fellow is a full member of the team, attends meetings, evaluates assigned elements, and contributes to the visit report, but the fellow's expenses are normally covered by their home medical school.

Observer: The team may include one or more observers. An observer may be appointed to the team by the CACMS Secretariat at the request of a medical school or another organization with a legitimate interest in accreditation. An observer does not contribute to the discussions or report writing but is entitled to attend scheduled team activities. The dean of the visited school must approve the presence of the observer(s) at the visit. Expenses for observers are covered by the organizations requesting their participation.

For **limited visits**, a medical student is included when possible, but an accreditation advisor typically is not.

Accreditation visit team duties

A template for assignment of elements to team members is provided in Appendix H.

General expectations of all team members:
- Agree in writing to hold confidential all information obtained through the visit process.
- Provide contact information for use by the team
- Prepare for and complete assignments in a timely manner respecting identified deadlines before, during and after the visits.
- Interact with other team members and school representatives in a professional manner
- Participate in all scheduled meetings for their full duration at their scheduled locations
- Respond to information requests from the team secretary in a timely manner
- Inform the team secretary of any food allergies or special needs
- Decline any personal tangible or monetary gifts
- Destroy and discard in a secure manner all confidential information and reports gained through the accreditation process either when specifically requested by the CACMS Secretariat, once feedback is received from the CACMS Secretariat, or within one year of the conclusion of visit, whichever comes first.

Duties of all visit team members (other than observers)

Before the stage 1 or limited visit

- Minimum expectations:
  o Read the ISA report
  o Review and analyze all assigned MSS element evaluation forms and related DCI sections*
  o Complete a preliminary evaluation of assigned elements using the appropriate team element evaluation forms
  o Submit preliminary team evaluation forms to the team secretary in advance of agreed upon deadlines[†]

  *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, other than the secretary, must not communicate directly with the school for any reason.

  [†]All final pre-visit versions of team evaluation forms must be submitted to the team secretary **at least one week before the visit begins.**

- Team Preparations
  o Participate in pre-visit meeting(s) to:
    ▪ Confirm responsibilities
    ▪ Review ground rules and timelines
    ▪ 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).
    ▪ Discuss any elements where requirements were marked as "unsure."

During stage 1, stage 2 or limited visits
- Prepare for and participate in visit sessions with particular attention to their assigned elements
- Revise and refine the team 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 any 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

Following stage 2 or limited visits
- Provide the team secretary with the final team evaluation forms for assigned elements either at the conclusion of the visit or as soon as possible, as the team secretary **must** submit the exit report within one week after the visit ends.
- 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.

Specific duties of the team chair

Before stage 1 or limited visits
- Meet with the team secretary to discuss visit organization and team assignments
- Review the draft schedule with the team secretary to consider timing, invitees and other factors to ensure that all relevant issues related to the accreditation elements can be explored during the visit.
- Work with the team secretary and accreditation advisor to determine a schedule of team meetings.
- Participate in team meetings.

During stage 1, stage 2, and limited visits
- Serve as the leader of the team's activities and speaks for the team
- Lead the discussion for the meeting(s) with the dean
- Introduce individual team members at meetings with various groups and explain the purpose and focus of the accreditation visit at each session
- Assist the team to pace its work and stay on schedule
- Assist the team in consolidating its observations and evaluations of accreditation elements at the end of each session (as time allows), at the end of each day, and after each stage of the visit.
- For full visits only, assist the team in identifying the list of elements requiring further review in Stage 2 as the Stage 2 schedule must be drafted within one week following the end of the Stage 1 visit.
- For full visits only, review the draft Stage 2 schedule with the team secretary to consider timing, invitees, and other factors to ensure that all outstanding issues can be resolved.

Following stage 2 or limited visits

- Review the draft visit report to confirm its completeness and comment on its quality, accuracy, and tone.
- 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.
- Work with the team secretary to review any concerns raised by the dean about the tone or accuracy of the draft visit report including other team members as needed.
- Review the final visit report before its submission to the CACMS Secretariat.

Specific duties of the team secretary

Throughout the process

- Mentor team members, in particular those with limited or no prior experience as a CACMS accreditation team and brief them on expectations for team membership
- Provide constructive feedback to all members as needed

Before stage 1 or limited visits

- Early communication with team
  - Confirm that each member downloaded all materials
  - Determine each member's areas of interest and strength for report writing
  - Determine each member's dietary constraints or any special needs
  - Obtain detailed emergency and urgent contact information for each member

- Early communication with the medical school
  - Contact FUAL to confirm completeness of pre-visit materials
  - Obtain contact information of accreditation administrator
  - Discuss secure communication platform to be used during the Stage 1 visit.
  - Discuss with FUAL/accreditation administrator, the special needs of team or team members

- Pre-visit review of submission
  - Undertake an initial review of the school's submission (for limited visits) and consult as needed with accreditation advisor who will undertake this review for full visits.
  - Ask FUAL to supply information if important omissions are discovered

- Element evaluation assignments
  - Assign, in consultation with the team chair and accreditation advisor, standards/elements to each team member considering their individual strengths and areas of interest. (see assignment template in Appendix H).

- Visit schedule
  - Refine the draft schedule in consultation with school officials (e.g., FUAL, undergraduate dean, accreditation administrator) that the school developed based on the "Model Schedule for Full Accreditation Visits" (see Appendix F).
  - Review preliminary team evaluation forms to identify elements that need to be discussed during the visit and consult with team chair regarding visit schedule
  - Meet with school officials as needed to modify the visit schedule
  - Provide all team members with a copy of the planned visit schedule

- Preliminary findings
  - Remind team members to complete their assigned team evaluation forms

- Organize team meetings to discuss preliminary findings
  - Determine, in consultation with the accreditation advisor and team chair, a schedule for team meetings required to review preliminary team element evaluation forms and resolve "unsure" requirement ratings

- Action items following each team meeting
  - Make a list of elements with a preliminary rating of U or SM
  - Create/revise a preliminary element rating summary table
  - Create/revise a preliminary list of findings
  - Consider any needed revisions to the visit schedule

During the visit (Stage1/Stage 2/or limited visit)

- Team findings
  - Ensure that the team evaluates each element (or in the case of limited visits, each specified element)
  - Compile, revise, and update the team's summary findings and element rating summary table at the end of each day
  - Compile, revise and update a list of positive team observations at the end of each day for use in the exit report

- Help from CACMS Secretariat
  - Contact the CACMS Secretariat immediately by phone, text or e-mail (cacms@afmc.ca) when problems arise that cannot be resolved by the team chair and secretary

- Split teams
  - In a circumstance when a team needs to be divided into groups during the visit, the team chair leads one group, and the team secretary leads the other

After a Stage 1 visit

- Prepare the list of elements that need to be reviewed during the stage 2 visit

- Contact the school to finalize the stage 2 visit schedule no later than one week following the end of the virtual visit

- Provide all team members with a copy of the planned stage 2 visit schedule

Before a Stage 2 visit or limited visit

- Hotel reservations
  - Confirm that the school has booked accommodation for each member of the team (including any observers), with all reservations guaranteed for late arrival
  - Inform team members of the arrangements.
  - Confirm the daily availability of either a conveniently located and appropriately sized meeting room or that a suite with an appropriately sized meeting room is booked for the team chair.
  - Confirm that reservation confirmations were sent directly to each team member, and if not, inform the school's visit coordinator.

- Contact the CACMS Secretariat early in the planning process with any questions or concerns related to accommodations or their cost or payment.

- Transportation
  - Request travel itineraries from all team members, and if possible, arrange group transportation to or from the airport
  - Confirm the appropriateness of arrival and departure dates/times.
  - Advise team members of any special instructions or suggestions for travelling to the hotel.
  - Confirm with the school's visit coordinator the arrangements for the team's transportation during the visit, including transportation between the hotel and the campus each day.
  - Contact the CACMS Secretariat with any questions or concerns related to transportation booking or payment.

After the stage 2 or limited visit

- Devising and submitting the exit report
  - Prepare and submit the exit report according to instructions in Appendix L

- Developing the draft visit report (see timelines in Appendix B for full visits or Appendix J for limited visits)
  - instruct team members to finalize and submit their team element evaluation forms during the visit or within 10 calendar days following the visit.
  - create, if needed, a supplemental appendix comprised of materials received during the visit.
  - complete or revise entries in the accreditation visit report template as per instructions appearing in blue font
  - review the accreditation history table for accuracy and completeness and advise the CACMS Secretariat if errors are suspected
  - review, and if necessary, edit all other areas of the draft report to ensure accuracy, completeness, and appropriate tone

- Submitting and finalizing the visit report (see timelines in Appendix B/Appendix J)
  - send the initial draft visit report and accompanying appendices to the CACMS Secretariat within four weeks of the conclusion of the visit
  - respond to comments from the CACMS Secretariat and make needed changes
  - submit a final draft to the CACMS Secretariat who will forward this version to the medical school dean.
  - consider any comments from the dean, and in consultation with the team chair and other team members as appropriate, revise the team report accordingly
  - submit this final version of the report to the CACMS Secretariat.

Specific duties of the accreditation advisor

Throughout the process:
- provide guidance to the team on how to approach the evaluation of elements
- mentor other team members with less accreditation experience
- participate in all team meetings
- assist the team secretary collate team writing assignments
- contribute to the review of the team evaluation forms
- fill-in for any team member unable to fulfill a commitment
- identify best practices during this process and report these to the CACMS Secretariat

Before the virtual visit:
- 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 designated school officials
- Work with the team secretary and team chair to determine a schedule of team meetings to occur before, during and after virtual or in person visits taking into account the timelines and responsibilities in Appendix A
- Participate in team meetings

During a visit:
- Participate in all sessions with the school (virtual or in-person)
- Ensure that clear, unambiguous answers are given to the team, asking follow-up questions if appropriate
- Help the team identify elements that require further follow-up (either for the second stage of the visit or as a call-back during in the current visit)
- Participate in the second stage of the visit
- Help the team formulate its positive observations and findings and ensure that requirements earlier rated as "unsure" are resolved before the visit ends
- Assist the team secretary in drafting the exit report

After the Stage 1 visit
- Assist the team secretary prepare a draft schedule for the stage 2 visit for discussion with the school no later than one week following the end of the virtual visit

After the Stage 2 visit
- Assist team members in the writing of findings and final preparation of team evaluation forms

- Assist the team secretary in finalizing the exit report
- Review the draft visit report before its first submission to the CACMS Secretariat
- Assist the team secretary in the report revision process (following secretariat review and dean's review)

Specific duties of an observer

Unless otherwise advised by the CACMS Secretariat:
- May attend all team meetings
- May attend all sessions of the team with representatives of the medical school
- Must refrain from participating in accreditation-related discussions
- Must refrain from participating in decision-making
- Must refrain from contributing to report writing.

APPENDIX E: Faculty undergraduate accreditation lead (FUAL) and accreditation visit coordinator designation form

Designation form
Faculty undergraduate accreditation lead (FUAL)
& accreditation visit coordinator

When completed email this page to: Accreditation Manager, CACMS Secretariat, cacms@afmc.ca

CACMS Accreditation visit of: _____
University name and name of medical school

NAME AND CONTACT INFORMATION:

Designated faculty undergraduate accreditation lead (FUAL)

The FUAL (typically a faculty member/ senior administrator) is the main point of contact with the CACMS Secretariat and the visit team secretary. The FUAL, among other duties, coordinates data collection for the school's Data Collection Instrument (DCI)/Mini-DCI and often is involved in finalizing the visit schedule with the team secretary. For full visits, the FUAL also oversees the medical school self-study process (MSS) and liaises with the ISA steering committee.

Name of FUAL:	
Title:	
University/School:	
Mailing address:	
Phone:	
Email:	
Name and contact information of assistant:	

Designated accreditation visit coordinator

The accreditation visit coordinator (typically an experienced staff person) assists the FUAL and is responsible for all logistics of the visit, including hotel reservations and transportation for the team and restaurant recommendations. The accreditation visit coordinator often handles the production and transmittal of the completed Data Collection Instrument/mini-DCI.

Name of visit coordinator:	
Title:	
University/School:	
Mailing address:	
Phone:	
Email:	
Name and contact information of assistant:	

APPENDIX F: Model schedule template – two-stage accreditation visits

Model schedule template – two-stage accreditation visits

The following is an example of a typical visit schedule. Other examples have been used successfully. The final schedule for an accreditation visit should be developed in consultation with the Team Secretary once the team has completed its initial review of the school's submission. Other examples of full visit schedule are available from the CACMS Secretariat.

The model schedule can be modified 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.

Stage 1- Initial Virtual Visit

Day 1

			Stage one: Initial virtual visit					Stage two: in person 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 in person review	Flagged by Team for possible in person 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: in person 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 in person review	Flagged by Team for possible in person 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: in person 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 in person review	Flagged by Team for possible in person 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

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 in person review	Flagged by Team for possible in person review
					Stage one: Initial virtual visit			**Stage two: in person visit**	
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							

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 in person review	Flagged by Team for possible in person review
					Stage one: Initial virtual visit			**Stage two: in person visit**	
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: in person 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 in person review	Flagged by Team for possible in person 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: in person 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 in person review	Flagged by Team for possible in person 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

Meeting	Element	Schedule* start/end times depend on team time zones	Stage one: Initial virtual visit					Stage two: in person visit	
			Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible in person review	Flagged by Team for possible in person 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							

Meeting	Element	Schedule* start/end times depend on team time zones	Stage one: Initial virtual visit					Stage two: in person visit	
			Seldom or never cited	Frequently cited	Cited since last full accreditation visit	Flagged by Team	Comments	Flagged by Secretariat for possible in person review	Flagged by Team for possible in person 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: in person 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 in person review	Flagged by Team for possible in person 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: in person 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 in person review	Flagged by Team for possible in person 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: in person 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 in person review	Flagged by Team for possible in person 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							

Stage 2 – in person visit

Day 1

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
**Stage two: in person visit**						
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)						

Activity	Element	Time						
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)

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						

Session	Element	Time						
	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 G: Model schedule template – Virtual Visit – Option 2

Model schedule template – Virtual Visit – Option 2

TIME (Time Zone)	Meeting					
Day 1		**Frequently Cited**	**Could Be Reviewed in Meeting**	**Seldom / Infrequently Cited**	**Cited since last full accreditation visit**	**Flagged by Team**
9:00 – 9:30	Team initial planning for day					
9:30 – 10:30	Meeting with dean - Changes since last accreditation - School challenges - School initiatives	5.1	1.1,1.4, 2.3, 2.4, 5.2, 5.5	1.3, 1.5, 1.6, 2.1, 2.2, 2.5, 2.6, 4.1, 5.3		
10:45 – 11:35	Meeting with student leadership - Discussion of ISA strengths and issues					
11:50 – 12:20	Senior Educational Leadership (Vice/Associate/Assistant and Regional Deans)	3.3, 9.2	1.1, 3.5, 3.6, 4.5	1.5, 3.4, 4.2, 4.6, 5.3		
12:20 – 1:05	LUNCH					
1:05 – 2:30	Meeting with Undergraduate Dean, Curriculum Management Leadership	7.1, 9.2	4.4, 5.2, 6.3, 6.9, 6.10, 7.2, 7.9, 8.1, 8.2, 8.3, 8.4, 8.6, 8.7, 8.8, 9.1, 9.3, 9.4, 9.7, 9.8, 9.9, 11.5, 11.6, 12.5	5.12, 6.1, 6.2, 6.4, 6.4.1, 6.8, 7.3, 7.4, 7.5, 7.6, 7.7, 7.8, 7.10, 8.5, 9.10, 11.4		

		Frequently Cited	Could Be Reviewed in Meeting	Seldom/ Infrequently Cited	Cited since last full accreditation visit	Flagged by Team
2:45 – 3:30	Meeting with Clinical Chairs and chairs of biomedical sciences	9.2, 3.3	4.4, 4.5, 5.2, 9.1, 9.3	1.3, 3.1, 4.1, 4.2, 4.3, 4.6,		
3:45 – 4:30	OPEN SLOT					
TEAM MEETING						
Day 2		**Frequently Cited**	**Could Be Reviewed in Meeting**	**Seldom/ Infrequently Cited**	**Cited since last full accreditation visit**	**Flagged by Team**
9:00 – 9:15	Team meeting and planning					
9:15 – 10:15	Directors of required learning experiences, preclerkship		3.2, 3.6, 4.4, 5.4, 5.8, 5.9, 6.3, 7.9, 8.1, 8.3, 8.4, 8.8, 9.1, 9.4, 9.5, 9.7, 9.8, 11.1	6.1, 8.5, 9.6		
10:30 – 11:30	Director of required learning experiences, clerkship	5.11	3.2, 3.5, 3.6, 4.4, 5.5, 5.7, 5.8, 5.9, 7.9, 8.1, 8.3, 8.4, 8.6, 8.7, 8.8, 9.1, 9.4, 9.5, 9.7, 9.8, 11.1, 11.3, 12.5	3.1, 4.3, 5.6, 6.1, 6.2, 6.4, 6.4.1, 6.5, 8.5, 9.6, 10.11		
11:45 – 12:30	Junior Faculty	3.3	4.4, 4.5	1.3, 4.2, 4.3		
12:30 – 1:15	LUNCH					
1:15 – 2:15	Meeting with preclerkship learners	5.11	2.4, 3.2, 3.5, 3.6, 5.7, 6.6, 8.4, 9.5, 9.7, 9.8, 11.1, 11.2, 11.3, 12.1, 12.3, 12.4, 12.6, 12.8	8.5, 6.1, 6.5, 11.6		

2:30 – 4:00	Student Affairs (and anyone else appropriate for discussions of academic counseling, career advising, electives, financial advising)		11.1, 11.2, 11.3, 11.5, 11.6, 12.1, 12.2, 12.3 12.4, 12.5, 12.6, 12.8	12.7		
TEAM MEETING						
Day 3		**Frequently Cited**	**Could Be Reviewed in Meeting**	**Seldom/ Infrequently Cited**	**Cited since last full accreditation visit**	**Flagged by Team**
9:00 – 9:15	Team meeting and planning					
9:15 – 10:00	Meeting with individuals responsible for diversity, social accountability, and learning environment	1.1.1, 3.3	3.5, 3.6, 6.6	3.4, 3.1		
10:15 – 11:15	Meeting with learners in clerkship	5.11	2.4, 3.2, 3.5, 3.6, 5.7, 8.4, 8.8, 9.5, 9.7, 9.8, 11.1, 11.2, 11.3, 12.1, 12.3, 12.4, 12.6, 12.8,	8.5, 6.1, 6.5, 11.6		
11:30 – 12:00	Meeting with Residents, PGME dean		9.1	3.1		
12:15 – 1:00	Admissions	3.3	1.1.1, 10.2, 10.3, 10.4	10.1, 10.5, 10.6, 10.7, 10.9, 10.11		
TEAM MEETING						

APPENDIX H: Full visit team assignment of standards & elements template

Full visit team assignment of standards & elements template

The following template provides suggestions for team assignments that can be modified to suit the preferences of the team.

Team members including faculty fellows take primary responsibility for completing their assigned element evaluation forms. All members (other than an observer) are encouraged to contribute to the evaluation of all elements, even those that have not been specifically assigned to them.

Should the team include one or more faculty fellows, the assignment suggestions (below) should be redistributed accordingly.

The accreditation advisor is **not** assigned any specific standards or elements.

Observers on the team are **not** assigned any specific standards or elements and do **not** participate in any aspect of report writing or contribute to discussions related to any aspect of accreditation.

Team Chair	Team Secretary*	Team Member	Team Member	Student Member
Standard 1 Standard 2 Standard 4 Standard 5	Standard 8 Standard 9	Standard 3 Standard 10 Standard 11	Standard 6 Standard 7	Standard 12
*The team secretary also has primary responsibility for the exit report and the final visit report.				

APPENDIX I: Visit team travel and reimbursement

Visit team travel arrangements and reimbursement for in person visits

Expenses of visit team members (excluding faculty fellows and observers) are reimbursed by the CACMS. The expenses of faculty fellows and any observers are covered by their home medical schools or organizations.

Three months before an accreditation visit begins, the CACMS Secretariat provides team members with information and instructions about:
- travel arrangements for any in person (i.e., limited or stage 2) component of the visit
- expense claims

Travel arrangements

<u>Flights</u>:

All team members are expected to arrange their own (economy) air travel as per instructions provided by the CACMS Secretariat.

<u>Travel arrangements during the visit</u>:

Travel to an additional campus or facility is the responsibility of the medical school.

Reimbursement

Team members (other than faculty fellows or observers*) will be reimbursed for all reasonable out-of-pocket expenses incurred during the visit in accordance with CACMS travel policies that are provided by the CACMS Secretariat in the team's instructional mailing.

Requests for reimbursement are handled through the CACMS Secretariat and must be submitted within 30 days of an accreditation visit.

Any necessary deviations from the policy or instructions must be approved by the CACMS Secretariat before travel arrangements are made. Any questions regarding reimbursable expenses should be directed to the CACMS Secretariat.

<u>Hotel</u>: The school will reserve hotel accommodations for all team members, but team members are responsible for paying all hotel charges on check-out.

<u>Taxi and other allowable expenses</u>: Team members should obtain receipts for cab fares or any other allowable 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.

Requests for reimbursement must be accompanied by the following receipts:
- Boarding passes and the itinerary for electronic tickets
- Hotel invoice
- Taxi fare receipts
- Receipts for other allowable expenses – check with the CACMS Secretariat

APPENDIX J: Typical timeline for a limited accreditation visit

Typical timeline for a limited accreditation visit

This timeline shows key interactions among the CACMS Secretariat, the school, and the visit team. Detailed descriptions of duties related to this timeline for the medical school and for the team are found in Appendices C and D, respectively.

Months/weeks -/+ Visit	Activities
-18-24 months	CACMS Secretariat • establishes visit dates and secretariat consultation dates with the medical school dean considering the number of campuses to be visited. • provides the medical school with the mini-DCI for the limited visit. • provides the medical school with the action plan template and instructions. • participates in mandated secretariat consultation. Dean (or delegate) • informs medical school faculty members, administrative staff and others who will be involved with the limited accreditation visit of the dates identified and apprises them of the need to be available for the limited visit, and as appropriate, the secretariat consultation. • designates the school's core visit personnel and notifies the CACMS using the form provided by the CACMS Secretariat (Appendix E). • initiates action plan process. Faculty undergraduate accreditation lead (FUAL) • initiates process to complete the mini-DCI and action plan as appropriate. • arranges, in consultation with the CACMS Secretariat, the schedule for the secretariat consultation. Dean and those invitees of the dean • participate in secretariat consultation.
-15-22 months	Dean/FUAL • complete action plan. FUAL • submit action plan within six months of receiving accreditation letter.
-15/-12 months	FUAL • ensures that various individuals or groups begin responding to questions in the mini-DCI.
-12/-6 months	Dean (delegate)/FUAL/Visit coordinator • draft a provisional limited visit schedule adapting the model provided in Appendix F for full visits. FUAL • ensures follow-up on action plan items. CACMS Secretariat • sends a list of proposed limited visit team members to the dean. Dean • approves the proposed list of limited visit team members or identifies conflicts and notifies the CACMS Secretariat.

-4/-3 months	**CACMS Secretariat** • sends background information and instructions to limited visit team. • sends limited visit instructions to the FUAL/Visit Coordinator. **FUAL** • reviews the mini-DCI and other required documents and ensures that any required updates/corrections are made.
-3 months	**FUAL/Visit coordinator** • submits, according to instructions provided by the CACMS Secretariat, the final limited visit accreditation package consisting of: o mini-DCI and related appendices.

-3/2.5 months	**CACMS Secretariat**
	• contacts the visit team to schedule a team training session shortly after receiving the school's accreditation package.
	
	Team Secretary
	• requests additional/missing information/materials.
	• contacts the FUAL to discuss revisions to the limited visit schedule.
	   o to add/delete specific sessions.
	   o to request attendance of specific faculty members or staff members.
	• contacts the visit coordinator to discuss logistical planning.
	
	Visit team
	• Reviews school's accreditation package by (at a minimum):
	   o reading the DCI sections related to assigned elements.

-2 months	**Dean (or delegate)/FUAL/Visit coordinator and team secretary** • finalize the limited visit schedule.
-1 month	**FUAL/visit coordinator** • bundle and submit, as per the instructions provided by the CACMS Secretariat, any corrections and/or updates to the mini-DCI. • Core appendix.
-1 week	**Visit team** • submits all preliminary team evaluation forms to the team secretary. • records and submits positive observations. **Team Secretary** • collates team evaluation forms. • creates preliminary list of findings. • creates preliminary element rating summary table • creates preliminary list of positive observations.
0 days (limited visit begins)	**Visit team** • conducts the limited visit (See Appendix D for roles and responsibilities) **FUAL** • supplies team secretary with supplementary material requested by the team secretary. • before the end of the final scheduled session of the visit, bundles and submits, as per the instructions provided by the CACMS Secretariat, all updates to the mini-DCI made since the original submission (at -3 months) and any materials that were given to the team secretary during the visit.

End of visit/+1 week	Visit team • submits complete, accurate and documented team element evaluation forms to team secretary by the date suggested by the team secretary.
0/+1 week (after limited visit)	Team secretary • submits finalized exit report as per instructions provided by the CACMS Secretariat.
+4 weeks (after limited visit)	Team secretary • sends a first draft of the limited visit report to the CACMS Secretariat for review.
+6 weeks (after limited visit)	CACMS Secretariat • sends CACMS Secretariat feedback to team secretary. Team secretary/visit team • revise limited visit report having considered secretariat feedback.
+8 weeks (after limited visit)	Team secretary • sends final draft of the limited visit report to the CACMS Secretariat. CACMS Secretariat • forwards final draft limited visit report to the dean for review of factual errors, omissions, and tone.
+10 weeks (after limited visit)	Dean • provides feedback to the CACMS Secretariat within 10 business days. CACMS Secretariat • forwards dean's feedback to team secretary. Team secretary/visit team • incorporate dean's feedback as appropriate into the final limited visit report.
+12 weeks (after limited visit)	Team secretary • finalizes the limited visit report. • sends the final limited visit report to the CACMS Secretariat. CACMS Secretariat • sends final limited visit report to the dean. • provides final limited visit report to CACMS members for review prior to the next CACMS meeting.
+3/+6 months (after limited visit)	CACMS • determines an accreditation decision at its next regularly scheduled meeting (typically in January/May/September). CACMS Secretariat • sends accreditation decision letter.

APPENDIX K: Introductory remarks template (for Chair)

Introductory remarks template (for Chair)

The following remarks do not have to be read but the key points should be shared at the start of every meeting. A degree of formality is helpful during the visit and often appreciated by the individuals who meet with the team, particularly for those who may have never participated in an accreditation visit.

For sessions when the team is together, the Chair does the Introduction. When the team splits, the Secretary would do the introductory script for the split team. As the visit progresses, other team members might do the introductions as a way of gaining experience.

Suggested Remarks:

"Greetings from the Committee on Accreditation of Canadian Medical School (CACMS) visit team. Before we begin the discussion for this part of the accreditation visit, we would like to take a few minutes to review the purpose of our visit and for introductions. We are here as colleagues to review the (insert name of medical education program) education program leading to the MD degree. It is our responsibility to confirm our understanding of the information provided so that we can accurately represent your medical education program to the CACMS. It is our responsibility to confirm our understanding of the information provided so that we can accurately represent your medical educational program to the Committee on Accreditation of Canadian Medical Schools (CACMS). The visit team will make recommendations about the strengths of the program and the program's adherence to the individual elements. However, the CACMS makes the final determination for the level of compliance with standards, satisfactory performance related to the elements and will make the final decisions about the accreditation status of the program and any required follow-up.

Each member of the visit team has read the mini-DCI and the other documents you have provided, and has come prepared to discuss certain aspects of the information to ensure the meaning is clear. There will be no time for formal presentations during the session or discussion of all the good work you are doing. We will be taking notes during the session and hope this is not too disruptive. It is a privilege to serve on this peer review team and to have the opportunity to learn about your educational program in such depth. We hope you will be open and honest with us in these discussions.

First we will introduce the team members and then we will turn it over to you for introductions. I am……"

Each teach team member can then introduce themselves with their role on the team, e.g. Secretary, CACMS student member, followed by their position at their own medical school.

Then the Chair asks the individuals to introduce themselves, including the role they play in the educational program. e.g., Chair of the curriculum committee, Associate Dean Student Affairs.

APPENDIX L: Exit report template

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 for the Exit Report:

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   Date of report

On behalf of the visit team