Supplement to Manual 4 - Preparing for the Onsite Visit: Virtual Site Visits

Table of Contents

Context

The early months of 2020 have been characterized by the COVID-19 pandemic. In a devastatingly short time period, we have witnessed a shocking human toll in terms of physical, emotional, and economic wellbeing. Virtually all industries and professions are being adversely impacted.

In the higher education arena, many colleges and universities have closed campuses and shifted students and faculty into virtual learning environments. CACREP, licensing/certifying bodies, and professional membership associations have been working to find innovative ways to assist pre-service counseling students, especially those nearing graduation, obtain their required pre-service supervised hours, while upholding the standards for entering the profession.

In terms of the accreditation review process, because of the COVID-19 crisis CACREP cancelled all In-Person Site Visits (IPVs) scheduled for Spring 2020. CACREP is developing ways to continue the accreditation review process for counseling programs in the review process, within the context of campuses being closed and students and employees being impacted by shelter-in-place orders and travel bans.

Virtual Site Visits

CACREP is temporarily and selectively offering to eligible counseling programs approved for site visit planning the option to participate in a virtual site visit (VSV) in lieu an in-person visit (IPV).

Purpose of This Guide

This guide is a supplement to *CACREP Mini-Manual 4 – Preparing for the On-Site Visit.* It serves to highlight those areas of the site visit process unique to Virtual Site Visits. All programs are expected to adhere to the IPV guidelines in *Mini Manual 4 – Preparing for the Onsite Visit*.

Purpose of a CACREP VSV

The purposes of the Virtual Site Visit are the same as for an In-Person Visit:
- to validate the Self-Study Document, and
- to clarify aspects of the program that cannot be evaluated fully through the initial review as described in *Mini-Manual 3 - What happens after a program applies?*

The virtual site visit will be done in lieu of an IPV and will emulate to the extent possible the standard format and activities of an IPV **(See Appendix I for a Sample Site Visit Agenda)**.

Minimum Eligibility Requirements

CACREP maintains sole authority in determining which programs are candidates for virtual site visits (VSVs). Selection eligibility criteria include but are not limited to: the nature of the accreditation review process outcomes thus far (identified areas of concern, recommendation for site visit, etc.) and the complexity of the site visit (number of programs, delivery methods, and delivery sites).

To be approved for a VSV, counseling programs, at a minimum, must be able to demonstrate the following:

- the ability to securely share but not transmit confidential files/documents with the site visit team (preferably via a VPN connection) while maintaining administrative control of the materials, and
- the ability to provide interaction for the site visit team with an acceptable number of representatives of the institution and the standard constituent groups that participate in CACREP accreditation site visits, to afford a full review of the counseling specialty areas.

CACREP's Site Visit Coordinator (SVC) will contact the CACREP Program Liaisons (CPLs) of eligible programs to offer the VSV option. The program may opt to move forward with planning for a VSV or may opt to defer until an in-person visit (IPV) can be rescheduled.

Virtual Site Visit Agreement Form

After a program has received initial approval to participate in a VSV through consultation with CACREP's SVC, the CACREP Program Liaison or other authorized program representative must sign and submit an electronic copy of the Virtual Site Visit Agreement form **(Appendix 2)**.

Through this form, the program verifies that it meets the minimum eligibility requirements and the additional scheduling and conduct parameters for a virtual site visit. In addition, the program agrees to accept the report of the virtual site visit and acknowledges that it cannot, at a later date, request a new site visit with a different format, or appeal the resulting accreditation decision solely on the basis of the virtual format of the site visit.

Fees

CACREP's site visit fees are available [here](#).

Establishing the Dates and Team for the VSV

CACREP's SVC, after receiving and approving the VSV Agreement, will work with the institution's CPL to determine the dates and team for the visit. Normally, the preferred site visit dates must be at least 12 weeks out from when the form is returned to the CACREP office. A virtual planning process may allow for a slight shortening of this time frame. The SVC will consult with the program on the applicable time frame for scheduling a VSV.

IPV site visits run from Sunday evening through midday Wednesday. VSVs will allow for alternate scheduling arrangements. The SVC will consult with the CPL on scheduling options.

Once the SVC secures a team for the visit, the SVC will communicate with the CPL and the Site Team Chair to establish the agenda and make preparations for the visit.

Technology for the VSV

Videoconferencing

CACREP utilizes the Health Insurance Portability and Accountability Act (HIPAA)- compliant Zoom for Health Care to facilitate the VSV. This platform will be used to provide a private meeting space for the site team and to provide space for the team members to meet with institutional and program representatives and representatives of other groups including but not limited to current students, alumni, site supervisors, and adjunct and affiliate faculty.

A copy of Zoom's April 2020 HIPAA Compliance Guide may be accessed by double-clicking on the link below.

[Zoom HIPAA Compliance Guide](#)

Guidelines for Videoconferencing

- All participants must have their own meeting space and the ability to log in separately for the meetings. There should not be multiple participants in any single screen.
- Each participant should have a quiet space without distractions available for participation in the meeting(s).
- CACREP will utilize a waiting room for approved access to all meetings with individuals outside of the team.
- All participants must have their video on and be on screen throughout the duration of the meeting. CACREP will not accept picture placeholders or blank screens with names on them for participation in the meeting. Anyone using picture placeholders or blank screens with names on them will be removed from the meeting.
- CACREP will not record any of the meetings. CACREP prohibits the recording of the meetings by the institution and/or any of the meeting participants. Video cameras may not be used except for security reasons or as agreed upon by CACREP and the program.
- Each participant should use earphones/buds during the meeting to limit background noise and ensure privacy for the meeting.
- It is strongly recommended that all meeting participants download and utilize the Zoom Client for Meetings app available at the [Zoom Download Center](#) to access meetings.

Backup/Contingency Plan

There are multiple avenues for accessing Zoom videoconferencing, including via PCs, laptops, tablets, and cell phones. If for some reason a meeting participant has trouble accessing the videoconferencing for a meeting, trying multiple avenues, he or she should notify the CACREP Program Liaison (CPL) or his or her designee as soon as possible. If the situation cannot be resolved quickly, the participant should use his or her cell phone to dial in to the meeting and may participate by audio only. Cell phones should only be used in situations where efforts to resolve the access to the videoconference were unsuccessful. All participants should participate in the videoconference, if possible, with video/audio and must have video/audio capability before being selected to participate.

Should a power failure or act of nature interfere with the conduct of the visit, the use of cell phones will be the immediate backup plan. All participants should be advised to have hard copies of the dial-in numbers available.

In the event the Site Visit Team is not able to complete its review, including the review of documents or to conduct meetings with required participants due to problems with technology or for any other reason, CACREP, in its sole discretion, may schedule another VSV or an IPV. In the event this occurs, an additional fee may be assessed.

File Sharing

CACREP utilizes Citrix Sharefile as the file sharing platform for the VSV. CACREP will provide the site team with access in Sharefile to the standard site visit documents and program-generated reports submitted to date, in advance of the visit.

During the site visit it will be necessary for the program to share student-related records (e.g., admission files, clinical files, assessment, and remediation files) with the site team. In deference to HIPAA and Family Education Right to Privacy Act (FERPA) considerations for security of records, the program will securely share without transmitting the confidential files/documents to the site visit team while maintaining administrative control of the records at all times. These documents should not be transferred to the team in any way. The preferred mechanism for sharing these documents is via a Virtual Private Network (VPN) connection in view-only. The sharing of these documents should be done in accordance with institutional protocols, to include non-disclosure agreements.

If the site team requests additional documentation or evidence during the visit, the program may similarly make these materials available to the team using the VPN or the share screen option in Zoom, or via email if the document is not a private document.

The Team Chair will work with the CACREP Program Liaison (CPL) in advance of the visit to determine what types and how many of each type of student records need to be made available to the team.

Planning for and Conducting the VSV

The following roles and responsibilities for a VSV for the CACREP SVC/Staff, the Team Chair, and the CPL are in addition to or in lieu of the standard roles and responsibilities delineated for an IPV.

Before the Visit

The Site Visit Coordinator will:
- Schedule a joint call with the CACREP Program Liaison and the Team Chair to provide an overview of the VSV planning process and to address logistical questions, and
- Schedule calls with the team members and with the CACREP Program Liaison to provide training on the technology that will be used during the visit, and

The CACREP Program Liaison will:
- Participate in a scheduled test run with the SVC to ensure that any problems with the technology for the site visit are identified and corrected. The test run will include major aspects of the site visit including connecting with some test constituents to ensure access to the video conferencing platform and file sharing through screen sharing or via a VPN, and
- Plan for the required videoconferencing meetings with all individuals and groups identified in the site visit agenda, and
  - The CPL should ensure that all potential participants have the requisite audio/video capabilities and review the videoconferencing guidelines with them, and
- Develop a virtual/video tour of the program's facilities, including the clinical instruction environment, for the team. If it is not feasible for a virtual tour to be developed, due to the campus being closed, the site team will notate in its report that at the time of the visit the team was only able to review written support in relation to the facilities, and

- Prepare a secure method (e.g., VPN) for sharing confidential student records, such as program admission files, clinical files, and assessment, retention and remediation records, in view-only, during the visit, and
- Ensure the confidentiality of all meetings
    - Provide final lists of attendees for all meetings to the team a minimum of 1 week prior to the start of the meeting. Any modifications following the provision of the final list should be discussed with the Team Chair, and
    - Ensure that all meeting participants understand the guidelines for participating in the videoconference meetings.

During the Visit

The Site Visit Coordinator will:
- Act in a support capacity for the team and institution regarding the use of technology and logistical considerations, and

The Team Chair will:
- Provide access/login information for meetings to the CPL, and
- Indicate in Team Report if the program was able to provide to the team a virtual/video tour of the program's facilities, including the clinical instruction environment. If a virtual/video tour the facilities has not been provided to date, the team will mark the applicable standards as not met and the program will have opportunities to respond to the team report at a later time in the review process, and

The CACREP Program Liaison will:
- Provide access/login information to meeting participants, and
- Ensure that all participants understand and agree that no part of the site visit may be audio and/or video recorded. Video cameras may not be used except for security reasons or as agreed upon by CACREP and the program, and
- Provide or assign a designee to provide in all virtual meetings a brief introduction of the team and participants or participant groups. The CPL or her designee will leave the meeting unless she is a designated participant in the meeting.

After the Visit
The Site Visit Coordinator will:
- Remove access to and content from the designated Sharefile Resource Room folder for the visit.

Virtual Meetings

Meeting Access/Log-In
We recommend, to avoid confusion or mix-ups in terms of who is logging in to what meeting, that you only provide the Zoom login details specific to the participants that will be attending each meeting.

For example, send the following to each Faculty member that will be joining the Faculty Site Visit Meeting:

MEETING	ROOM LINK	Pacific	Mountain	CENTRAL	Eastern
Faculty Meeting	[Insert Link Specific to Faculty Meeting here]	7:45 am-8:45 am	8:45 am-9:45 am	9:45 am-10:45 am	10:45 am-11:45 am

Procedures and Structure of Virtual Meetings

Each Virtual Meeting will follow the same general procedures and structure as a standard in-person site visit meeting, with the following exceptions:

- The CACREP Program Liaison provides the site team with a list of all approved attendees for a meeting within 1 week prior to the start of the meeting, and
- A member of the team or CACREP staff will open the Zoom meeting room approximately 10 minutes prior to the start of the meeting
  - All participants entering the meeting will enter a waiting room.
  - The team or staff member, working off the approved attendee list provided by the CPL, will allow entry into the meeting room.

See **Appendix 3** for Information on Connecting to Zoom Meetings.

Appendix 1: Sample VSV Agenda

Blue Steel University Counseling Department

CACREP Virtual Site Visit

Sunday, April 26 – Wednesday, April 29, 2020

Program Considerations in Planning:

- **Meeting start times should be adjusted in consideration of the location of team members and institution**
- **The CACREP Program Liaison should send invites to all constituent groups with the links, provided by the SVC or Team Chair, to access the video conferencing for their specific meeting**
- **Constituent participants should ensure they have access to resources to be able to answer team's questions**
- **The CPL should help ensure everyone is prepared to use the meeting technology. CACREP will test the technology with the program ahead of the visit**

PLANNING

Sunday, April 26, 2020

MEETING	ROOM LINK	Pacific	Mountain	Central	**Eastern**
Team planning meeting	(CACREP virtual team room)	1:00 pm	2:00 pm	3:00 pm	4:00 pm

DAY ONE

Monday, April 27, 2020

MEETING	ROOM LINK	Pacific	Mountain	Central	**Eastern**
Faculty Meeting		6:00 am-6:30 am	7:00 am-7:30 am	8:00 am-8:30 am	9:00 am-9:30 am
Meet with Program Director		6:45 am-7:15 am	7:45 am-8:15 am	8:45 am-9:15 am	9:45 am-10:15 am

Core faculty will be broken out by specialty (one meeting room per specialty)		7:30 am- 8:00 am	8:30 am- 9:00 am	9:30 am- 10:00 am	10:30 am- 11:00 am
Meet with Provost		8:15 am - 8:45 am	9:15 am - 9:45 am	10:15 am - 10:45 am	11:15 am - 11:45 am
Break		8:45 am - 9:45 am	9:45 am - 10:45 am	10:45 am - 11:45 am	11:45 am - 12:45 pm
Site Team Meeting		9:45 am - 10:15 am	10:45 am - 11:15 am	11:45 am - 12:15 pm	12:45 am - 1:15 pm
Meet with university President		10:30 am - 11:00 am	11:30 am - 12:00 am	12:30 pm – 1:00pm	1:30 pm - 2:00 pm
Meet with team chair and Associate Provost, Dean of Student Development, Director of Distance Learning, Registrar, Faculty Chair		11:15 am - 11:45 am	12:15 pm - 12:45 pm	1:15 pm - 1:45 pm	2:15 pm - 2:45 pm
Meet with students and 2 team members		11:15 am - 12:00 pm	12:15 am - 1:00 pm	1:15 pm - 2:00 pm	2:15 pm - 3:00 pm
Meet with identified CMHC site supervisors		12:15 pm- 1:00 pm	1:15 am- 2:00 pm	2:15 pm - 3:00 pm	3:15 pm - 4:00 pm
Debriefing with liaison		1:15 pm - 1:45 pm	2:15 pm - 2:45 pm	3:15 pm - 3:45 am	4:15 pm - 4:45 pm

MEETING	ROOM LINK				
Team Meeting		1:45 pm - 3:15 pm	2:45 pm - 4:15 pm	3:45 pm - 5:15 pm	4:45 pm - 6:15 pm

DAY TWO

Tuesday, April 28, 2020

MEETING	ROOM LINK	Pacific	Mountain	Central	Eastern
Meet with identified School Counseling supervisors		6:00 am- 7:00 am	7:00 am- 8:00 am	8:00 am- 9:00 am	9:00 am- 10:00 am
Review of files and individual meetings, as needed		7:00 am - 8:00 am	8:00 am - 9:00 am	9:00 am - 10:00 am	10:00 am - 11:00 am
Break		8:00 am - 9:15 am	9:00 am - 10:15 am	10:00 am - 11:15 am	11:00 am - 12:15 pm
Review of Files		9:15 am - 10:15 am	10:15 am - 11:30 am	11:15 am - 12:30 pm	12:15 pm - 1:30 pm
Group meeting with appropriate student services representatives: Dean of Students, Administrative Assistant, Librarian, Director of Financial Aid, Career Counselor, Director of Admissions		10:30 am - 11:15 am	11:30 am - 12:15 pm	12:30 pm - 1:15 pm	1:30 pm - 2:15 pm

Break	`	11:15 am - 12:00 pm	12:15 pm - 1:00 pm	1:15 pm - 2:00 pm	2:15 pm - 3:00 pm
Meeting with Adjunct Professors		12:00 pm - 12:45 pm	1:00 pm - 1:45 pm	2:00 pm - 2:45 pm	3:00 pm - 3:45 pm
Alumni broken out by specialty (one meeting room per specialty)		12:00 pm - 12:45 pm	1:00 pm - 1:45 pm	2:00 pm - 2:45 pm	3:00 pm - 3:45 pm
Debriefing with CACREP Program Liaison		1:00 pm - 1:15 pm	2:00 pm - 2:15 pm	3:00 pm - 3:15 pm	4:00 pm - 4:15 pm

DAY THREE

Wednesday, April 29, 2020

MEETING	ROOM LINK	Pacific	Mountain	Central	**Eastern**
Exit Report with Program Faculty, Provost, Program Director		6:00 am - 6:30 am	7:00 am- 7:30 am	8:00 am- 8:30 am	9:00 am- 9:30 am

Appendix 2: VSV Agreement

CACREP

VIRTUAL SITE VISIT AGREEMENT

OVERVIEW/PURPOSE

CACREP Mission

The mission of CACREP is to promote the professional competence of counseling and related practitioners through:

- the development of preparation standards;
- the encouragement of excellence in program development; and
- the accreditation of professional preparation programs.

CACREP Core Values

The CACREP Board of Directors believes in
- advancing the counseling profession through quality and excellence in counselor education;
- ensuring a fair, consistent, and ethical decision-making process;
- serving as a responsible leader in protecting the public;
- promoting practices that reflect openness to growth, change and collaboration; and,
- creating and strengthening standards that reflect the needs of society, respect the diversity of instructional approaches and strategies, and encourage program improvement and best practices

Virtual Site Visits

In response to the COVID-19 pandemic, CACREP is temporarily and selectively offering the option for counseling program accreditation review via a Virtual Site Visit (VSV) in lieu of an In-Person Site Visit (IPV). The VSV option is being offered as a short-term solution where it is currently impractical or impossible to conduct an on-site evaluation due to complications caused by the pandemic.

The purposes of the Virtual Site Visit are the same as for an In-Person Visit:

- to validate the Self-Study Document; and,
- to clarify aspects of the program that cannot be evaluated fully through the initial review as described in *Mini-Manual 3 -What happens after a program applies?*

Programs must meet selection eligibility criteria, the minimum requirements for hosting a VSV and agree to the terms and conditions outlined in this *Agreement.* The decision concerning whether to proceed with a VSV is in CACREP's sole discretion.

A new applicant program that meets CACREP's definition of an online program and meets the eligibility requirements for VSV set forth in the *Supplement to Mini-Manual 4* may, in CACREP's discretion, may be offered the VSV option.

All programs offered the option may opt to move forward with planning for a VSV or may opt to defer the visit until an in-person visit (IPV) can be (re)scheduled. It is not known at this time when in-person site visits (IPVs) will resume or the timeline in which a program may be scheduled once IPVs resume.

<u>Agreement</u>

This Agreement is entered into this day by _____and the Council for Accreditation of Counseling and Related Educational Programs (CACREP), collectively the parties, and sets forth the understandings and obligations of the institution and CACREP relating to a Virtual Site Visit (VSV) of the _____ program as part of CACREP's review of the program's application for (re) accreditation.

Whereas the parties have determined that it is impractical or impossible for the program to host an IPV on its campus due to complications caused by the COVID-19 pandemic; and

Whereas the institution acknowledges that it prefers to proceed with a VSV rather than reschedule an IPV for a later time; and

Whereas CACREP has determined that the institution has met the eligibility criteria and logistical and other requirements set forth in the *Supplement to Mini-Manual 4* qualifying the program to host a VSV; and

The parties therefore agree to the following terms and conditions:

Terms and Conditions

The program agrees that it has capacity and will comply with the guidelines set forth in the *Supplement to Mini-Manual 4* in preparing for and participating in the VSV.

Technology:

- The program has the technological capacity to host a VSV and to use CACREP's preferred platform, *Zoom for Healthcare*, to facilitate secure communication between and among VSV team members, and program administrators, faculty and students; and

- The program will ensure that all potential participants are trained to use the technology selected by CACREP for audio/video communication and that they understand the videoconferencing guidelines; and

- In deference to HIPAA and Family Education Right to Privacy Act (FERPA) considerations for security of records, the program has the ability to securely share without transmitting confidential files/documents with the site visit team (preferably via a VPN connection in view-only) while maintaining administrative control of the records; and

- The program will facilitate a scheduled test run with CACREP's Site Visit Coordinator (SVC) to ensure that any problems with the technology are identified and resolved in advance of the visit. The test run will include major aspects of the site visit including a run through connecting a sample group of participants to ensure access to the video conferencing platform and file sharing through a VPN; and

Preparation and Logistics

- The program accepts and will follow the VSV planning process outlined in the *Supplement to Mini-Manual 4 – Preparing for the Site Visit* Virtual Site Visits; and
- The program will provide final lists of attendees, including but not limited to program administrators, site supervisors, faculty, students and alumni for all meetings to the team chair a minimum of one (1) week prior to the start of the meeting; and
- In the event the Site Visit Team is not able to complete its review, including the review of documents or to conduct meetings with required participants due to problems with technology or for any other reason, CACREP, in its sole discretion, may schedule another VSV or an IPV. In the event this occurs, an additional fee may be assessed.

Other Terms and Conditions

- The program bears the responsibility to assure the confidentiality of interviews with the Virtual Site Visit Team in the same manner as if the visit were to take place in person.
- In order to foster collegiality and open communication, the parties agree that legal counsel shall not be present at any stage of the virtual site visit, including the site team's exit presentation.
- The parties agree that no meetings will be recorded.
- The program agrees to accept the report of the VSVT and acknowledges that it cannot, at a later date, request a new site visit with a different format, or appeal the resulting accreditation decision solely on the basis of the virtual format of the site visit.

Acknowledgement

As the authorized program representative for the Counseling Program at _____, I have read and agree to the foregoing requirements for the program to participate in a virtual site visit by CACREP. I understand that unless CACREP requires otherwise, the virtual site visit will be the only visit conducted by CACREP as part of the accreditation review process and that the results will become part of the record to be reviewed by the CACREP Board in making its accreditation decision of the program.

I understand that once the program has agreed to participate in the virtual site visit and planning has begun, a program may not, without adequate justification as determined by CACREP, change its selection to an in-person site visit. The program agrees to pay the virtual site visit fee invoiced by the CACREP.
(*Acknowledgement continues on next page*)

As the authorized representative of the program, I agree that the program will not challenge the results of the visit or CACREP's decision relative to the accreditation of the program solely on the basis that the visit was conducted virtually.

_____ _____ _____

Authorized Program   Printed Name   Title

Representative Signature

Date: _____

_____ _____ _____

CACREP Site Visit   Printed Name   Title

Coordinator Signature

Date: _____

Appendix 3: Joining Zoom Meetings

Here is a helpful video on logging into Zoom:
https://www.youtube.com/watch?v=hIkCmbvAHQQ

Connecting Computer Audio:

1. Join the Zoom meeting.
2. You will be prompted to join the audio automatically
   a. if this prompt does not appear or you close out of it, click Join Audio in the meeting controls.
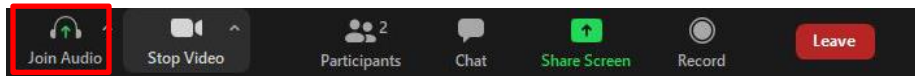
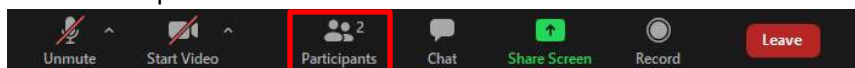3. Under the "Computer Audio" tab, click "Join with Computer Audio"
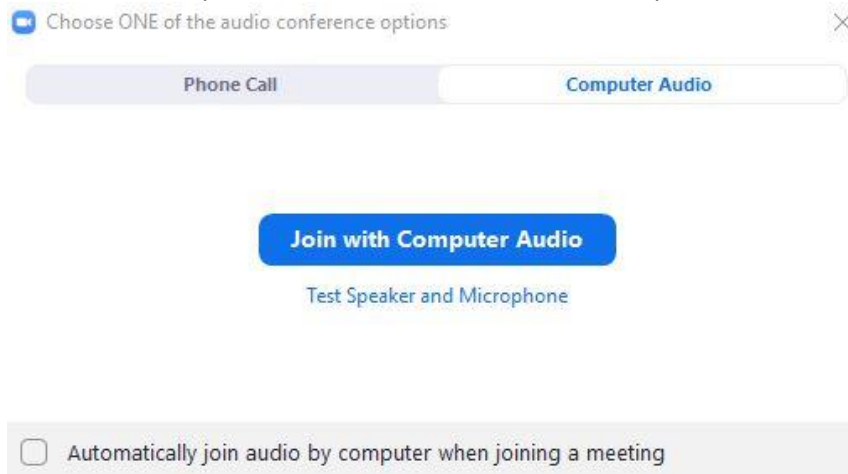
Here is a helpful video on how to test your computer audio:
https://youtu.be/-s76QHshQnY

Identify Yourself and Display your Name and Program on the screen (Rename):

Please display your first name, last name on your screen by doing the following:

1. Click "Participant" icon

2. Hover over your name and click "More" then "Rename" to change your screen name displayed to other participants.

Mute/Unmute:

To avoid audio echo, please mute yourself upon entry and when you are not speaking by:

    1. Clicking the Mute/Microphone icon:
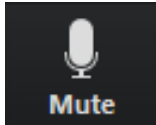

Gallery View:

It is recommended that all users switch their video layout to from Active Speaker to Gallery view to view all participants on a single screen by:

    1. Click "Gallery View" in the top-right corner.

Joining Meeting Audio by Phone (ONLY IF EXPERIENCING TECHNICAL DIFFICULTIES):

If you are experiencing technical difficulties with your computer audio, you may use your phone audio by doing the following:
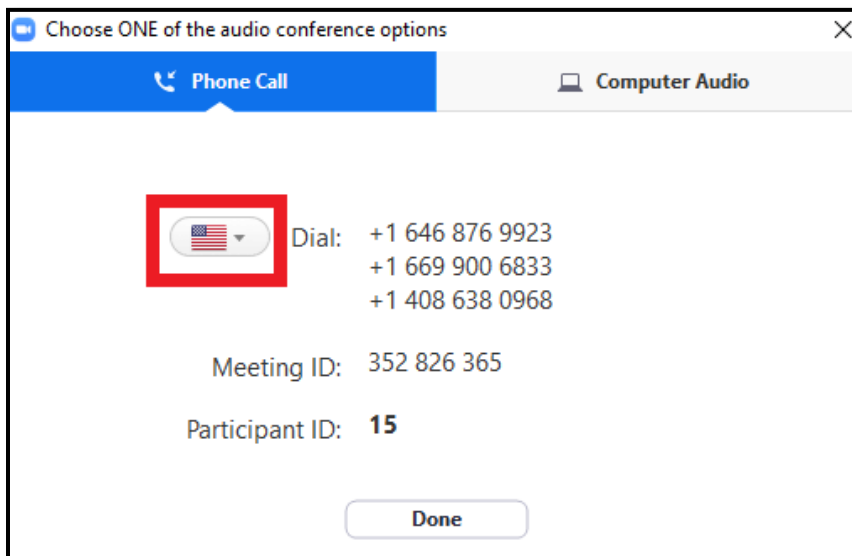
4. Join the Zoom meeting.
5. You will be prompted to join the audio automatically
    a. if this prompt does not appear or you close out of it, click Join Audio in the meeting controls.
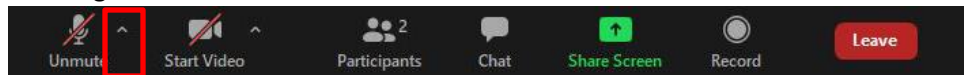
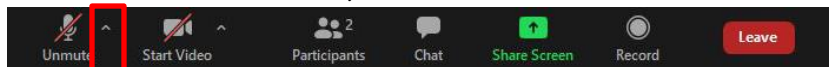6. Click the "Phone Call" tab
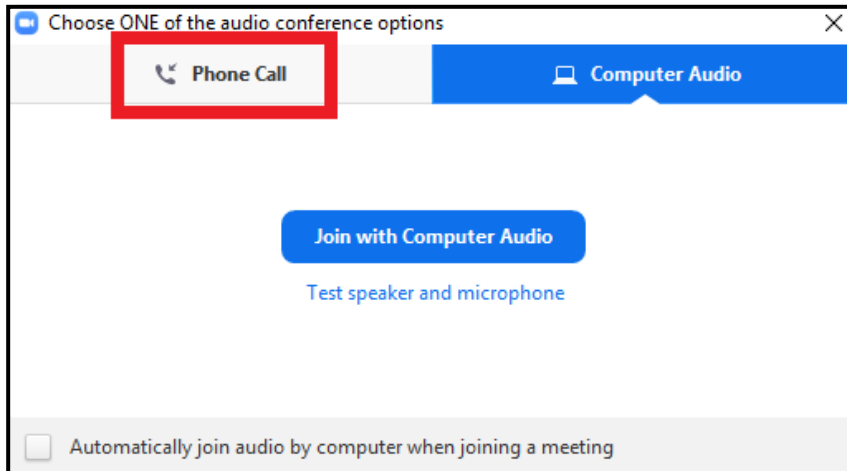
7. Select the country you're calling from in the flag drop-down menu.

8. Call one of the numbers provided.
9. Enter your meeting ID followed by #.
10. Enter your participant ID followed by #.

If you joined computer audio automatically, you can leave the computer audio and join by phone.

1. Click the arrow next to Mute/Unmute

2. Click Leave Computer Audio.
3. Click Join Audio