



ACCET Document 8.1.DCT – Preparation Checklist for ACCET Evaluation Visit

14 days before the visit, each item listed below must be uploaded to Dropbox and available to the team unless a later date is specified. The only exceptions are sample files/documentation selected by the team. The team will request sample student files and selected placement verification documentation to be uploaded 5–7 days before the scheduled visit.

Each item must be complete and (1) referenced by item number, (2) clearly labeled, (3) legible and properly oriented, and (4) successfully uploaded. Some items listed below may have been included in the ASER/BASER previously submitted to ACCET. However, it is important that the institution describe and document any changes which have occurred since the submission, with updated information to aid the team in completing its evaluation report.

Note: In advance of the visit, sample files/documents will be selected by the team; however, additional files/documents may be requested to be uploaded during the visit.

Copies of documents, including those listed on the Preparation Checklist, may be taken by the ACCET Commission Representative (CR) for preparation of the team report and may be included as exhibits to the team report.

INSTRUCTIONS FOR UPLOADING DOCUMENTS AND NAMING ELECTRONIC FILES

Uploading Documents – Acceptable File Formats

Whenever possible, please upload files in PDF format. Acceptable formats for uploading files include the following: PDF, MS Word (.doc; .docx), MS Excel (.xls; .xlsx), Images (.jpg; .jpeg).

Electronic File Naming – Best Practices

Descriptive file names are an important part of organizing, sharing, and keeping track of data files. Institutions are asked to apply the following best practices when naming electronic files:

- Files should be **named consistently**
- File names should be **short but descriptive** (<30 characters)
- Avoid **spaces** or **special characters**, such as ~ ! @ # \$ % ^ & * () ` ' ; < > ? , [] { } ' " "
- Use **capitals**, **underscores**, or **dashes** instead of **periods**, **slashes**, or **spaces**
- Use the following **date format**: YYYYMMDD
- When using a sequential numbering system, use leading zeros for clarity and to make sure files sort in sequential order. For example, use "001, 002, ...010, 011 ... 100, 101, etc." instead of "1, 2, ...10, 11 ... 100, 101, etc."
- For files specific to individual students or staff, include the **last name** and **first initial** in the file name

Examples of acceptable file names:

| | |
|--------------------------------|--------------------------------|
| Organizational_Chart | OrganizationalChart |
| MillerJanice_Academic_Director | Miller-Janice_AcademicDirector |
| Doc28-1_2019_DentalAssistant | Doc_50FR |
| SmithP_EnrollmentAgr_20190423 | StaffMeeting_20191104 |
| 001_RefundCalc_Sample | 002_RefundCalc_Sample |
| Miller_P_DentalAssistant | MillerP-DentalAssistant |
| Jones_M_graduate | JonesM-graduate |

Items 1–20 must be uploaded 14 days before the visit.

☐ **1. Program Verification Chart** ALL

Complete the Program Verification Chart (provided by the CR), listing all approved programs and enrollment/staffing information. For each program, also identify the mode of instructional delivery (in-person, temporary distance education, hybrid, approved IDL).

☐ **2. Organizational Chart** ALL

If changes occurred since the submission of the ASER, upload a current/updated Organizational Chart with names and job titles.

☐ **3. Training Schedule** ALL

Upload a Training Schedule that lists all courses/training and breaks **scheduled during the visit** and identifies for each course/training:

1. course name and, if applicable, the course number,
2. the corresponding program,
3. instructor,
4. time course/training begins and ends,
5. mode of instructional delivery (in-person, temporary distance education, hybrid, approved IDL),
6. access link(s) for classroom observation(s).

☐ **4. Faculty and Staff Listing** ALL

Upload a listing of all faculty and staff, identifying for each:

1. name,
2. job title of staff,
3. job title and programs taught for all instructional personnel,
4. email address, and
5. phone number.

Important: Emails and phone numbers are for the purpose of interviews and, if applicable, classroom observations.

☐ **5. Listing of Textbooks, Instructional Materials** ALL

For each program, upload a complete listing of all textbooks, workbooks, and instructional materials, including (1) the publication date, (2) publisher, (3) author(s), and (4) ISBN.

☐ **6. Active Students** ALL

Upload complete roster of all active students, including start dates, and a listing of students on LOA.

☐ **7. Graduates, Cancellations, Withdrawals, Terminations** ALL

Upload a listing of all students who graduated, cancelled, withdrew, or were terminated within the past 12 months. Please ensure each category is clearly separated.

☐ **8. Administrative Operations and Procedures Manual** ALL

Upload the administrative operations/procedures manual.

☐ **9. Correspondence with ACCET, State, Federal Agencies** ALL

Upload correspondence files of all communications with ACCET, state, and federal agencies in the past 12 months. This includes, but is not limited to, notices of approval, denial, withdrawal, probation, restrictions, complaints, program reviews, audits, investigations, and other actions.

☐ **10. Personnel Policies, Employee Handbook** ALL

Upload the personnel policies/employee handbook.

☐ **11. ACCET Document 21** ALL

Upload the completed ACCET Document 21 – ACCET On-Site Visit – Personnel File/Qualifications Checklist with information for all faculty and staff, based on documentation contained in employees' personnel files.

☐ **12. Personnel Files** ALL

For each personnel file, upload the documents identified below. Include the personnel files of **all instructional personnel and at least 10 staff** to include supervisors/directors of education, financial aid, externship/internship, career services, and student services, as applicable. (Smaller schools with fewer than 10 staff members should upload all staff personnel files.)

1. Either:
 - a. Resume and completed page 1 of Document 6 **or**
 - b. Completed Document 6,
2. Latest annual performance evaluation,
3. Classroom observations (instructional personnel),
4. Evidence of required bachelor's degrees, certifications, or licenses, if applicable,
5. In-service or professional development documentation.

☐ **13. Meeting Minutes** ALL

Upload minutes of all staff and faculty meetings since the submission of the ASER.

☐ **14. ACCET Document 50FR** ALL

Upload the completed and signed ACCET Document 50FR – Financial Review Checklist and the following supporting documentation:

1. Any bonds and/or letters of credit, if applicable,
2. Documented evidence of payment of workman's compensation,
3. A copy of lawsuit(s) against the institution, if applicable,
4. Notice of administrative action and/or audit instituted by a government agency, if applicable.

Federal Form 941s for the past four quarters and evidence of payment will be requested for review during the visit and, therefore, are not required to be uploaded in advance.

☐ **15. State Licensing Agency's Cancellation and Refund Policy** if applicable

Upload the State licensing agency's cancellation and refund policy (if the institution is approved/licensed by a state agency with a required cancellation and refund policy).

☐ **16. Curricular Materials** ALL

Upload a set of curricular materials for each program including:

1. Access to a set of all textbooks, workbooks, and instructional materials (to be reviewed with CR in advance)
2. Instructor guide(s)
3. Testing and evaluation tools
4. Syllabi and lesson plans, including at a minimum:
 - a. Syllabi and lesson plans for all courses being taught at the time of the scheduled visit,
 - b. Syllabi and lesson plans for at least two additional courses for each program. Note that the team may request additional courses during the visit.

☐ **17. Current Enrollment Agreement/Enrollment Document** ALL

Upload current enrollment agreement/enrollment document.

☐ **18. Student Surveys** ALL

Upload documentation of student surveys completed **in the past 12 months**, including:

1. A blank copy of each student survey utilized in the past 12 months,
2. An analysis of the results of student surveys completed in the past 12 months,
3. Student surveys completed in the past 12 months.

If there are more than 100 completed student surveys, upload a representative sample of completed student surveys for the previous calendar year to include one class/cohort for each program offered by the institution.

☐ **19. Employer Surveys** if applicable

Upload documentation of employer surveys completed in the past 12 months, including:

1. A blank copy of each employer survey utilized in the past 12 months,
2. An analysis of the results of employer surveys completed in the past 12 months,
3. Employer surveys completed in the past 12 months.

☐ **20. Completion Statistics**

AVOC/ESOL

For each program, upload the following:

1. Completion statistics for calendar year 2022 and 2023 January–May
2. Supporting documentation to verify the completion rates reported for calendar year 2022 and 2023 January–May, e.g., roster of graduates by program by year.

Items 21–22 must be uploaded 5–7 days before the visit.

☐ **21. Sample Student Academic Files**

ALL

For each student academic file selected by the team in advance of the visit (at a minimum, five active current students, five students on leaves of absence, five graduates, and five withdrawn students), upload the following documents 5–7 days before the visit:

1. Enrollment agreement, including all attestations, (enrollment agreement or registration form for avocational programs),
2. HS diploma/transcript/HS attestation,
3. All academic progress reports,
4. Any academic transcript or cumulative academic reports,
5. Any notices of academic counseling, warning, probation, and/or termination,
6. If applicable, documentation of leaves of absence,
7. Record of daily attendance identifying days/hours present, absent, and, if applicable, last date of attendance,
8. If applicable, all externship documentation, including but not limited to, student attestations upon enrollment, performance checklists completed by site supervisor, record of externship attendance, and the institution's site visit.

Please ensure that each student's program is listed in the individual file name.

Note: For institutions with multiple programs being evaluated, two current students and two graduates per program may be requested. Sample files of students on externships may also be requested.

☐ **22. Sample Student Financial Files**

ALL

For each former student file selected by the team in advance of the visit (a minimum of 10 former students, including cancellations, withdrawals, and terminations), upload the following documents **5–7 days before the visit**:

1. Enrollment agreement (enrollment agreement or registration form for avocational programs) identifying program start date and scheduled end date,
2. Daily attendance report identifying days/hours present, absent, and last date of attendance (LDA),
3. Leave of absence form (LOA), if applicable,
4. Ledger or account card identifying the dates and amounts of all charges, payments, and credits to the student's account,
5. Refund calculation worksheet, and
6. Documented evidence of refund.