



Site Visitor Team Captain Workshop

October 2025

The Site Visitor Team Captain Workshop (October 2025) focused on improving **consistency, clarity, communication, and professionalism** in accreditation site visits for CoAEMSP.

1. Communication & Consistency

- Maintain **clear, concise, and consistent** communication.
- Use standardized terms: **finding** or **area of non-compliance** (avoid *citation* or *violation*).
- Approach visits as **consultative**, not punitive.
- Balance consistency with flexibility; each program is unique.

2. Documentation & Rationale Writing

- Be **brief, specific, and objective**: *Less is best*.
- **Don't bury the lead** – start with the key point.
- Keep **findings factual**, avoiding recommendations or opinions.
- Revisit and edit the **SV Report** after resting for clarity.
- Use the **new SV Report templates** and dropdown phrasing for consistency.
- Reference the **Site Visit Checklist** for structure and completeness.

3. Professional Conduct

- **Set a positive tone** during the first meeting.
- Keep **introductions short** and professional.
- Adhere to **business attire** expectations.
- Avoid socializing (e.g., dinners) before the site visit officially begins.
- Remember: site visitors are the **face of CoAEMSP** – act with professionalism and collaboration.

4. Logistics & Travel

- **Contact the program director** within **24–72 hours** of assignment confirmation.
- Use **Concur** for travel (half the cost of Direct Travel).
- **Purchase insurance** when renting vehicles.
- Independent travel booking is permitted with proper approval.

5. Mentorship & Self-Improvement

- Partner with colleagues for **mutual learning and mentorship**.
- Conduct **post-visit reflections** to identify areas for growth.
- Involve team members early for **future team lead development**.

Core Message

The workshop reinforced CoAEMSP's commitment to **clarity, professionalism, and continuous improvement**. Site visitors are encouraged to maintain high standards of documentation and communication while embodying a **collaborative and supportive** approach to accreditation.

What did you learn from the workshop?

1. The importance of ensuring consistency and clear communication when noting findings.
2. The value of site visits and the work we all do to support accreditation is something we all need to work to be the best representation we can be.
3. Helpful to cover per diem information.
4. Reread the written rationale for any findings. Make sure it is clear. Pat has a challenging job.
5. The first meeting is important for setting a positive tone and ensuring a positive site visit experience for the program.
6. Expectations for business attire.
7. Review the EA with the program director during the meeting.
8. After completing the SV Report, reread it after sleeping.
9. Be specific with statements.
10. New SV Report coming.
11. Need for overall improvement in how to document. Improve clarity.
12. Talking with colleagues after a site visit to look for self-improvement.
13. How to be a better mentor and involve the partner site visitor more.
14. How to better interpret the standards and word any potential findings clearly, avoiding opinion.
15. Although trying to develop a consistent approach to site visits, each program lends itself to requiring flexibility.
16. Need to learn new language (terms) and ensure consistent terminology use by the site visit team.
17. Setting the tone matters.
18. Rationale makes a huge difference!
19. Concur is a scheduling program we can use to arrange travel, which costs ½ price for CoAEMSP.
20. Findings should only state the standard not met.
21. New nomenclature, finding.

22. Don't start the site visit before the site visit.
23. Direct Travel costs twice as much as Concur.
24. Avoid language indicating 'citation'; instead, use 'finding' or 'area of non-compliance'.
25. Areas of non-compliance – not citations or potential violations.
26. Best practices for the initial meeting with the program.
27. Review of documenting findings.
28. Get the insurance if you rent a car!
29. Sometimes there is no right answer, and that is ok.
30. The CoAEMSP folks are amazing!
31. Be descriptive using objective terms when documenting findings.
32. Can use other means to book travel.
33. Keep intros to a minimum.
34. Reviewing proper language samples for rationale.
35. Verify process and not quality.
36. Don't start the site visit ahead of time.
37. We can be consistent, yet objective.
38. Do what is in the best interest of the standard.
39. JC was born without a beard.
40. There are many ways to meet a set standard.
41. Write a rationale with the ask in mind.
42. CAAHEP Academy is expanding to CoAEMSP.
43. We really should not engage in social activities, such as dinner, the night before the site visit.
44. Don't start the site visit before the official start date.
45. To get a rental car, you must be approved and must buy insurance.
46. Must write rationales better.
47. Don't bury the lead
48. Sleep on your SV report for a few days and reread
49. Brief inros, not full resumé.
50. New terminology.
51. Don't bury the lead in rationale writing.
52. More than one way to determine evidence.
53. Review resources regularly.
54. Be brief but specific in documentation.
55. Look for a legitimate way to mark 'met'. Multiple methods can demonstrate this.
56. Clear, precise rationale.
57. Replace citation with 'finding' or 'potential non-compliance'.
58. Collaboration with program and site visit partner, emphasis on equals.
59. Know what evidence you seek to satisfy a finding.
60. Make initial contact with the program director within 24 hours of receiving confirmation of the site visit.
61. Consistency!
62. Proper rationale – simple, not mixed findings with recommendations.
63. Concise verbiage on SV Report, no backstory.
64. Don't hesitate to call.

65. Collegial and consultative.
66. It is ok to call the CoAEMSP staff.
67. There is a new SV Report that scores a 10 out of 10.
68. To be less wordy with rationales.
69. Be brief and brilliant when writing any possible findings. Dropdown verbiage is fantastic!
70. Reference the site visit checklist when approaching site visits. Great prompts and info.
71. Documentation should be clear and concise with findings.
72. Travel can be booked independently with Concur.
73. Keep intros to a minimum.
74. Clinical preceptor changed to clinical liaison.
75. Attire is a critical issue for CoAEMSP.
76. Don't provide recommendations with a finding.
77. Involve the team member from the beginning of the process for future team lead education.
78. Set expectations/tone at the beginning.
79. Ensure clarity when submitting findings/recommendations.
80. Create opportunities to be collaborative.
81. Do not cite the interpretation in a potential finding.
82. Do not make statements about what evidence will be required to meet an area of non-compliance or finding.
83. Start using the terms 'findings', not 'violations.
84. Clarity on the SV Report.
85. Be relaxed with the program director, good open communication during the site visit.
86. Preparation for the site visit does not start the site visit.
87. Discussion with SV Team member best practices for writing reports.
88. Better written rationales.
89. Introductions are meant to be brief and concise, not CVs.
90. Use terminology reflective of the CoAEMSP's role – findings of non-compliance vs. citation.
91. Early contact within 24 hours.
92. Make sure you use clear language to support non-compliance.
93. Use the suggested wording in the new SV Report.
94. Never underestimate the power of communication and what we say on-site. Standards can be met in many ways.
95. As site visitors, we are the face of CoAEMSP.
96. We are consultative, not punitive.
97. Taking more time to write reports
98. Do not write recommendations in findings.
99. Dress code – while I have not experienced issues, it is important.
100. Clear, concise language in the report.
101. Continue to promote a collaborative approach.
102. Encourage self-preparation for the site visit.
103. "Less is best." Be more precise in documenting the finding.
104. Proper attire.

105. Contact made with program within 3 business days of receiving site visit confirmation email from CoAEMSP staff.
106. Facts only in rationales for non-compliance.
107. People need to stop putting recommendations in the findings section.
108. Advisory Committee role is not to 'approve' everything.
109. Brief introduction. No need to go on about extensive background, etc.
110. Make first contact within 1-2 days.
111. Shorter rationales – don't bury the lead.