

# 2015 Standards

## Organization of Documents for Progress Reports and Other Submissions

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### Introduction

Program Directors of CAAHEP-accredited medical assisting programs need to provide the MAERB with documentation when responding to either an Onsite Survey Report or a Progress/Probation Report. This document provides an overview of how to best organize the electronic information effectively. We have focused on the most commonly cited standards and the most commonly requested documentation.

To use this resource effectively, you can use the linked table of contents and click on the CAAHEP Standard. You will then find the guidelines for labeling and organizing the documents for either your Response to the Survey Report (RTSR), progress report, or probation report.

Here are some general guidelines to think about when you are putting together your electronic resources:

1. The materials should be organized by the Standard to make it easy to identify. You can see guidelines for the naming conventions for standards.
2. The electronic organization shouldn't have too many sub-folders, as that becomes too complicated and time-consuming. As a rule, you do not need to put one stand-alone

document into its own folder, unless there is only one document needed for a specific standard.

3. The document titles must be significantly abbreviated. You will note rules below to provide you with guidelines.
4. If you decide to combine a large group of documents (such as transcripts of 25 students from a medical assisting course) into a PDF, you need to add bookmarks so that the MAERB Members can easily and efficiently access the material.
5. You will need to adjust the schema depending upon the material submitted, but you can work with a similar logic.
6. There are certain materials that can be pdfed with the individual documents bookmarked for easy access. Avoid making the PDF too large, as it does not transmit well to the MAERB server or to the reviewers.
7. You might be asked to submit the same document for different Standards. In that situation, you will need to provide it again under the appropriate Standard for review.

You will find a visual representation of the organization throughout this discussion to help you “see” the possibilities.

You will put all the information into one folder that is labelled as follows:

Response to Survey Report: YY.MMRTSR  
 Progress Report: YY.MMProgRprt  
 Probation Report: YY.MMProbRprt

**It is required that you submit a cover letter that briefly details your response to each citation.**

You will send the information to your MAERB Case Manager at the following address:

MAERB  
 20 N. Wacker Dr., Ste 1575  
 Chicago, IL 60606

[II.A - Program Goals - Program Goals and Outcomes](#)

Folder	II.A
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	MissSt	<i>Mission statement(s) with explanation</i>
File	PrgGoals	<i>Program Goals</i>
File	NarrChgs	<i>Narrative that details changes</i>
File	CurrChgs	<i>Documents that outline curriculum changes</i>
File	InstCurrMtgs	<i>Minutes of institutional curriculum committee meetings</i>
Folder	AdvMtg	<i>Minutes of Advisory Committee meetings</i>

Files (3)	YY.MMAAdv	One file for each meeting
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File	SrvysTmplt	survey tool templates
	SrvysCmpltd	Completed surveys or other assessment data

### II.B - Program Goals - Appropriateness of Goals and Learning Domains

Folder	II.B
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	NarrChgs	narrative that describes how program personnel identify and respond to changes
File	Rstr	Roster of advisory committee
Folder	AdvMtg	Minutes of Advisory Committee meetings

Files (3)	YY.MMAAdv	Individual files of advisory minutes—depending on what is requested.
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### II.C - Program Goals - Minimum Expectations

Folder	II.C
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	MinExp	Statement of minimum expectations
File	AddGoals	Statement of additional goals

### III.A - Resources – Type and Amount

Folder	III.A
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	Faculty	Faculty Member
File	ClerStaff	Clerical Staff
File	SuppStaff	Support Staff
File	Curr	Curriculum
File	Finances	Finances
File	Offices	Offices
File	ClstrmFac	Classroom Facilities
File	LabFac	Laboratory Facilities
File	StudFac	Student Facilities

File	PractAff	<i>Practicum Affiliations</i>
File	Eqmnt	<i>Equipment</i>
File	Supplies	<i>Supplies</i>
File	CompRrcs	<i>Computer Resources</i>
File	InstMat	<i>Instructional Materials</i>
File	ContEd	<i>Continuing Education</i>

### III.B – Personnel

Folder	III.B
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Folder	ProgDir	Program Director

File	JobDes	<i>Job Description</i>
File	AdminDut	<i>Administrative Duties</i>
File	Narr	<i>Narrative of Service</i>
File	Transcript	<i>Transcript</i>
File	EdThTech	<i>Educational Theory and Techniques Documentation</i>
File	Certificate	<i>Certificate</i>
File	PDwrkbk	<i>Program Director Workbook</i>

Folder	Faculty	<i>Faculty</i>
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Folders (# of Faculty)	LastName.First Initial	<i>Individual Faculty Member</i>
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File	JobDes	<i>Job Description</i>
File	EdorExp	<i>Background in courses Taught</i>
File	EdThTech	<i>Educational Theory and Techniques Documentation</i>
File	Evaluation	<i>Student or Peer Evaluations</i>
File	FacWrkbk	<i>Faculty Workbook</i>

Folder	PractCoord	<i>Practicum Coordinator</i>
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Folders (# of Practicum Coordinators)	LastName.First Initial	<i>Individual Practicum Coordinator</i>
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File	Selection	<i>Selection of practicum sites</i>
File	OrientMat	<i>Orientation Materials</i>
File	Oversight	<i>Oversight of Practicum Sites</i>
File	Assess	<i>Assessment of Students</i>

File	ProgCurr	<i>Knowledge of Medical Assisting Program Curriculum</i>
File	MedAsst	<i>Medical Assisting Background</i>
File	Transcript	<i>Transcript</i>
File	PCWkbk	<i>Workbook</i>
File	JobDes	<i>Job Description</i>
File	Resume	<i>Resume</i>

### III.C.1 - Curriculum

Folder	III.C.1
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	CrseCat	<i>Course Catalog</i>
File	NarrSeq	<i>Narrative explaining sequencing</i>
File	CurrCrseLst	<i>Curriculum Course List</i>
File	NarrComp	<i>Narrative Competency Completion</i>
Folder (or file)	Syllabi	<i>Syllabus for all listed courses</i>

### III.C.2 - Curriculum - Content and Competencies

Folder	III.C.2
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In supplying documentation for the cognitive objectives and the psychomotor and affective competencies of the MAERB Core Curriculum, it is necessary to provide information that indicates the specific objective or competency has an appropriate tool that is being taught and assessed. The psychomotor and affective competencies also need to be tracked to demonstrate student achievement. The documentation requested focuses on those goals. Below is a model to use. You will note that it organizes the material by course. Then you will include all the objectives and competencies that were cited within that course. Within the course folder, you would include the syllabus, the grading policy, the specific assessment tools for each unmet objective or competency, the course roster for the most recently assessed group of students, the gradebook for those students, the transcripts, and the tracking mechanism if psychomotor and affective competencies were cited. Below you will find a schema to follow. You would include all the courses applicable in separate folders with the same information.

Folder (s)	Course Number & Abbreviated titles	Examples:
		MA190Admin MA201MdTrm MA211Clin1 MA212Clin2

File	Syllabus	<i>Syllabus (highlight the specific objectives and/or competencies that were cited)</i>
File	GrPolCog	<i>Grading Policy (scale and pass score) Cognitive Objectives (might be included on the syllabus)</i>

File	GrPoIPsAf	<i>Grading Policy (scale and pass score) Psychomotor and Affective Competencies (might be included on the syllabus)</i>
File	Objective or Competency # (for example, I.C.3)	<i>Blank Assessment Tool</i>
File	Objective or Competency # (for example, I.C.9)	<i>Blank Assessment Tool</i>
File	Objective or Competency # (for example, I.P.2)	<i>Blank Assessment Tool</i>
File	Objective or Competency # (for example, I.P.4)	<i>Blank Assessment Tool</i>
File	Objective or Competency # (for example, I.A.3)	<i>Blank Assessment Tool</i>
File	CrseRoster	<i>Course Roster</i>
File	Grdbk	<i>Gradebook (highlight the specific exams and/or exercises in which the objectives and/or competencies were assessed.)</i>
Folder	Transcripts	<i>Note: The transcripts can be pdfed into one file, but they will need to be bookmarked by student.</i>

File	Student Last Name.First Initial	<i>Individual Transcript</i>
File	Student Last Name.First Initial	<i>Individual Transcript</i>
File	Student Last Name.First Initial	<i>Individual Transcript</i>
File	And so on	<i>Individual Transcript</i>

Folder	CompCklists	Required tracking mechanism if there are psychomotor and/or affective competencies (highlight the specific competencies that were cited.)
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		Note: The tracking mechanism can be pdfed into one file, but they will need to be bookmarked by student.
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File	Student Last Name.First Initial	<i>Individual Tracking Mechanism</i>
File	Student Last Name.First Initial	<i>Individual Tracking Mechanism</i>
File	Student Last Name.First Initial	<i>Individual Tracking Mechanism</i>
File	And so on	<i>Individual Tracking Mechanism</i>

### III.C.3 - Curriculum – Practicum

Folder	III.C.3
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	Superv	<i>How students are supervised</i>
File	PrctAgr	<i>Template of Practicum Agreement</i>
File	NarrComp	<i>Narrative about practicum completion</i>
File	StHand	<i>Student Handbook</i>
File	CrseCat	<i>Course Catalog</i>
File	StCat	<i>Student Catalog</i>
File	CrseRoster	<i>Course Roster</i>
Folder	PrctTmeSht	<i>Practicum Time Sheet for each student</i>  Note: The Practicum Time Sheets can be pdfed into one file, but they will need to be bookmarked by student.

File	Student Last Name.First Initial	<i>Individual Time Sheet</i>
File	Student Last Name.First Initial	<i>Individual Time Sheet</i>
File	Student Last Name.First Initial	<i>Individual Time Sheet</i>
File	And so on	<i>Individual Time Sheet</i>

### III.D - Resource Assessment

Folder	III.D	Resource Assessment
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Files	YY.MMResAss	
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#### IV.A.1 - Student Evaluation - Frequency and Purpose

Folder	IV.A.1
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	NarrGrdng	<i>Narrative explaining grading policies and practices</i>
Folder	Grdbks	<i>Gradebook</i>

File	Course Number & Abbreviated titles <b>Examples:</b> MA190Admin MA201MdTrm MA211Clin1 MA212Clin2	<i>Gradebook for specific course</i>
File	Course Number & Abbreviated titles	<i>Gradebook for specific course</i>
File	Course Number & Abbreviated titles	<i>Gradebook for specific course</i>

Folder	Syllabi	<i>Requested Syllabi</i>
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File	Course Number & Abbreviated titles <b>Examples:</b> MA190Admin MA201MdTrm MA211Clin1 MA212Clin2	<i>Syllabus for specific course</i>
File	Course Number & Abbreviated titles	<i>Syllabus for specific course</i>
File	Course Number & Abbreviated titles	<i>Syllabus for specific course</i>

#### IV.A.2 - Student Evaluation – Documentation

Folder	IV.A.2
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	NarrEval	<i>Narrative about evaluation records</i>



## IV.B.1 - Outcomes - Outcome Assessment

Folder	IV.B.1
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In requesting the raw data to match with the reported aggregated data, MAERB traditionally requests the raw data for the admission cohorts for two years in the future, and, as is outlined below, the most effective approach is to organize it by year. There is a sample below of how to organize it by year. In addition, there are times in which information is requested about the program's tracking of students' achievement of the competencies and the raw data supporting that, so there is a template provided for that information.

Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
Folder	YYRawDataARF	<i>Raw data</i>

Folder	CrsRstrs  NOTE: If there is only one admission cohort per year, the submission could just be a file.	Trigger Course/Admission Cohort
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File	MM.YYCrsRstr	<i>Course Roster for specific cohort</i>
File	MM.YYCrsRstr	<i>Course Roster for specific cohort</i>
File	MM.YYCrsRstr	<i>Course Roster for specific cohort</i>
File	And so on	<i>Course Roster for specific cohort</i>

Folder	EmplSurv  Note: The employer surveys need to be organized by admission cohort.	<i>Employer Surveys</i>
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Note: The Employer Surveys can be pdfed into one file, but they will need to be bookmarked by student.

Folder	MM.YYCohort	
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File	Student Last Name.First Initial	<i>Individual Survey</i>
File	Student Last Name.First Initial	<i>Individual Survey</i>

File	Student Last Name.First Initial	<i>Individual Survey</i>
File	And so on	<i>Individual Survey</i>

If the student name is not provided on the completed survey, you can name the files as follows: Stud1, Stud2, Stud3, Stud4 and so on.

Folder	MM.YYCohort	
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File	Student Last Name.First Initial	<i>Individual Survey</i>
File	Student Last Name.First Initial	<i>Individual Survey</i>
File	Student Last Name.First Initial	<i>Individual Survey</i>
File	And so on	<i>Individual Survey</i>

Folder	GradSurv  Note: The graduate surveys need to be organized by admission cohort.	<i>Graduate Surveys</i>
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Folder	MM.YYCohort	<i>Graduate Surveys</i>
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Note: The Graduate Surveys can be pdfed into one file, but they will need to be bookmarked by student.

File	Student Last Name.First Initial	<i>Individual Survey</i>
File	Student Last Name.First Initial	<i>Individual Survey</i>
File	Student Last Name.First Initial	<i>Individual Survey</i>
File	And so on	<i>Individual Survey</i>

Folder	MM.YYCohort	
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File	Student Last Name.First Initial	<i>Individual Survey</i>
File	Student Last Name.First Initial	<i>Individual Survey</i>
File	Student Last Name.First Initial	<i>Individual Survey</i>
File	And so on	<i>Individual Survey</i>

If the student name is not provided on the completed survey, you can name the files as follows: Stud1, Stud2, Stud3, Stud4 and so on.

File	Exam	<i>Exam participation rates and results</i>
File	Jbplmnt	<i>Job Placement Chart</i>

File	GradList	<i>Listing of Graduates for the full five years, including the month &amp; year of graduation</i>
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File	NarrTrckng	<i>Narrative explaining tracking mechanism and trigger course</i>
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Folder	CrsRstrs	<i>Course Rosters</i>
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File	Course Number & Abbreviated titles <b>Examples:</b> MA190Admin MA201MdTrm MA211Clin1 MA212Clin2	<i>Course rosters for specific course</i>
File	Course Number & Abbreviated titles	<i>Course rosters for specific course</i>
File	Course Number & Abbreviated titles	<i>Course rosters for specific course</i>

Folder	TrckngTls	<i>Tracking Tools</i>
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Folder	Course Number & Abbreviated titles <b>Examples:</b> MA190Admin MA201MdTrm MA211Clin1 MA212Clin2	<i>Tracking Mechanisms organized by course number.</i>
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File	Student Last Name.First Initial	<i>Individual Tracking Mechanism</i>
File	Student Last Name.First Initial	<i>Individual Tracking Mechanism</i>
File	Student Last Name.First Initial	<i>Individual Tracking Mechanism</i>
File	And so on	<i>Individual Tracking Mechanism</i>

#### V.A – Publications and Disclosure

Folder	V.A
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	StudCat	<i>Student (College)Catalog</i>
File	CatAdd	<i>Catalog Addendum</i>
File	FacHndbk	<i>Faculty Handbook</i>
File	StdntHndbk	<i>Student Handbook</i>
File	PromLit	<i>Promotional Literature</i>
File	NarrAch	<i>Student/Graduate Achievement</i>

#### V.B - Lawful and Non-discriminatory Practices

Folder	V.B
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	StudCat	<i>Student (College)Catalog</i>
File	CatAdd	<i>Catalog Addendum</i>
File	FacHndbk	<i>Faculty Handbook</i>
File	StdntHndbk	<i>Student Handbook</i>
File	FacGrvPol	<i>Faculty Grievance Policy</i>
File	NarrFac	<i>Narrative explaining faculty grievance policy</i>

#### V.C – Safeguards

Folder	V.C
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	SftyPol	<i>Safety Policies</i>
File	ImageEquip	<i>Photographs of equipment</i>
File	RcptEquip	<i>Receipts of equipment</i>

File	ActEduc	<i>Programs Activities are educational</i>
File	StdntAct	<i>Students are not used as staff</i>

#### V.D - Student Records

Folder	V.D
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	AdmPol	<i>Admission Policy</i>
File	AdvPol	<i>Advisement Policy</i>
File	CnsIngPol	<i>Counseling Policy</i>
File	EvalPol	<i>Evaluation Policy</i>
File	NarRet	<i>Narrative Retention of Student Records</i>

#### V.F – Agreements

Folder	V.F
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Type	File/Folder Name	Abbreviated version of requested documentation. Look back at your official CAAHEP Letter or MAERB Report for the complete details.
File	CrsRstr	<i>Course Roster of most recently assessed practicum students</i>
Folder	ActAffAgr	<i>Active Affiliation Agreement</i>

File	Student Last Name.First Initial	<i>Individual Affiliation Agreement</i>
File	Student Last Name.First Initial	<i>Individual Affiliation Agreement</i>
File	Student Last Name.First Initial	<i>Individual Affiliation Agreement</i>
File	And so on	<i>Individual Affiliation Agreement</i>