



## ACCET Document 8.1.RDSG – 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 1–15 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

An organizational chart with names and job titles for the redesignated main campus and, if applicable, an organizational chart for the corporate office.

**3. Narrative Report** ALL

A narrative report that includes (a) the rationale as to why the redesignation of the main campus was requested, (b) a description of any staffing changes made as a result of the redesignation and their impact on the administrative, financial, and educational operation of the institution, and (c) evidence to demonstrate that the redesignated main campus can provide effective oversight of the institution and ensure continued compliance with ACCET policies, standards, and practices. (See form provided in Dropbox).

**4. Administrative Staff Listing** ALL

Upload a listing of all administrative (non-teaching) staff, identifying for each:

1. name,
2. job title of administrative (non-teaching) staff,
3. job description,
4. email address, and
5. phone number.

The team may require access to the actual staff personnel files during the visit.

**Important:** Emails and phone numbers are for interviews.

**5. Updated Staff Turnover** ALL

Upload an updated staff turnover listing and calculated rates (separately for full/part-time) since submitting the Management Report.

**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, canceled, 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. Personnel Policies, Employee Handbook** ALL

Upload the personnel policies/employee handbook.

**10. 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,
5. Federal Form 941s for the past four quarters and evidence of payment will be requested for review during the virtual visit.

**11. Samples of all Advertising and Promotional Materials** ALL

Upload samples of all advertising/promotional materials used by the school since the re-designation of the main campus.

**12. ACCET Document 50I** if applicable

Institutions authorized for F, M, J visas upload the supporting documentation:

1. The institution’s official Form I-17 approved by SEVP,
2. Written policies and procedures for the enrollment of non-immigrant students,
3. Immigration information provided to non-immigrant students regarding their responsibilities for maintenance of status.

**13. State Licensing Agency’s Cancellation and Refund Policy** if applicable

Upload the State licensing agency’s cancellation and refund policy (if applicable).

**14. Completion Statistics** AVOC/ESOL

For each program, upload the following:

1. Completion statistics.
2. Supporting documentation to verify the completion rates.

Please refer to the most recently published ACCET Document 8.1 for timeframes.

**15. Completion and Placement Statistics** VOC

Upload the following:

1. Completed ACCET Document 28.1 – Completion & Placement Statistics for each program.
2. Completed ACCET Document 28.5 – Placement Summary – Completion and Placement.
3. If no students have graduated from the new program, please indicate so on Document 28.1(s).

Please refer to the most recently published ACCET Document 8.1 for timeframes.

**Items 16–17 must be uploaded 5–7 days before the visit.**

**16. Sample Placement Verification** VOC

Upon review of ACCET Document 28.1s, the team will select sample cohorts for calendar year for placement verification in advance of the visit. For each student cohort selected, upload the following documentation:

1. Completed ACCET Document 28.2s – Sampling Verification Forms (SVF),
2. The following supporting documentation to verify each reported placement:
  - a. Name of student
  - b. Completion date
  - c. Program name
  - d. Employer information:
    - 1) Employment start date
    - 2) Job title and/or description of placement
    - 3) Name of employer, mailing address, telephone number, and email address
    - 4) Employer contact
    - 5) Method of verification (e.g., employer signature, telephone verification with employer, telephone verification with student, email with student or employer).
3. Documentation/attestation of self-employment, temporary employment, part-time employment, continuing employment, and waivers.

**17. Sample Student Financial Files** ALL

For each former student file selected by the team in advance of the visit (a minimum of five former students, including cancellations, withdrawals, and terminations), upload the following documents:

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,
6. Return of Title IV (R2T4) worksheet, if applicable, and
7. Documented evidence of refund and/or R2T4, if applicable.