



PATH Intl. Virtual Site Visit

Center Training Manual

The Virtual Site Visit Interim Process for PATH Intl. Accreditation Site Visits

To meet the needs of our member centers wishing to accredit and reaccredit within the restrictions of the COVID-19 pandemic, PATH Intl. and the PATH Intl. Accreditation Committee has developed an interim virtual site visit process to allow accreditation site visits to resume. There were several factors that led to the decision to develop a virtual site visit process, first and most importantly, was consideration for the safety and wellbeing of center personnel and site visitors due to the ongoing uncertainty of the COVID-19 variants. Additionally, due to the need to put site visits on hold, there is a number of centers who have already submitted accreditation applications and many additional centers with lapse dates into 2022. The interim virtual process resumes visits in a timely, safe, and fiscally responsible manner. This interim process will continue to support the quality, integrity and excellence of the accreditation program.

As with an in-person visit, all documentation, observation and interview requirements remain the same.

Requirements for Virtual and In-Person Site Visits

To support the quality and the integrity of the accreditation program, not every center is eligible for a virtual site visit.

First Time Accrediting Centers

Centers applying for their first accreditation must have an in-person site visit. There are NO exceptions for centers pursuing initial accreditation.

Centers Applying for Reaccreditation

Determining the eligibility for a virtual site visit is based on the center's last site visit.

- Centers that earned Premier Accredited Center status with a passing score of 90% or more on the last site visit are eligible for a virtual site visit.
 - PATH Intl. will verify the score of the previous visit for centers that are reapplying for accreditation. If the center meets the eligibility requirements for a virtual site visit notification is sent by the PATH Intl. office.
- Centers that meet the requirements for a virtual site visit may choose to have an in-person site visit in lieu of a virtual site visit. With this option, the center is required to pay for all site visitor expenses.
 - When choosing an in-person site visit, this option must be selected on the accreditation application.
- A determination for eligibility is made by the Accreditation Committee for centers that passed with a score lower than 90% or passed on appeal.
- An in-person visit is required for one of the following:
 - Centers that did not pass the last accreditation site visit or did not pass on appeal.

- Centers that did not pass or passed on appeal and chose to go through the accreditation process a second time and passed.
- Centers that have technology issues that make a virtual site visit unfeasible must contact the PATH Intl. office for further assistance.

Guidelines for Choosing to Have an In-Person Visit

For centers that have selected to have an in-person site visit and pay for the site visitor expenses, below are examples of AVERAGE expenses, calculated from 16 randomly selected reimbursement forms from site visitors for visits occurring between June and December 2019.

Please note that there are two site visitors and each person is reimbursed separately for expenses incurred during each site visit. These averages are per person NOT per site visit. Not every site visitor incurs every type of expense.

- Average total reimbursement - \$375.00 per person
- Average airfare \$262.00
- Average miles driven in personal vehicle - 293 miles
- Average hotel expense \$120.00 per night
- Average car rental expense (including fuel) \$107.00
- Average parking/tolls \$29.00
- Average meal expense \$30.00

A center that chooses to pay site visit expenses for an in-person reaccreditation site visit can help manage expenses by providing suggestions to PATH Intl. site visitors for more affordable lodging options, providing transportation, etc. PATH Intl. and site visitors are mindful of expenses and do their best to keep costs to a minimum, but hotel and airfare costs can vary dramatically based on location.

Technology

Internet

- A center must have access to a stable internet connection that can run a live video chat platform, such as Zoom, Skype or Google Meet. If a stable internet connection is not available, a mobile hotspot may be an option.
- A center must have the capability to upload large video files to Dropbox.

Platforms

- Zoom is the primary platform.
- PATH Intl. will provide the lead visitor with access to one of the association's Zoom accounts. If a PATH Intl. Zoom account is not available, the lead visitor will use Skype or Google Meet.
 - The lead visitor will notify the center representative at least two weeks prior to the scheduled visit date if Zoom is unavailable and an alternate platform must be used.
- Tutorials for Zoom, Skype, Dropbox, Google Meet, Google Docs & Google Drive are listed at the end of this manual.
- Score forms are completed and signed utilizing HelloSign.
- PATH Intl. will provide the center and site visitors with secure access to Dropbox.

- Tutorials for Zoom, Skype, Dropbox, Google Meet, Google Docs & Google Drive are listed at the end of this manual.

Other Technology

- Portable devices with quality video and audio (phone, tablet or another portable device) must have Zoom capabilities.
- Fully charge all devices to be used on the day of the visit.
- For information on recording quality videos with audio, refer to the video recording guidelines found in this manual.
- A portable device that can run Zoom (or other platform) away from an internet connection is necessary for a live walk-through of the center and some interviews.
- A back-up phone to communicate with the site visitors in case of technical issues.

Virtual Site Visit Procedures

Submitting an Application for Reaccreditation

A center that meets the eligibility requirements and applies for reaccreditation is placed on the list for site visitor assignment in the order applications are received. Centers that passed on appeal will have their application reviewed at the next PATH Intl. Accreditation Committee meeting and will be notified if the committee determines they are eligible for a virtual site visit. Application should be received within 90 days of the completion of the Standards Course. Upon assignment of a virtual site visit, it is highly encouraged that the center watches the PATH Intl. Virtual Site Visit Center Training webinar.

Virtual Site Visit Waiting List

The centers on the waiting list were emailed a Virtual Site Visit Application Addendum to complete and email to the PATH Intl. office at accreditation@pathintl.org. The addendum must be submitted for a site visit to be scheduled. The addendum is available on the PATH Intl. website or by [clicking here](#). There is no additional application fee required. Centers must meet the requirement of completing and passing the PATH Intl. Standards Course within a year of the site visit. Most centers will need to take the course again to meet this requirement. To register for the course free of charge, enter the previous standards course completion date on the addendum application or email the PATH Intl. office at accreditation@pathintl.org.

Assignment of Site Visitors and Scheduling the Site Visit

Once a center is approved for a virtual site visit, the center is placed on the waiting list for site visitor assignment. Assigning site visitors can take anywhere from a few weeks to a few months, depending on availability.

Once the lead and associate visitors have accepted the virtual site visit assignment, the lead visitor contacts the center representative to establish possible dates for the visit. Alternate dates should be discussed in case of inclement weather. When scheduling the time for the virtual site visit, be aware that the center and site visitors may be in different time zones.

Other Pre-Visit Considerations

Centers must have all documentation submitted to Dropbox two weeks prior to the scheduled visit. During those two weeks, the site visitors will review the documentation. To assist the center in submitting all the necessary documentation, the center representative is emailed a link to the Virtual Site Visit Center Checklist.

The lead visitor will complete the Accreditation Pre-Visit Questionnaire with the center representative. If the center requires the site visitors to sign a Confidentiality Agreement the lead visitor is notified. The center confidentiality agreement is emailed to the site visitors to sign and return. The center representative provides the lead visitor the agenda for the day of the site visit. To ensure that the site visit is as efficient as possible, the center representative and lead visitor should be in communication if any changes to the agenda are necessary.

The center representative will receive an email from HelloSign and an email from PATH Intl. with a link to the Google forms that are needed the day of the visit.

Preparing for the Virtual Site Visit

Upon application approval for a virtual site visit, the center is emailed a link to the Virtual Site Visit Center Checklist. This checklist does **NOT** replace careful review of the standards and compliance demonstrations. The checklist serves as a tool to help the center upload all necessary documentation.

Center Review Checklist

This Checklist can be used for both Virtual and In-Person Visits
Highlight indicates documentation that will require a RANDOM check from the site visitor
This Checklist does NOT replace careful reading of the standards and compliance

CORE STANDARDS

Administrative

File Name(s)	P (Photo) V (Video) (for observation)	Uploaded Date	Check if Submitted	Check if WRITTEN	Check if Interview	Check if Observation	View Day of Visit	DNA	
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		A1 Legal Structure
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		A2 Liability Insurance
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		A3 Organizational Chart
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		A4 Job Descriptions
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A5 Explanation of consulting health professional procedures
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		A6 Explanation of compliance with federal, state and local laws
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		A7 Risk management - all Subparts
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		A8 Contract for leased or borrowed equines
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		A9 Policy on eligibility and discharge of participants
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		A10 Policy of dismissal of volunteers and guests
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		A11 Registration for participants and volunteers - all Subparts
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		A12 Attendance information and hours for participants and volunteers

To prepare for the virtual site visit, the center will submit documentation that meets the compliance demonstration of the standards.

All required documentation is submitted electronically by uploading to Dropbox. Scanning of all documentation on hard copy might take some time. For many centers, documentation is already electronic.

Documentation

The center representative is given access to a folder in Dropbox. The Dropbox access information is emailed to the center representative from the PATH Intl. office. Documentation may include photographs, videos and scanned paperwork. Each center may organize their documents in a way that best fits their organizational needs. To ensure that the site visitors can efficiently review the standards, it is important that the Dropbox file name is listed next to the appropriate standard number on the Virtual Site Visit Center Checklist. If utilizing the same document, video or photo to meet the compliance demonstration for multiple standards, upload the documentation only once, but list the file name next to all appropriate standards.

To avoid potential issues, organize all documentation on a computer prior to uploading to Dropbox. Once a file is uploaded it cannot be accessed again. If there are any files that need to be corrected, please contact the PATH Intl. office at accreditation@pathintl.org.

Two weeks prior to the scheduled visit, center access to the Dropbox file is closed. Any missing documentation is reviewed by the site visitors on the day of the visit. Once all the documentation has been uploaded, the center representative will contact the PATH Intl. office. The office will then provide the site visitors access to the uploaded documentation to begin their pre-visit review.

The Dropbox folder for each site visit will only be accessible by the center representative, the assigned lead and associate site visitors and the PATH Intl. office.

Suggestions for organizing documentation in Dropbox:

- If the center has a complete electronic accreditation book, upload the book.
- Create a folder in Dropbox for each section of the Standards Manual (Administration Facility, etc.). Upload the applicable documentation to each created folder.
- Dropbox allows for folders containing multiple files to be uploaded and can save time.
- Create folders on a computer and upload the entire folder instead of each individual document.
- Each individual document must include the standard number in the file name to which it applies (A1, F2, etc.).
- Videos can be uploaded individually if upload speeds are slow.
- For items that do not pertain to standard compliance, create an additional folder titled General. Items in this folder would include a list of participants, personnel and volunteers, an agenda and any other pertinent information that will help with the day of the visit.
- Refer to the Virtual Site Visit Center Checklist to ensure that all required documentation is uploaded.

Documentation will include the following:

- All applicable written documentation.
 - All sensitive information should be redacted according to the center's policy, but the first name and last initial should remain to distinguish individuals.
 - Random documentation is selected live on the day of the visit. The site visitors will ask the center representative to select files. For example, the site visitors might ask to pull the tenth file out of the participant drawer. The page of the file is viewed by the site visitors via screen sharing, texting a photo or live streaming.
- A list of participants, personnel and volunteers who will be on-site the day of the visit.
- The center's agenda for the day of the visit.
- Videos and photos to be uploaded to the Dropbox folder:
 - Videos or photos for standards that require observation but are not marked as View on Day of Visit on the Virtual Site Visit Center Checklist. It is possible that on the day of the visit the site visitors may ask to see a live stream of items to determine compliance.
 - Photos of the facility may include areas that are hard to capture on video such as ventilation, light switches, restrooms, etc.
 - A full facility walk through may be uploaded by the center, but it isn't required. On the day of the visit, site visitors will need to see a live streaming walk through.

Video Guidelines

- Record videos in an mp4 format so they can be easily supported, uploaded and viewed on various platforms.
- Videos should be done in short segments. Video should be a continuous shot, not edited, paused, or spliced together.
- At the beginning of the video, briefly announce what is to be shown.
- Pan the camera slowly.
- When possible, utilize a tripod or selfie stick to reduce unnecessary movement of the camera.
- The video must have sound and be clearly heard. Wind or traffic can make it difficult for the audio to be understood. Speak close to the camera.
- The video should be filmed at eye level in landscape orientation. If using a phone, lock the orientation prior to starting the recording.
- Be aware of back lighting and shadows that will make the video difficult to see.
- When uploading the video, make sure that the orientation remains in landscape to ensure a wider range of view.
- Make sure the video can be clearly seen and heard. It is suggested that additional individuals view the video before uploading.

Photo Guidelines

- The preferred format for submitted photos are PDF or JPG.
- Photos should be in focus. Be aware of poor lighting and shadows.
- Make sure that the photos present the correct subject matter pertaining to the specific standards you are addressing.
- Photos need to include various views. These should include all aspects to show standard compliance. For example, when photographing the toilet facility, different views would show compliance with governing accessibility regulations.

The Day of the Visit

Prepare for the virtual site visit as though it is an in-person visit. Site visitors may request to see anything related to a standard even though it may have already been uploaded. The site visitors may need additional clarification if documentation was missing from the upload or if a photo or video submitted is not clear.

The virtual site visit is conducted by the site visitors using Zoom, Skype or Google Meet. Zoom is the preferred platform. The lead visitor will host the Zoom meeting.

Before the site visit begins:

- Portable devices such as a phone or tablet and a desktop computer can be utilized for interviews and paperwork. Charge all devices prior to the start of the visit and have charging cords available.
- Prior to the scheduled start time, it is recommended to check the internet connection both in the office and around the facility.
- Confirm that all volunteers, participants and personnel directly involved with the live portions of the visit (interviews, riding sessions, driving sessions, therapy session, etc.) will be present. Notify the site visitors if there are any changes.
- Review the agenda, including breaks and lunch times and notify the site visitors of any changes.
- Have the emails from HelloSign and PATH Intl. with the Google form links easily accessible.

Areas to be covered via live streaming:

- Review of random paperwork
 - The site visitors will ask the center representative to select a file. The pages of the file can be viewed either by taking a photo of the paperwork and texting it to the site visitors or by slowly scanning via the live stream. If the paperwork is kept electronically, the lead visitor will give permission to the center representative to share the screen.
- Interviews
 - Some standards require an interview to meet the compliance demonstrations. These interviews may take place before or after a session, in an office or during the facility walk through.
 - Participants, personnel and volunteers should understand that they may be selected for an interview.
 - Any changes to the provided list of individuals present on the day of the visit should be communicated to the lead visitor as early as possible
- Facility walk-through
 - The facility walk-through is conducted to observe standard compliance demonstrations that are not satisfied by photo or video plus any observation of standards where previously uploaded documentation needs additional observation.
 - To ensure the best possible live streaming quality the following are some suggestions:
 - When possible, utilize a tripod or selfie stick to reduce unnecessary movement of the camera.

- Be aware of back lighting and shadows that will make the live stream difficult to see.
- The live stream must have sound and be clearly heard. Wind or traffic noise can make it difficult for the audio to be heard and/or understood.
- Pan the camera slowly to ensure the site visitors can clearly see what is being shown. The site visitors may ask the center representative to slow down or adjust the angle of the camera.
- Standards that require observation
 - Review the Virtual Site Visit Center Checklist the standards that require site visitor observation on the day of the visit.
 - The site visitors will observe a session of each service the center provides via live streaming (therapeutic riding session, therapy session, driving, etc.).
- Additional review of standards
 - Site visitors may request to see anything related to a standard even though it might have been uploaded. The site visitors may need additional clarification if a document is missing or if a photo or video submitted is not clear

Technology on the day of the visit

Be prepared for technical difficulties. Other options are available to keep the visit on track. The lead visitor may ask the center representative to incorporate one of the following options:

- The center representative may be asked to move to another area with better reception. This could be another location within the barn, to another part of the arena, etc.
- If there is a specific item that needs to be observed and is in a location that has poor reception, that item may be moved to a location with better reception. For example, if helmets are in the tack room that has no reception, move the helmets to another location.
- If technical issues arise during the live presentation, try doing the live demonstration at a different time during the visit.
- A different cell phone carrier may have better service. Prepare onsite center staff that during the visit, they may be called upon to use their cell phone for the live stream or as a hot spot.
- As a last resort, if there is an area that absolutely cannot be reviewed live, the center representative or center staff may record a video of the session and upload it immediately to a Google drive or other platform that allows for the sharing of large files. The video should be short, covering the beginning, a short lesson and end of the session. The video is reviewed at the end of the visit and prior to scoring.

Scoring

- All scoring is done at the end of the visit.
- The center representative is placed in a Zoom waiting room to allow the lead and associate visitors to meet privately to discuss their observations. The center representative is invited back when it is time to rejoin the Zoom meeting.

- As part of the scoring process, the associate visitor will read aloud the bolded part of the standard and the compliance demonstration. The lead visitor will mark the score form in HelloSign.
- The lead visitor will share the screen to show the Score Form. Scoring takes place in real time.
- If a standard receives a No score, the Comment Form (a Google Doc) is available for comments from both the lead visitor and the center representative.
- If a mandatory standard receives a No score, the Immediate Corrective Action Form (a Google Doc) is completed by the lead visitor.
- Once scoring is complete, the site visitors and center representative will complete the Score Form in Hello Sign. The lead visitor will complete the forms and sign, then the associate visitor will sign, and then the center representative will sign. After all three signers have signed the forms, a final official signed copy is automatically emailed to all three signers and a copy is sent to the PATH Intl. office.
- The Comment Form and, if necessary, the Immediate Corrective Action Form, are reviewed to ensure that all signatures are completed.
- The Standards Feedback Form, Field Test Feedback Form and the Site Visitor Evaluation Form are emailed to the center representative. The completed forms can be emailed to accreditation@pathintl.org or mailed to the PATH Intl. office.
- Documentation uploaded to Dropbox is deleted upon final accreditation approval. The Score Form, Comment Sheets and, if necessary, Immediate Corrective Action Form are kept in the center's file according to the PATH Intl. Document Retention Policies and Procedures.

Additional Preparation Resources

The PATH Intl. Accreditation Committee has prepared resources to assist centers in preparing for the virtual site visit. The resources include links to tutorials for Zoom, Skype, Google Meet, Dropbox, Google Docs and Google Drive.

In addition, the Center Virtual Site Visit Training recorded webinar is available to centers at no charge and can be found on the PATH Intl. website.

Zoom Meeting Tutorial:

<https://support.zoom.us/hc/en-us/articles/206618765-Zoom-video-tutorials>

Google Meet Tutorial:

<https://support.google.com/a/users/answer/9282720?hl=en>

Skype Tutorial:

<https://support.skype.com/en/faq/FA11098/how-do-i-get-started-with-skype>

Dropbox Tutorial:

<https://help.dropbox.com/guide/individual/how-to-use-dropbox#welcome-to-dropbox>

- [What is Dropbox?](#)

- [Where and how do I save my stuff?](#)
- [How do I share and collaborate with my team?](#)
- [How can Dropbox help my team work together?](#)
- [How do I request stuff from others?](#)
- [Structuring folders](#)
- [Renaming a shared folder](#)

Google Docs Tutorial:

<https://support.google.com/a/users/answer/9282664?hl=en>

Google Drive Tutorial:

<https://support.google.com/a/users/answer/9282958?hl=en>