## Guidelines for Virtual Site Visits

### Pre-Visit

**EPP Responsibilities:**
- Determine capacity of conferencing platform
- Identify technical support
- Confirm participants willingness to join virtually
- Share time zone of the EPP with review team and note in schedule.
- Check ability to share evidence electronically as requested by the site team during the visit.
- Designate EPP personnel to moderate the process through proper platform and protocol.

1 Week Out:
- Schedule agreed upon with Team Lead
- Log-in details and links shared with Team Lead
- Coordinating phone call with CAEP & Team Lead

**Site Team Responsibilities:**
- Determine capacity to participate virtually and test platform
- Schedule agreed upon with EPP and shared with team members and CAEP
- Include virtual links and log-in details for interviews/groups shared with team members

**Required:**
- Separate “rooms” for each virtual meetings/interview.
- CAEP creates team space for the duration of the visit.

### During Visit

**EPP Responsibilities:**
- Technical liaison available at the beginning of each session.
- Share contact information for main contact during visit with the Site Team Lead.
- Upload additional on-site evidences by 5:00 pm on Day 2 of visit.
- Establish check in times with Team lead and EPP lead. These times are scheduled with links and log-in details in the overall schedule.

**Site Team Responsibilities:**
- CAEP site visitor completes roll call and documentation for each interview.
- Site Team establishes check in process with Team Lead about communicating requests for additional materials stemming from interviews

**Required:**
- Participants have quiet professional space to conduct interviews
- CAEP Site team members participate in all team meetings and deliberations
- CAEP Site Team deadline adherence.
- Interviews and sessions can not be recorded.

### Post Visit*

**EPP Responsibilities:**
- Respond to the Site Visit Report with factual corrections and rejoinder.
- Provide any feedback to CAEP staff about the visit.

**Site Team Responsibilities:**
- Submit draft of Site Visit Report within 7 days of site visit.
- Respond to factual corrections and rejoinder.
- Provide feedback to CAEP staff about the visit.

**Required:**
- Appropriate dress during Virtual Calls (i.e., no clothing with words/images)

### Best Practice:
- Provide 10 minutes between scheduled sessions to allow transition.
- If site team is not familiar with EPP selected platform, host a test run in the week prior to the visit.
- Mute yourself in interviews.
- CAEP Staff may join interviews as a quality check.
- Identify roles for CAEP Site Team Members (i.e., First person listed on schedule is “lead” to facilitate discussion and second person verifies the roster.
- Restrict the number of participants in an interview (i.e., 40 is too many, approximately 7-10 maximum)

### Dispositions:
- Site team member - Notify CAEP Staff immediately if unable to devote the time and space for this work and deadline adherence
- Participants (EPP and CAEP Site Team) should be in a space to focus on the work (i.e., not in a car, not walking dog, minimize background noise, etc.).
- Site team members are cognizant of how their interactions/behaviors with participants may dissuade honest conversations. Site team members will not engage in micro- or macro-aggressions.
- Participants (EPP and CAEP Site Team) devote uninterrupted time (i.e., not other scheduled meetings during visit) and adhere to all deadlines.
- Appropriate dress during Virtual Calls (i.e., no clothing with words/images)

* Post visit guidelines are not unique to virtual visits. Submission deadlines and process are not altered for virtual visits.