

Do's & Don'ts for Preparing Documentation

Updated June 2020

PHAB would like to emphasize a few important points for Health Departments when submitting their documentation to PHAB. As Health Departments prepare documentation for submission to PHAB, following the provided suggestions will save the department time and effort at later stages of the process.

A PHAB Accreditation Specialist will conduct a Completeness Review of documentation to assure that enough type and volume of documentation has been submitted. The Health Department will be asked to resubmit new documentation for measures in which original documentation did not follow the PHAB requirements. This will require additional work for the department.

Additionally, Health Departments will benefit from assisting site visitors in identifying all required elements easily within submitted documentation. Not only will the site visitors have fewer questions and requests for additional documentation, but they will be able to focus more attention on assessing the content of the Health Department's documentation.

Questions?

Ask your assigned Accreditation Specialist.



DO'S

Make sure every document is dated. The specificity of the date depends on the document and is determined by the Health Department. The date on some documents need only be the year (i.e., brochures or flyers). Other documents will include a date range. Agendas and meeting minutes, for example, will have the month, day, and year. **The date must appear on the actual document itself.** Dates mentioned in e-PHAB (i.e., upload title) and/or coversheets are not acceptable.

Make sure web links include dated screenshots. Include a dated screenshot and description of the website to allow site visitors to verify that the information found on the site was in place at the time of documentation submission.

Make sure every document includes evidence of authenticity. This could be the Health Department's name, logo, staff names, etc. There should be some indication or description provided that proves the document is indeed in use by your Health Department, even if the document was not created by your Health Department. **The evidence of authenticity must appear on the actual document itself.** Evidence of authenticity mentioned in e-PHAB (i.e., upload title) and/or coversheets is not acceptable.

Make sure to provide the appropriate number of examples per Required Documentation. The number of examples should not be confused with the number of documents. It may take several documents to describe one example. Clearly identify which documents make up each example or where possible, it is preferred that you **combine the documents that comprise an example into a single upload with the coversheet.**

Make sure to "tell the story." Utilize the **required coversheet** to briefly explain the context of the document, how your Health Department uses it, and exactly where in the document the site visitors should focus their attention. If using PDF documents, please refer to the PDF page number rather than the document page number.

Make sure to point the site visitors in the right direction within the document. In addition to the required coversheet, within the document itself, it's helpful if you can use bookmarks, arrows, and highlighted text that indicates where the required elements are located. **Site visitors will not search the documentation** to put the puzzle together, so this is particularly helpful for large documents.

DON'TS

Don't upload drafts. Site Visitors are trained not to review and consider draft documents.

Don't upload sideways documents. These are difficult to review, particularly when the document is lengthy.

Don't include links without a dated screenshot. Any links should be included within the documentation along with a dated screenshot and description.

Don't upload documents with blank signature lines. A signature line that is not signed implies that the document isn't final or approved and therefore can't be accepted.

Don't use unacceptable file formats. Refer to PHAB's Acceptable File Formats tip sheet found on the PHAB website or obtained from your Accreditation Specialist. Please note that while **PDF files are the preferred** format for documentation, PDF Portfolios should not be used.