Do's & Don'ts for Preparing Documentation

PHAB would like to emphasize a few pointers for health departments when they submit their documentation to PHAB. As health departments prepare documentation for submission to PHAB, following a few suggestions will save the health department time and effort later in the process.

A PHAB Accreditation Specialist will conduct a Completeness Review of documentation to assure that a sufficient type and volume of documentation has been submitted. The health department will be asked to resubmit documentation that does not follow the PHAB requirements. This will require additional work for the health department.

Additionally, health departments want the site visitors to identify all of the required elements easily within your documentation. Not only will the site visitors have fewer questions and requests for additional documentation, but they will be able to focus more on assessing your 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 the month and year (i.e., community health improvement plans). Agendas and meeting minutes, for example, will have the month, day, and year.

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 your 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.

Make sure to provide two examples per Required Documentation. Unless the Measure or Requirement states otherwise, two examples are required. The number of examples should not be confused with the number of documents. It may take several documents to describe one example.

Make sure to "tell the story" using the upload title, upload description, and Measure Narrative. Utilize the upload title and description in e-PHAB 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. Utilize the Measure Narrative to explain how all of the documentation provided as whole is intended to demonstrate the Measure.

Make sure to point the site visitors in the right direction within the document. 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 in upload description or Measure Narrative. 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 include examples from unaccepted programs or activities. Refer to PHAB's Accepted Programs tip sheet found on the PHAB website or obtained from your Accreditation Specialist.

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.

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