

**Does your organization have all these required documents ready for Accreditation? Are they up-to-date?**

Done?	Doc Label	Document Requested
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**RESOURCE DATABASE PHASE DOCUMENTATION**

**Resource Database Section**

<input type="checkbox"/>	RD001	Description of program service area (including counties, towns, or regions)
<input type="checkbox"/>	RD002	Inclusion policy and/or procedure
<input type="checkbox"/>	RD003	List of organization/agency names and legal statuses
<input type="checkbox"/>	RD004	Customized list of taxonomy terms
<input type="checkbox"/>	RD005	Indexing procedures
<input type="checkbox"/>	RD006	Target Term Use policy and/or procedure
<input type="checkbox"/>	RD007	Update Verification procedures
<input type="checkbox"/>	RD008	Style Guide
<input type="checkbox"/>	RD009	Resource Database Activity Report
<input type="checkbox"/>	RD010	Quality assurance process for resource database
<input type="checkbox"/>	RD011	Report showing formal verification dates
<input type="checkbox"/>	RD012	Customer satisfaction/quality assurance report results for the Resource Database

**CONSULTATIVE PHASE DOCUMENTATION**

**Service Delivery Section**

<input type="checkbox"/>	SD001	Memorandum of Understanding (MOU)/contract/formal agreement with the after-hours provider (if applicable)
<input type="checkbox"/>	SD002	Policy and/or procedures for handling transactions via IM/chat, text/SMS messaging or other forms of social media
<input type="checkbox"/>	SD003	Policy and/or procedures for handling simultaneous transactions
<input type="checkbox"/>	SD004	Confidentiality policy and/or procedures
<input type="checkbox"/>	SD005	Personal Identifiable Information (PII) policy and/or procedures
<input type="checkbox"/>	SD006	Acknowledgement form that is signed by staff agreeing to adherence to the organization's/program's Confidentiality policy/procedure
<input type="checkbox"/>	SD007	Nondisclosure form signed by visitors that may access confidential information
<input type="checkbox"/>	SD008	Advocacy policy and/or procedures.
<input type="checkbox"/>	SD009	Crisis Intervention policy and/or procedures
<input type="checkbox"/>	SD010	Risk Assessment form (aka Lethality Assessment)
<input type="checkbox"/>	SD011	Protocols between your I&R program and the crisis intervention center (see "**Note" in manual if the center is outside your org)
<input type="checkbox"/>	SD012	Proof of your AAS or ICH accreditation (if applicable)
<input type="checkbox"/>	SD013	Follow-up policy and/or procedures
<input type="checkbox"/>	SD014	Follow-up results report, and/or a link to a real-time dashboard
<input type="checkbox"/>	SD015	A user guide (with definitions/explanations) for the reports you provide for those on your distribution list
<input type="checkbox"/>	SD016	Procedures regarding data collection and analysis that describes how the information is collected and used
<input type="checkbox"/>	SD017	Program's Service Delivery Activity Report
<input type="checkbox"/>	SD018	Screenshots of your data collection form (aka your contact record)

**Cooperative Relationships Section**

<input type="checkbox"/>	CR019	An agreement (MOU) with an I&R program or Community Information Exchange Agreement in your community
<input type="checkbox"/>	CR020	An agreement (MOU) with another (different) I&R program or Community Information Exchange Agreement in your community

**Disaster Preparedness Section**

<input type="checkbox"/>	DP021	Emergency Operations Plan
<input type="checkbox"/>	DP022	Business Continuity Plan
<input type="checkbox"/>	DP023	Mutual Assistance Agreement
<input type="checkbox"/>	DP024	Recent disaster report showing the volume of requests, met and unmet needs, etc.
<input type="checkbox"/>	DP025	After-Action Report describing observations and/or lessons learned from the most recent disaster

<b>Organizational Effectiveness Section</b>		
<input type="checkbox"/>	OE026	Roster for your governing body
<input type="checkbox"/>	OE027	Organization's bylaws
<input type="checkbox"/>	OE028	Policies and/or procedures pertaining to your governing body
<input type="checkbox"/>	OE029	Employee policies and/or procedures
<input type="checkbox"/>	OE030	Code of ethics for the I&R program
<input type="checkbox"/>	OE031	Fiscal policies and/or procedures
<input type="checkbox"/>	OE032	Non-discrimination policy and/or procedure
<input type="checkbox"/>	OE033	Data Retention policy and/or procedure
<input type="checkbox"/>	OE034	Technology Redundancy and back-up policy and/or procedure
<input type="checkbox"/>	OE035	Org chart that shows key positions and includes the I&R program
<input type="checkbox"/>	OE036	Succession Plan
<input type="checkbox"/>	OE037	All job descriptions for positions in the I&R program
<input type="checkbox"/>	OE038	Hiring policies and/or procedures
<input type="checkbox"/>	OE039	Employment interview questions for each of the positions within your I&R program and the rating form you use to evaluate responses
<input type="checkbox"/>	OE040	Policies and/or procedures relating to remote I&R work
<input type="checkbox"/>	OE041	Standardized Observation form / rating sheet for call monitoring
<input type="checkbox"/>	OE042	Standardized Observation form / rating sheet for resource curation
<input type="checkbox"/>	OE043	Performance Appraisal forms/reviews that are used for I&R staff
<input type="checkbox"/>	OE044	Sample Individualized Performance Improvement plan for I&R staff
<input type="checkbox"/>	OE045	Table of Contents for your community resource specialist training program
<input type="checkbox"/>	OE046	A detailed, day-by-day training agenda for your community resource specialists
<input type="checkbox"/>	OE047	Table of Contents for your database curator training program
<input type="checkbox"/>	OE048	A detailed, day-by-day training agenda for your database curators
<input type="checkbox"/>	OE049	Examples of tools used for measuring an I&R trainee's level of competency
<input type="checkbox"/>	OE050	I&R Training Evaluation form
<input type="checkbox"/>	OE051	I&R Trainer Evaluation form
<input type="checkbox"/>	OE052	Outreach plan for promoting your service
<input type="checkbox"/>	OE053	Outreach report for the I&R program describing the plan, the outputs, and outcomes
<input type="checkbox"/>	OE054	Summary report from your call management system/ACD
<input type="checkbox"/>	OE055	Most recent Customer Satisfaction/quality assurance report for the I&R program
<input type="checkbox"/>	OE056	Work plan that includes written goals and objectives from the previous year
<input type="checkbox"/>	OE057	The corresponding program evaluation report