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

Inform USA	Doc #	Document Requested
Service Delivery Section		
☐	001	Policy and procedures for handling transactions via IM/chat, text/SMS messaging or other forms of social media.
☐	002	Confidentiality policies that address confidentiality of client records or use of Caller ID or other applicable technology.
☐	003	A sample of the form that is signed by I&R staff agreeing to the confidentiality policy. Do NOT send all the forms your staff have signed!
☐	004	The nondisclosure form signed by others with access to confidential information.
☐	005	Your client advocacy policy and procedures.
☐	006	Proof of your AAS certification or International Council for Helplines accreditation (if you are skipping the Crisis Intervention section).
☐	007	The signed, written agreement and protocols you have with the crisis intervention center with which your I&R service has an arrangement.
☐	008	Your crisis intervention policies and procedures. Be sure it addresses each bullet point in the Manual.
☐	009	The form your community resource specialists use to complete a lethality (risk) assessment. If your lethality assessments are in electronic format, submit a screen shot.
☐	010	Your follow-up policy and procedures. Be sure it addresses each bullet point in the Manual.
☐	011	A Follow-up results report.
☐	012	Screenshots showing your data collection form.
☐	013	A copy of the procedures that describe the information that is collected and how it is used. Be sure it addresses each bullet point in the Manual.
☐	014	A complete and current, finished, and formatted report of your I&R activities. Be sure it addresses each bullet point in the Manual.
☐	015	An explanation or a user guide to the reports you provide for those on your distribution list.
☐	016	Provide definitions of Terminology used to categorize contacts
Cooperative Relationships Section		
☐	001	Copies of agreements with other I&R programs in your community (a minimum of three agreements with other I&R programs)
Disaster Preparedness Section		
☐	001	Your Emergency Operations and Business Contingency Plans.
☐	002	Your Mutual Assistance Agreement
☐	003	A disaster-related service request form or actual report (showing the volume of inquirer requests, and the met and unmet needs to emergency planners and the community).
Organizational Effectiveness Section		
☐	001	The roster for your Board of Directors/Advisory Committee.
☐	002	Governance and Administrative policies and procedures manual(s).
☐	003	Most recent audit or review for the organization.
☐	004	IT/Technology Backup Policies and Procedures.
☐	005	An organization chart that reflects all the positions within your agency. If you are part of a larger organization, submit a functional organization chart for the I&R service.
☐	006	Job descriptions for all the positions within the I&R service.
☐	007	Your employment interview questions for each of the positions within your I&R service and the rating form you use to evaluate responses.
☐	008	Sample written supervision plan for I&R staff.
☐	009	Observation forms that are used for I&R staff.
☐	010	Performance appraisal forms that are used for I&R staff.
☐	011	Rating sheet for I&R call monitoring.
☐	012	Sample individualized performance improvement plan for I&R staff.
☐	013	Policies and procedures relating to the use of off-site I&R staff.
☐	014	Your succession plan for key staff.
☐	015	A detailed, day-by-day training agenda for both your community resource specialists and database curators. Be sure to address points in Manual.
☐	016	Examples of subjective and/or objective evaluation tools used for measuring an I&R trainee's level of competency.
☐	017	A Table of Contents for your training manual that shows a detailed list of all topics covered in your community resource specialist training program.
☐	018	A Table of Contents for your training manual that shows a detailed list of all topics covered in your database curator training program.
☐	019	Your I&R training evaluation form.
☐	020	Your I&R trainer evaluation form.
☐	021	An outreach report for the I&R service describing the plan, the outputs, and outcomes (what was accomplished)

☐	022	Summary report from your call management system/ACD or the annual report you receive from your telephone company documenting call volume, number of abandoned calls, average speed of answer and average call length.
☐	023	Most recent customer satisfaction/quality assurance report for the I&R service.
☐	024	Written goals, objectives, and I&R service work plan for the current year.
☐	025	The most recent evaluation report for the I&R service, generally based on your written goals and objectives (could be done internally or externally).
Resource Database Section		
☐	001	Inclusion/Exclusion Policy
☐	002	Style Guide
☐	003	Customized List of Taxonomy terms used, including target terms if being used (In Excel format if possible)
☐	004	Database maintenance procedures
☐	005	Description of service area (including counties, towns, or regions)
☐	006	Report showing formal update dates (In Excel format if possible)
☐	007	List of agency names and their legal status type/agency type to compare types with your Inclusion/Exclusion policy (In Excel format if possible)
☐	008	Your Target Term Use policy
53 documents required		