

Creating and Presenting Your Documentation: Tips for Success



*Advancing
public health
performance*



Welcome and Introduction





Learning Outcomes

- Identify and implement strategies for selecting and presenting their agency documentation in the PHAB accreditation process
- Describe methods to support PHAB site visitors in effectively reviewing and assessing documentation
- Identify strategies utilized by an accredited health department in identifying and preparing documentation submitted in the PHAB accreditation process



Presenters

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PHAB Consultant

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Accreditation Manager, PHAB

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Webinar Format

- Presentation and discussion
- During the presentation, enter your questions into question box on the control panel to the right of your computer screen
- Questions will be addressed in the discussion period following the presentations

Documentation in Context of the PHAB Accreditation Process

Shirley Orr
PHAB Consultant



PHAB Accreditation Process



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graph TD; S1[Step 1 – Preparation] --> S2[Step 2 – Registration and Application]; S2 --> S3[Step 3 – Documentation Selection and Submission]; S3 --> S4[Step 4 – Site Visit]; S4 --> S5[Step 5 – Accreditation Decision]; S5 --> S6[Step 6 – Annual Reports]; S6 --> S7[Step 7 – Reaccreditation];
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Step 1 – Preparation

Step 2 – Registration and Application

Step 3 – Documentation Selection and Submission

Step 4 – Site Visit

Step 5 – Accreditation Decision

Step 6 – Annual Reports

Step 7 – Reaccreditation

Health Department Self-Assessment



- Systematically review the PHAB standards, measures and required documentation to identify strengths and opportunities for improvement
- Team approach
- “Do we do this?” If so, in what programs or activities?
- If not, explore potential strategies to address gap

The Role of Documentation in the PHAB Accreditation Process

- Documentation is the basis for determining conformity with standards and measures
- Documentation “tells the story” of the health department

The Role of Documentation in the PHAB Accreditation Process

(continued)

- The process of selecting or creating and presenting documentation is in itself a quality improvement strategy
 - Builds better overall awareness and understanding of the overall scope of work of the department
 - Provides a means to share and adopt positive practices across the agency



Documentation Basics

Marita Chilton
PHAB Accreditation
Manager



Selecting Documentation

- Utilize your Accreditation Team
- Pick your BEST example(s)
- ...that meet specifics of the Required Documentation within the context of Standard, Measure, and Domain
- Showcase a variety of Programs
- Select the correct number of examples
- REMEMBER: Population Public Health Focus

Ensure ALL Examples Are:

- Current, in use, and **DATED** within the appropriate timeframe when submitted
- Final (draft documents not accepted)
- Free of confidential information (redactions OK)
- Include **Evidence of Authenticity** (if signature line is present, make sure there's a signature)
- In an acceptable file format (PDF strongly preferred)

Not Prescriptive

- “What” is in place, not “How” it got there or “Who” developed it
- Documentation may be developed, e.g.,
 - By the health department
 - By another level of government (an umbrella agency, the state or local HD)
 - By another governmental agency
 - By a community partner, non-profit org
 - By a contractor (e.g., consultant, academic)
 - By a partnership (evidence of membership)

...PROVIDE CONTEXT & HIGHLIGHT STAFF NAMES

Acceptable File Formats

FILE TYPE	EXTENSION
Audio	mp3, wav
Image	The following should be pasted into a MS Word or PDF; they should not be uploaded as a separate file. bmp, gif, jpeg, jpg, tif, tiff
MS Excel	xlsx, xls
MS PowerPoint	pps, ppsm, ppsx, ppt, pptm, pptx
MS Word	doc, docm, docx, rtf
Portable Document Format	PDF
Text	htm, html, txt
Video	wmv, mpeg, mpg, mpv, mp4

Prepare and Package Each Example



- Clearly present the materials
- Identify the location of the requirements (hint: “must”)
 - Highlight, coversheet, bookmark, sticky notes, etc.
- Double check: Dates and Evidence of Authenticity
- Create a meaningful title
- Provide Context to ensure evidence gives a complete picture

Example of Packaging



- PDF one upload per example
 - Multiple related documents within 1 PDF
 - Include a Coversheet that includes context and clearly identifies each required element
 - Use Bookmarks

Use e-PHAB to Provide Context



- Document Title
 - Identify documents
 - 250 characters limit
- Document Description
 - Describe document: what it is, what is in it, where the relevant section is
 - 150 words limit
- Measure Narrative
 - Explain how documents demonstrate the measure
 - 10,000 character limit (including spaces, punctuations)

In e-PHAB

Titles and Upload Descriptions

Upload Document ✕

Title:

File:

Description: i

150 Words/150 Words



Example File Titles

- Obesity Coalition Minutes, May 2014
- Administrative QI Project on Improving timesheet on-time completion rates
- Healthy Heart Task Force Membership List
- New Employee Orientation Policy 2015
- 2012 Bed Bugs Board of Health Presentation

Upload Descriptions: Point to Requirements



- Describe how document demonstrates conformity
- Identify specific location within the document for each required element
- Provide context if upload is part of a larger document
- Describe the author, if not a health department document
- Use the description boxes with very brief remarks
 - Character Limit: 150 words
 - “See cover sheet and PDF bookmarks”
- Use cover sheets when more details are needed






Example Description

Coalition minutes are provided by the X Hospital Representative. See page 2 for highlighted names of health department staff represented on Coalition.

*Marita's personal suggestion: If you have more text than this, use a cover sheet.

In e-PHAB

Titles and Upload Descriptions

DOCUMENTATION	TITLE	UPLOADED BY	ACTION
Document 1.1.2 L.2.1	2011 Community Health Assessment	Jonas Salk 04-20-2012	 
Document 1.1.2 L.2.2	Appendix 2	Jonas Salk 04-20-2012	  


Appendix 2 of the 2011 Community Health Assessment is a list of the Community Partners engaged in the planning process.

Upload More Documents

In e-PHAB Measure Narratives

▼ Health Department's Narrative for Measure 1.1.2 L (Optional)

Use the following box to explain how the submitted documentation, taken as a whole, demonstrates and illustrates how the health department meets this measure.



Save Response

10000 Characters

Measure Narratives

Use the measure narrative to explain to the Site Visitors the reason for selecting ALL documents submitted for the measure.

- Size Limit: 10,000 characters
- Optional
 - Give context to the evidence
 - Describe how all evidence demonstrates conformity
 - Explain why the HD is using the documents
- DON'T just reiterate the requirements and write that the documentation meets the requirements

Submit the Required Number of Examples

- More is NOT better!
- Several pieces of evidence may be needed to demonstrate conformity for each example
 - PDF documents together
- If using the same document for multiple requirements in same RD, only upload once with coversheet
- Pay attention to example requirements (e.g. administrative & programmatic)
- Showcase a variety of programs



For Preparing Documentation

DO:

- Make sure web links include dated screenshots and a description
- Make sure every document is dated
- Make sure every document includes evidence of authenticity
- Make sure to provide the correct number of examples
- Make sure to “tell the story” using the upload title, upload description or cover page, and Measure Narrative
- Make sure to point the site visit team to each required element

DON'T:

- Don't upload drafts
- Don't upload sideways documents
- Don't include links in upload description or Measure Narrative
- Don't upload documents with blank signature lines
- Don't include examples from unaccepted programs or activities
- Don't use unacceptable file formats
 - Don't use PDF Portfolios