



CREDIBILITY • INTEGRITY • ACHIEVEMENT

Council on Accreditation

*Steps for Producing an Electronic
Self-Study Document on CD-ROM*

8th Edition



Table of Contents

Steps for Producing an Electronic Self-Study Document on CD-ROM

Welcome to COA’s 8th Edition Self-Study Process	Page 1
Introduction	Page 2
Hardware and Software Needs	Page 3
Steps for Producing the Electronic Self-Study Document	Page 4
Step 1 - Organizing the Electronic Self Study	Page 4
Step 2 - Gathering Pre-Site Evidence	Page 5
Step 3 – Completing the Forms	Page 6
Step 4 - Preparing Each Section of the Table of Contents.....	Page 7
Step 4.1 - Administration and Management Narrative	Page 7
Step 4.2 - Service Delivery Administration Narrative.....	Page 8
Step 4.3 - Service Narrative	Page 8
Step 4.4 - Evidence of Implementation.....	Page 8
Step 4.5 - Creating Hyperlinks.....	Page 9
Step 4.6 - Not Applicable Ratings	Page 10
Step 5 - Preparing the READ ME FIRST File and Executive Verification...Page 12	
Step 6 - Completing the Check List.....	Page 12
Step 7 - Burning and Labeling the CD.....	Page 13
Step 8 - Sending the Electronic Self-Study.....	Page 14
Glossary of Electronic Terms	Page 15
Frequently Asked Questions	Page 16



Welcome to COA's 8th Edition Self-Study Process

Welcome to COA's 8th Edition self-study process! I think you will find that this improved process will help streamline your accreditation by making it less time consuming, less expensive, less staff intensive, *but not less valuable!*

This 8th Edition Self Study will assist you in three important ways. It will:

1. Help you understand the essential elements of the self-study process;
2. Describe what specifically needs to be included in your self study; and
3. Provide you with some tips and tools on organizing and managing the 8th Edition Self Study process using the electronic option.

As part of COA's own continuous quality improvement, we need your feedback as to whether the 8th Edition Electronic Self Study "works." Is it easy to use? Is it useful? And is it cost effective? As a stakeholder in COA, the importance of your partnering with us as we reshape and streamline the accreditation process cannot be overstated. Please feel free to contact me (rklarberg@coanet.org).

Good luck as you begin the process of becoming (re)accredited, and thank you!

Sincerely,

Richard Klarberg
President and Chief Executive Officer



Introduction

Welcome to a new and improved way to submit your self-study document to the Council on Accreditation (COA). We are pleased to offer organisations the opportunity to submit their self-study document in electronic format on [CD-ROM](#). This document will provide instructions to organisations regarding the appropriate format for an electronic submission, as well as the proper tools to facilitate this process.

The following Electronic Self-Study Instructions are a supplemental guide to the 8th Edition *Accreditation Guidelines*. The *Accreditation Guidelines* can be found at www.coacanadastandards.org.

If you plan to complete an 8th Edition electronic self-study, you must contact your Accreditation Coordinator at COA so that efforts can be made to staff the Peer Review Team with individuals who have easy access to a computer and are proficient in the use of computers.

If you choose to complete an 8th Edition electronic self-study, you must submit the entire self-study on [CD-ROM](#). Please do not submit a self-study in both electronic and hard copy format. Choose one format or the other.

Before starting the electronic self-study process, COA recommends that you take the time to read the following instructions and to assess whether you have the appropriate personnel expertise to complete a self-study on [CD-ROM](#). Your Accreditation Coordinator can provide you with technical assistance; however you must have the internal proficiency.

When the Peer Team is on-site, you must have a copy of the self-study and other relevant documents – in electronic or hard copy format – readily available to the Team in the room in which they are meeting. If the self-study and other documents are in electronic format, you must have a laptop or desktop computer available in the room for the Team to use. Please refer to the “On-Site Documents” column in each standard’s Table of Evidence for a list of materials to have available on-site.

COA strongly recommends that the organisation consider creating back-up copies of its self-study in either electronic or hard copy format in case the Peer Team experiences difficulties in reviewing the self-study prior to the site visit.

If you have any questions regarding this document or the electronic self-study process, please contact your assigned COA Accreditation Coordinator at 866-COA-8088 or review the [Frequently Asked Questions \(FAQs\)](#) at the end of this document.



Hardware/Software Needs:

To create an 8th Edition Electronic Self-Study, an organisation will need at least the following software/hardware:

- a. Microsoft Office (1997 and higher) <http://www.microsoft.com/office/>
- b. Writeable [CD \(CD-R\)](#)
- c. [Scanner](#) and scanning software *or* the organisation may have a copy center scan documents for the self-study and save them for the organisation using the appropriate formats listed below
- d. [CD burner](#) and software for burning [CDs](#)

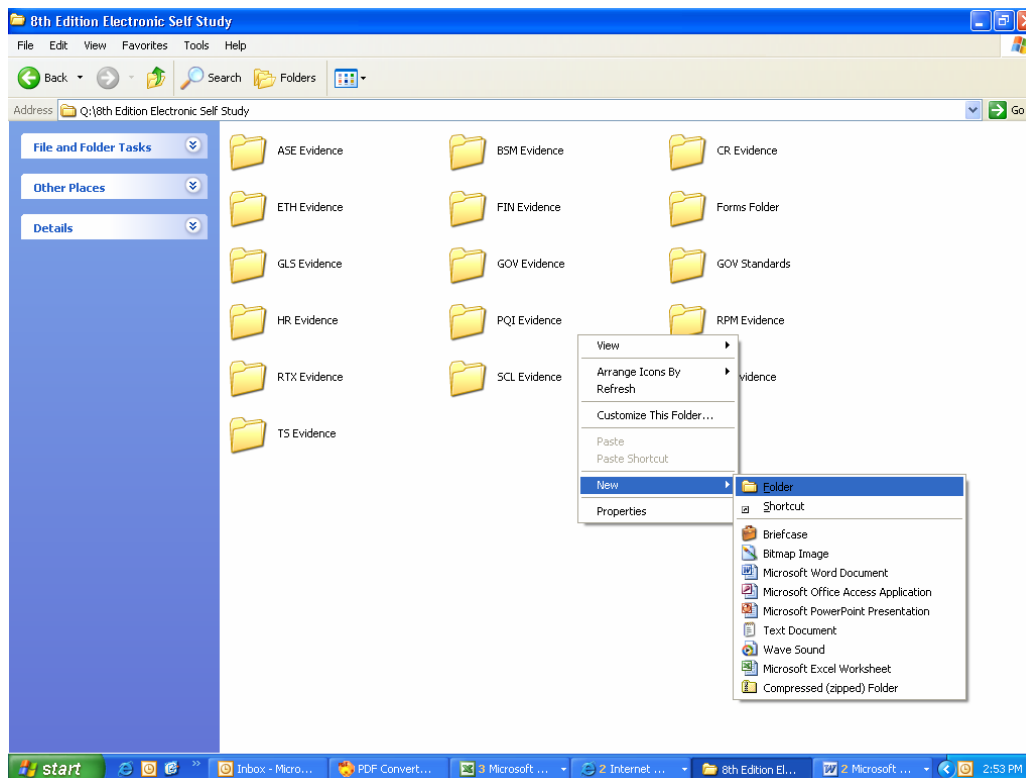
It is also acceptable for an organisation to use Adobe [Acrobat 7.0](#) <http://www.adobe.com/products/acrobat/main.html> however COA does not require an organisation to purchase Adobe in order to complete its self-study, unless the organisation wishes to “print to PDF” as a way to lock the document.

NOTE: For reasons of compatibility and consistency, organisations should only use the COA-approved software listed above. Appropriate document extensions include: [PDF](#), [DOC](#), [XLS](#), and [PPT](#). Organisations may also save documents as HTML files or common picture files such as JPG.

Steps for Producing the Electronic Self-Study Document

Step 1 – Organizing the Electronic Self Study:

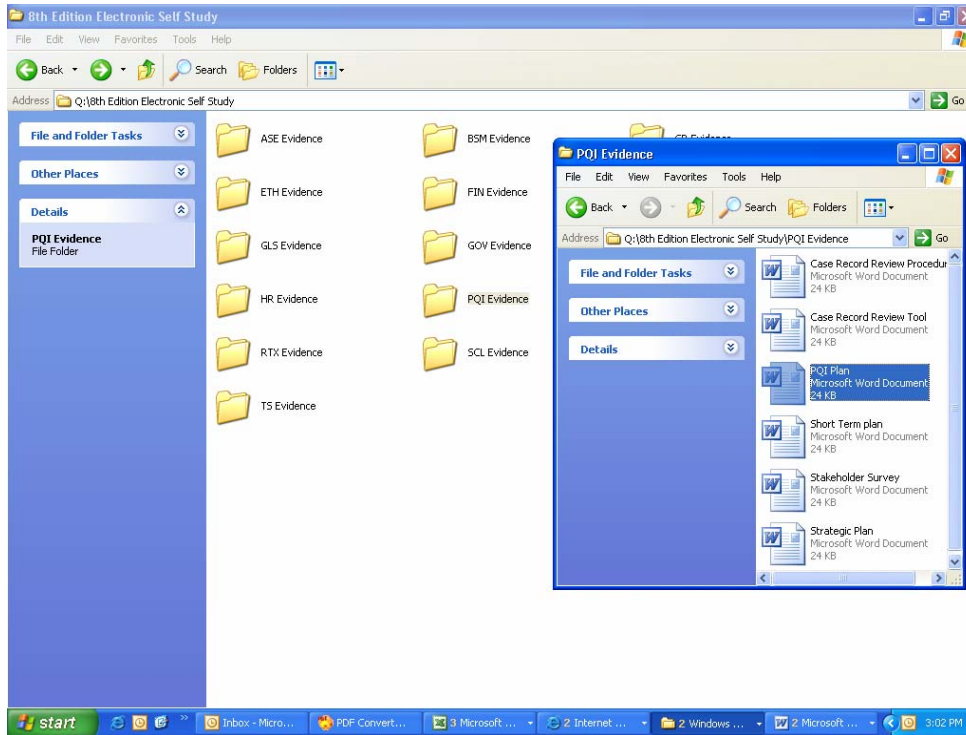
- a. Create a folder for your organisation’s self study on your hard drive or network drive and label it Electronic Self Study.
- b. Create Evidence folders for all Administration and Management and Service Delivery Administration standards in your self study folder (as indicated in the picture below).
- c. Create Evidence folders for the Service standards applicable to your organisation in your self study folder.
- d. Create a Forms Folder and save any applicable Forms in your organisation’s self study folder. A list of Forms may be found in the *Accreditation Guidelines* or in the Related Files on www.coacanadastandards.org.
- e. Copy and paste the Table of Contents folder(s) to your self study folder.
- f. Create and save a copy of the READ ME FIRST document you have completed for the peers (more detailed instructions regarding this document will follow).



NOTE: You are only responsible for those standards and supplements that are applicable to your organisation (see the Accreditation Plan for applicable standards and supplements). Include only these standards and supplements on the final copy of the electronic self-study.

Step 2 – Gathering Pre-Site Evidence

- a. Compile all pre-site documentation listed in the *self-study documents* column of each standard's Table of Evidence, and save it in the appropriate Evidence folders (as indicated in the picture below).



- b. Use only COA-approved formats and extensions to save documents (see the note on page 3 for details).
- c. Submit only relevant documentation. If a standard asks for something specific, and it is found in a larger document, you have several options. You can submit only the specific page(s) from the document that address(es) the requirements of the standard *or* you can save the entire document and create a bookmarked hyperlink to the specific page. For instructions on how to create bookmarks in [Word](#) and Adobe documents, see the [Electronic Self-Study FAQs](#) at the end of this document.
- d. For any multiple-page piece of documentation, try to bracket or label the relevant sections that relate to the standard. This is helpful to the Peer Team when they review the document so that they can easily reference the applicable documentation.
- e. When saving documentation in the evidence folders, it may be helpful to label evidence with the standard reference (i.e., PQI 1, Strategic Plan) so that it is easier to find later on in the process when hyperlinks are being created.



Step 3 – Completing the Forms

- a. Fill out all applicable forms.
- b. Save all applicable forms to the Forms folder with the exception of NA Request Forms (see points “c” and “d” for further instructions regarding NA materials).

Standards Section	Charts, Data Sheets and Service Profiles
Governance	<u>Community Demographic Profile</u>
Adoption Services	<u>Domestic Adoption Service Profile</u>
Early Child Care and Development Services	<u>Child Care Data Sheet</u>
Foster Care Services	<u>Foster Care Service Profile</u>
Group Living Services	<u>Group Living Services Grouping Chart</u>
Intercountry Adoption Services	<u>Intercountry Adoption Service Profile</u>
Residential Treatment Services	<u>Residential Treatment Grouping Chart</u>
Wilderness and Adventure-Based Therapeutic Outdoor Services	<u>Therapeutic Outdoor Services Grouping Chart</u>

- c. If a rating of NA is permitted and the organisation determines that a rating of NA is applicable, the organisation should be prepared to provide evidence on-site that supports that determination.
- d. If an NA is not offered within the standard, an organisation must submit an *NA Request Form* to COA. To assist the Peer Team in its review, all COA-approved NA requests should be scanned and saved in the appropriate evidence folder and should be included in the self-study document.

NOTE: If the COA-approved NA is not in the self-study document, the team will rate the standard accordingly.

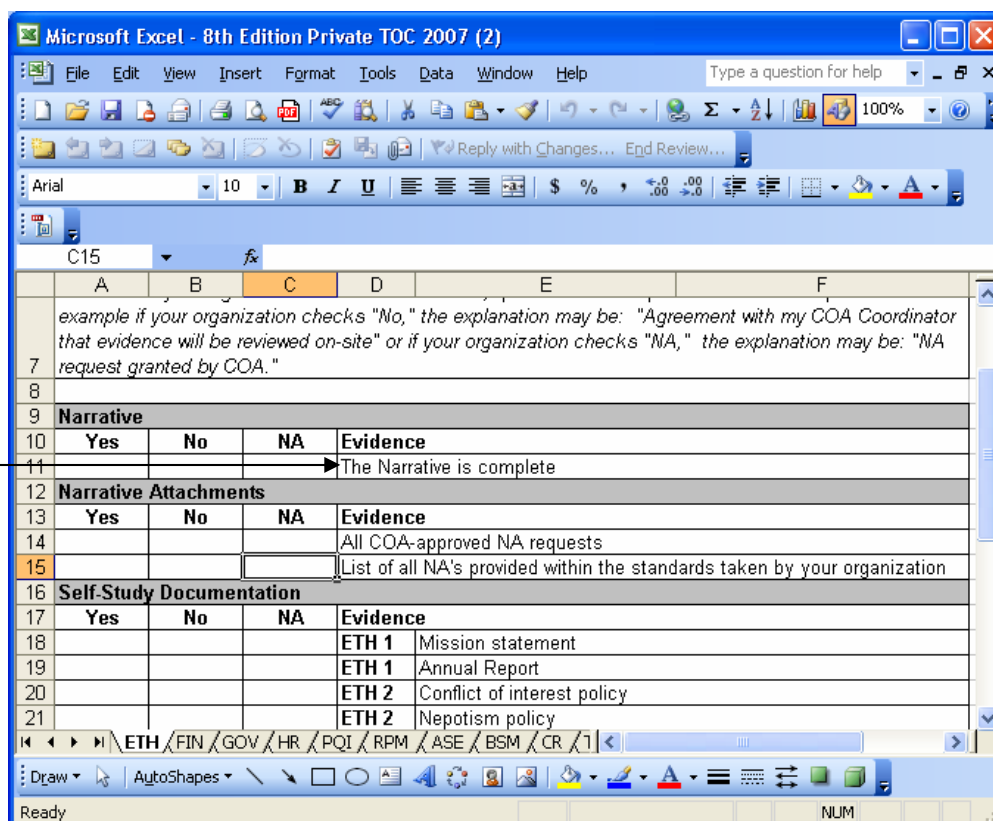
Step 4 – Preparing Each Section of the Table of Contents

The Table of Contents (TOC) chart is an [Excel](#) document that contains tabs at the bottom of the page for all the Administration and Management, Service Delivery Administration and Service sections. Before adding evidence to this chart, delete all tabs that are not applicable to your organisation. Before deleting tabs, please refer to the Accreditation Plan for applicable standards.

Step 4.1 – Preparing the Administration and Management Narrative for Each Section

- Download the Narrative Template found on www.coacanadastandards.org in the Related Files for each Administration and Management Standard.
- Read the information that is required in the Administration and Management Narrative for each section and complete the template.
- Save the Administration and Management Narrative in the appropriate evidence folder for each section.
- Open the TOC chart.
- Create a hyperlink to the words “The Narrative is complete” for each section as indicated below in the TOC chart (see Step 4.5 for creating hyperlinks).
- Place an “X” in the “Yes” box indicating that the Narrative is present and complete.

Create hyperlink here



	A	B	C	D	E	F
7	example if your organization checks "No," the explanation may be: "Agreement with my COA Coordinator that evidence will be reviewed on-site" or if your organization checks "NA," the explanation may be: "NA request granted by COA."					
8						
9	Narrative					
10	Yes	No	NA	Evidence		
11				▶The Narrative is complete		
12	Narrative Attachments					
13	Yes	No	NA	Evidence		
14				All COA-approved NA requests		
15				List of all NA's provided within the standards taken by your organization		
16	Self-Study Documentation					
17	Yes	No	NA	Evidence		
18				ETH 1	Mission statement	
19				ETH 1	Annual Report	
20				ETH 2	Conflict of interest policy	
21				ETH 2	Nepotism policy	



Step 4.2 – Preparing the Service Delivery Administration Narrative for Each Section

- a. Download the Narrative Template found on www.coacanadastandards.org in the Related Files for each Service Delivery Administration section.
- b. Read the information that is required in the Service Delivery Administration Narrative for each section and complete the template.
- c. Save the Service Delivery Administration Narrative in the appropriate evidence folder for each section.
- d. Open the TOC chart
- e. Create a hyperlink to the words “The Narrative is complete” for each section (see step 4.5 for creating hyperlinks).
- f. Place an “X” in the “Yes” box indicating that the Narrative is present and complete.

Step 4.3 – Preparing the Service Narrative for Each Section

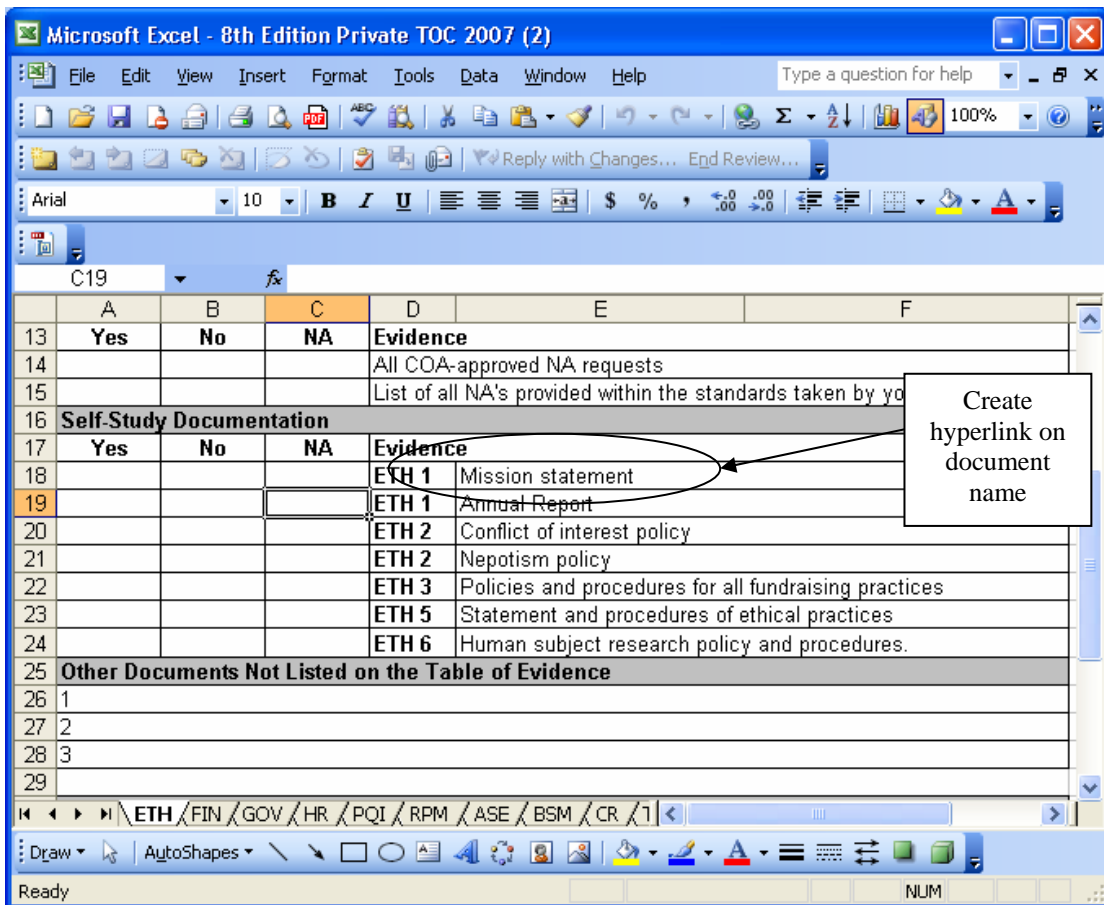
- a. Open the applicable sections in the TOC.
- b. Delete all non-applicable tabs at the bottom of the TOC chart for which the organisation will not be accredited.
- c. Download the Narrative Template found on www.coacanadastandards.org in the Related Files for each applicable Service section.
- d. Read the information that is required in the Service Narrative for each applicable section and complete the template.
- e. Save the Service Narrative(s) in the appropriate evidence folder(s) for each section.
- f. Open the TOC chart.
- g. Create a hyperlink to the words “The Narrative is complete” for each section (see step 4.5 for creating hyperlinks).
- h. Place an “X” in the “Yes” box indicating that the Narrative is present and complete.

Step 4.4 – Preparing the Evidence of Implementation for Applicable Self-Study Documents

- a. Within the Table of Contents, COA has listed out the self-study documents that are required for each section (see example below). We recommend that you also use the Tables of Evidence at www.coacanadastandards.org alongside the Table of Contents template as evidence may have changed since the creation of the template. If evidence has changed, you are welcome to add or delete evidence on the Table of Contents, as applicable.

NOTE: When saving documentation in the evidence folders, it may be helpful to label information with the standard number (e.g., PQI 1 Table of Contents) so that it is easier to find and create links later on.

- b. After saving relevant documents in the evidence folders, select the cell that contains the document name and create a hyperlink to the evidence (see Step 4.5 for creating hyperlinks). Repeat this for all evidence.
- c. Place an “X” in the “Yes” box indicating that the evidence is present.
- d. For any document not listed on the Table of Evidence, type the name of the document in the section labeled “Other Documents Not Listed on the Table of Evidence” and create a hyperlink to the evidence.



Step 4.5 – Creating Hyperlinks

To create a hyperlink in Microsoft [Excel](#), select the cell in which you would like to create a hyperlink. Choose the Insert Hyperlink command (or press Ctrl + K). Select an icon in the “Link To” column that represents the type of hyperlink you want to create (i.e., existing file or webpage, place in this document, create new document, e-mail address). Next, specify the location of the document that you want to link to by browsing for a file, webpage or bookmark. Once you’ve located the document, click OK; [Excel](#) then creates a hyperlink in the active cell (see example below).

8th Edition Private TOC 2007.xls

Performance and Quality Improvement (PQI) Evidence Checklist

Instructions: This tool is both the Table of Contents for your electronic and hard copy self-study, and a checklist for all documentation included in your self-study. Your organization is required to complete this checklist. If you are completing a hard copy self-study, add a page number column, complete the checklist, print it out, and place it in the front of each assigned section of standards. If you're completing an electronic self-study, complete the checklist and create a hyperlink to the cell with the relevant piece of evidence.

In the event your organization checks "No" for any of the evidence items, you must provide an explanation. For example if your organization checks "No" for "Long-term or strategic plan" you must provide evidence that evidence will be reviewed on-site" or "request granted by COA."

Narrative				
Yes	No	NA	Evidence	
			The Na	
Narrative Attachments				
Yes	No	NA	Evidence	
			Questi	
			Questi	
			All CO	
			List of	
Self-Study Documentation				
Yes	No	NA	Evidence	
			PQI 1	Long-term or strategic plan
			PQI 1	List of PQI committee/work group members
			PQI 2	PQI Plan
			PQI 2	Short-term/annual plan(s)
			PQI 2	Stakeholder satisfaction survey instruments
				Overview of performance and outcome expectations, achievements, and example of periodic stakeholder reviews/reports.
			PQI 3	
			PQI 4	Care record review tool(s)
			PQI 4	Case record review procedures
			PQI 5	Annual reports/outcomes
Other Documents Not Listed on the Table of Evidence				

Edit Hyperlink

Link to: Text to display: Long-term or strategic plan

Look in: PQI Evidence

- PQI 1 Strategic Plan.doc
- PQI 1 Workgroup Members.doc
- PQI 2 PQI Plan.doc
- PQI 2 Short Term Plans.doc

Address: S:\COA SHARED RESOURCES\Accreditation Operations\Accredi

Because hyperlinking instructions can vary based on the operating systems software, COA encourages organisations to visit Microsoft's website (<http://support.microsoft.com/>) to learn more about creating hyperlinks.

Step 4.6 – Indicating Not-Applicable Ratings

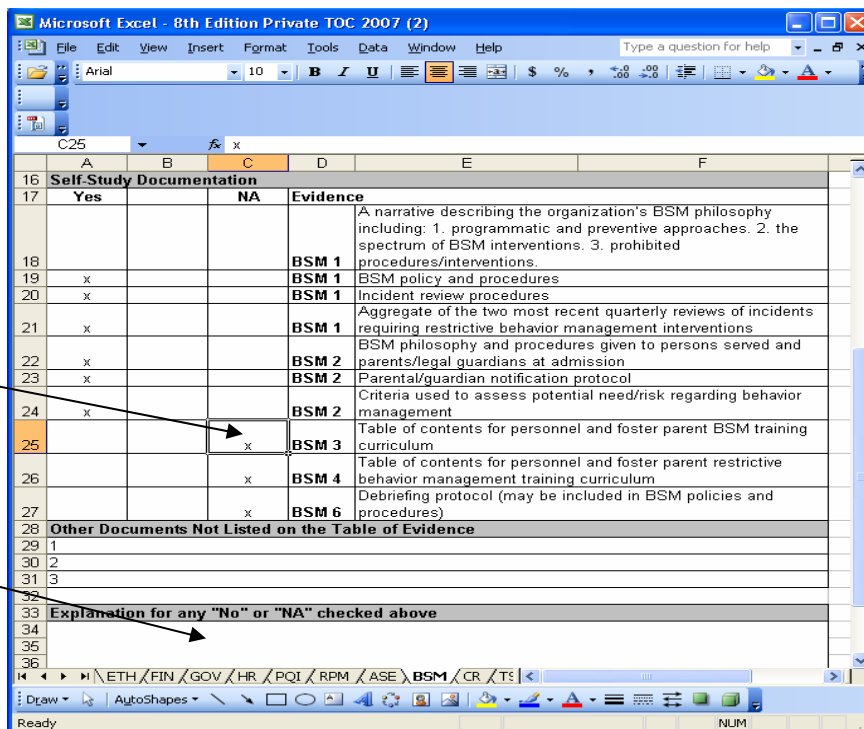
Organisations should never decide on their own that a standard is not applicable unless a rating of Not-Applicable (NA) is permitted within the *8th Edition Standards*.

- a. PERMISSIBLE RATINGS OF NOT APPLICABLE: If a rating of NA is permitted and the organisation determines that a rating of NA is applicable,

the organisation should be prepared to provide evidence on-site that supports that determination. Organisations are required to indicate on the Table of Contents all ratings of NA that are permissible and that they have automatically taken in the attachments section of the Narrative.

- b. COA-APPROVED RATINGS OF NOT APPLICABLE: For an exception to a standard that is *not* permitted within the *8th Edition Standards*, organisations should complete the [NA Request Form](#) located at in the *Accreditation Guidelines* or in the Related Files at www.coacanadastandards.com. The completed form should be submitted to COA for approval. To expedite the process of evaluating an NA request, please provide documentation in support of the organisation’s request. Upon approval from COA, the organisation should do the following:
 - i. Save the approved NA form in the appropriate evidence folder;
 - ii. For approved NAs in the Administration and Management, Service Delivery Administration, and Service standards, indicate the NA in the boxes provided in the Table of Contents template, select the cell, and create a hyperlink to the approved NA document in the evidence folder (see Step 4.5 for creating hyperlinks).
- c. Use the box at the bottom of the Table of Contents to provide a *brief* explanation for any “No” or “NA” checked above. This helps the reviewers quickly understand why this standard is NA for your organisation or why you have not provided the documentation listed.

Indicate your NA and create a hyperlink here. Write explanation for any “No” or “NA” indicated on the Table of Contents in the box at the bottom.



Self-Study Documentation			
Yes	NA	Evidence	
			A narrative describing the organization's BSM philosophy including: 1. programmatic and preventive approaches. 2. the spectrum of BSM interventions. 3. prohibited procedures/interventions.
x		BSM 1	BSM policy and procedures
x		BSM 1	Incident review procedures
x		BSM 1	Aggregate of the two most recent quarterly reviews of incidents requiring restrictive behavior management interventions
x		BSM 2	BSM philosophy and procedures given to persons served and parents/legal guardians at admission
x		BSM 2	Parental/guardian notification protocol
x		BSM 2	Criteria used to assess potential need/risk regarding behavior management
	x	BSM 3	Table of contents for personnel and foster parent BSM training curriculum
	x	BSM 4	Table of contents for personnel and foster parent restrictive behavior management training curriculum
	x	BSM 6	Debriefing protocol (may be included in BSM policies and procedures)
Other Documents Not Listed on the Table of Evidence			
			1
			2
			3
Explanation for any "No" or "NA" checked above			

NOTE: If the COA-approved NA Request is not included, the Peer Team will rate the standard accordingly



Step 5 - Preparing the READ ME FIRST File and the Executive Verification

The READ ME FIRST file contains basic information about the organisation and should include the following at a minimum:

- a. Contact Name(s) at the organisation if the Peer Team experiences problems;
- b. Phone Number(s);
- c. E-mail Address(es); and,
- d. Any other information that is pertinent to the organisation of the self-study document.

Optionally, the organisation may include hotel information, directions to the organisation, and/or local information about the city in the READ ME FIRST file.

The READ ME FIRST file should be saved in a place that is visible to the Peer Team when they open the CD Rom to begin their work.

The Executive Verification serves as an additional assurance that your self study is complete and COA standards have been implemented. This document must be signed by your Chief Executive Officer. This document, found in the Accreditation Guidelines Related Files, must be completed for both the hard copy and Electronic Self Studies.

The signed Executive Verification should be saved in the same place as the READ ME FIRST file.

Step 6 – Completing the Check List

COA recommends that organisations complete the check list below before submitting the self-study document to COA. This check list will help ensure that the organisation produces a quality document. When the self-study document is submitted, it should be complete in every respect.

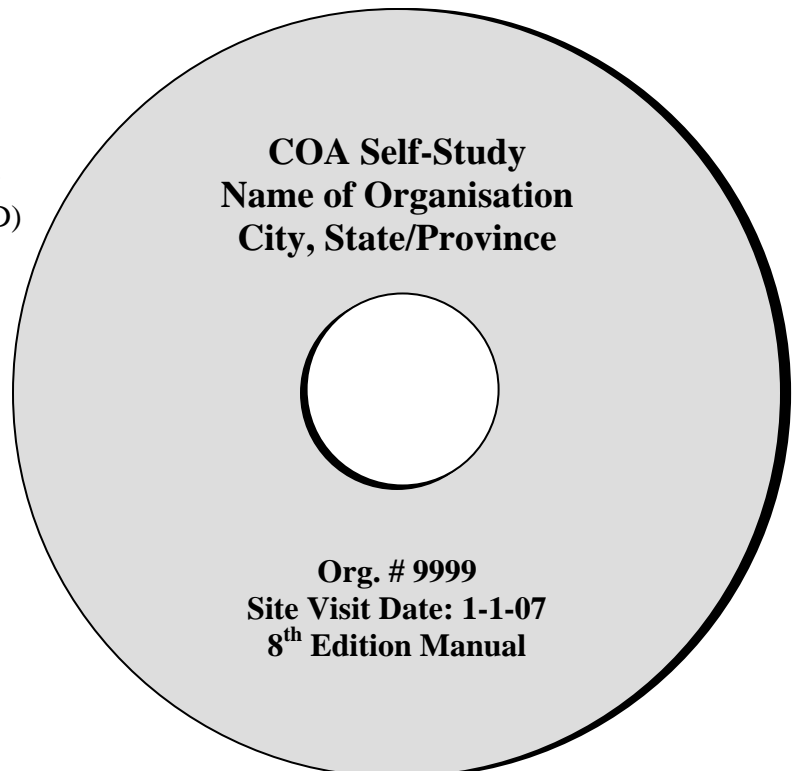
- A Narrative is complete for all Administration and Management, Service Delivery Administration, and Service sections and linked appropriately.
- All Administration and Management and Service Delivery Administration sections are present.
 - Documentation (e.g., narratives and evidence) is included and saved in the applicable evidence folder.
 - Evidence is linked appropriately.
- All applicable service sections are present.
 - Documentation (e.g., narratives and evidence) is included and saved in the applicable evidence folder.

- Evidence is linked appropriately.
- A completed Table of Contents is present for each applicable section. All non-applicable tabs in the Table of Contents have been deleted.
- All hyperlinks in the Table of Contents work and link to the appropriate documents.
- All applicable forms have been completed, saved in the Forms folder, and are linked appropriately.
- All COA-approved NA Request Forms are included in the “All approved NA Request Forms” section of the *Table of Contents*, as applicable.
- All “Yes,” “No,” or “NA” boxes are checked on the Table of Contents and explanations for all “No’s” and “NA’s” are included.
- A READ THIS FIRST file with contact information is present.
- The signed Executive Verification is present.
- The entire self-study document has been laid out per COA’s Electronic Self-Study Instructions.

Step 7 - Burning and Labeling the CD

Follow the instructions for the software that you are using to burn the [CD](#). Ensure that all relevant files and folders are burned on the [CD-ROM](#). These would include: Evidence Folders, Table of Contents, and the PEERS READ ME FIRST file, and the Forms Folder. After burning the [CD](#), verify that all links on the Table of Contents work and link to the appropriate documents. Label the [CD](#) with the following information (see example below):

- COA Self-Study
- Organisation Name
- City, State/Province
- Organisation ID Number
(please ask your Coordinator if you are unaware of your ID)
- Site Visit Date
- Manual under which you are being accredited
(e.g., 8th Edition Manual)





Step 8 - Sending the Electronic Self-Study

Once the self-study is complete, send a copy of the electronic self-study document to COA at the address listed below 10 weeks prior to the site review (see your organisation's Accreditation Plan for the self-study due date).

Council on Accreditation
Attn: Org. ID#___ Self-Study
45 Broadway, 29th Floor
New York, NY 10006

If the self-study document submitted to COA has been properly assembled as per the instructions contained in this document, you will be instructed to send a copy of your self-study to the entire Peer Review Team. If the self-study needs remediation or adjustments, your COA Coordinator will give you instructions regarding what to change and where and when to submit the changes. COA recommends that the organisation send the self-study document via a courier service in order to track the package and ensure that it arrives at the desired location.



Glossary of Electronic Terms

Acrobat: A product from *Adobe Systems, Inc.*, for manipulating documents stored in Portable Document Format. Acrobat provides a platform-independent means of creating, viewing, and printing documents.

Compact disk/compact disc (CD): A small optical disk on which data such as music, text, or graphic images can be digitally encoded.

CD Burner: A device which shoots a laser and writes data to a compact disc, allowing a user to store, retrieve, and read documents in digital format.

Compact disc read only memory (CD-ROM): A compact disc that functions as read-only memory.

Compact disc recordable (CD-R): A compact disc on which you can write only once and thereafter is read-only.

Microsoft Excel (XLS): A spreadsheet program from Microsoft, part of their *Microsoft Office* suite of productivity tools and one of the most widely used spreadsheets.

Microsoft Word (DOC): A popular word processor, part of the *Microsoft Office* suite.

Portable Document Format (PDF): The native file format for *Adobe Systems' Acrobat*. PDF is the file format for representing documents in a manner that is independent of the original application software, hardware, and operating system used to create those documents. A PDF file can describe documents containing any combination of text, graphics, and images in a device-independent and resolution-independent format. These documents can be one page or thousands of pages, very simple or extremely complex, with a rich use of fonts, graphics, colour, and images.

PowerPoint (PPT): A *Microsoft* application for creating presentations, speeches, slides, etc.

Scanner: A device that allows a finely focused beam of light to move in a systematic pattern over a surface in order to reproduce and subsequently transmit a digital image.



Frequently Asked Questions

[What is the electronic self-study?](#)

[What are the benefits of completing the self-study electronically?](#)

[Can our organisation submit part of our self-study electronically and part of it in hard copy format?](#)

[Do we have to submit our self-study electronically?](#)

[I do not understand how to scan a document or burn a CD. Can I call my COA Coordinator for help?](#)

[Do I really need the full version of Adobe Acrobat? Can I just use the free version of the Reader located on Adobe's website?](#)

[Do I need to purchase a scanner and scanning software? Can I have a copy center scan my hard copy documents?](#)

[What if our system crashes while I am doing the electronic self-study and we lose everything?](#)

[I work for a public agency \(or an EAP or FMDC\). Do you have electronic procedures for these separate business lines?](#)

[What if we decide late in the process that we want to complete an electronic self-study? Can we just do it and send one to COA?](#)

[Does the electronic self-study affect the on-site review in any way?](#)

[The instructions indicate that we should submit only relevant documentation. Does that mean that we cannot submit an entire document \(e.g., bylaws\) as evidence of compliance for a standard?](#)

Question: What is the electronic self-study?

Answer: The electronic self-study is essentially the same as COA's regular self-study with one major exception. Rather than organisations submitting a binder filled with paper documents showing evidence of implementation, the electronic self-study is submitted on a CD-ROM.

Question: What are the benefits of completing the self-study electronically?

Answer: There are many benefits to many different stakeholders - Peer Reviewers, Organisations, and COA staff. Some of these benefits include:

- Organisations save a significant amount of money on paper, copying, and shipping.
- Organisations save time preparing the self-study document because they only need to produce one CD and then copy it.
- Peers no longer have to lift heavy boxes or carry around big binders.
- Peers have the convenience of being able to review an entire self-study any place they can bring a laptop computer.
- COA saves money on shipping self-studies to Peers and responses to Commissioners.



Question: Can our organisation submit part of our self-study electronically and part of it in hard copy format?

Answer: If you choose to complete an electronic self-study, you must submit the entire self-study on CD-Rom. Please do not submit a self-study in both electronic and hard copy format. Choose one format or the other.

Question: Do we have to submit our self-study electronically?

Answer: No, all organisations still have the option of completing their self-study in hard copy format. The electronic self-study submission process is voluntary.

Question: I do not understand how to scan a document or burn a CD. Can I call my COA Coordinator for help?

Answer: COA Coordinators are very talented in many ways however they are not necessarily technical experts. They can provide you with a lot of information and technical assistance about the self-study and the accreditation process, however you must have the internal technical proficiency. Please consult your internal IT experts or some other outside source if you do not understand a technical piece related to completing the self-study.

Question: Do I really need the full version of Adobe Acrobat? Can I just use the free version of the Reader located on Adobe's website?

Answer: If you need to use Adobe Acrobat to read a document, you can download the free Acrobat Reader from <http://www.adobe.com/>. If you wish to convert certain electronic or paper documents to readable PDF files for the Peers to review electronically, you will need to purchase the full version of Adobe Acrobat. COA does not require an organisation to purchase the full version for the electronic self-study process.

Question: Do I need to purchase a scanner and scanning software? Can I have a copy center scan my hard copy documents?

Answer: While the organisation may not need to purchase a scanner and scanning software, it will need to find a method for saving hard copy documents in an appropriate electronic format for the self-study. Using a scanner and scanning software would allow the organisation to do this. However, an organisation may choose to bring their hard copy documents to a copy center for scanning. When using an outside entity the organisation should ensure that all scanned documents comply with COA's document extension requirements.

Question: What if our system crashes while I am doing the electronic self-study and we lose everything?

Answer: COA strongly recommends that the organisation consider creating back-up copies of its self-study in either electronic or hard copy format in case the organisation loses documentation or the Peer Team experiences difficulties in reviewing the self-study prior to the site visit.

Question: I work for a public agency (or an EAP or FMDC). Do you have electronic procedures for these separate business lines?

Answer: COA has developed separate electronic self-study instructions for each of COA's separate business lines: EAP, FMDC, Canadian organisations and public agencies.



Please send an e-mail to your Coordinator if you are interested in getting a copy for your organisation.

Question: What if we decide late in the process that we want to complete an electronic self-study? Can we just do it and send one to COA?

Answer: If you plan to complete an electronic self-study, you must contact your Accreditation Coordinator at COA so that efforts can be made to staff the Peer Review Team with individuals who have easy access to a computer and are proficient in the use of computers.

Question: Does the electronic self-study affect the on-site review in any way?

Answer: Essentially the on-site review by the Peer Team occurs as it would if the organisation had done a hard copy self-study however there is one major difference. Since the Peer Team is reviewing the self-study electronically, the organisation needs to make a laptop or desktop computer available to the team in the room in which they will be meeting during the site visit. Peer Reviewers are not required to bring their own laptops on the site visit.

Also, if the organisation essentially operates in a paperless environment, they should inform the Peer Team before the site visit and make arrangements during the on-site review to show the Peer Team how to access needed documents.

Question: The instructions indicate that we should submit only relevant documentation. Does that mean that we cannot submit an entire document (e.g., bylaws) as evidence of implementation for a standard?

Answer: If an organisation decides to save an entire document (e.g., bylaws) in their Electronic Self-Study, they should create bookmarks in the document and hyperlinks in the table of contents only to the relevant pages of that document. Pages must be clearly labeled so that Peer Reviewers know where to find the relevant documentation. Organisations should also indicate in their "Read Me First" file when they are using this method of bookmarks and hyperlinks.

The following instructions describe the process of creating bookmarks and hyperlinks. NOTE: Please review and test these instructions for creating bookmarks before you create multiple bookmarks. These instructions were obtained from the Microsoft and Adobe help websites and have been known to not work effectively.

Step 1: Creating Bookmarks

Create bookmarks first by opening the document that you want to save in its entirety as part of the Electronic Self-Study.

Step 1.1: Creating Bookmarks in Word Files

If the document is a Word file, insert bookmarks on all relevant pages by doing the following:

1. Select an item you want a bookmark assigned to (i.e., highlight a word, sentence, paragraph, or several paragraphs to which you want to assign a bookmark), or click where you want to insert a bookmark.
2. On the **Insert** menu, click **Bookmark**.
3. Under **Bookmark name**, type or select a name.
4. Click **Add**.

Note: Bookmark names must begin with a letter and can contain numbers. You



can't include spaces in a bookmark name. However, you can use the underscore character to separate words -- for example, "First_heading."

Step 1.2: Creating Bookmarks in Adobe Acrobat Files

If the document is an Adobe Acrobat file, insert bookmarks on all relevant pages by doing the following:

1. Click the Bookmarks tab in the navigation pane to bring the Bookmarks palette to the front.
2. Click the bookmark under which you want to place the new bookmark. If you don't select a bookmark, the new bookmark is automatically added at the end of the list.
3. Use the Next Page and Previous Page arrows on the command bar to navigate to the destination in the PDF document to which you want the bookmark to link.
4. Modify the view so it directs the reader's attention to the correct information. For more information, see *Setting magnification options* in the Adobe Acrobat help menu. Any magnification option you set will apply to any new bookmarks you create, as well as to the current bookmark, until you change the option.
5. Choose New Bookmark from the Bookmarks palette menu, or select the new bookmark icon at the bottom of the Bookmarks palette.
6. Type in the text for the bookmark label, and press Enter.

Step 2: Saving the "Bookmarked" Document

Once you've created all of the relevant bookmarks, save the entire "bookmarked" document in the one of the evidence folders.

Note: Because Peer Reviewers use the table of contents to navigate the Electronic Self-Study, COA does not prescribe in which evidence folders organisations should save their evidence.

Step 3: Creating Hyperlinks in the Table of Contents

1. Type the name of the evidence in the appropriate cell to which you are creating a hyperlink (e.g., Intake Procedure).
2. Select the cell and choose **Insert** and **Hyperlink** (or press Ctrl+K) on the menu bar. To link to the document, click **Existing file** under **Link to**. Locate and select the document to which you want to link.
3. Once you have selected the document, do not click **OK**. Instead, go to the end of the location string, enter a pound sign (#), and then enter the name of the bookmark that is being referenced in the evidence immediately after the pound sign (e.g., H:\MyDocuments\CounselorHandbook.doc#**Intake_Procedures**). Once you've entered this information, then click **OK**.
4. Test the hyperlink to ensure that the link goes directly to the bookmarked page.