



Accreditation Milestone Timeline Twelve Month

Org Name:
Org ID:

Self Study Target:
Site Visit Target:

Monthly Timeline	Milestone	Task	Document to be Submitted	Due Date	Recommended Tools and Training to Assist Organization
Within Month 1	<ul style="list-style-type: none"> Self-Study Planning Process 	<ul style="list-style-type: none"> Appoint a Coordinator to track assignments, monitor work completion, and edit and assemble the final draft of the self-study document. The Coordinator’s role includes ensuring: <ul style="list-style-type: none"> ✓ Development of the self-study document; ✓ Evaluation of the organization’s current level of implementation with the Standards and triage of areas that need improvement; ✓ Staff being informed of relevant accreditation information; ✓ Remaining up-to-date on Standards. 	<ul style="list-style-type: none"> Work Plan Coordinator Name & Contact Information 		<ul style="list-style-type: none"> Evidence of Implementation Worksheets Policies and Procedures Checklist Intensive Accreditation Training (IAT) Tips for Getting Ready for Accreditation Webinar How to Use My COA Webinar How to do an Initial Assessment of Your Organization's Practices Against COA's 8th Edition Standards Webinar
	<ul style="list-style-type: none"> Governance (GOV) Plan 	<ul style="list-style-type: none"> Review the organization’s by-laws. Review organization’s Board committee structure. Review organization’s Board manual. Review Board membership for community representation (GOV 2). Ensure governing body reviews and adopts policies and evaluates implementation (GOV 6.04). Assess areas of organizational risk (GOV 6.08 and RPM 2.01). 	<ul style="list-style-type: none"> Governing Body Manual Table of Contents Description of Governing Body Members 		<ul style="list-style-type: none"> Governing Body Skills Worksheet Tip Sheet - Audit and Finance Committee Tip sheet - Board Minutes Governing Body Responsibilities Board Manual Table of Contents Template



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Within Month 4	<ul style="list-style-type: none"> Administrative Service Environment (ASE) - Emergency Preparedness 	<ul style="list-style-type: none"> Review the organization’s emergency response plan that facilitates and coordinates emergency preparedness and addresses all elements of ASE 7. Ensure fire drills (ASE 6.02) are conducted at proper frequency. 	<ul style="list-style-type: none"> Emergency Preparedness Plan 		
Within Month 5	<ul style="list-style-type: none"> Client/Staff Ratios 	<ul style="list-style-type: none"> Review organization’s method for assigning and managing organization’s caseload. 	<ul style="list-style-type: none"> Caseload size data by individual staff 		<ul style="list-style-type: none"> Caseload Qualifications Worksheet



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Within Month 6	<ul style="list-style-type: none"> Performance and Quality Improvement (PQI) Plan 	<ul style="list-style-type: none"> Review COA PQI Plan Model. Review the organization’s PQI plan and procedures to ensure that they address PQI Standards including sections: <ul style="list-style-type: none"> ✓ 3.02: Process inclusive of staff and stakeholders to develop outcomes and identify data sources; ✓ 3.04: Outcomes results and data reviewed by stakeholders; ✓ 5.05: Staff and stakeholders review results of improvement efforts; ✓ 5.06: Improvement efforts and changes have been communicated throughout the organization; ✓ 6.01: Information packet describing process developed for stakeholders; ✓ 6.02: PQI material incorporated into new hire packets and orientation. 	<ul style="list-style-type: none"> PQI Plan and procedures 		<ul style="list-style-type: none"> PQI Operational Procedures Worksheet Initial PQI Review Worksheet PQI Stakeholder Packet Tip Sheet – Stakeholder Involvement Performance and Quality Improvement Training PQI Webinar Series
	<ul style="list-style-type: none"> Medication Management Procedures 	<ul style="list-style-type: none"> Review COA’s definitions of medication management procedures and ensure that the organization’s medicine is stored and documentation of such in accordance with the applicable RPM section 3 Standards. Make certain that evidence of medication management training is documented. Insure that relevant areas of state laws and regulations are addressed. 	<ul style="list-style-type: none"> Medication management procedures 		<ul style="list-style-type: none"> Medication Management Procedures Tool – Log in to your My COA account to access this tool in the Announcements section.



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Within Month 7	<ul style="list-style-type: none"> Risk Prevention Management (RPM) Procedures 	<ul style="list-style-type: none"> Review the organization’s mechanism for analyzing internal risks meet RPM Standards. Draft and/or revise the organization’s risk management procedures in accordance with RPM 2.01. 	<ul style="list-style-type: none"> Risk Management Procedures 		
	<ul style="list-style-type: none"> Training and Supervision (TS) 	<ul style="list-style-type: none"> Review annually and revise personnel training and development program (TS 1.03) including identifying specific personnel professional growth plans and conducting an annual assessment of the organization’s training needs. 	<ul style="list-style-type: none"> Annual Staff Training Program 		



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Within Month 9	<ul style="list-style-type: none"> Behavior Support and Management (BSM) Procedures & Policies 	<ul style="list-style-type: none"> Identify the organization’s permitted and prohibited interventions. Insure that relevant aspects of state laws and regulations are addressed. Explain BSM philosophy and procedures including addressing harassment/violence and notification and consent of parent/guardian for restrictive practices (BSM 2.01). 	<ul style="list-style-type: none"> BSM Policy Procedures 		<ul style="list-style-type: none"> Behavior Support and Management Policy and Procedures Tool – Log in to your My COA account to access this tool in the Announcements section.
Within Month 10	<ul style="list-style-type: none"> Risk Prevention Management (RPM) Reports 	<ul style="list-style-type: none"> Submit quarterly (RPM 2.02) and annual (RPM 2.01) risk management reports, including, as applicable, analyses and improvement action plans. 	<ul style="list-style-type: none"> Risk Management Reports 		<ul style="list-style-type: none"> Improvement Plan template



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	<ul style="list-style-type: none"> Governance (GOV) Plan 	<ul style="list-style-type: none"> Review the organization's by-laws. Review organization's Board committee structure. Review organization's Board manual. Review Board membership for community representation (GOV 2). Ensure governing body reviews and adopts policies and evaluates implementation (GOV 6.04). Assess areas of organizational risk (GOV 6.08 and RPM 2.01). 	<ul style="list-style-type: none"> Governing Body Manual Table of Contents Description of Governing Body Members 		<ul style="list-style-type: none"> Governing Body Skills Worksheet Tip Sheet - Audit and Finance Committee Tip sheet - Board Minutes Governing Body Responsibilities Board Manual Table of Contents Template



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Within Month 3	<ul style="list-style-type: none"> Performance and Quality Improvement (PQI) Plan 	<ul style="list-style-type: none"> Review COA PQI Plan Model. Review the organization’s PQI plan and procedures to ensure that they address PQI Standards including sections: <ul style="list-style-type: none"> ✓ 3.02: Process inclusive of staff and stakeholders to develop outcomes and identify data sources; ✓ 3.04: Outcomes results and data reviewed by stakeholders; ✓ 5.05: Staff and stakeholders review results of improvement efforts; ✓ 5.06: Improvement efforts and changes have been communicated throughout the organization; ✓ 6.01: Information packet describing process developed for stakeholders; ✓ 6.02: PQI material incorporated into new hire packets and orientation. 	<ul style="list-style-type: none"> PQI Plan and procedures 		<ul style="list-style-type: none"> PQI Operational Procedures Worksheet Initial PQI Review Worksheet PQI Stakeholder Packet Tip Sheet – Stakeholder Involvement Performance and Quality Improvement Training PQI Webinar Series



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Within Month 4	<ul style="list-style-type: none"> Administrative Service Environment (ASE) - Emergency Preparedness 	<ul style="list-style-type: none"> Review the organization’s emergency response plan that facilitates and coordinates emergency preparedness and addresses all elements of ASE 7. Ensure fire drills (ASE 6.02) are conducted at proper frequency. 	<ul style="list-style-type: none"> Emergency Preparedness Plan 		
Within Month 5	<ul style="list-style-type: none"> Risk Prevention Management (RPM) Procedures 	<ul style="list-style-type: none"> Review the organization’s mechanism for analyzing internal risks meet RPM Standards. Draft and/or revise the organization’s risk management procedures in accordance with RPM 2.01. 	<ul style="list-style-type: none"> Risk Management Procedures 		
	<ul style="list-style-type: none"> Client/Staff Ratios 	<ul style="list-style-type: none"> Review organization’s method for assigning and managing organization’s caseload. 	<ul style="list-style-type: none"> Caseload size data by individual staff 		<ul style="list-style-type: none"> Caseload Qualifications Worksheet
Within Month 6	<ul style="list-style-type: none"> Medication Management Procedures 	<ul style="list-style-type: none"> Review COA’s definitions of medication management procedures and ensure that the organization’s medicine is stored and documentation of such in accordance with the applicable RPM section 3 Standards. Make certain that evidence of medication management training is documented. Insure that relevant areas of state laws and regulations are addressed. 	<ul style="list-style-type: none"> Medication management procedures 		<ul style="list-style-type: none"> Medication Management Procedures Tool – Log in to your My COA account to access this tool in the Announcements section.



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	<ul style="list-style-type: none"> PQI 	<ul style="list-style-type: none"> Provide description of generated reports and indication of who they are provided to and how frequently they are provided. Identify what is being measured by your organization: <ul style="list-style-type: none"> ✓ Strategic goals and objectives per PQI 1 and GOV 6.03; ✓ Operations and management performance per PQI 3.03 and PQI 4; ✓ Program effectiveness measures per PQI 3.03 and PQI 4; ✓ Client outcomes per PQI 3.03 and PQI 4; ✓ Data monitoring of risks per PQI 4; ✓ Case record review including accurately completed release of information forms and client rights notification (CR 2.04), posting client rights at all locations (CR 1.02). Identify the responsible parties and describe the involvement of the Executive Director, senior management and other stakeholders in the organization's PQI process (PQI 2.02). 	<ul style="list-style-type: none"> PQI Committee Minutes PQI Reports PQI Aggregate Outcome data 		<ul style="list-style-type: none"> PQI Operational Procedures Worksheet Initial PQI Review Worksheet PQI Stakeholder Packet Tip Sheet – Stakeholder Involvement Performance and Quality Improvement Training PQI Webinar Series



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	<ul style="list-style-type: none"> Behavior Support and Management (BSM) Procedures & Policies 	<ul style="list-style-type: none"> Identify the organization’s permitted and prohibited interventions. Insure that relevant aspects of state laws and regulations are addressed. Explain BSM philosophy and procedures including addressing harassment/violence and notification and consent of parent/guardian for restrictive practices (BSM 2.01). 	<ul style="list-style-type: none"> BSM Policy and Procedures 		<ul style="list-style-type: none"> Behavior Support and Management Policy and Procedures Tool – Log in to your My COA account to access this tool in the Announcements section.
Within Month 8	<ul style="list-style-type: none"> Risk Prevention Management (RPM) Reports 	<ul style="list-style-type: none"> Submit quarterly (RPM 2.02) and annual (RPM 2.01) risk management reports, including, as applicable, analyses and improvement action plans. 	<ul style="list-style-type: none"> Risk Management Reports 		<ul style="list-style-type: none"> Improvement Plan template



Accreditation Milestone Timeline

Six Month

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Within Month 1	<ul style="list-style-type: none"> Self-Study Planning Process 	<ul style="list-style-type: none"> Appoint a Coordinator to track assignments, monitor work completion, and edit and assemble the final draft of the self-study document. The Coordinator's role includes ensuring: <ul style="list-style-type: none"> ✓ Development of the self-study document; ✓ Evaluation of the organization's current level of implementation with the Standards and triage of areas that need improvement; ✓ Staff being informed of relevant accreditation information; ✓ Remaining up-to-date on Standards. 	<ul style="list-style-type: none"> Work Plan Coordinator Name & Contact Information 		<ul style="list-style-type: none"> Evidence of Implementation Worksheets Policies and Procedures Checklist Intensive Accreditation Training (IAT) Tips for Getting Ready for Accreditation Webinar How to Use My COA Webinar How to do an Initial Assessment of Your Organization's Practices Against COA's 8th Edition Standards Webinar



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	<ul style="list-style-type: none"> Performance and Quality Improvement (PQI) Plan 	<ul style="list-style-type: none"> Review COA PQI Plan Model. Review the organization’s PQI plan and procedures to ensure that they address PQI Standards including sections: <ul style="list-style-type: none"> ✓ 3.02: Process inclusive of staff and stakeholders to develop outcomes and identify data sources; ✓ 3.04: Outcomes results and data reviewed by stakeholders; ✓ 5.05: Staff and stakeholders review results of improvement efforts; ✓ 5.06: Improvement efforts and changes have been communicated throughout the organization; ✓ 6.01: Information packet describing process developed for stakeholders; ✓ 6.02: PQI material incorporated into new hire packets and orientation. 	<ul style="list-style-type: none"> PQI Plan and procedures 		<ul style="list-style-type: none"> PQI Operational Procedures Worksheet Initial PQI Review Worksheet PQI Stakeholder Packet Tip Sheet – Stakeholder Involvement Performance and Quality Improvement Training PQI Webinar Series
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