**Document Checklist**

All documents listed below are embedded elsewhere in the questionnaire, and have been listed here as a convenient checklist/index for you.

**(please ensure all documents requested are submitted)**

**1. Organisational**

|  |
| --- |
| Response to prior OMR report requirements and recommendations |[ ]
| 1a. Organogram / Organisational Chart |[ ]
| 1b. Terms of Reference for all Committees, Boards |[ ]
| 1c. List of key officer roles and who holds each role |[ ]
| 1d. External Moderator’s report |[ ]
| 1e. Organisations Governance Documents (for example Bye-laws) |[ ]
| 1f. Working Online policy |[ ]
| 1g. Social Media / digital policy |[ ]
| 1h. Lone working policy |[ ]
| 1i. Annual accounts/reports for the last 3 years |[ ]
| 1j. Please provide a copy of your most recent business plan |[ ]

**2. Membership (no documents required for this section)**

**3. Ethics and Conduct**

|  |
| --- |
| 3a. All relevant Codes of Ethics and Professional Practice/Conduct |[ ]

**4. Diversity and Equality**

|  |
| --- |
| 4a. Diversity and Equality policy |[ ]

**5. Professional Practice Policies**

|  |
| --- |
| 5a. CPD Policy and procedures |[ ]
| 5b. Any additional supporting CPD documentation |[ ]
| 5c. Suitability/Return to Practice Policy and procedures |[ ]
| 5d. Supervision Policy |[ ]
| 5e. Details of supervision courses  |[ ]
| 5f. Re-accreditation Policy, procedures, and forms, including appeals procedures |[ ]
| 5g. Please provide a selection of re-accreditation submissions (including pass, fail or referral) |[ ]

**6. Safeguarding**

|  |
| --- |
| 6a. Safeguarding Policy |[ ]

**7. Complaints**

|  |
| --- |
| 7a. Complaints tracking or log |[ ]
| 7b. Organisational complaints and appeals procedure |[ ]
| 7c. Grievance procedures and appeals process |[ ]
| 7d. Accreditation complaints process and appeals process |[ ]
| 7e. Complaints and appeals processes, including those for any members who are not UKCP accredited, or complaints about supervisors |[ ]

**8. Conflicts of Interest**

|  |
| --- |
| 8a. Conflict of Interest policies and procedures |[ ]
| 8b. Dual relationships/roles policy |[ ]

**9. Accrediting individuals**

|  |
| --- |
| 9a. Examples of submitted documentation |[ ]
| 9b. Application form and procedures for accreditation |[ ]
| 9c. Guidance notes or other supporting documentation |[ ]

**10. Accrediting other organisations or training programmes**

|  |
| --- |
| 10a. Examples of submitted documentation |[ ]
| 10b. Application form and procedures for accreditation |[ ]
| 10c. Outline of your quality review/re-assessment process(es) |[ ]
| 10d. Guidance notes or other supporting documentation |[ ]
| 10e. Other relevant documentation, including training standards and etc |[ ]