

TEPHINET Accreditation of Field Epidemiology Training Programs: Document Management Tips

Document management plays an important role in preparing for the accreditation process. Much of the work required of a program in preparing for applying for accreditation involves gathering and reviewing extensive amounts of documentation. Having your program's information organized as well as possible beforehand will help facilitate this process.

General Best Practices in Document Management

1. Centralize as much as possible.

It is likely that your program maintains some hybrid system of file management consisting of both hard copy and digital files. If your program does not have a central hub for all of its important documentation, you should consider creating one, as this will minimize confusion and duplication, establish a clear home for saving documents, and allows for more easy access to files when you need them.

2. Develop and maintain consistent naming conventions.

Without consistency in the way files are named, even the most robust document management systems will fail to deliver effective results. You must ensure that your team knows and uses the naming conventions, which should be customized to suit your program's needs.

3. Review, archive and purge documents periodically.

You must develop a policy on the retention of documents, identifying which documents should be archived and/or purged and when. Take into consideration how to handle and retain documents containing private information.

In short, spend some time with your team thinking through and identifying your requirements and devising policies that are sustainable for the operations of your program, knowing that you can always continue improving as you build more capacity.

Choosing a Document Management System

Key features and functionalities of document management systems:

- Storage of various file types
- Keyword search
- Access restrictions on certain documents
- Versioning (the ability to track and save different versions of documents and recover old versions)
- The ability to see which users are accessing which documents
- Mobile device support

Things to look for:

- Security
- File structure
- Searching
- Ease of use
- Mobile access
- Integration with existing systems in use (such as email)
- Virus scanning compatibility

Please consult your organization's IT department for help in identifying and implementing specific systems.