Guidance for sending documentation (Updated September 2026)

All Accommodation providers are asked to provide pre-inspection documentation (Stages 1 & 2) electronically; this should be uploaded directly to your SharePoint channel. The private link will be sent to you in due course. Providers will need to read the guidance on downloading the Microsoft Multi Factor Authoriser app.
How to Access a SharePoint File Using MFA

FAQs

This is also the case for on-site documentation (Stage 3), which may also be presented electronically – though any documents that are normally stored in paper form may, of course, be presented this way to inspectors on the day of inspection.

Before the inspection

Your Stage 1 documents: Docs 2, 6, 7 and 9 can be uploaded and once signed off by the unit, a date will be established for inspection. Stage 2 will then commence Inspection timeline

Preparing Stage 2 documentation

Stage 2 documentation is listed in the Documents list as part of the Accommodation CRG on the Accreditation Unit website. This also contains guidance on the preparation of documents to comply with GDPR requirements.

Inspection documents

When submitting documents electronically, it is helpful if you make a folder for each area of documentation listed and put files of all documents relating to that area within the folder (even if there is only one document in the folder).

Please label folders clearly with the document number and a brief description, e.g. 20 Complaints procedures. Do not use the complete description from the Stage 2 list as the folder or document name; use a shortened version.

See Appendix 1 for a sample set of Stage 2 documentation presented electronically.

Templates

Templates are available online for several documents. These are marked with (T) on the documents list.

T1 Inspection Application

T6 People to be seen form

T6c Admin and staff quals and experience

T7 Action Plan

T10 Organisational plan
T11 Self Evaluation

T12 List of Staff

If you have documents that are not available electronically, please inform the reporting inspector by email before the Stage 2 documentation is sent to the SharePoint channel, indicating the document number(s). Inspectors will look at these documents when they are with you on site.

Submitting Stage 2 documentation

1. Upload Stage 2 documentation to the SharePoint channel set up for you. A link will be sent at inspection confirmation (approximately eight weeks before your inspection).

2. Your inspection team will be able to see the documents in the channel until your inspection is over.

Stage 3 documentation: What are the options?

Providers are also asked to prepare additional documentation (Stage 3) for inspectors to refer to during the inspection. Please discuss with your reporting inspector how it can best be presented.

There are three options:

1. Upload the Stage 3 documents to the provider SharePoint channel.

2. For documents that normally require redactions or are kept only in paper form, indicate these on the Stage 3 documentation list and present them in paper files in the inspectors' base room.

3. Be present with an inspector to view the documents on your company computer.

Stage 3 documents must be clearly and consistently labelled and numbered in the same way as Stage 2 documents.

During the inspection

Stage 2 documentation

Inspectors will have access to the Stage 2 documents on the provider SharePoint channel during interviews; some inspectors may wish to refer to documents and will, therefore, have their tablets or laptops open.

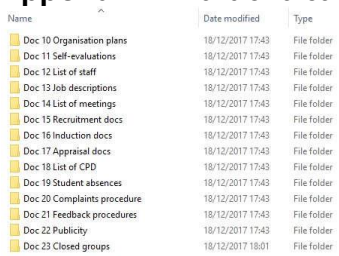
Stage 3 documentation

Inspectors may wish to have copies of certain non-confidential Stage 3 documents to take for reference when writing the inspection report. These should be uploaded to the SharePoint folder 'Stage 3'. However, these documents will only be retained by the inspectors after the end of the inspection with your specific agreement.

After the inspection

The Accreditation Unit are required to keep all inspection documentation until the final, agreed form of your report is published on the Accreditation Unit website. Stage 2 documents will be kept in your SharePoint folder for the required time of 4 years, after which it shall be deleted.

Appendix 1. Part of a sample set of Stage 2 documentation presented electronically



The provider has created a separate folder for each document, even if the folder contains only one file. This is helpful as it keeps the documents in order.

Annual declarations and Notification of change can be found here: Annual Declaration

Notification of Change