Guidance on Navigating Self-Study Templates in the Accreditation Management Platform

This document supports members in using self-study templates in [AAQEP's Accreditation Management Platform (AMP)] hosted by Weave.

Note: Weave offers a wide-variety of **In-App Resources**, accessible via the question mark icon in the top menu bar, to help you navigate throughout the platform.

Contents

Role of the AMP

Q: What's the AMP?

A: The AMP serves as a secure repository for your self-study and all associated documents. In addition to serving as an ongoing workspace for report authors, the platform facilitates controlled and easy access to completed reports for review team members, state observers, accreditation commissioners, and staff.

Access and Technical Support

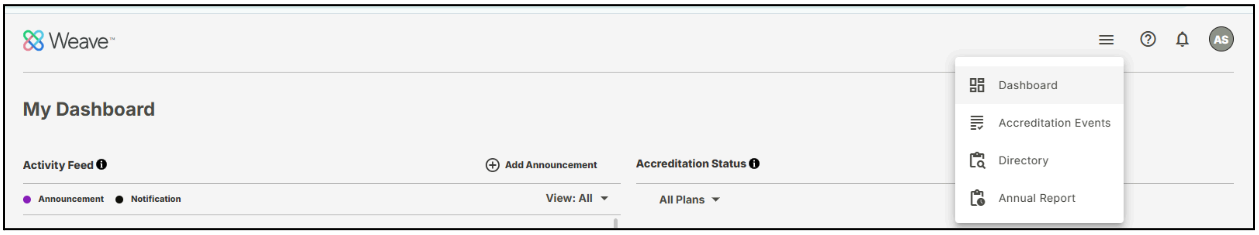
Q: Who can access templates in the AMP?

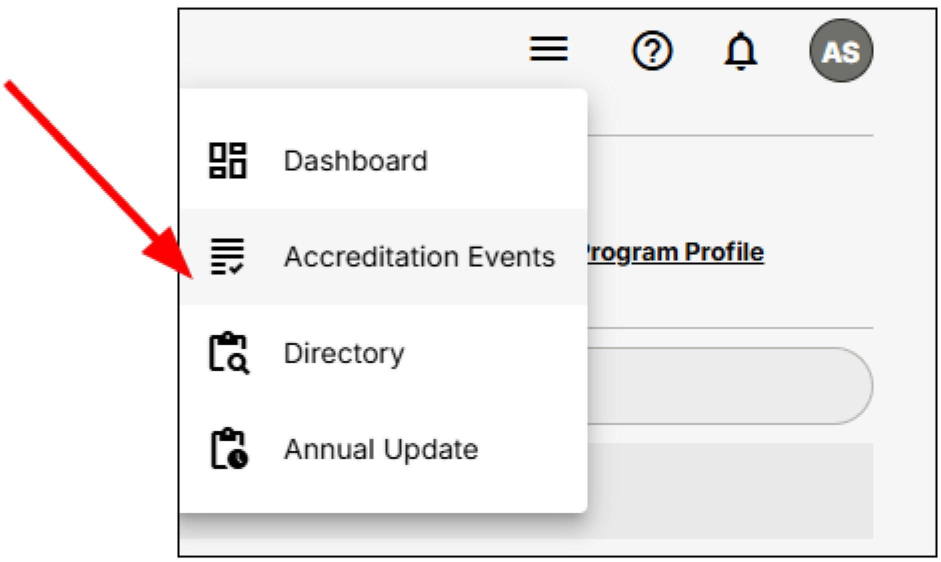
A: A provider's **primary contact** is the only individual to whom AAQEP can grant template access. Once the primary contact has access, they can then add additional users as needed. Please note that if you have more than one active self-study template, primary contacts will receive all notifications when a submitted report's fields have been locked and unlocked.

Q: How do I locate my self-study template in the system?

A: For those who have been assigned only **ONE self-study template:**

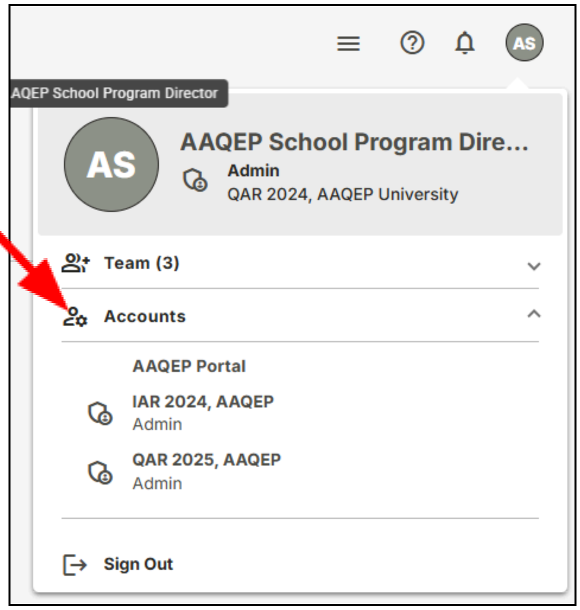
Once you log into the AMP, you'll see a navigation bar at the top. Select the "hamburger menu" (three stacked horizontal lines) near your initials and select Accreditation Events in the drop-down menu to find your active template:





A: For those who have been assigned **TWO or more self-study templates:**

Once you log into the AMP, you'll see a navigation bar at the top. Click on your initials in the upper right corner and select Accounts in the drop-down menu to choose the specific case desired (e.g., initial preparation, P-12 leadership, etc.). After selecting the case you wish to access, click the "hamburger menu" (three stacked horizontal lines) near your initials and select Accreditation Events in the drop-down menu to find your active template.



Q: We're planning to split our programs into two self-studies. How do we manage them in the AMP?

A: AAQEP staff assign a separate template to each self-study, and all active templates should appear on the Accounts drop-down menu. If you don't see the templates you need, please contact Sara Hiller at s.hiller@aaqep.org.

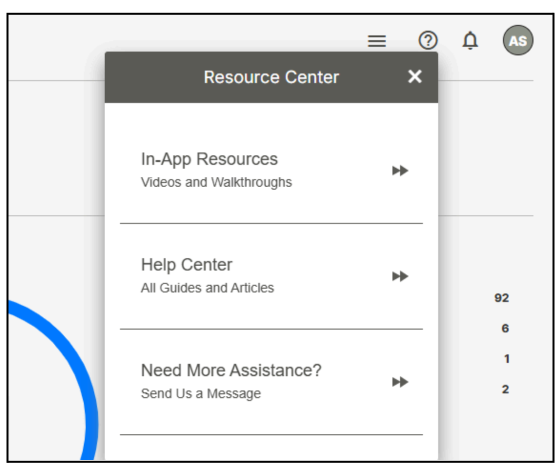
Q: How do I get technical support for my work in the AMP?

A: Weave offers a number of resources to help you navigate the platform. **Weave's Resource Center** can be found by clicking on the question mark icon located near your initials.

If you are experiencing **technical difficulties**, contact the Weave Help Desk at support@weaveeducation.com

If you have questions about **navigating the platform**, including how to add to users or change users' access and permissions, contact Jeremy Fairley at jrfairley@weaveeducation.com

Please note that AAQEP staff do not have access to your program's profile, which includes your users, or to your self-study templates prior to submission.



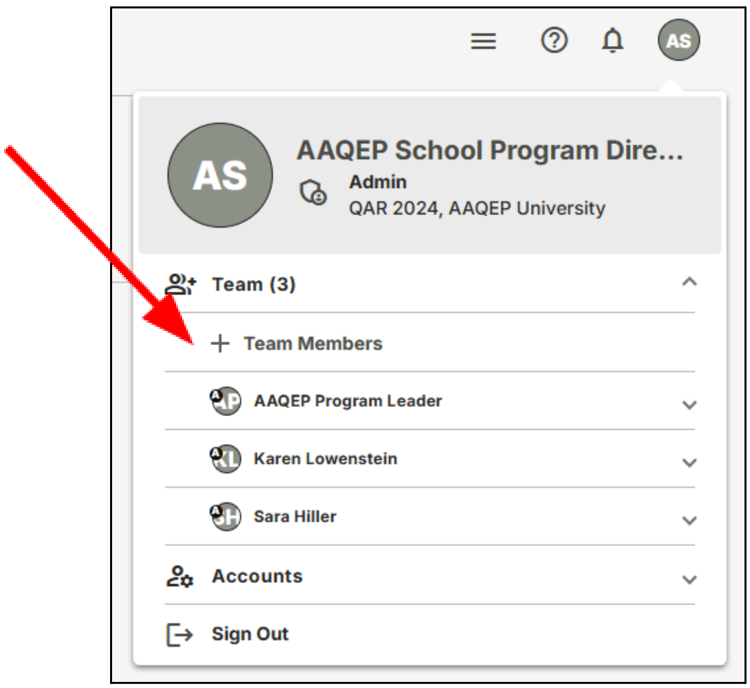
User Permissions

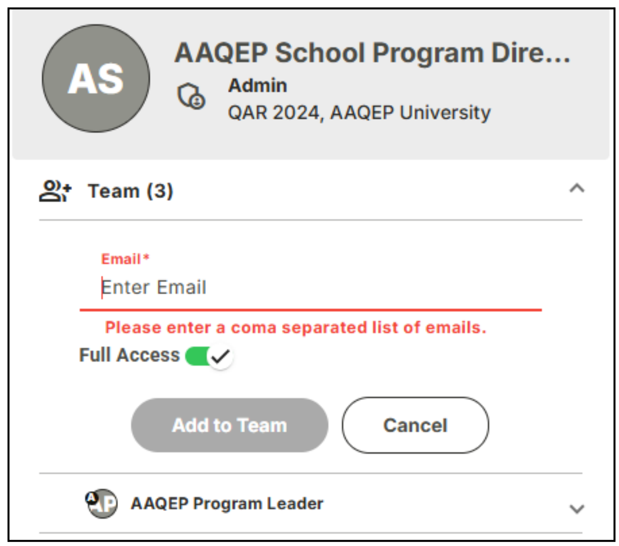
Q: Who can see what I'm working on in my report template?

A: Only you and your designated colleagues can view reports in progress—not AAQEP staff, reviewers, or anyone else. Once you hit the Submit button, however, staff will have access, and your report will be locked, preventing you from making further edits.

Q: How do I give colleagues access to work in the AMP?

A: Primary Contacts can add anyone through the Team option, which can be accessed via the drop-down menu under your user profile (click on the circle with your initials). There you can add colleagues by selecting + Team Members and entering their contact information. This page is also where you can assign permissions for specific projects; click on a name in your team list to update permissions.





Q: What permissions can I assign to users?

A: The AMP offers two main roles—Admin and Team Member—and providers can assign as many people to each role as desired.

Admins (e.g., AAQEP Primary Contacts) receive notifications regarding all project templates, such as when staff unlock or lock fields in the template. Admins can also add users at the two permission levels:

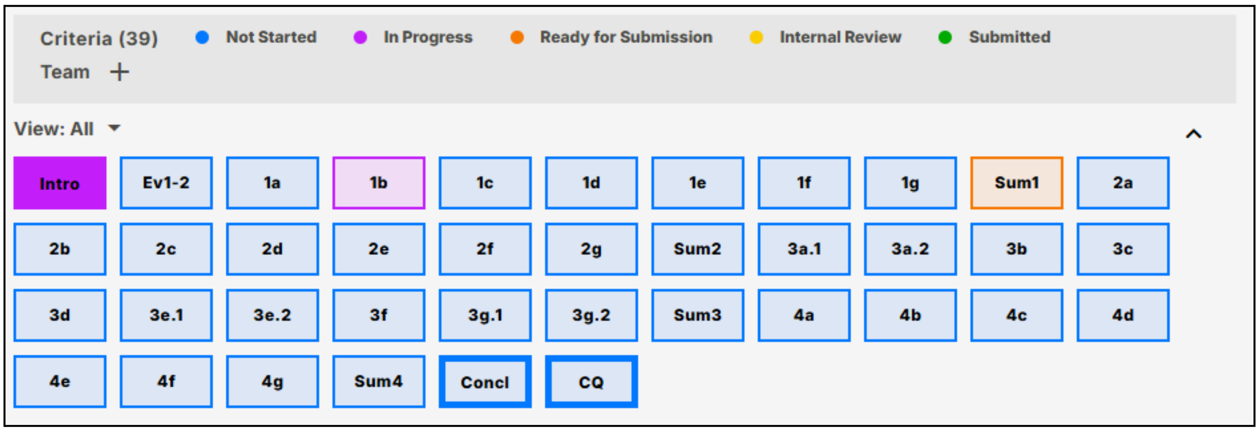
- **Admin** access allows global permissions such as editing access to the *entire self-study project* as well as the Annual Update / Annual Report and the ability to add Team Members.

- **Team Member** access can be granted *to individual fields* in the template or to the full project. Team Members can only access (viewing or editing) the fields they are assigned.

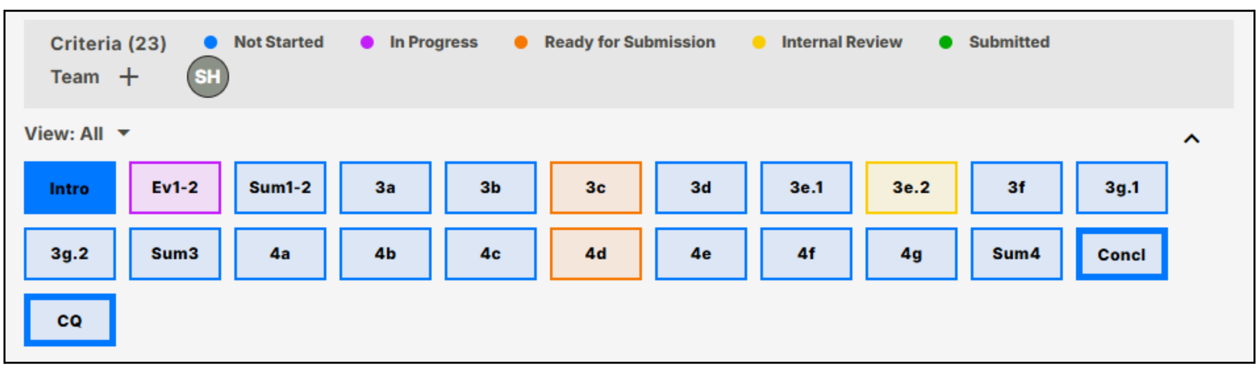
Navigating Your Self-Study Template

Self-study templates are composed of multiple fields, all of which must be completed by the time of submission. Each template is visually organized by a "heatmap" of buttons representing individual fields of the report. The buttons provide quick navigation and are color-coded to signal the field's status.

QAR template heatmap



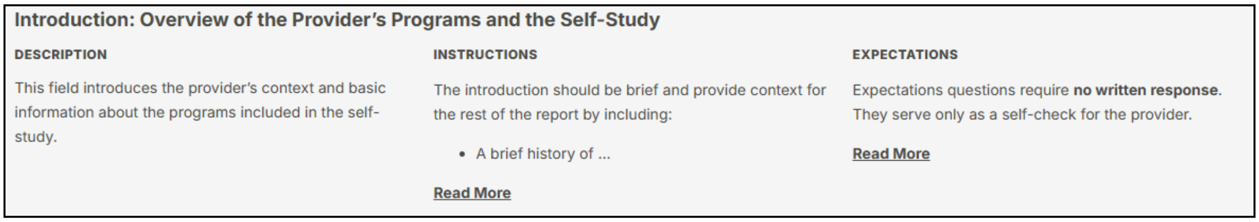
IAR template heatmap



Each field contains focused guidance in three parts:

- The **Description** provides a brief overview of the field for its eventual readers. This description will appear in your final report.
- The **Instructions** contain reminders for authors about what to include in the field. You may also find links to external templates for required attachments in this section.
- The **Expectations** list questions for authors to review prior to submitting the report to check key elements have been addressed. *Please do not provide a written response to these questions.* The questions simply serve as a self-check and are similar to those in the completeness check tool used by staff.

Guidance Example



Narrative Organization
When multiple programs are contained within a single self-study, it is recommended that authors implement the consistent use of program names throughout the fields for Standards 1 and 2 to clearly demonstrate which measures are aligned with which programs.

Using the Narrative Space

Q: What's the best way to copy and paste text in from another document (Google, Word)?

A: The AMP narrative space is designed primarily to accept plain text, not formatting. For those who are planning to draft their narrative in another space, we would recommend not spending any time formatting prior to import because little to none of this will carry over. Specifically:

- Within the narrative space in each field, you can add basic formatting to your text such as bold, italics, underline, and color formatting.
- Hyperlinks *are* retained when copying and pasting text into AMP narrative fields. Hyperlinks to websites are acceptable in your self-study, but **please do not link to any Google drives or other platforms/cloud storage** (e.g., Canvas, Box, Dropbox) where evidence or documentation is housed.

Q: What happens if I accidentally delete a portion of my narrative?

A: Like most digital workspaces, the narrative authoring space in your AMP template does have an "undo" function that allows you to back out of recent changes as you are drafting in the narrative. Authors can also access a past version by using the version history icon located in the narrative drafting space.

Q: What's the best way to include a table or other graphic?

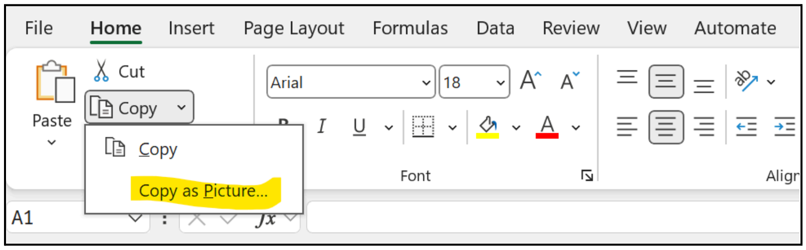
A: There are two options available to include graphics in the AMP templates:

1. Tables may be constructed within the AMP using the table generator in the narrative box providing formatting capabilities comparable to other platforms.

2. If the graphic is small enough to be viewed on a single screen, upload it as an image (.PNG format) as an evidence file and embed it into the appropriate narrative section. Embedding visuals directly makes readers' experience seamless rather than diverting their attention to another location.

To save an Excel table/chart as a picture:

- Make sure the table or graphic has a background color (white is recommended)
- Select the area to be saved
- In the toolbar, click the drop-down arrow next to Copy and select Copy as Picture



- For settings, select *Appearance: As shown on screen* and *Format: Picture*
- Paste the selected table/visual into the same document (or another location)
- Right click (or control-click for Macs) on the pasted image and select Save as Picture in PNG format

Complex tables that are not conducive to copying/embedding or to constructing directly in the AMP can be uploaded in the evidence library (as a Word document or PDF) and then hyperlinked into the narrative. Please note that templated Program Specification Tables and Evidence Summary Tables must be uploaded as Word documents, even if they are also embedded as images.

Evidence Files

Each field of the self-study template contains an evidence library to help clearly organize the evidence by section. Please make sure that all evidence is uploaded into the AMP so it is accessible to the review team. Additionally, be sure that any evidence files you upload into a field's evidence library are hyperlinked in the narrative for that field.

Q: Does it matter how I name my evidence files?

A: Decide on a naming convention before uploading your evidence files (documents, images, tables, figures, etc.), because they cannot be renamed once uploaded to the system.

It also helps readers connect evidence accurately with your narrative if the file name matches how it is referenced within the text. Some authors also choose to append an underscore (_) or a parenthetical identifier at the end of a file name to indicate which section of the template the file supplements (e.g., “AlumniSurvey_2c” or “Student Teaching Data (1a)”).

Q: Can I upload a folder containing a number of separate files?

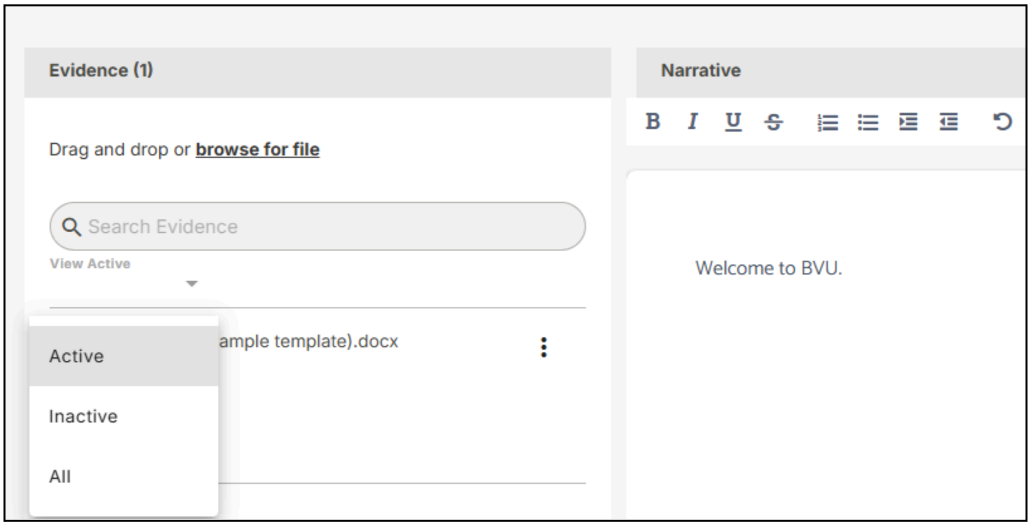
A: Yes, you can upload a folder with multiple files (e.g., course syllabi or faculty CVs). Zipped folders can be uploaded, if needed.

Q: Can I link to evidence files outside of the AMP?

A: No. All evidence referenced within the self-study must be uploaded into the AMP. This is to ensure that AAQEP has a complete record of the case presented. It also helps limit issues with access for reviewers and staff. Hyperlinks to public websites are welcome.

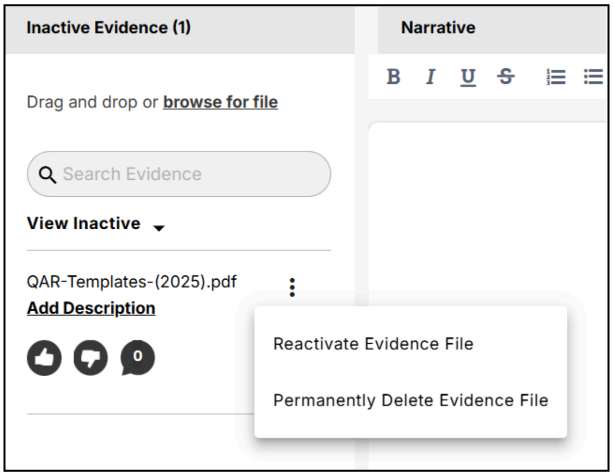
Q: How can I view my evidence files in the system?

A: There are three ways to look at your evidence files. You can view active, view inactive, and view all.



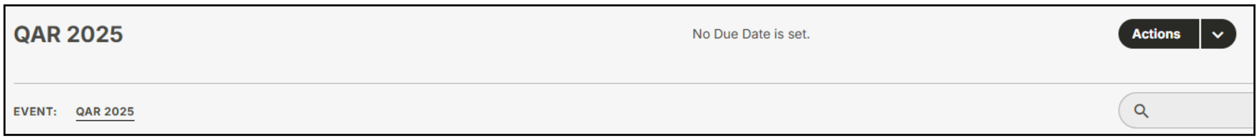
Q: What if I have uploaded an evidence file I no longer wish to use?

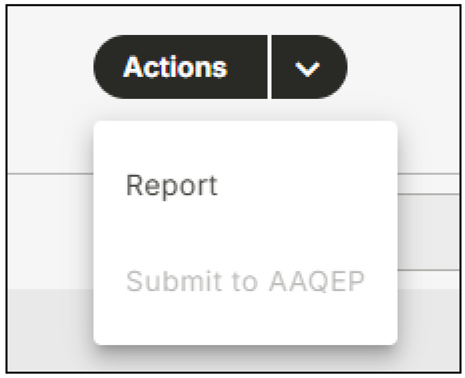
A: To remove an evidence file, first click the archive button to make the file inactive. Then, choose to view inactive files, where you can permanently delete the file.



Saving and Submitting Your Report

Q: How can I download a report?





A: You can download a PDF of your draft at any time by clicking on the Report tab in the upper right corner of your template page under the actions dropdown menu.

Note: When you download the self-study report, you will only be able to access the associated evidence if the file is extracted first. Below are directions from the AMP regarding the downloading and extraction of report files.

As a reminder, color formatting of text will NOT transfer over into a PDF of your self-study, but any embedded images will retain their color.

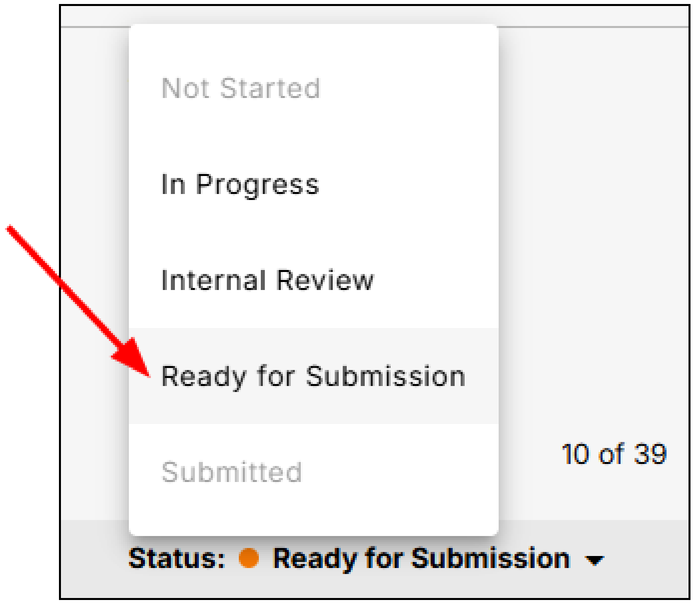
Instructions for Downloading a Report

Step 1: Click the Download button and the file will be saved to the Download folder on your computer. The downloaded file will be a zip file.
Step 2: This zip file **must** be extracted in order to access any document attachments. Open the Download folder on your computer, find and highlight the zipped folder. Click Extract All. When prompted to select a location to extract the files to, select a place on your hard drive or a flash drive.
NOTE: You must select a static location to extract the files to, rather than a web based location such as Dropbox so that the filepath of the hyperlinked documents remain valid.
Step 3: Inside the extracted file will be a Reports folder, inside that folder is the PDF report. This is all that needs to be opened. The folders contain all evidence that are hyperlinked within the narrative responses.

NOTE: If you are working on a **MAC**? **Watch this brief video**.

Q: How do I submit my report?

A: When you're ready to submit your report, you will first need to check that the status for each field in the template is marked as "Ready for Submission." You can make this selection in the Status dropdown menu at the bottom of each narrative space.



Note: **All of the narrative fields must contain text** before you can submit your report, including the clarification question responses field. Please enter placeholder text such as "forthcoming" in that narrative space. Once all fields contain text and their statuses have been updated, the Submit to AAQEP button (located near the top right of the screen) will become clickable.

Q: Do I need to submit my report again if I made any edits to it (e.g., after clarification question responses have been added, edits prompted by the completeness check, or other additional requests)?

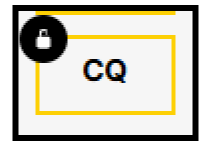
A: No. Once a report has been submitted, you will not be able to submit it again (even though the Submit button is still active). With the exception of responding to clarification questions, **please notify** AAQEP's director of accreditation services when edits to template fields have been completed, at which time these fields will be relocked and no longer editable.

Q: What's the process for engaging in the optional staff completeness check?

A: When you are ready for the completeness check, submit your self-study draft in the AMP and email Sara Hiller (s.hiller@aaqep.org) to notify her that your report is ready for a completeness check. After the check is complete, staff will unlock your report again so that you may make any revisions. When you are ready to submit your final self-study, please notify Sara Hiller so that staff can proceed with your review. You can find a copy of the IAR Completeness Check on the Initial Accreditation Reports resource page and a copy of the QAR Completeness Check on the Quality Assurance Reports resource page.

Q: Why does a lock symbol appear on a heatmap button?

A: After you've submitted your report for a completeness check or for peer review, it becomes locked for further editing unless unlocked by staff. An open padlock symbol on a heatmap button in your template indicates that the field is again available for you to edit. For example, the final "CQ" field in the template for clarification questions will have this icon so that you can post the review team's questions and your responses.



Extra Material

Q: What if my state requires additional evidence that is not part of AAQEP's expectations framework?

A: If your state requires additional evidence to be included in your self-study, upload the associated documentation in the evidence library for Aspect 4g and reference it in the narrative for that field. Information regarding state appendices can be found on AAQEP's self-study resource webpages.

Q: When do I update the final "CQ" field in the template, for QRT clarification questions and responses?

A: About a month before your site visit, you will receive the Quality Review Team's Previsit Report, which generally includes a series of clarification questions that you will need to provide written responses to at least one week prior to the visit. You will copy the questions from the Previsit Report into this field and provide a narrative response under each one, uploading any evidence files as needed.

Please contact your team lead when you have completed answering the clarification questions in the AMP.

Q: Where should I upload additional information requested during the site visit?

A: If the team requests additional evidence during the site visit, add it to the "CQ" field (Clarification Question Responses). Be sure to clearly identify any files added to the evidence library and reference them in the narrative with hyperlinks to the uploaded documents.