# MACTE

## Montessori Accreditation Council for Teacher Education

# Accreditation Management Portal Tutorial

Portal Version 2.0

# Table of Contents

# 1. Accessing the Portal

You can access the MACTE Accreditation Management Portal by typing in one of the following web addresses:

**macte2.armaturecorp.net**

**macte.org/2portal** - using this address, you will be redirected to the URL above.

# 2. Logging In and Out

## 2.1 Logging In

To log into the portal, you will be prompted to enter a username and password. Please use the email address provided in the MACTE Portal Access Email.

If this is your first-time logging into the system, please click 'Can't Log In or forgot your password?' and follow the instructions to set your password.
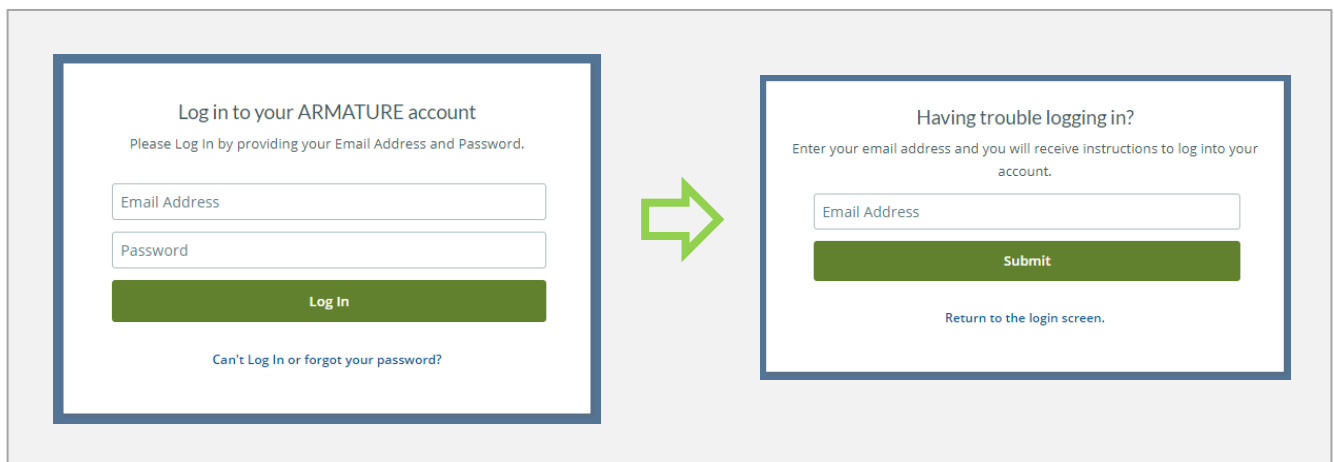


## 2.2 Logging Out

Click on the initials in the upper right corner and select 'Logout.'
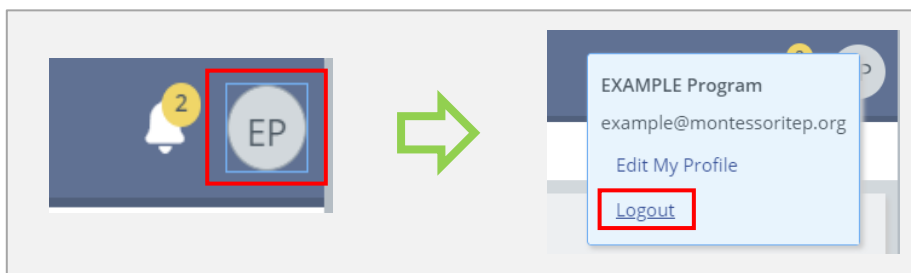


**NOTE:** If you are inside of a *Self-Study* or Substantive Change, it must be exited before the initials will appear.

# 3. Introduction to the Portal Dashboard



## 3.1 Home Tab

**Program Information:** Each program is set up with a single user account – email info@macte.org if you would like to change the email address associated with the portal.

**Scheduled Items:** All in-process *Self-Study* and Substantive Change submissions will be listed and accessible here. To access any archived submissions, click the 'Instrument' Tab.

## 3.2 Profile Tab
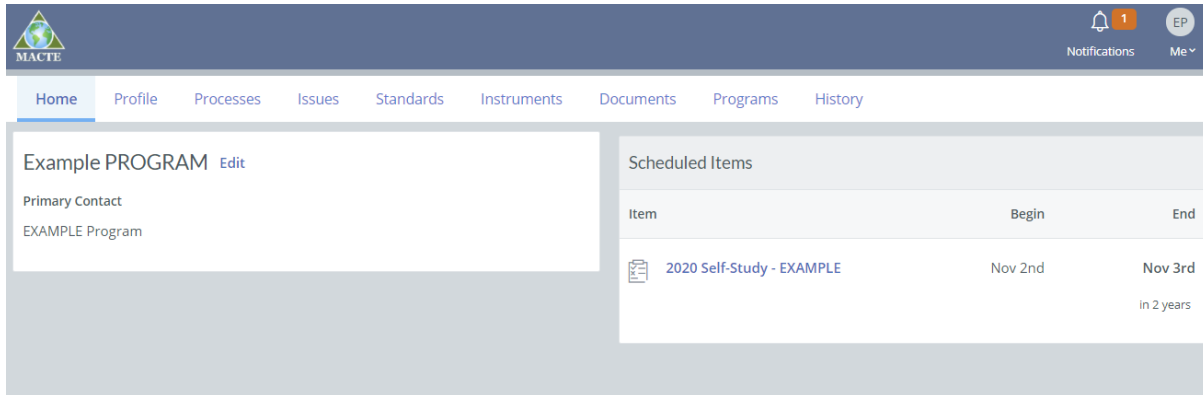
**Profile Info:** The program's address, phone, and public email address are maintained in a separate database. This information can be updated either by emailed request or in the program's annual report submission.

**Contacts:** The program's user account will be listed here. To make changes, email info@macte.org.

## 3.3 Instruments Tab

All *Self-Study* and Substantive Changes will be listed here. There are no filters applied by default.

## 3.4 Documents Tab
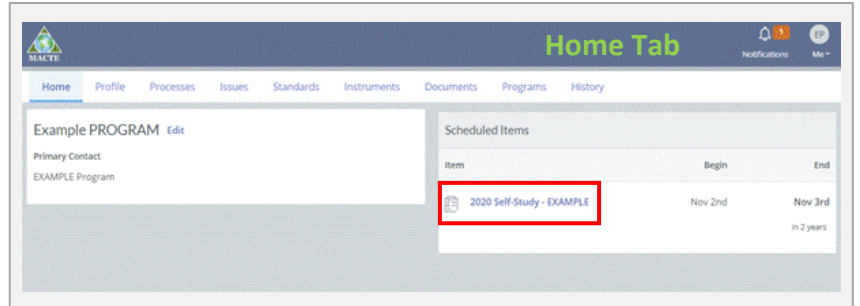
This is a space where your program can upload documents you would like to store in the portal.

**Important:** The documents uploaded to this area are *not* connected to the documents uploaded in a *Self-Study* or Substantive Change. If you would like to add a document uploaded here to a *Self-Study* or Substantive Change, it must be downloaded to your computer and then re-uploaded into the *Self-Study* or Substantive Change.

# 4. Accessing a *Self-Study* or Substantive Change

## 4.1 From the Home Tab

1. All active *Self-Studies* and Substantive Changes will be listed under 'Scheduled Items' and can be accessed by clicking on the name.



## 4.2 From the Instruments Tab

1. Click on the 'Instruments' tab to go to the list of all current *Self-Studies* and Substantive Changes.



2. From the list, select the target *Self-Study* and Substantive Changes.

# 5. Navigating a *Self-Study* or Substantive Change

## 5.1 Instrument Overview

| Home | Profile | Processes | Issues | Standards | Instruments | Documents | Programs | History |

**Instrument Overview**
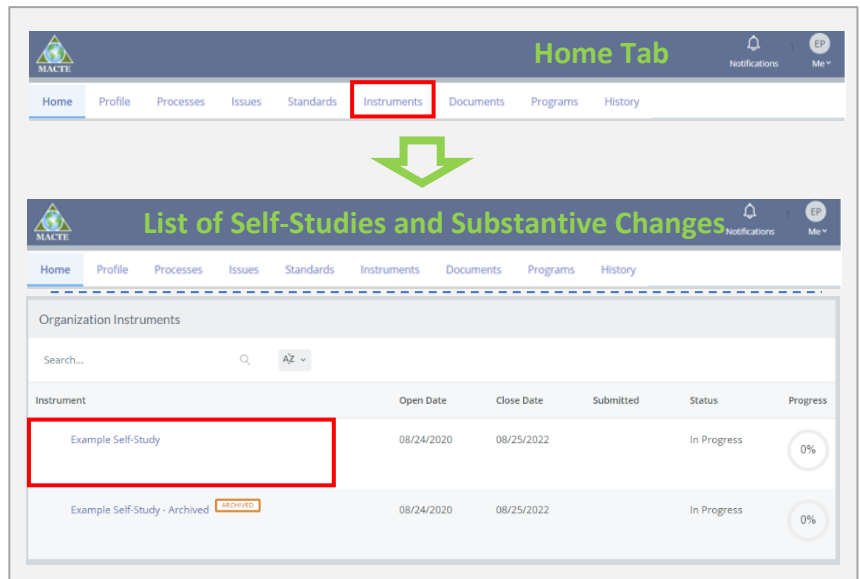
**Example Self-Study** ⚙️

| FOR | OPENS | CLOSES |
|---|---|---|
| Example PROGRAM | 08/24/2020 | 08/25/2022 |
| | COORDINATOR | STATUS |
| | -- | In Progress |

◉ Opened on August 24th, 2020 - **In Progress**

> Name of *Self-Study* or Substantive Change

> **Opens & Closes:** Start and end date of availability to submit. The instrument will become **read-only** after the 'closes' date. To modify the closes date, please contact the MACTE office.

> **Gear Icon/Settings:** Click here find the export instrument tool. Go to Section 7.5 of this tutorial for additional information on the export function.

> **Assignees:** If your affiliate has a joint review process with the MACTE office, their users will be listed here.

**Instrument detail**

| Progress | Documents | Issues | Assignees |

| | | |
|---|---|---|
| ⊙ | 0% | Introduction |
| ⊙ | 0% | Section 1: Teacher Preparation Program Summary |
| ⊙ | 0% | Section 2: Evidence of Candidate Learning |
| ⊙ | 0% | Section 3: Faculty Learning and Inquiry |
| ⊙ | 0% | Section 4: Program Capacity |
| ⊙ | 0% | Section 5: Online Education Requirements |
| ⊙ | 0% | Section 6: Additional Delivery Option Information |
| ⊙ | 0% | Appendix A: Adult Learner Handbook(s) |
| ⊙ | 0% | Appendix B: Affiliate Requirements |
| ⊙ | 0% | Appendix C: Teaching Site Information |
| ⊙ | 0% | Appendix D: Additional Location(s) Renewal |
| ⊙ | 0% | Conclusion |

✈ Submit

## 5.2 Navigating Between Sections of a *Self-Study* or Substantive Change

### 5.2.1 From the Instrument Overview Screen:
You can click between each of the sections as listed on the Instrument Overview above.

### 5.2.2 From Inside the *Self-Study* or Substantive Change:
On the right side of the *Self-Study* or Substantive Change, each section is listed with the percentage completed of the section's required criteria. You can click on a section to go to it. **NOTE:** Clicking a new section will automatically save any changes made to the current section. There is no need to click 'Save' before going to another section.

### 5.2.3 At the Bottom of the *Self-Study* or Substantive Change:
Use the use the ‹ PREV. and NEXT › buttons at the bottom of the page to proceed back and forth between sections. **NOTE:** Clicking on *Prev.* or *Next* will automatically save any changes made to the current section. There is no need to click 'Save' before going to another section.

# 6. Saving a *Self-Study* or Substantive Change

Please remember to save your work frequently. The portal has several safeguards to minimize the risk of lost work, however, saving your work frequently is the best way to ensure your work is not lost.

**NOTE**: If the browser tab remains open to the portal, it will remain logged-in – it will **not** timeout after a period of time.

**Saving Options:**

Clicking on any of the following will save your work:

1. The SAVE button at the top of the *Self-Study* or Substantive Change
2. Navigating to a different section
3. The *Prev.* or *Next* buttons
4. The Exit button in the upper right corner
5. The SAVE button in the bottom right corner

**Actions that <u>will</u> result in losing your work:**

Though the browser will not timeout, your work will be lost if any of the following actions are completed **without saving first**:

1. Closing your browser or browser tab
2. Navigating away from the page
3. Restarting or turning off your computer

If you try to complete actions 1 or 2 with un-saved changes, a prompt from your browser will appear, such as the one from Google Chrome below. You can click 'Cancel' to go back to your instrument and then save it.

Leave site?

Changes you made may not be saved.
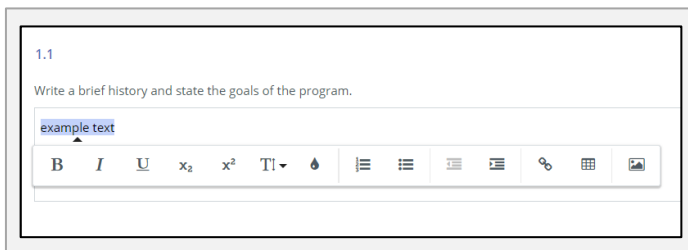
Leave    Cancel

# 7. Completing a *Self-Study* or Substantive Change

## 7.1 Question Types

There are several question types that may be used in an instrument. Questions may be asked in the form of a document upload, a table format, radio buttons, checkboxes, or as simple or narrative text. If you have any questions on how to answer a particular question, please contact the MACTE office.

## 7.2 Narrative Text Questions

To format (bold, italicize, underline, etc.) the text of a narrative question, highlight the text you would like to format, and a tool bar will appear with the formatting options.

1.1

Write a brief history and state the goals of the program.

example text

B  *I*  U  $x_2$  $x^2$  TI▾  ⬥  ≣  ≣  ≣  ≣  ⬥  ▦  ⬒

MACTE

## 7.3 Document Questions

### 7.3.1    Naming a Document

All document names should start with the criteria number (1.8, 1.9, 1.10, etc.) for which it is being uploaded as evidence. **NOTE:** The criteria number is only required for the first instance that a document is referenced.
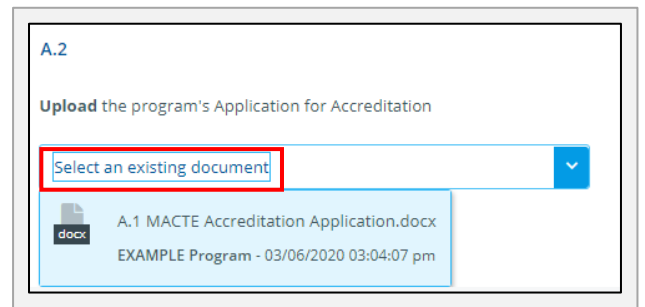
### 7.3.2    Uploading a Document

If a criterion asks you to **upload** a document, click 'UPLOAD' and select the document from your computer.
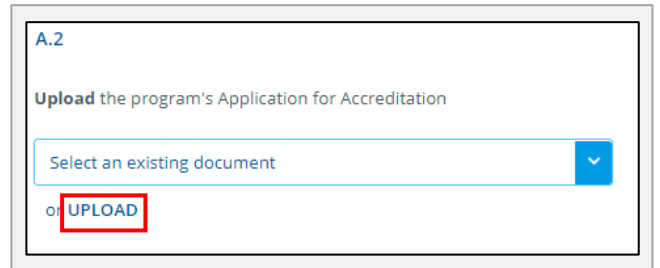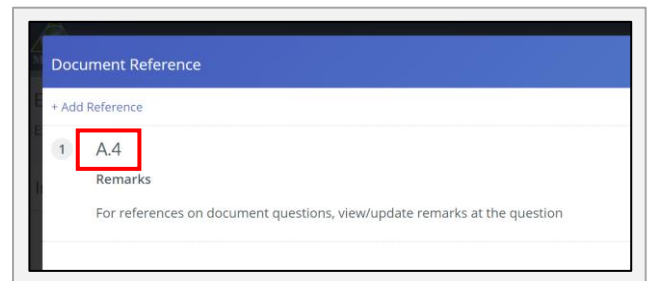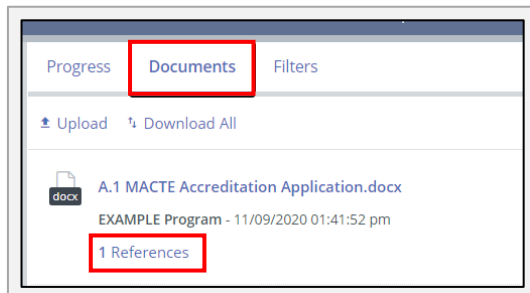


### 7.3.3    Referencing a Document

If a criterion asks you to **reference** a document, click 'Select an existing document' and select the document that was previously uploaded that should be also referenced at that criterion.
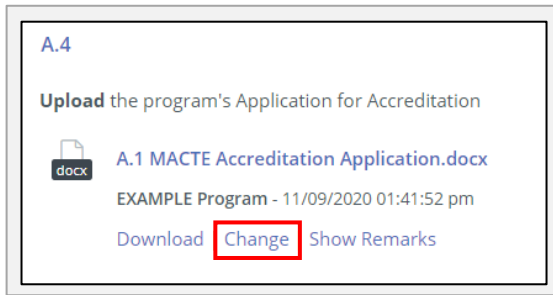


### 7.3.4    Locating where a Document is Referenced

Click on the 'Documents' tab in the upper right corner of the *Self-Study* or Substantive Change and locate the document you would like to un-reference. Click the number of references underneath the document. The popup lists each criterion where the document is referenced.

### 7.3.5  Un-Referencing a Document

Go to the criterion where the document should be un-referenced, click 'Change' to un-reference the document.



### 7.3.6  Deleting a Document

*IMPORTANT:* A document must first be unreferenced everywhere (will show as having '0 References') before it can be deleted. Please see 7.3.4 for instructions on locating which criterions reference a document and 7.3.5 for how to un-reference the document.

When the document is showing as '0 References,' to **delete** the document, click the ⊖ icon next to the document you wish to delete, and click 'Remove Item' in the browser popup to complete the deletion.
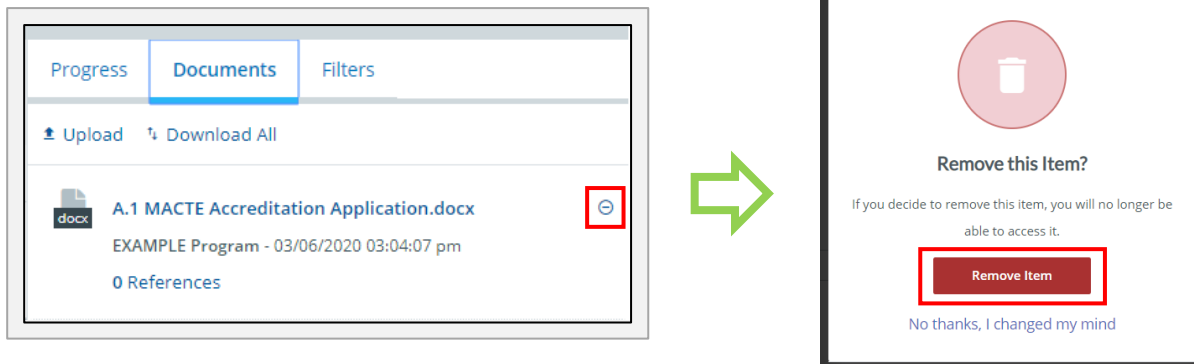


**IMPORTANT TIP ABOUT UPLOADING UPDATED DOCUMENTS DURING A REVIEW PHASE:** If you are updating/re-uploading documents as part of a *Self-Study* or Substantive Change review, first un-reference and delete any documents that were revised using the steps outlined in 7.2.4 - 7.2.6 above BEFORE uploading/referencing the revised document versions. This ensures the most up-to-date document is the one selected in related criteria in the final *Self-Study* or Substantive Change submission.

### 7.3.7  Downloading All Documents

To download all documents for editing or reviewing offline, click 'Download All' and the files will be downloaded in a zip file.
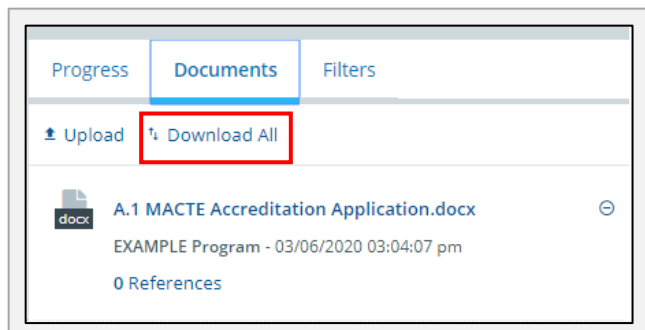
### 7.3.8    Merging Documents

**General Guideline:** Relevant criteria documentation should be merged and uploaded as a single document/PDF whenever possible.

Uploading a single document/PDF is **required** as described for the following criteria:

**SECTION 2: Evidence of Candidate Learning**

2.1 – All of the course syllabi should be merged into one large document/PDF, not separated out by course

2.5 – As with the syllabi, combine all sample copies of evaluation forms into a single document

**SECTION 3: Faculty Learning and Inquiry**

3.2 – Combine the resume and Montessori credential for each faculty member

  Ex: 3.2 Doe, Jane – Faculty Resume & Credential

3.3 – Combine the resume and two letters of reference

  Ex: 3.3 Doe, Jane – Guest Lecturer Resume & Letters

3.6 & 3.7 – If applicable, all required portfolio documents should be uploaded as a single document for each instructor or program director

  Ex: 3.6 Doe, Jane – Instructor Portfolio Documentation

Merging documents can be done by:

1.  printing all documentation and then scanning as one PDF document
2.  using the merge feature in Microsoft Word or Adobe Acrobat if your software version allows.
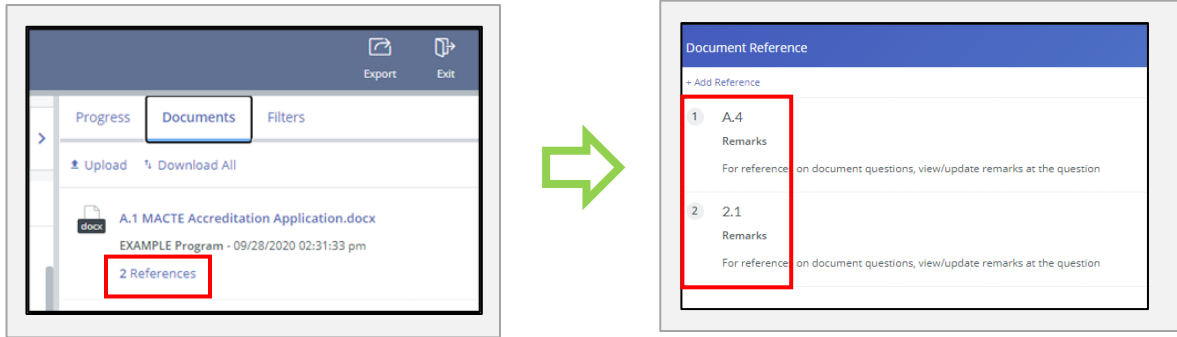
### 7.3.9    Viewing all Documents

There are two options to see all the documents uploaded in an instrument, either from the instrument overview or from inside an instrument, as shown below:
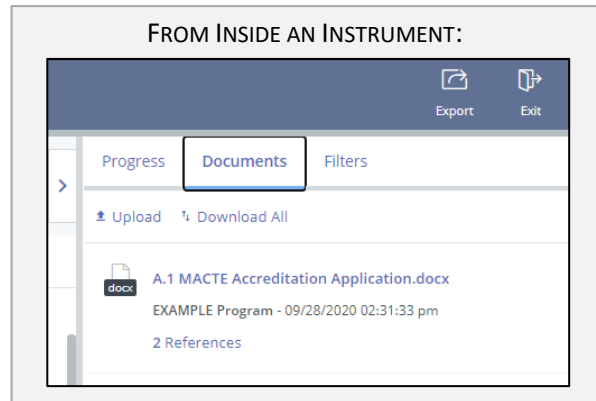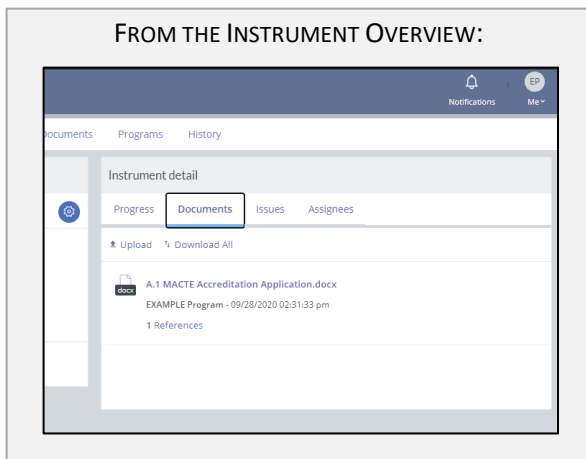
### 7.3.10 Viewing the Criteria Where a Document is Referenced

To see all criteria that reference an individual document, click 'References' under the document.



## 7.4 Table Questions

For table questions, all fields are required unless noted otherwise.

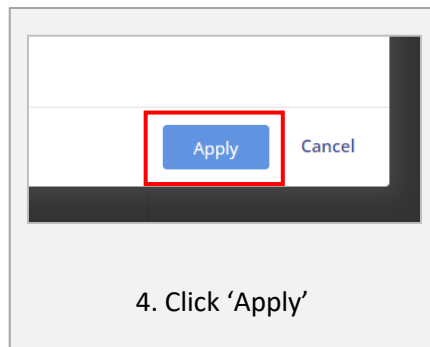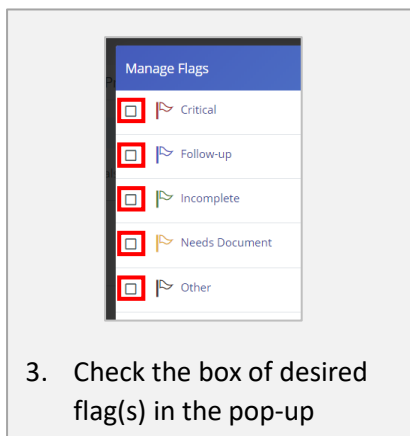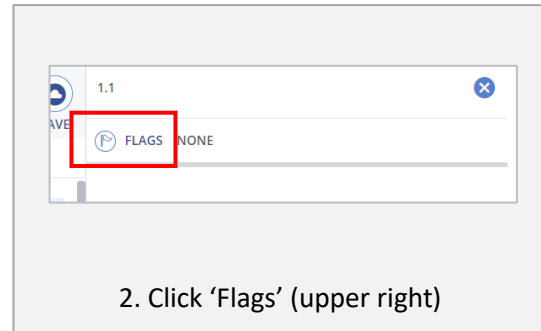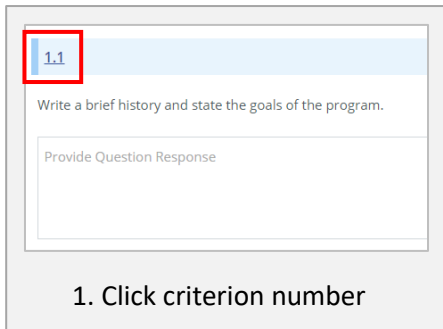To add additional rows, click 'Add Row.'

## 7.5 Using Flags

Color-coded flags are intended to allow more efficient and effective collaboration among those writing a program's *Self-Study* or Substantive Change submission. They will not be referenced or used by the MACTE office. There are five flag options:

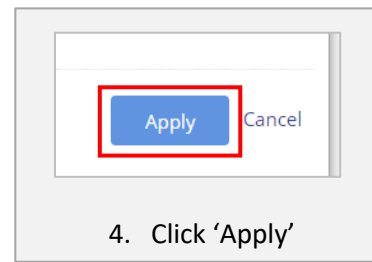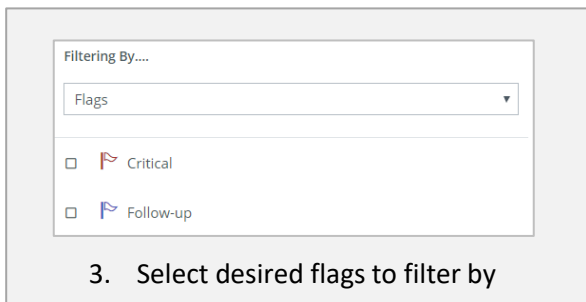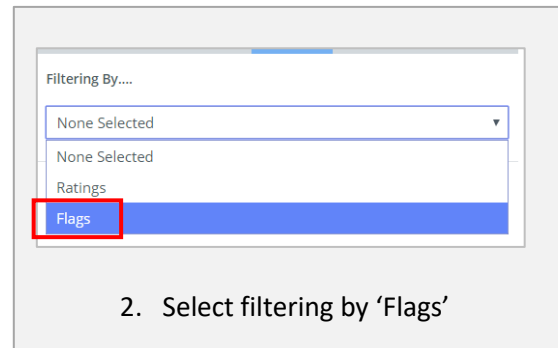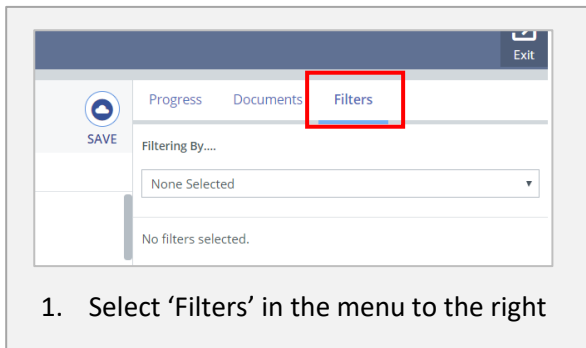⚑ Critical   ⚑ Follow-up   ⚑ Incomplete   ⚑ Needs Document   ⚑ Other

### 7.5.1   Adding a Flag

Any combinations of flag(s) can be added to a criterion by clicking on the number of the criterion and selecting the flags to be added.

| 1. Click criterion number | 2. Click 'Flags' (upper right) |
|---|---|

| 3.   Check the box of desired flag(s) in the pop-up | 4. Click 'Apply' | 5. Click X to close flag view |
|---|---|---|
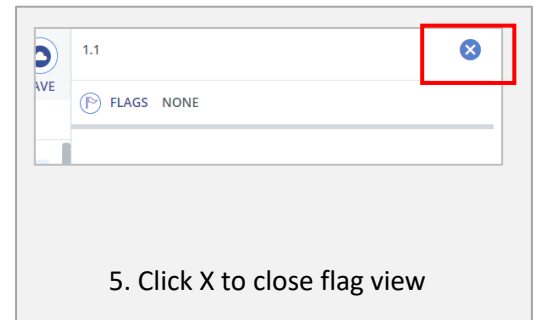
### 7.5.2  Filtering by a Flag

To see only the criteria that have been flagged, a filter can be applied.



1.  Select 'Filters' in the menu to the right



2.  Select filtering by 'Flags'



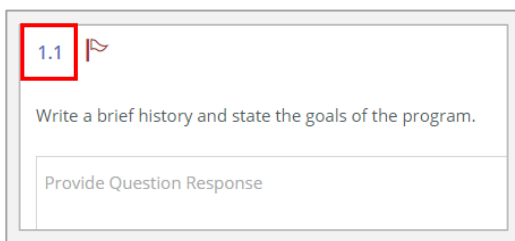3.  Select desired flags to filter by



4.  Click 'Apply'

After following steps 1-4, only the criteria with the selected flag(s) applied will be listed as you navigate through the *Self-Study* or Substantive Change Instrument.

### 7.5.3  Turning Off Filtering by a Flag
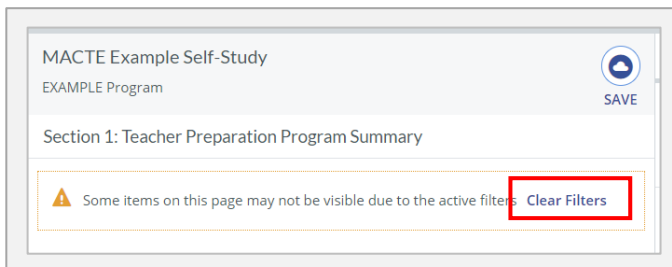


Click 'Clear Filters' and all criterion will be listed again.
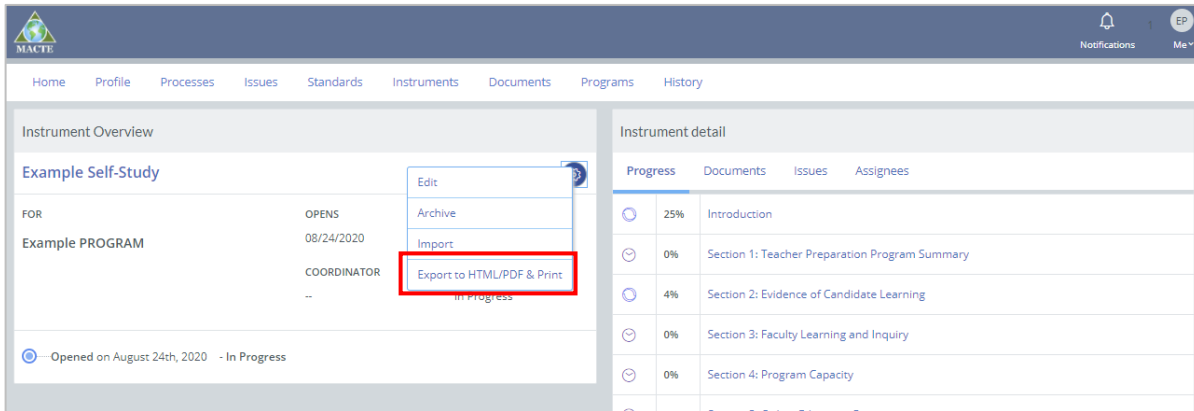
### 7.5.4  Removing a Flag



Click on the criterion that has a flag you want to remove and follow steps 1-5 of 7.5.1, except in step 3, uncheck the flag.
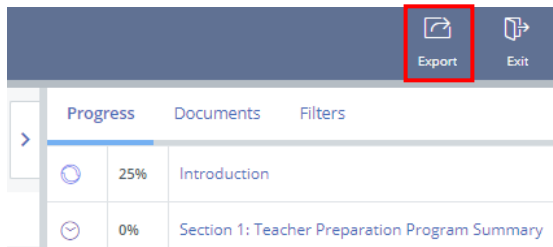
## 7.6 Exporting or Printing a *Self-Study* or Substantive Change

### 7.6.1 Starting/Accessing the Export Feature

**Option 1:** From the instrument overview, click the gear/settings icon, then click 'Export to HMTL/PDF & Print.'



**Option 2:** From inside the *Self-Study* or Substantive Change, click 'Export' in the upper right corner.



### 7.6.2 Options for Exporting

Select the desired options to be include in the export:

| Export Option | Description |
|---|---|
| Apply Filters | Selecting 'Apply Filters' will export only those criteria that are filtered, <u>only</u> if a filter has already been applied to your instrument <u>before</u> starting the export process (see 7.5.2 for more information on filtering by flags). |
| Include Documents | This option does not apply to MACTE's use of the program – documents will always be listed on the export. To download all documents for review offline, please follow the steps in 7.3.7. |
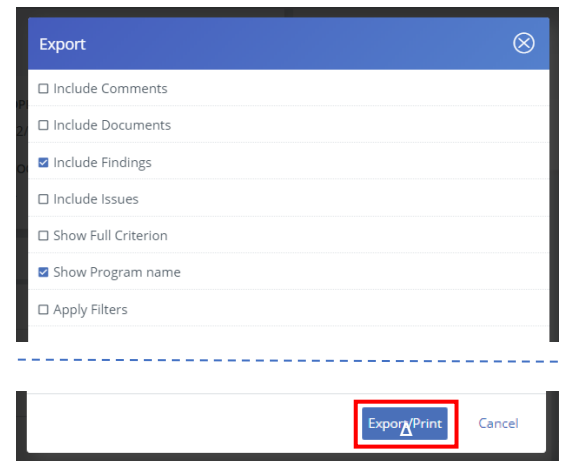


Click 'Export/Print' to finalize export options and open the export view.

### 7.6.3    Downloading/Saving the Export as a PDF

From the export view, click the 'Export' icon in the upper right corner. Depending on your browser settings for document downloads, the PDF will either be automatically downloaded and saved, or a prompt will appear for you to select the folder/location to which the PDF should be downloaded and saved.
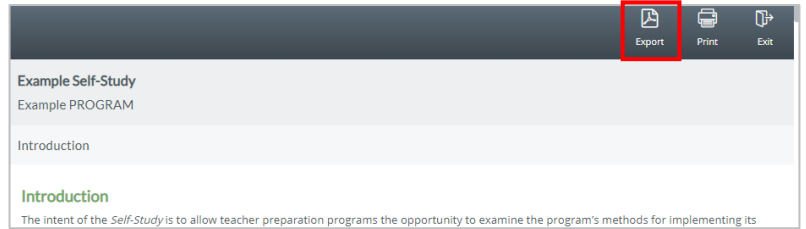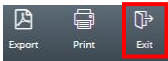


### 7.6.4    Printing the Export

From the export view, click the printer icon in the upper right corner and follow your browser printing instructions.
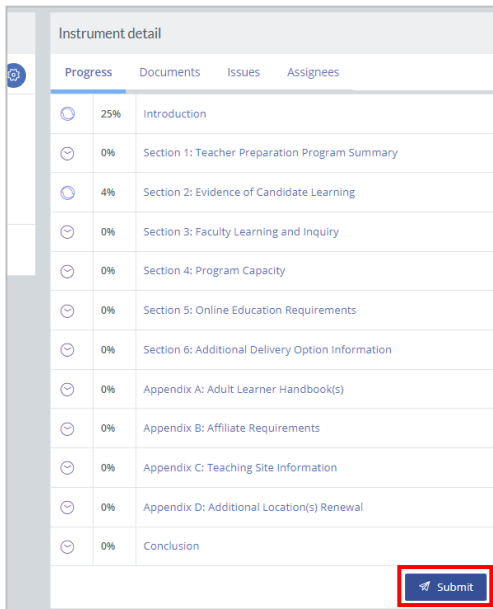


### 7.6.5    Exiting the Export View

Click the arrow in the upper right corner to close/exit the export view and go back the Instrument Overview.



## 7.7 Submitting a *Self-Study* or Substantive Change

Once the program has finished writing or updating (if in the review phase) the *Self-Study* or Substantive Change, click the submit button from either the instrument overview or from inside the *Self-Study* or Substantive Change as shown below.

FROM THE INSTRUMENT OVERVIEW:



FROM INSIDE THE INSTRUMENT: