# Table of Contents

1. Accessing the Portal .................................................................................................................. 3  
   2. Logging In and Out ..................................................................................................................... 3  
      2.1 Logging In .............................................................................................................................. 3  
      2.2 Logging Out .......................................................................................................................... 3  
   3. Introduction to the Portal Dashboard ......................................................................................... 4  
      3.1 Home Tab .............................................................................................................................. 4  
      3.2 Profile Tab ............................................................................................................................. 4  
      3.3 Instruments Tab ...................................................................................................................... 4  
      3.4 Documents Tab ....................................................................................................................... 4  
   4. Accessing a Self-Study or Substantive Change ........................................................................ 5  
      4.1 From the Home Tab ................................................................................................................. 5  
      4.2 From the Instruments Tab ....................................................................................................... 5  
   5. Navigating a Self-Study or Substantive Change ........................................................................ 6  
      5.1 Instrument Overview ................................................................................................................. 6  
      5.2 Navigating Between Sections of a Self-Study or Substantive Change .................................... 6  
      5.2.1 From the Instrument Overview Screen: ................................................................................. 6  
      5.2.2 From Inside the Self-Study or Substantive Change: ............................................................. 6  
      5.2.3 At the Bottom of the Self-Study or Substantive Change: ...................................................... 6  
   6. Saving a Self-Study or Substantive Change ............................................................................... 7  
   7. Completing a Self-Study or Substantive Change ..................................................................... 7  
      7.1 Question Types ....................................................................................................................... 7  
      7.2 Narrative Text Questions ........................................................................................................ 7  
      7.3 Document Questions .............................................................................................................. 8  
      7.3.1 Naming a Document ........................................................................................................... 8  
      7.3.2 Uploading a Document ....................................................................................................... 8  
      7.3.3 Referencing a Document .................................................................................................... 8  
      7.3.4 Locating where a Document is Referenced ...................................................................... 8  
      7.3.5 Un-Referencing a Document ............................................................................................. 9  
      7.3.6 Deleting a Document ........................................................................................................... 9  
      7.3.7 Downloading All Documents ............................................................................................ 9  
      7.3.8 Merging Documents .......................................................................................................... 10  
      7.3.9 Viewing all Documents ..................................................................................................... 10  
      7.3.10 Viewing the Criteria Where a Document is Referenced ................................................... 11  
      7.4 Table Questions .................................................................................................................... 11
7.5 Using Flags
- Adding a Flag
- Filtering by a Flag
- Turning Off Filtering by a Flag
- Removing a Flag

7.6 Exporting or Printing a Self-Study or Substantive Change
- Starting/Accessing the Export Feature
- Options for Exporting
- Downloading/Saving the Export as a PDF
- Printing the Export
- Exiting the Export View

7.7 Submitting a Self-Study or Substantive Change
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(s) will be listed here. To make changes or add and/or remove users, 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

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 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 button in the upper right corner
5. The button in the bottom right corner

Actions that will 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.

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.
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 ‘Choose Existing’ and search for the document that was previously uploaded that should also be referenced in the criterion. Click "Select" next to the document to reference it.

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:

**FROM THE INSTRUMENT OVERVIEW:**

**FROM INSIDE AN INSTRUMENT:**
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
From inside the Self-Study or Substantive Change, click 'Export' in the upper right corner.

![Export button]

7.6.2 Options for Exporting
Select the desired options to be include in the export:

<table>
<thead>
<tr>
<th>Export Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Filters</td>
<td>Selecting ‘Apply Filters’ will export only those criteria that are filtered, only if a filter has already been applied to your instrument before starting the export process (see 7.5.2 for more information on filtering by flags).</td>
</tr>
<tr>
<td>Include Documents</td>
<td>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.</td>
</tr>
</tbody>
</table>

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.

![Print button]
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.