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Council on Accreditation

Steps for Producing an Electronic Self-Study Document

After School Programs



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Steps for Producing an Electronic Self-Study Document on CD-ROM

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Welcome to COA's After School Program Electronic Self-Study Process

Welcome to COA's After School Program electronic self-study process! I think you will find that this process will help streamline your accreditation by making it less time consuming, less expensive, less staff intensive, *but not less valuable!*

This set of electronic self-study instructions will assist you in three important ways. It will:

1. Help you understand the essential elements of the electronic self-study process;
2. Provide you with some tips and tools for organizing and managing the After School Program self-study process using the electronic option; and
3. Help you and your staff save time, money and valuable human resources in preparing your self-study for the recognition process.

As part of COA's own continuous quality improvement, we need your feedback as to whether the After School Program Electronic self-study "works." Is it easy to use? Is it useful? And is it cost effective? As a stakeholder in COA, the importance of your partnering with us as we reshape and streamline the recognition process cannot be overstated. Please feel free to contact me at rklarberg@coanet.org.

Good luck as you begin the process and thank you!

Sincerely,

Richard Klarberg
President and Chief Executive Officer



Introduction

Welcome to a new and improved way to submit your self-study document to the Council on Accreditation (COA). We are pleased to offer programs the opportunity to submit their self-study document in electronic format on [CD-ROM](#) or [USB](#) drive. This document will provide instructions to programs regarding the appropriate format for an electronic submission, as well as the proper tools to facilitate this process.

The following Electronic Self-Study Instructions are a supplemental guide to the *After School Program Guidelines*. The *After School Program Guidelines* can be found at www.COAafterschool.org.

Below are a few quick tips to keep in mind as you begin preparing your electronic self-study:

1. Before starting the electronic self-study process, take the time to read the following instructions and to assess whether you have the appropriate personnel expertise to complete a self-study electronically. Your COA Accreditation Coordinator can provide you with technical assistance; however you must have the internal proficiency and resources.
2. Please submit your entire self-study electronically. Do not submit parts of your self-study in hard copy format. If you do not have a specific piece of documentation in electronic format, scan the document or make it available on-site for the review team and put a note in your self-study notifying the team.
3. When the review team is on-site, you must have a copy of the self-study and other relevant documents – in electronic or hard copy format – readily available to the Team in the room in which they are meeting. While the review team may bring their own laptop on the site visit, please check with the Team Leader before they arrive. If they are not bringing their own laptops, please place a laptop or desktop computer in the room for the team to use. Please refer to the “On-Site Documents” column in each standard's Table of Evidence for a list of materials to have available on-site.
4. Also, you are not required to print out your self-study for the team. If you happen to have documentation in hard copy format and would like to make that available to the team while they are on-site, you can do so; however, you do not have to print out the documentation in your self-study.
5. COA strongly recommends that you save your self-study on a network drive that is regularly backed up. If a non-networked computer is utilized, please consider creating back-up copies of the self-study on a regular basis.
6. If you have any questions regarding this document or the electronic self-study process, please contact your assigned COA Accreditation Coordinator at 866-COA-8088 or review the [Frequently Asked Questions \(FAQs\)](#) at the end of this document.



Hardware/Software Needs:

To create an Electronic Self-Study, a program will need at least the following software/hardware:

HARDWARE:

- a. Writeable [CD \(CD-R\)](#) or a [USB](#) drive
- b. [Scanner](#) and scanning software *or* the program may have a copy center scan documents for the self-study and save them for the program using the appropriate formats listed below
- c. [CD burner](#) and software for burning [CDs](#)

SOFTWARE:

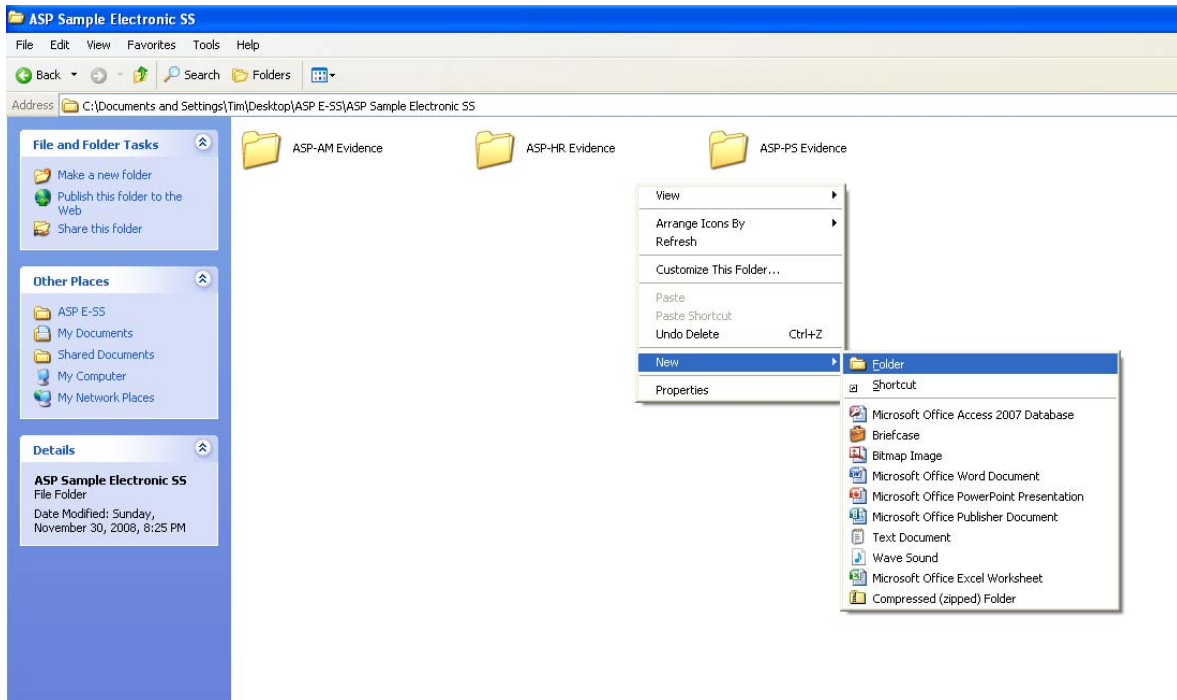
- a. Microsoft Office (2003 and higher recommended)
<http://www.microsoft.com/office/>
- b. It is also acceptable for a program to use Adobe [Acrobat 7.0](#)
<http://www.adobe.com/products/acrobat/main.html> however COA does not require a program to purchase Adobe in order to complete its self-study, unless the program wishes to “print to PDF” as a way to lock the document.

NOTE: For reasons of compatibility and consistency, programs should only use the COA-approved software listed above. Appropriate document extensions include: [PDF](#), [DOC](#), [XLS](#), and [PPT](#). Programs may also save documents as HTML files or common picture files such as JPG, TIF or GIF.

Steps for Producing the Electronic Self-Study Document

Step 1 – Organizing the Electronic Self-Study:

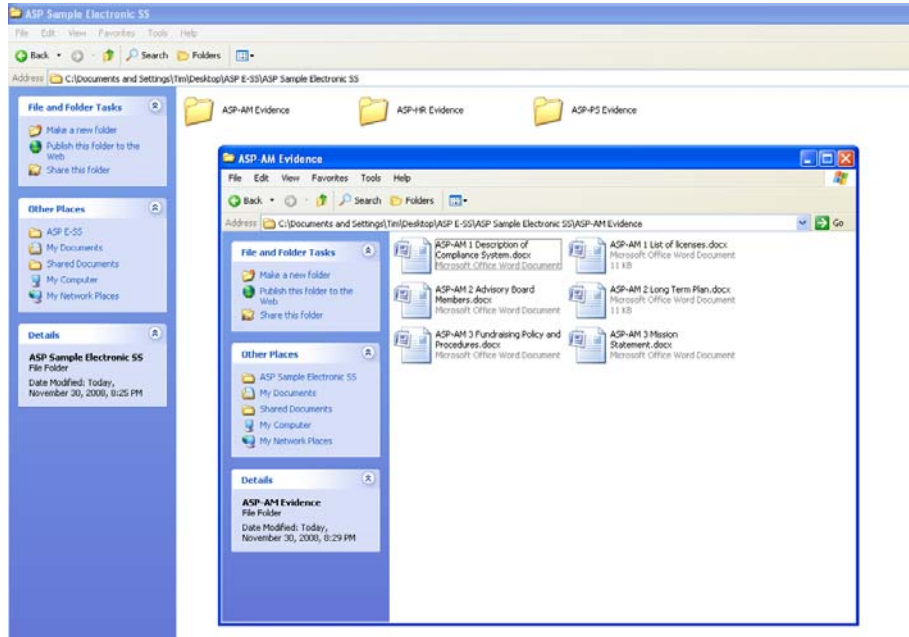
- a. Create a folder for your program’s self-study on your hard drive or network drive and label it Electronic Self-Study.
- b. Create Evidence folders for all sections of the standards in your self-study folder (as indicated in the picture below).
- c. Copy and paste the Table of Contents document to your self-study folder.
- d. Copy and paste the READ ME FIRST document you have completed for the review team.
- e. Copy and paste the Executive Verification to your self-study folder.





Step 2 – Gathering Pre-Site Evidence

- a. Compile all pre-site documentation listed in the *self-study documents* column of each standard’s Table of Evidence, and save it in the appropriate Evidence folders (as indicated in the picture below).



- b. Use only COA-approved formats and extensions to save documents (see the note on page 3 for details).
- c. Submit only relevant documentation. If a standard asks for something specific, and it is found in a larger document, you have several options. You can submit only the specific page(s) from the document that address(es) the requirements of the standard *or* you can save the entire document and create a bookmarked hyperlink to the specific page. For instructions on how to create bookmarks in [Word](#) and Adobe documents, see the [Electronic Self-Study FAQs](#) at the end of this document.
- d. For any multiple-page piece of documentation, try to bracket or label the relevant sections that relate to the standard. This is helpful to the team when they review the document so that they can easily reference the applicable documentation.
- e. When saving documentation in the evidence folders, it may be helpful to label evidence with the standard reference (i.e., ASP-AM 9, Stakeholder survey instruments) so that it is easier to find later on in the process when hyperlinks are being created.



Step 3 – Completing and Saving NA Documents

- a. If a rating of NA is permitted and the program determines that a rating of NA is applicable, the program should be prepared to provide evidence on-site that supports that determination. The program should also provide a list all NAs that it has automatically taken in the appropriate evidence folder.
- b. If an NA is not offered within the standard, a program must submit an *NA Request Form* to COA. To assist the team in its review, all COA-approved NA requests should be scanned and saved in the appropriate evidence folder and should be included in the self-study document.



NA Request Form

Instructions:

1. Use this form only when an NA is not listed in the standard.
2. Please complete and submit to COA for approval.
3. A reason and supporting documentation must be provided for each request.
4. When your request is approved, place a copy of the approved form where indicated in the Table of Evidence.

Please do not misplace this form! If an approved NA Request Form is not included in the program's self-study where appropriate, the standard may be rated out of compliance.

Program	
COA ID Number	
City/State/Province	
Phone/Fax/E-mail	
Date of Request	
Contact Person	

Standard	Reason for NA Request

Pre-Site Visit Decision		
Based on the submitted documentation, the request for an NA rating has been:		
Approved	Denied	Comment

Note: All approvals are pending on-site verification by the Endorsers.

Decision Date: _____ COA Coordinator: _____

COA Signature: _____

Council on Accreditation – After School Program Standards

NOTE: If the COA-approved NA is not in the self-study document, the team will rate the standard accordingly.



Step 4 – Preparing Each Section of the Table of Contents

The Table of Contents (TOC) chart is an [Excel](#) document that contains tabs at the bottom of the page for all the Administration and Management, Service Delivery Administration and Service sections. Before adding evidence to this chart, delete all tabs that are not applicable to your program. Before deleting tabs, please refer to the Accreditation Plan for applicable standards.

Step 4.1 – Preparing the Narratives, as Applicable, for Each Section

- a. Download the Narrative Template, as applicable, found at www.COAafterschool.org in the Related Files and save it to the appropriate evidence folder for each section of the standards.
- b. Complete the Narrative Template.
- c. Open the TOC chart.
- d. Create a hyperlink to the words “The Narrative is complete” for each section as indicated below in the TOC chart (see Step 4.5 for creating hyperlinks).
- e. Place an “X” in the “Yes” box indicating that the Narrative is present and complete.

Create hyperlink here

After School Program Administration (ASP-AM) Evidence Checklist			
<i>Instructions: This tool is both the Table of Contents for your electronic self-study, and a checklist for all documentation included in your self-study. Your program is required to complete this checklist. As you complete an electronic self-study, complete the checklist and create a hyperlink to the cell with the relevant piece of evidence.</i>			
<i>In the event your program checks "No" or "NA," provide a brief explanation in the area provided. For example if your program checks "No," the explanation may be: "Agreement with my COA Coordinator that evidence will be reviewed on-site" or if your organization checks "NA," the explanation may be: "NA request granted by COA."</i>			
Narrative			
Yes	No	NA	Evidence
			The Narrative is complete.
Narrative Attachments			
Yes	No	NA	Evidence
			All COA-approved NA requests.
			A list of all NAs applicable to your program provided within the standards.
Self-Study Documentation			
Yes	No	NA	Evidence
			ASP-AM 1 List of licenses applicable to the program
			ASP-AM 1 Signed compliance letter from Program Administrator
			ASP-AM 1 Description of system used to ensure compliance
			ASP-AM 2 Long-term plan
			ASP-AM 2 Contact information for oversight entity
			ASP-AM 2 List of Advisory Board/Governing Body members
			ASP-AM 3 Program Brochures
			ASP-AM 3 Mission Statement
			ASP-AM 3 Annual Report
			ASP-AM 3 Fundraising policies/procedures
			ASP-AM 3 Conflict of Interest policies/procedures
			ASP-AM 4 Human subject research policy/procedures



Step 4.2 – Preparing the Evidence of Implementation for Applicable Self-Study Documents

- a. Within the Table of Contents, COA has listed out the self-study documents that are required for each section (see example below). We recommend that you also use the Tables of Evidence at www.COAAfterschool.org alongside the Table of Contents template as evidence may have changed since the creation of the template. If evidence has changed, you are welcome to add or delete evidence on the Table of Contents based on when you signed your agreement with COA.

NOTE: When saving documentation in the evidence folders, it may be helpful to label information with the standard number (i.e., ASP-AM 9, Stakeholder survey instruments) so that it is easier to find and create links later on.

- b. After saving relevant documents in the evidence folders, select the cell that contains the document name and create a hyperlink to the evidence (see Step 4.3 for creating hyperlinks). Repeat this for all evidence.
- c. Place an “X” in the “Yes” box indicating that the evidence is present.
- d. For any document not listed on the Table of Evidence, type the name of the document in the section labeled “Other Documents Not Listed on the Table of Evidence” and create a hyperlink to the evidence.

After School Program Administration (ASP-AM) Evidence Checklist			
<p>Instructions: This tool is both the Table of Contents for your electronic self-study, and a checklist for all documentation included in your self-study. Your program is required to complete this checklist. As you complete an electronic self-study, complete the checklist and create a hyperlink to the cell with the relevant piece of evidence.</p> <p>In the event your program checks "No" or "NA," provide a brief explanation in the area provided. For example if your program checks "No," the explanation may be: "Agreement with my COA Coordinator that evidence will be reviewed on-site" or if your organization checks "NA," the explanation may be: "NA request granted by COA."</p>			
Narrative			
Yes	No	NA	Evidence
			The Narrative is complete.
Narrative Attachments			
Yes	No	NA	Evidence
			All COA-approved NA requests.
			A list of all NAs applicable to your program provided within the standards.
Self-Study Documentation			
Yes	No	NA	Evidence
			ASP-AM 1 List of licenses applicable to the program
			ASP-AM 1 Signed compliance letter from Program Administrator
			ASP-AM 1 Description of system used to ensure compliance

Create hyperlink on document name



Step 4.3 – Creating Hyperlinks

To create a hyperlink in Microsoft [Excel](#), select the cell in which you would like to create a hyperlink. Choose the Insert Hyperlink command (or press Ctrl + K). Select an icon in the “Link To” column that represents the type of hyperlink you want to create (i.e., existing file or webpage, place in this document, create new document, e-mail address). Next, specify the location of the document that you want to link to by browsing for a file, webpage or bookmark. Once you’ve located the document, click OK; [Excel](#) then creates a hyperlink in the active cell (see example below).

After School Program Administration (ASP-AM) Evidence Checklist

Instructions: *This tool is both the Table of Contents for your electronic self-study, and a checklist for all documentation included in your self-study. Your program is required to complete this checklist. As you complete an electronic self-study, complete the checklist and create a hyperlink to the cell with the relevant piece of evidence.*

In the event your program checks "No" or "NA," provide a brief explanation in the area provided. For example if your program checks "No," the explanation may be: "Agreement with my COA Coordinator that evidence will be reviewed on-site" or if your organization checks "NA," the explanation may be: "NA request granted by COA."

Narrative			
Yes	No	NA	Evidence
			The Narrative is
Narrative Attachments			
Yes	No	NA	Evidence
			All COA-approved
			A list of all NAs and
Self-Study Documentation			
Yes	No	NA	Evidence
			ASP-AM 1 List of licenses applicable to the program
			ASP-AM 1 Signed compliance letter from Program Administrator
			ASP-AM 1 Description of system used to ensure compliance



Because hyperlinking instructions can vary based on the operating systems software, COA encourages programs to visit Microsoft’s website (<http://support.microsoft.com/>) to learn more about creating hyperlinks.

If you select “No” or “NA” for any self-study documentation, use the box at the bottom of the Table of Contents to provide a *brief* explanation. This helps the reviewers quickly understand why this standard is No or NA for your program or why you have not provided the documentation listed.

X			ASP-AM 3	Annual Report
		X	ASP-AM 3	Fundraising policies/procedures
X			ASP-AM 3	Conflict of Interest policies/procedures
X			ASP-AM 4	Human subject research policy/procedures
X			ASP-AM 5	Current year program budget
X			ASP-AM 5	Budget planning policy/procedures
X			ASP-AM 5	Financial control procedures
X			ASP-AM 6	Risk prevention plan
X			ASP-AM 6	Procedures for quarterly reviews
X			ASP-AM 6	Two quarters report of incidents, accidents & grievances
X			ASP-AM 6	List of insurance policies
X			ASP-AM 7	Information management policies/procedures
X			ASP-AM 8	Procedures for maintaining files
X			ASP-AM 8	Access of files policies/procedures
X			ASP-AM 9	Program goals/outcomes and plan to address
X			ASP-AM 9	Stakeholder survey instrument
X			ASP-AM 9	Aggregate analysis of stakeholder survey results
		X	ASP-AM 9	Improvement plan(s), if applicable
Other Documents Not Listed on the Table of Evidence				
1				
2				
3				
Explanation for any "No" or "NA" checked above				

Indicate your NA and create a hyperlink here. Write explanation for any “No” or “NA” indicated on the Table of Contents in the box at the bottom.

NOTE: If a COA-approved NA Request is not included, the Peer Team will rate the standard accordingly



Step 5 - Preparing the READ ME FIRST File and the Executive Verification

The READ ME FIRST file contains basic information about the program and should include the following at a minimum:

- a. Contact Name(s) at the program if the Peer Team experiences problems;
- b. Phone Number(s);
- c. E-mail Address(es); and,
- d. Any other information that is pertinent to the program of the self-study document.

Optionally, the program may include hotel information, directions to the program, and/or local information about the city in the READ ME FIRST file.

The READ ME FIRST file should be saved in a place that is visible to the review team when they open the [CD-ROM](#) or [USB](#) drive to begin their work.

The Executive Verification serves as an additional assurance that your self-study is complete and the COA standards have been implemented. This document must be signed by your Program Administrator.

The signed Executive Verification should be saved in the same place as the READ ME FIRST file.

Step 6 – Completing the Check List

COA recommends that programs complete the check list below before submitting the self-study document to COA. This check list will help ensure that the program produces a quality document. When the self-study document is submitted, it should be complete in every respect.

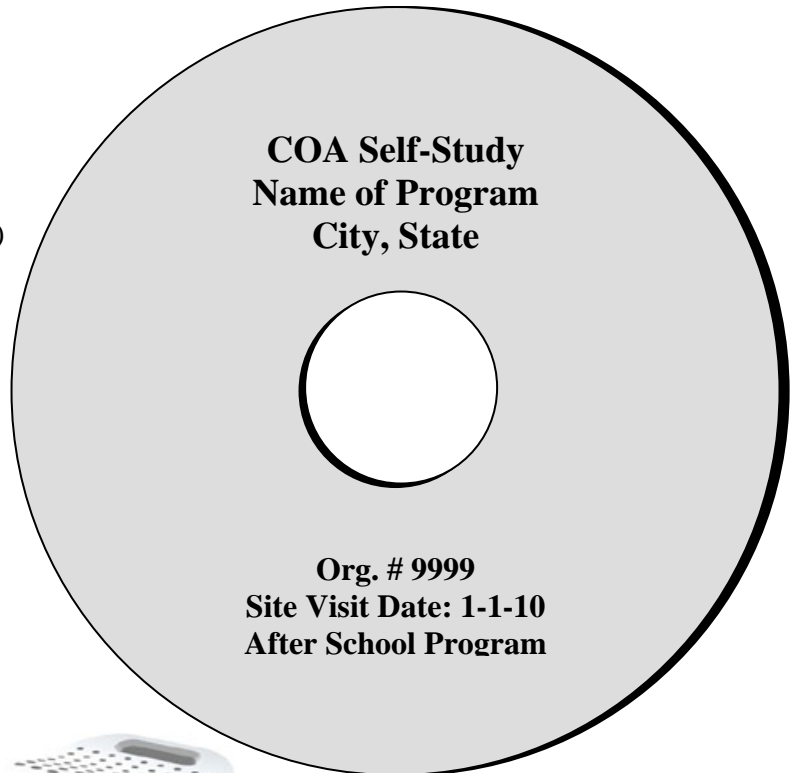
- As applicable, a narrative is complete for each section and is linked appropriately.
- All sections are complete.
 - Documentation (e.g., narratives and evidence) is included and saved in the applicable evidence folder.
 - Evidence is linked appropriately.
- A completed Table of Contents is present for each applicable section. All non-applicable tabs in the Table of Contents have been deleted.
- All hyperlinks in the Table of Contents work and link to the appropriate documents.
- All COA-approved NA Request Forms are included and are listed in the “All approved NA Request Forms” section of the *Table of Contents*, as applicable.
- All “Yes,” “No,” or “NA” boxes are checked on the Table of Contents and explanations for all “No’s” and “NA’s” are included.

- A READ THIS FIRST file with contact information is present.
- The signed Executive Verification is present.
- The entire self-study document has been laid out per COA's Electronic Self-Study Instructions.

Step 7 - Burning and Labeling the CD or the USB Drive

Follow the instructions for the software that you are using to burn the [CD](#) or for saving information on an [USB](#) drive. Ensure that all relevant files and folders are saved on the [CD-ROM](#) or [USB](#) drive. These would include: Evidence Folders, Table of Contents, the Executive Verification and the READ ME FIRST file. After creating the [CD](#) or [USB](#) drive, verify that all links on the Table of Contents work and link to the appropriate documents. Label the [CD](#) or [USB](#) drive with the following information (see example below):

- COA Self-Study
- Program Name
- City, State/Province
- Program ID Number
(please ask your Coordinator if you are unaware of your ID)
- Site Visit or Review Date
- Manual under which you are being accredited
(e.g., After School Program Standards)





Step 8 - Sending the Electronic Self-Study

Once the self-study is complete, send a copy of the electronic self-study document to COA at the address listed below per the timeline set up by COA.

Council on Accreditation
Attn: Program ID#___ Self-Study
45 Broadway, 29th Floor
New York, NY 10006

If the self-study document submitted to COA has been properly assembled as per the instructions contained in this document, you will be instructed to send a copy of your self-study to the entire Review Team. If the self-study needs remediation or adjustments, your COA Coordinator will give you instructions regarding what to change and where and when to submit the changes. COA recommends that the program send the self-study document via a courier service in order to track the package and ensure that it arrives at the desired location.



Glossary of Electronic Terms

Acrobat: A product from *Adobe Systems, Inc.*, for manipulating documents stored in Portable Document Format. Acrobat provides a platform-independent means of creating, viewing, and printing documents.

Compact disk/compact disc (CD): A small optical disk on which data such as music, text, or graphic images can be digitally encoded.

CD Burner: A device which shoots a laser and writes data to a compact disc, allowing a user to store, retrieve, and read documents in digital format.

Compact disc read only memory (CD-ROM): A compact disc that functions as read-only memory.

Compact disc recordable (CD-R): A compact disc on which you can write only once and thereafter is read-only.

Microsoft Excel (XLS): A spreadsheet program from Microsoft, part of their *Microsoft Office* suite of productivity tools and one of the most widely used spreadsheets.

Microsoft Word (DOC): A popular word processor, part of the *Microsoft Office* suite.

Portable Document Format (PDF): The native file format for *Adobe Systems' Acrobat*. PDF is the file format for representing documents in a manner that is independent of the original application software, hardware, and operating system used to create those documents. A PDF file can describe documents containing any combination of text, graphics, and images in a device-independent and resolution-independent format. These documents can be one page or thousands of pages, very simple or extremely complex, with a rich use of fonts, graphics, color, and images.

PowerPoint (PPT): A *Microsoft* application for creating presentations, speeches, slides, etc.

Scanner: A device that allows a finely focused beam of light to move in a systematic pattern over a surface in order to reproduce and subsequently transmit a digital image.

USB Drive: USB standards for universal serial bus. A USB drive is sometimes called a flash drive, memory stick, or thumb drive. It is a flash memory data storage device that is removable and rewritable, much shorter than a floppy disk, and weighs less than 2 ounces. Storage capacities typically range from 64 MB to 64 GB with steady improvements in size and price per gigabyte.



Frequently Asked Questions

[What is the electronic self-study?](#)

[What are the benefits of completing the self-study electronically?](#)

[Can our program submit part of our self-study electronically and part of it in hard copy format?](#)

[Do we have to submit our self-study electronically?](#)

[I do not understand how to scan a document or burn a CD. Can I call my COA Coordinator for help?](#)

[Do I really need the full version of Adobe Acrobat? Can I just use the free version of the Reader located on Adobe's website?](#)

[Do I need to purchase a scanner and scanning software? Can I have a copy center scan my hard copy documents?](#)

[What if our system crashes while I am doing the electronic self-study and we lose everything?](#)

[Does the electronic self-study affect the on-site review in any way?](#)

[The instructions indicate that we should submit only relevant documentation. Does that mean that we cannot submit an entire document \(e.g., bylaws\) as evidence of compliance for a standard?](#)

Question: What is the electronic self-study?

Answer: The electronic self-study is a process created by COA which allows a program to submit its evidence of implementation on a CD-ROM or a USB drive.

Question: What are the benefits of completing the self-study electronically?

Answer: There are many benefits to many different stakeholders – Review Team and Programs. Some of these benefits include:

- Programs save a significant amount of money on paper, copying, and shipping.
- Programs save time preparing the self-study document because they only need to produce one CD and then copy it.
- Reviewers have the convenience of being able to review an entire self-study any place they can bring a laptop computer.

Question: Can our program submit parts of our self-study in hard copy format?

Answer: Please submit the entire self-study in electronic format. If some of your evidence is only in hard copy format, please scan the evidence and put the scanned copy in your self-study or make the hard copy documents available to the review team during the



site visit.

Question: Do we have to submit our self-study electronically?

Answer: Starting January 1, 2009, COA is requiring all programs to submit their self-study in electronic format. If you are unable to submit your self-study electronically, you must apply for a waiver. Please contact your COA Accreditation Coordinator for more information on the waiver process.

Question: I do not understand how to scan a document or burn a CD. Can I call my COA Coordinator for help?

Answer: COA Coordinators are very talented in many ways however they are not necessarily technical experts. They can provide you with a lot of information and technical assistance about the self-study and the recognition process, however you must have the internal technical proficiency. Please consult your internal IT experts or some other outside source if you do not understand a technical piece related to completing the self-study.

Question: Do I really need the full version of Adobe Acrobat? Can I just use the free version of the Reader located on Adobe's website?

Answer: If you need to use Adobe Acrobat to read a document, you can download the free Acrobat Reader from <http://www.adobe.com/>. If you wish to convert certain electronic or paper documents to readable PDF files for the team to review electronically, you will need to purchase the full version of Adobe Acrobat. COA does not require a program to purchase the full version for the electronic self-study process.

Question: Do I need to purchase a scanner and scanning software? Can I have a copy center scan my hard copy documents?

Answer: While the program may not need to purchase a scanner and scanning software, it will need to find a method for saving hard copy documents in an appropriate electronic format for the self-study. Using a scanner and scanning software would allow the program to do this. However, a program may choose to bring their hard copy documents to a copy center for scanning. When using an outside entity the program should ensure that all scanned documents comply with COA's document extension requirements.

Question: What if our system crashes while I am doing the electronic self-study and we lose everything?

Answer: COA strongly recommends that the program consider creating back-up copies of its self-study.

Question: Does the electronic self-study affect the on-site review in any way?

Answer: Since the team is reviewing the self-study electronically, the program needs to make a laptop or desktop computer available to the team in the room in which they will be meeting during the site visit. Reviewers are not required to bring their own laptops on the site visit.

Also, if the program essentially operates in a paperless environment, they should inform the team before the site visit and make arrangements during the on-site



review to show the team how to access needed documents.

Question: The instructions indicate that we should submit only relevant documentation. Does that mean that we cannot submit an entire document (e.g., bylaws) as evidence of implementation for a standard?

Answer: If a program decides to save an entire document (e.g., bylaws) in their Electronic Self-Study, they should create bookmarks in the document and hyperlinks in the table of contents only to the relevant pages of that document. Pages must be clearly labeled so that reviewers know where to find the relevant documentation. Programs should also indicate in their "Read Me First" file when they are using this method of bookmarks and hyperlinks.

The following instructions describe the process of creating bookmarks and hyperlinks. NOTE: Please review and test these instructions for creating bookmarks before you create multiple bookmarks. These instructions were obtained from the Microsoft and Adobe help websites and may change based on upgrades to software and operating systems.

Step 1: Creating Bookmarks

Create bookmarks first by opening the document that you want to save in its entirety as part of the Electronic Self-Study.

Step 1.1: Creating Bookmarks in Word Files

If the document is a Word file, insert bookmarks on all relevant pages by doing the following:

1. Select an item you want a bookmark assigned to (i.e., highlight a word, sentence, paragraph, or several paragraphs to which you want to assign a bookmark), or click where you want to insert a bookmark.
2. On the **Insert** menu, click **Bookmark**.
3. Under **Bookmark name**, type or select a name.
4. Click **Add**.

Note: Bookmark names must begin with a letter and can contain numbers. You can't include spaces in a bookmark name. However, you can use the underscore character to separate words -- for example, "First_heading."

Step 1.2: Creating Bookmarks in Adobe Acrobat Files

If the document is an Adobe Acrobat file, insert bookmarks on all relevant pages by doing the following:

1. Click the Bookmarks tab in the navigation pane to bring the Bookmarks palette to the front.
2. Click the bookmark under which you want to place the new bookmark. If you don't select a bookmark, the new bookmark is automatically added at the end of the list.
3. Use the Next Page and Previous Page arrows on the command bar to navigate to the destination in the PDF document to which you want the bookmark to link.
4. Modify the view so it directs the reader's attention to the correct information. For more information, see *Setting magnification options* in the Adobe Acrobat help menu. Any magnification option you set will apply to any new bookmarks you create, as well as to the current bookmark, until you change the option.
5. Choose New Bookmark from the Bookmarks palette menu, or select the new bookmark icon at the bottom of the Bookmarks palette.
6. Type in the text for the bookmark label, and press Enter.



Step 2: Saving the "Bookmarked" Document

Once you've created all of the relevant bookmarks, save the entire "bookmarked" document in the one of the evidence folders.

Note: Because Peer Reviewers use the table of contents to navigate the Electronic Self-Study, COA does not prescribe in which evidence folders programs should save their evidence.

Step 3: Creating Hyperlinks in the Table of Contents

1. Type the name of the evidence in the appropriate cell to which you are creating a hyperlink (e.g., Intake Procedure).
2. Select the cell and choose **Insert** and **Hyperlink** (or press Ctrl+K) on the menu bar. To link to the document, click **Existing file** under **Link to**. Locate and select the document to which you want to link.
3. Once you have selected the document, do not click **OK**. Instead, go to the end of the location string, enter a pound sign (#), and then enter the name of the bookmark that is being referenced in the evidence immediately after the pound sign (e.g., H:\MyDocuments\CounselorHandbook.doc#**Intake_Procedures**). Once you've entered this information, then click **OK**.
4. Test the hyperlink to ensure that the link goes directly to the bookmarked page.