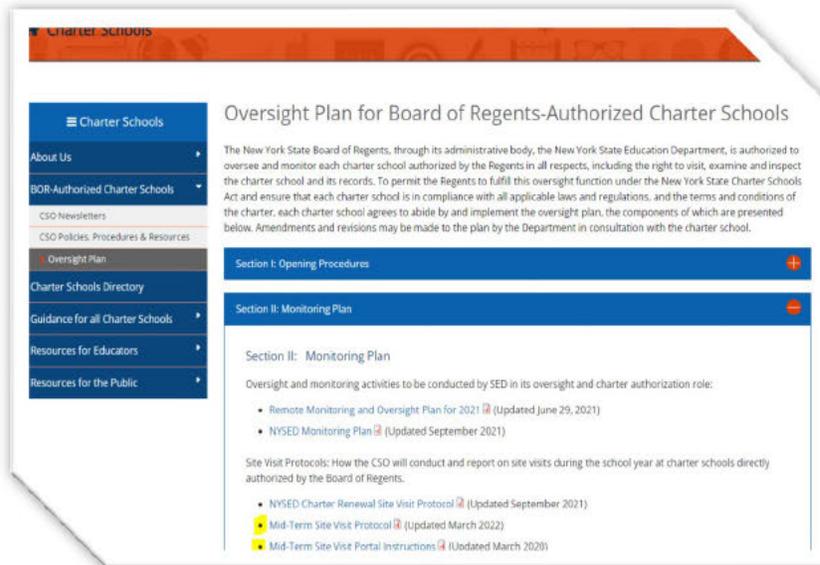




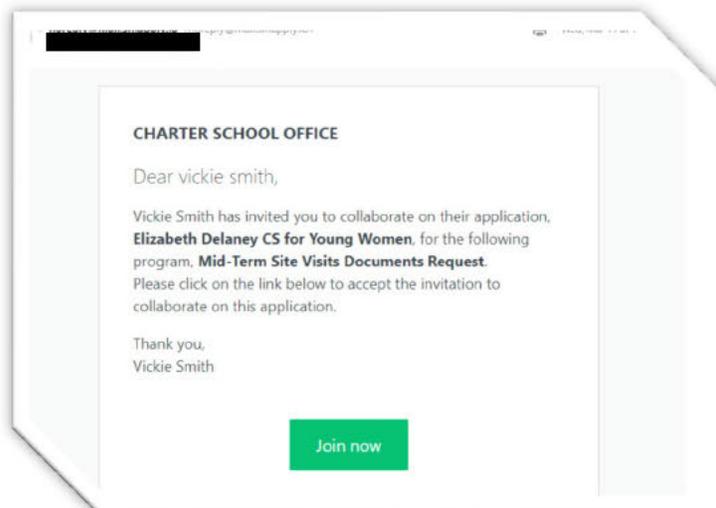
## NYSED CHARTER SCHOOL OFFICE

### PORTAL INSTRUCTIONS FOR SUBMITTING REQUESTED MID-TERM SITE VISIT DOCUMENTS

1. To prepare for and to ensure that you have a well-informed understanding of what to expect, please access the [2021-2022 Mid-Term Site Visit Protocols and Portal Instructions](#) and review thoroughly in its entirety.

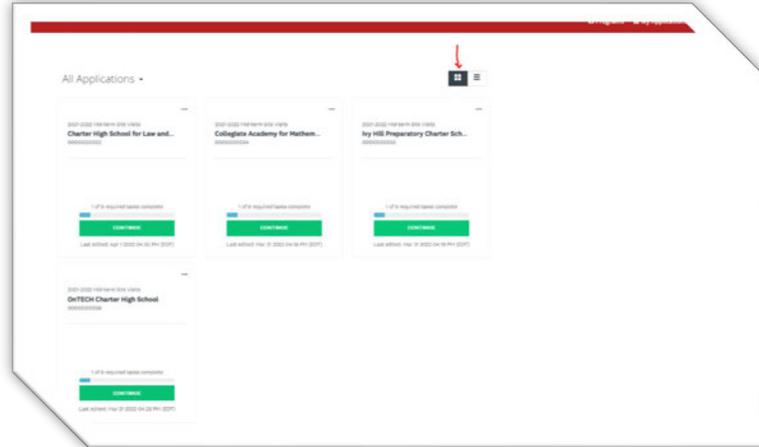


2. School Leaders and Board Chairs have received an email from the CSO Online Portal with an invitation from your CSO Liaison to collaborate. (**Upon successful login, ownership will transfer to the School Leader**). By clicking on the “Join Now” link, both will have access to the school’s account to begin uploading the requested documents.



- After login, your dashboard will appear. Your name will appear in the red banner in the top right corner and the 2021-2022 MTSV “application” will appear in one of two formats or views as shown below. (Note: The system refers to submissions as “applications”).

View 1



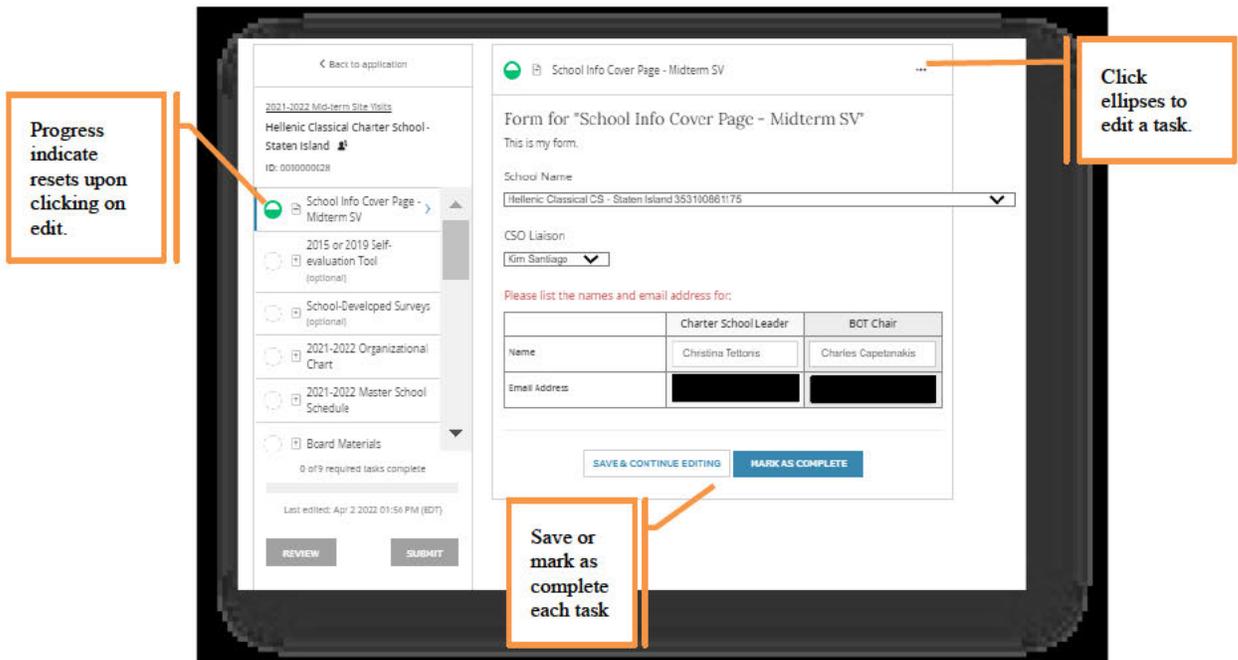
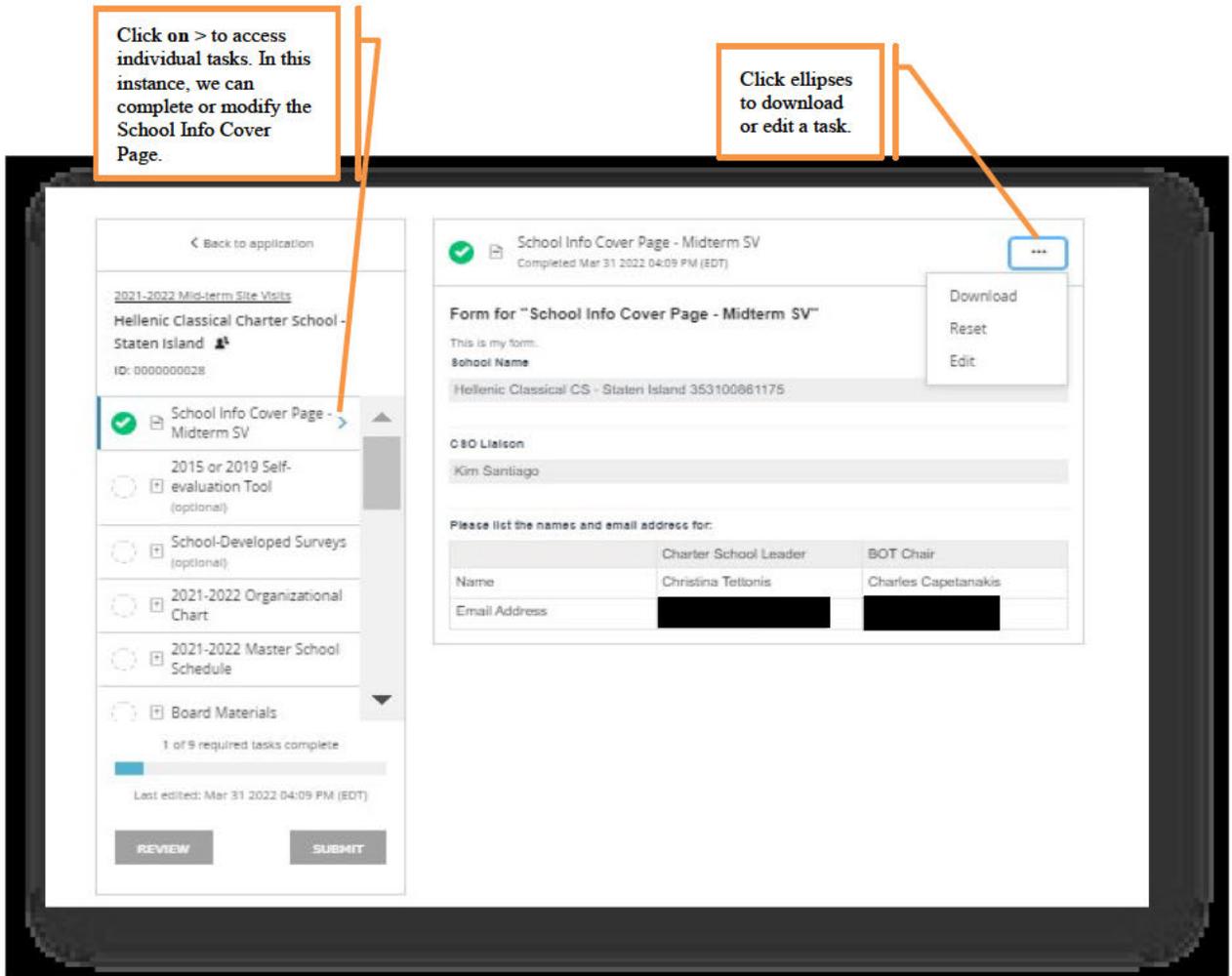
View 2

Program	Application	Deadline	Status	Completion	Last edited	
2021-2022 M66 term site visits	Charter High School for Law and Social Justice			1 of 9 required tasks complete	Apr 1 2022 04:30 PM (EDT)	CONTINUE
2021-2022 M66 term site visits	Collegiate Academy for Mathematics and Personal Awareness Charter School			1 of 9 required tasks complete	Mar 31 2022 04:18 PM (EDT)	CONTINUE
2021-2022 M66 term site visits	Ivy Hill Preparatory Charter School			1 of 9 required tasks complete	Mar 31 2022 04:19 PM (EDT)	CONTINUE
2021-2022 M66 term site visits	OnTECH Charter High School			1 of 9 required tasks complete	Mar 31 2022 04:23 PM (EDT)	CONTINUE

- The School Leader or Board, seeing the school’s application, will click on “Continue” to access your MTSV tasks. The “tasks” or required uploads will appear on your screen. These tasks may be completed in any order. As each task is completed, the circle next to each task will begin to fill with green.
- Clicking on continue, the School Leader or Board Chair will see that the CSO liaison is listed as the primary owner the account along with the names of the invitees. If you don’t see your CSO liaison name or the names of all invitees, it means that you have not accepted the invitation in the email as described in Step 2 above. Doing so also means that you have created another, separate account that is not connected at all to the account already set up for your school. Go back to Step 2 above.

The screenshot shows a user interface for a school information system. On the left, a 'Task Progress indicator' shows '1 of 9 required tasks complete' with a progress bar and 'Last edited: Mar 31 2022 04:09 PM (EDT)'. Below this are 'REVIEW' and 'SUBMIT' buttons. The user profile for Kimberly Santiago (Owner) is visible, along with a 'Collaborators' section with an 'Add' button. A note on the far left states: 'Note: Ownership will not change until the school leader clicks on "Join Now"'. The main 'Tasks List' for '2021-2022 Mid-term Site Visits' is shown for 'Hellenic Classical Charter School - Staten Island'. The first task, 'School Info Cover Page - Midterm SV', is completed. A callout box points to the top right of the tasks list, stating: 'Click to access download or edit feature'. Another callout points to the right arrow of the first task, stating: 'Click on > for instructions and to upload document for each given task.' A third callout points to the 'Additional Documents (School Upload)' task, stating: 'School uploads documents for tasks beginning at top of list to here.' A fourth callout points to the same task, stating: 'CSO only refers to documents that the CSO will upload for liaison and consultant access but will be visible to the school'. The tasks list includes items like '2015 or 2019 Self-evaluation Tool (optional)', 'School-Developed Surveys (optional)', '2021-2022 Organizational Chart', '2021-2022 Master School Schedule', 'Board Materials', 'Description of School Leadership Eval Process', 'Description of Teacher Eval Process', 'Efforts to Reach Enrollment/Retention Targets', 'Admissions and Waitlist', 'Supplemental Data to BM1', 'Additional Documents (School Upload) (optional)', 'School Data/Info (CSO Only) (optional)', 'General Resources (CSO Only) (optional)', 'Annual Reports (CSO Only) (optional)', 'CSO Monitoring Visit Reports (as applicable) (CSO Only) (optional)', and 'Site Visit Schedules and Logistics (CSO Only) (optional)'.

6. Your CSO liaison may request additional documentation. If so, you will be able to upload additional documents as required to comply with the request. You may also upload additional documentation including videos you feel are relevant and/or supplemental to highlight the school’s success in meeting the Performance Framework Benchmark indicators. Please discuss the latter with your liaison first.
7. If necessary, you have the ability to download or edit any tasks whether it is correcting an error in the school info and cover page form or replacing a previous uploaded document for a revised or corrected one. Using the ellipses (...) at the top right of your tasks list. **Never click on reset unless you desire to delete all tasks and start anew. None of the files you uploaded are recoverable.**



- A School Leader (when ownership has transferred) may invite members of your team by clicking on "Add Collaborator" that appears below their name. The account owner will

insert an email address (placing a comma after each email if more than one) and grant each invitee the right to “view and edit” or “view”. Then hit send

Collaborators

Add collaborators to view or contribute to your application

Email address of collaborators Separate addresses by commas

Type of access

View & edit  View only

Message (optional)

You have been added to the school's account in the NYSED CSO MTSV portal. Use the link in this invitation for initial access to the portal. TY

SEND INVITE

9. The invitees will receive an email from the CSO portal just as the School Leader and Board chair did with an invitation to collaborate. By clicking on the “Join Now” link in the email initially, the invitee will be added as a collaborator to the same account.
10. Please make sure that collaborators are working from the same account as you. Do not create more than the one account for the same school – as multiples will be deleted.
11. The account owner is the only person who can submit mark the submission as complete for it to be sent to the CSO. And then you are done! The owner and all who are listed from the school will receive a date stamped receipt via email acknowledging the submission.
12. Please feel free to contact your liaison for content questions and Patrick Garrett or Vickie Smith for technical assistance by email to [charterschools@nysed.gov](mailto:charterschools@nysed.gov).

Thank you,

Charter Schools Office  
Performance Oversight Team  
[charterschools@nysed.gov](mailto:charterschools@nysed.gov)  
518-474-1762