



NEW YORK STATE EDUCATION DEPARTMENT Charter School Office (CSO)

Completing the Add a Board of Trustees (BOT) Member Application

1. Before starting the application in the NYSED Business Application portal, please review the guidance on the CSO website on the [BOR-Authorized Charter School Policies, Procedures & Resources](#) web page under the Adding a Board of Trustee Member section.
2. After reading the above directions, and once you are ready to start the application process, begin by logging in to the NYSED Business Application portal at <https://portal.nysed.gov/>. If you are having trouble logging in, please refer to the [Business Portal Applications and Contact Information](#) help page.

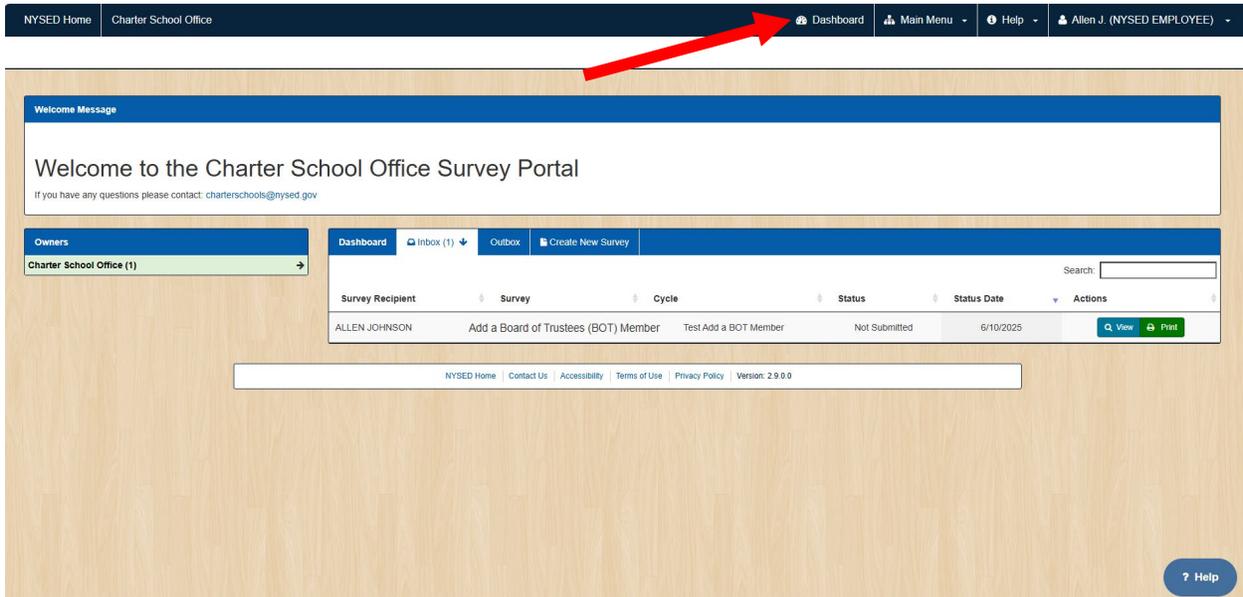
The screenshot shows the NYSED Business Application Portal dashboard. At the top, there is a navigation bar with 'NYSED Home', 'Portal Home', 'Reset Your Password', and a 'Log In' button highlighted with a red box. Below the navigation bar is the NYSED logo and the text 'New York State EDUCATION DEPARTMENT Knowledge > Skill > Opportunity'. The main heading is 'Application Business Portal' with 'Portal Dashboard' underneath. The dashboard content is divided into three main sections: 'My Applications', 'Public Links', and 'Other Applications'. The 'My Applications' section contains a message: 'In order to view secure applications, you must be logged in. Please Log In to continue to your NYSED Business Portal Applications.' The 'Public Links' section lists several links: 'Inventory of Registered Programs', 'Look Up Postal Zip Codes', 'NYSED Public web site', 'Professional License Online Verification Searches', 'SEDRF Query', 'Teacher Certification Help', and 'TEACH Public Inquiry System'. The 'Other Applications' section lists: 'Child Nutrition Knowledge Center (CN)', 'Impartial Hearing Reporting System (IHRS)', 'Rate Setting Unit (RSU)', 'System to Track and Account for Children (STAC)', 'Teacher's Certification (TEACH)', and 'Teacher Access and Authorization'. At the bottom of the page, there is a footer with links for 'NYSED Home', 'Accessibility', 'Privacy Statement', 'Disclaimer', and 'Terms of Use'.

3. After you login, look under the section “**My Applications**” and click on “**SED Monitoring and Vendor Performance System.**”

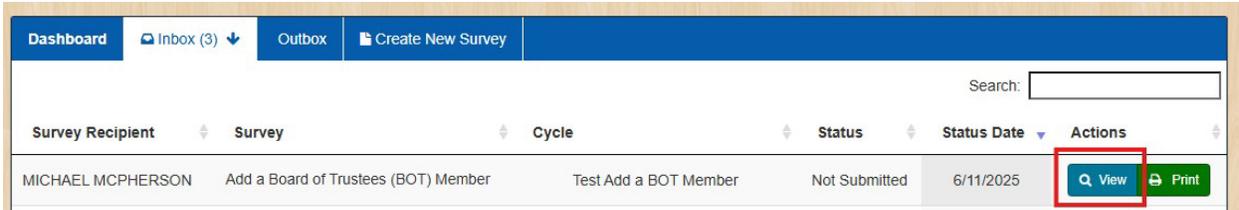


This will bring you to your Applications Dashboard.

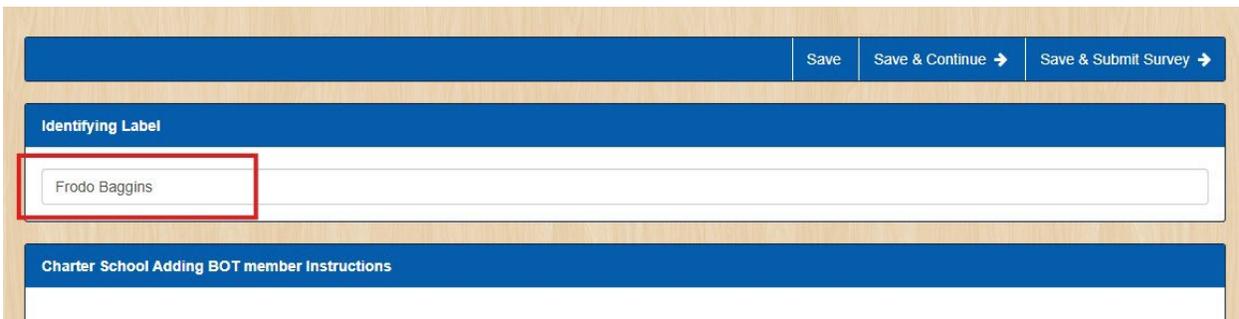
4. If you do not see your school’s Applications Dashboard, click the **Dashboard** tab at the top of the window. The Applications Dashboard will show all applications associated with your account, similar to the example below.



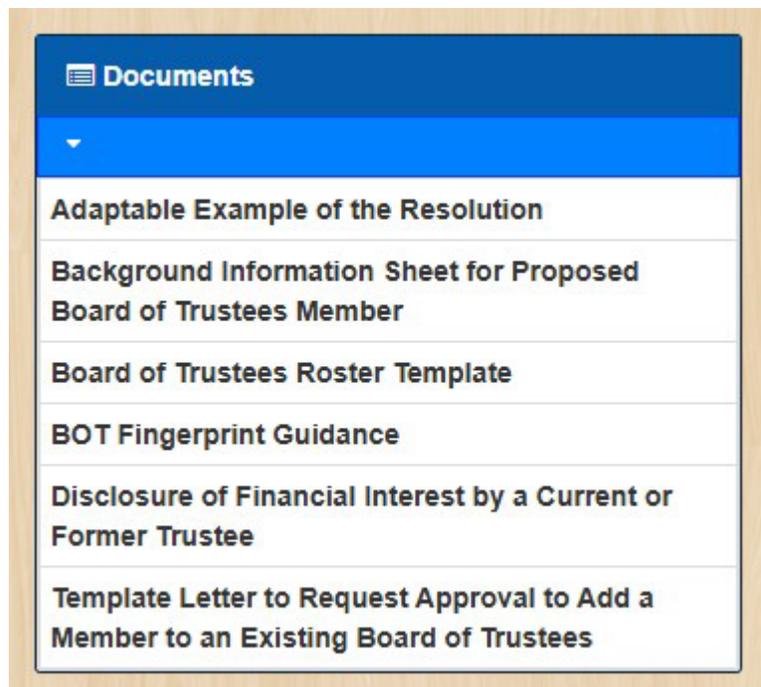
5. Scroll down to the **Add a Board of Trustees (BOT) Member** option and click the **View** button to open the application.



6. As you complete the application you will first need to enter the **Identifying Label**, which is the new BOT member's full name, at the top right of your screen as shown below.



7. The application has two sections: **Board of Trustees (BOT) Information** and **Proposed BOT Member Document Upload**. Both sections need to be completed before the application can be successfully completed and submitted. For your convenience, guidance documents and templates needed to complete the application are located in the **Documents** section located on the lower left side of the browser window.



- Fill out all **required** questions in the **Board of Trustees (BOT) Information** section, which are indicated by a red asterisk (*). Once you have completed all required questions, scroll to the bottom or top of the page and click **Save & Continue**.



This will bring you to the **Proposed BOT Member Document Upload** section.

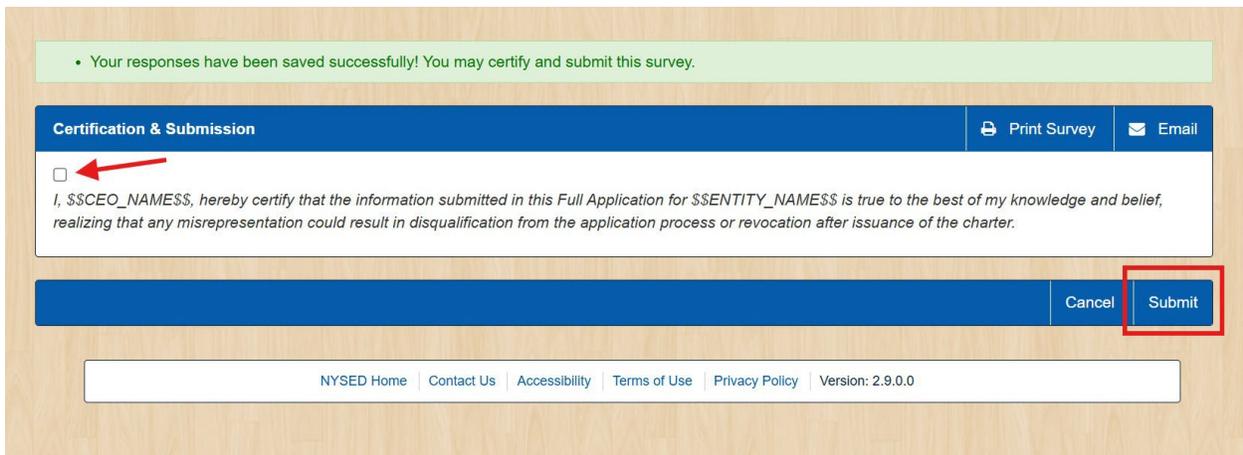
- Upload all **required** (*) documents in the **Proposed BOT Member Document Upload** section using the guidance and templates found on our website here: [BOR-Authorized Charter School Policies, Procedures & Resources](#) or in the **Documents** section of the portal page as shown above.

- Once you have completed this section, click **Save & Continue** a final time.

Note: If you have not completed a required () question or upload, you will receive an error and will not be able to submit your application until the error is corrected.*

- Once all questions and uploads have been completed AND you are able to save your application without error, you should submit your application by clicking **Save & Continue**.

- A legal assentation will appear that you must agree to in order to submit the application. To do so, click the check box and then click the **Submit** button.

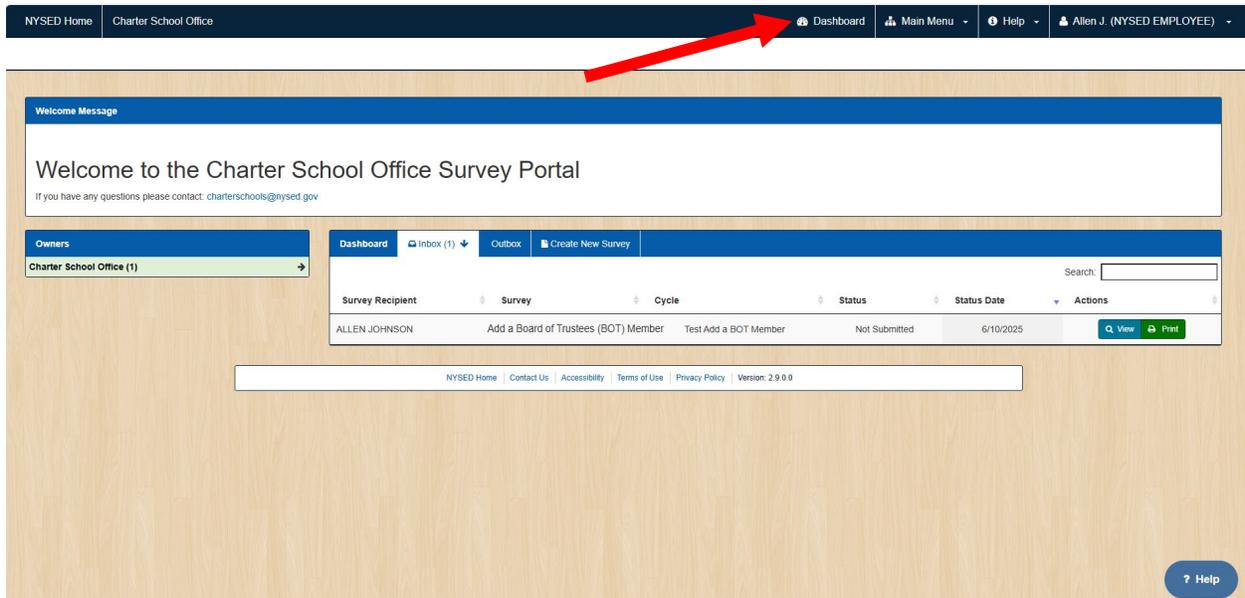


You have now completed and submitted your application.

Creating Additional Board of Trustees Applications

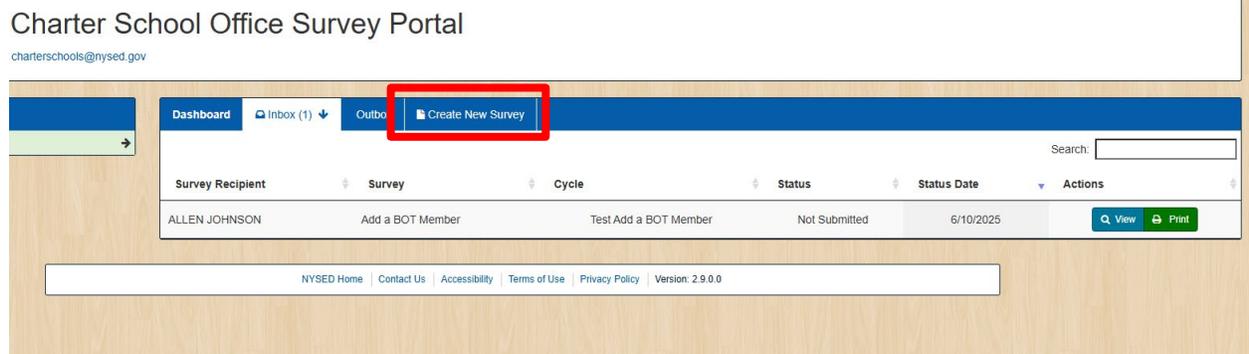
You must complete a **separate Add a Board of Trustees (BOT) Member portal application** for each new board member candidate. To complete a new application for additional prospective Board of Trustees members, please follow the directions below.

1. Click the **Dashboard** tab at the top of the window. The **Dashboard** will open to the inbox by default.



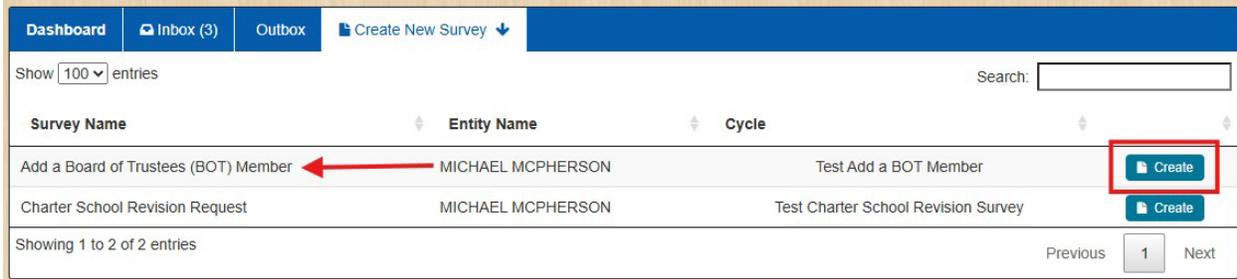
The screenshot shows the Charter School Office Survey Portal interface. At the top, there is a dark blue navigation bar with the following items: 'NYSED Home', 'Charter School Office', 'Dashboard' (highlighted with a red arrow), 'Main Menu', 'Help', and 'Allen J. (NYSED EMPLOYEE)'. Below the navigation bar is a 'Welcome Message' section with the text 'Welcome to the Charter School Office Survey Portal' and contact information 'charterschools@nysed.gov'. The main content area features a 'Dashboard' tab, an 'Inbox (1)' dropdown, and a 'Create New Survey' button. Below these are tabs for 'Outbox' and 'Create New Survey'. A table displays survey data with columns for 'Survey Recipient', 'Survey', 'Cycle', 'Status', 'Status Date', and 'Actions'. The table contains one row for 'ALLEN JOHNSON' with the survey 'Add a Board of Trustees (BOT) Member' and status 'Not Submitted'. A footer contains links for 'NYSED Home', 'Contact Us', 'Accessibility', 'Terms of Use', 'Privacy Policy', and 'Version: 2.9.0.0'. A 'Help' button is located in the bottom right corner.

2. Now click the **Create New Survey** tab.



This screenshot shows the same Charter School Office Survey Portal interface, but with the 'Create New Survey' button highlighted by a red rectangular box. The rest of the page, including the navigation bar, welcome message, and data table, remains the same as in the previous screenshot.

3. Scroll down until you see the survey name “**Add a Board of Trustees (BOT) Member**” and then click the corresponding **Create** button.



4. You will now need to enter the application’s **unique identifying label**, which is the new **BOT member’s full name**, at the top left of your screen.



5. Now fill out all **required** questions, indicated by a red asterisk (*), in both the **Board of Trustees (BOT) Information** and **Proposed BOT Member Document Upload** sections. Once you have completed the questions on each page, scroll to the bottom or top of the page and click **Save & Continue**.



6. Once you have completed all pages, click **Save & Continue** a final time.

*Note: If you have not completed a **required** (*) question or upload, you will receive an error and will not be able to submit your application until the error is corrected.*

13. Once all questions and uploads have been completed AND you are able to save your application without error, you should submit your application by clicking **Save & Continue**.

14. A legal assentation will appear that you must agree to in order to submit the application. To do so, click the check box and then click the **Submit** button.

• Your responses have been saved successfully! You may certify and submit this survey.

Certification & Submission Print Survey Email

I, \$\${CEO_NAME}\$\$, hereby certify that the information submitted in this Full Application for \$\${ENTITY_NAME}\$\$ is true to the best of my knowledge and belief, realizing that any misrepresentation could result in disqualification from the application process or revocation after issuance of the charter.

Cancel Submit

[NYSED Home](#) | [Contact Us](#) | [Accessibility](#) | [Terms of Use](#) | [Privacy Policy](#) | Version: 2.9.0.0

You have now completed and submitted your application.

7. Your main **Dashboard** page will then show additional **Add a Board of Trustees (BOT) Member** applications.

Survey Recipient	Survey	Cycle	Status	Status Date	Actions
MICHAEL MCPHERSON	Add a Board of Trustees (BOT) Member - Eomer Eadig	Test Add a BOT Member	Submitted	6/11/2025	View Print
MICHAEL MCPHERSON	Add a Board of Trustees (BOT) Member - Frodo Baggins	Test Add a BOT Member	Not Submitted	6/11/2025	View Print

Contact Information

For technical / portal questions: michael.mcpherson@nysed.gov, cc: charterschools@nysed.gov

For application-specific questions: your CSO liaison