



## 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.

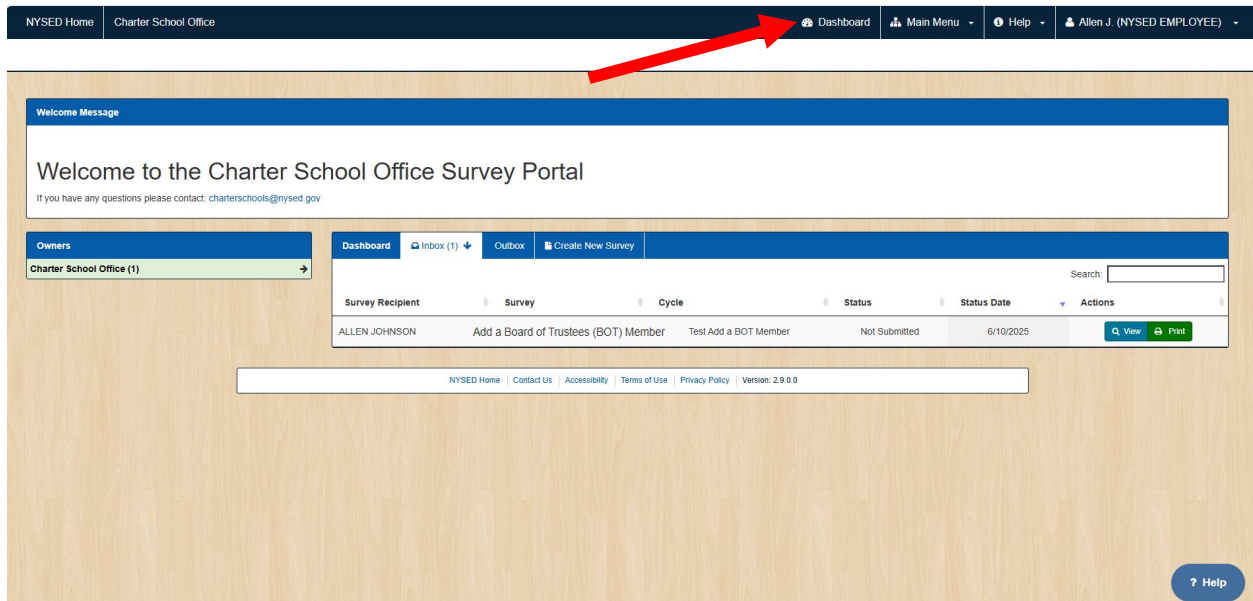
The screenshot shows the NYSED Business Application Portal. At the top, there is a dark blue navigation bar with links for 'NYSED Home', 'Portal Home', 'Reset Your Password', and a highlighted 'Log In' button. Below the navigation bar, the NYSED logo and 'New York State EDUCATION DEPARTMENT' are on the left, and 'Application Business Portal' with 'Portal Dashboard' is on the right. A blue banner below the header reads 'My Applications' and states: 'In order to view secure applications, you must be logged in. Please [Log In](#) to continue to your NYSED Business Portal Applications.' Below this banner are two columns of links. The left column, titled 'Public Links', includes: '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 right column, titled 'Other Applications', includes: '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: 'NYSED Home', 'Accessibility', 'Privacy Statement', 'Disclaimer', and 'Terms of Use'.

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

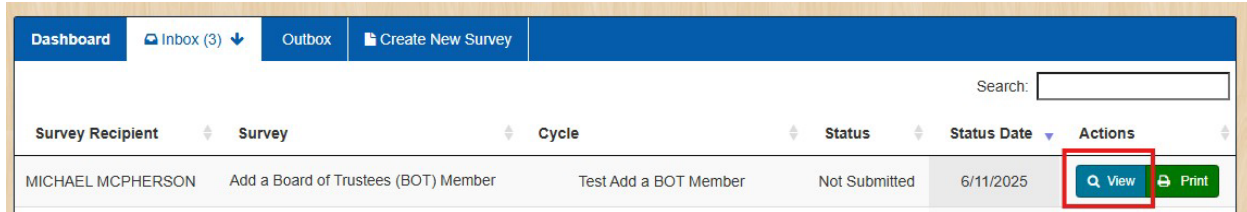


This will bring you to your Applications Dashboard.

- 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.



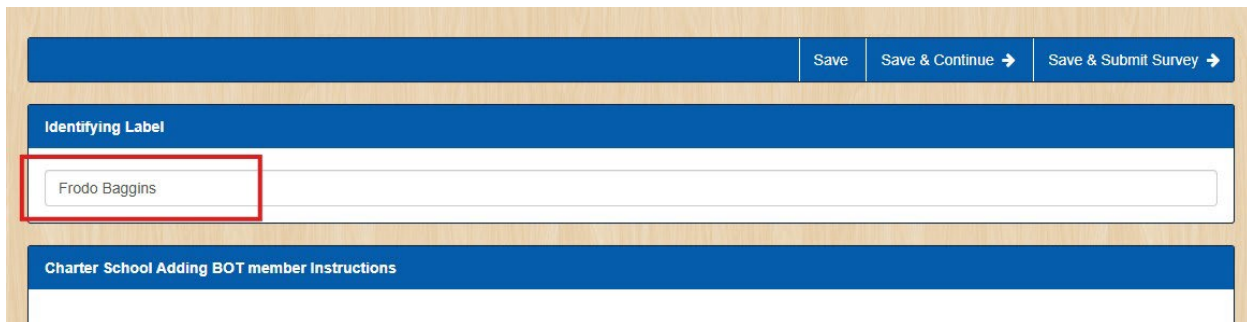
5. Scroll down to the **Add a Board of Trustees (BOT) Member** option and click the **View** button to open the application.



The screenshot shows a dashboard with a table of survey entries. The table has columns for Survey Recipient, Survey, Cycle, Status, Status Date, and Actions. A red box highlights the 'View' button in the Actions column for the entry 'Add a Board of Trustees (BOT) Member'.

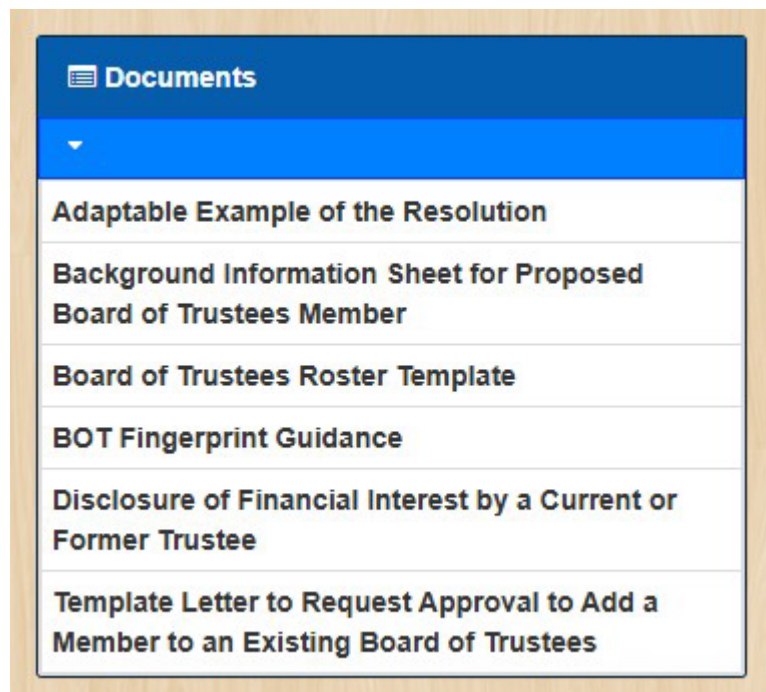
Survey Recipient	Survey	Cycle	Status	Status Date	Actions
MICHAEL MCPHERSON	Add a Board of Trustees (BOT) Member	Test Add a BOT Member	Not Submitted	6/11/2025	<a href="#">View</a> <a href="#">Print</a>

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 left of your screen as shown below.



The screenshot shows the application form. At the top, there are buttons for 'Save', 'Save & Continue', and 'Save & Submit Survey'. Below these is a section titled 'Identifying Label' with a text input field containing 'Frodo Baggins'. A red box highlights the input field. Below the input field is a section titled 'Charter School Adding BOT member Instructions'.

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.



8. 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**.

The screenshot shows a 'Delete Page Answers' dialog box with a blue header and a white body. The body contains the text: 'This will delete all answers on the current page. Deleted answers cannot be recovered.' Below this text is a brown button labeled 'Delete Page Answers'. Below the dialog box is a blue navigation bar with three buttons: 'Save', 'Save & Continue →', and 'Save & Submit Survey →'. The 'Save & Continue →' button is highlighted with a red rectangle.

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

9. 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.

10. 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.*

11. 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**.

12. Finally, you must certify and submit the application by clicking the check box and then clicking the **Submit** button.

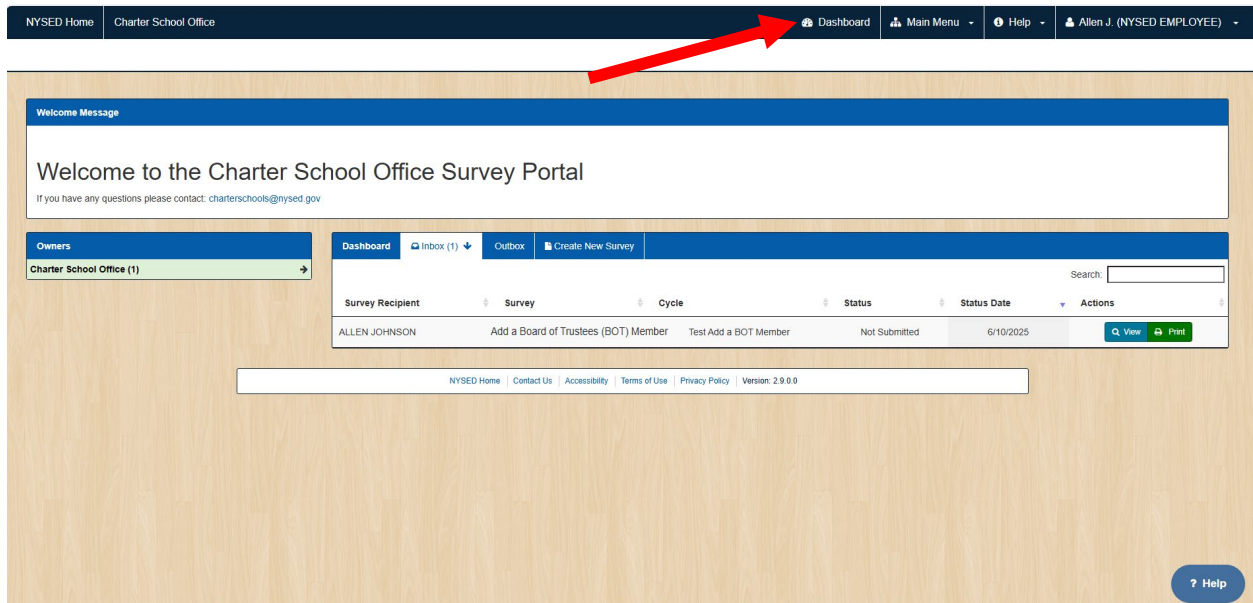
The screenshot shows the 'Certification & Submission' section of the application. At the top, a green banner reads: '• Your responses have been saved successfully! You may certify and submit this survey.' Below this is a blue header for 'Certification & Submission' with links for 'Print Survey' and 'Email'. The main content area contains a checkbox with a red arrow pointing to it, followed by the text: 'I, \$SCEO\_NAME\$\$, hereby certify that the information submitted in this Full Application for \$SENTITY\_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.' Below this text is a blue bar with 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted with a red rectangle. At the bottom, a white footer bar contains links for 'NYSED Home', 'Contact Us', 'Accessibility', 'Terms of Use', 'Privacy Policy', and 'Version: 2.9.0.0'.

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.

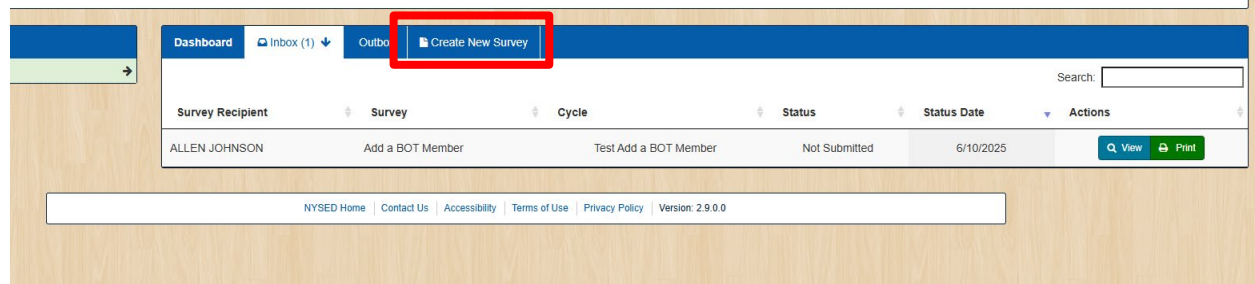
1. Click the **Dashboard** tab at the top of the window. The **Dashboard** will open to the inbox by default.



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

Charter School Office Survey Portal

charterschools@nysed.gov





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

Survey Name	Entity Name	Cycle
Add a Board of Trustees (BOT) Member	MICHAEL MCPHERSON	Test Add a BOT Member
Charter School Revision Request	MICHAEL MCPHERSON	Test Charter School Revision Survey

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.

Identifying Label

Eomer Eadig

An unique identifier is required

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**.

Delete Page Answers

This will delete all answers on the current page. Deleted answers cannot be recovered.

Delete Page Answers

Save Save & Continue → Save & Submit Survey →

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.*

7. 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**.

8. Finally, you must certify and submit the application by clicking the check box and then clicking 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.

9. Your main **Dashboard** page should now show additional **Add a Board of Trustees (BOT) Member** applications.

Dashboard	Inbox (4)	Outbox	Create New Survey	Search:		
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.mcperson@nysed.gov](mailto:michael.mcperson@nysed.gov), cc: [charterschools@nysed.gov](mailto:charterschools@nysed.gov)

For application-specific questions: your CSO liaison