

# U.S. Department of Education Office of Postsecondary Education E recognition System



e Recognition System Administrator's User Guide

2015-2016

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# 1 Access and Login

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The e-Recognition system allows Department administrators to maintain information needed to allow the agencies to submit their on-line reports and analysts to review them.

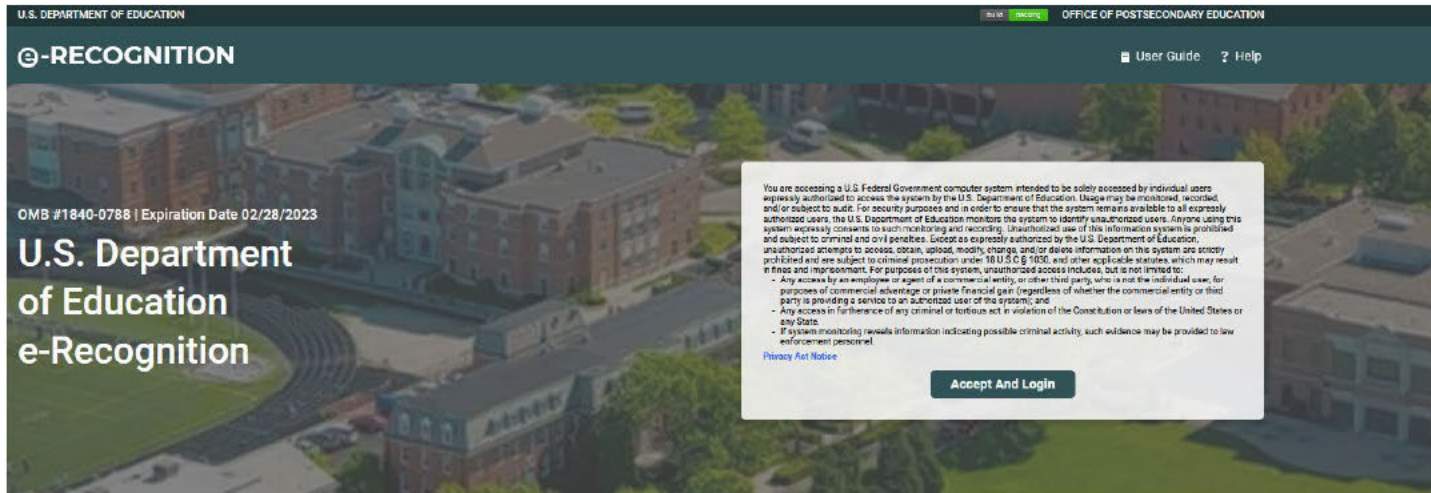
Administrators can perform the following tasks.

- Add and update agencies and countries
- Add and update meeting dates
- Assign, change, and remove meeting dates for agencies and countries
- Assign and update the agency report submission type
- Enter the agency's scope of recognition
- Upload historical documents
- Upload 3<sup>rd</sup> party comments documents and requests to make oral comments
- View agency reports
- Change Status agency reports or change the report status
- Assign analysts to agencies
- Add, update, and delete analyst, reviewer, and committee user accounts and assign roles
- Assign committee members to meeting dates
- Unlock user accounts and reset passwords
- Update the text of standard emails
- Update the text of the criteria displayed on the agency narrative screens
- Output agency or committee data for FOIA or other requests
- Add documents to the e-folder
- Edit documents in the e-folder
- Search documents and narratives in the e-folder
- Send a blast email to agencies or countries
- Update document types for the e-folder

The screens you will use to perform these tasks are explained in the following sections.

## 1.1 Accessing the System

To access the system, enter the URL <https://surveys.ope.ed.gov/erecognition> in the address box of the browser. The e-Recognition landing screen will display. Click the **Accept and Login** button after reading the Privacy Act Notice and Security Warning message. Enter your User ID and Password and click the **Log in** button to log in to the system. All login attempts are logged. If you have three unsuccessful login attempts, your account will be locked. You will then need to contact the Help Desk to have your account unlocked. A link to the *Contact the Help Desk* is located on the *Login* page.



## 1.2 Forgot Password

If you forget your password, you can click the 'Forgot Password?' link and enter your email. The system will confirm your identity and email your password to you. After three failed login attempts, you will be locked out of the system and will need to contact the Help Desk to have your account unlocked.



## Forgot Password

Please enter your username and email and click the "Send Password" button. Your password will be emailed to you shortly.

If you are unable to provide this information at this time please contact the Help Desk here for further assistance.

Username

Email  
Email Address

## 1.3 Change Password

You can change your password by clicking on the 'Password' link at the top of the screen. You are required to change your password every 90 days. This screen will display after you login if your password has expired.

Enter your Current Password, New Password, and Verify New Password in the appropriate text boxes, then click the **Submit** button.



## Change Password

Please create a new password.

Current Password

### Password Requirements

- Your new password cannot be the same as your previous 24 passwords.
- Your new password must be at least 12 characters, and include any combination of the following:
  - passwords cannot contain your first or last name or the word 'password'
  - at least one uppercase alphabetic character (A-Z)
  - at least one lowercase alphabetic character (a-z)
  - at least one number (0-9)
  - at least one special character (#\$%&'()\*@%&)

New Password

Confirm Password

## 1.4 Help

A Help Desk is supported in conjunction with technical support for the e-Recognition website. The role of the Help Desk is to respond to technical questions about the website. Click the 'Help' link to contact the help desk.

## 1.5 User Guides

Click the 'User Guide' link in the toolbar to view the *User Guides* screen. Click on a link to display any of the guides.

## User Guide

Click on a link to display a user or administrator how-to guide. All guides are in PDF format.

### User Guides

- [Administrator User Guide](#)
- [Analyst/Reviewer User Guide](#)
- [Committee User Guide](#)
- [NACIQI User Guide](#)
- [NCFMEA User Guide](#)
- [Foreign Veterinary Agency User Guide](#)

### How-to Guides

#### Agency

- [Add an Agency or Country](#)
- [Assign an Analyst to an Agency](#)
- [Search for an Agency](#)
- [Unsubmit an Agency](#)

#### Meeting

- [Add a Meeting Date](#)
- [Modify a Meeting Date](#)

#### User

- [Add a User](#)
- [Assign a Committee Member](#)
- [Change your Password](#)
- [Change User Access](#)

#### e-Folder

- [Add a Document to the e-folder](#)
- [Edit a Document in the e-folder](#)

#### Other

- [Generate Downloadable Data](#)
- [Manage Criteria](#)
- [Manage Emails](#)

## 2 Agency and Country Maintenance

When an administrator logs in to the e-Recognition system, the *Administrator Search* screen will display. Most administrative functions related to agencies and countries can be done through this screen. Click the 'Admin Main' link in the top menu bar to return to this screen.

You can search for agency information by agency Login ID, name, type, state, submission status or type, meeting date, and assigned analyst. To include archived meeting dates in your search results, check the 'Include Archive' checkbox. To include deleted meetings, click the 'Include Deleted' checkbox.

After you enter your search criteria, click the **Search** button. Click on the **Reset** button to clear previously entered/selected search criteria.

## e-RECOGNITION

User Guide ? Help

AU Admin L  
Edit User

Search e-Folder Meetings Users Emails Criteria Documents Output Data Reports

## Search

ID	Name	Type	State	Include	Status
All	Select	All	All	Select	All
Submission Type	Meeting Date	Analyst			
All	All	All	Reset	Search	

Add Agency Or Country

Send Email

142 Agencies

Email Blast Archive

<input type="checkbox"/>	ID	Name	Type	State	Last Login	Locked	Analyst	Action
<input type="checkbox"/>	AARDVARK	AAARDVARK	Accrediting	WV	----	No	----	
<input type="checkbox"/>	ABCAA	ABC Accrediting Agency	Accrediting	CO	05/19/2022	No	Paul Florek	

The results of the search are displayed sorted by agency or country name under the search criteria. The following information is displayed for each one: login ID, agency name, agency type, state, last login date, and analyst assigned.

The types of Status are:

- N/A – Agency has not started their report
- Narrative In Process – Agency has logged in and started their report
- Narrative Submit (Draft) – Agency has submitted the report and the Analyst can review it
- Response In Process – The Analyst has completed their review and the reviewer has sent the agency an email notifying them that the draft analysis has been completed,
- Response Submit – Agency has resubmitted their response
- Final Review (Final) – The Analyst has completed their review and it is ready for the committee

For each agency, the following links are available:

- Update - Update the agency's address and administrator information.
- Analysis Information - Update analysis information, not specific to a meeting date, for the staff report.
- Assign - Assign the Analyst for the agency.
- Unlock - If the agency has been locked out of the e-recognition system (unsuccessful log in after 3 attempts), the 'Unlock' link displayed in the Locked Column will allow the admin to unlock the agency's account so that they can attempt to login again. The admin will need to notify the agency when their account has been unlocked.
- Reset – If the agency cannot recall their password, the admin can click on the 'Reset' link displayed in the Locked Column to reset the agency's password back to the default login. The agency will then be able to login and update their password. The admin will need to let the agency know when their password has been reset.

For each meeting date, the meeting date, submission status, latest submit date, and type of submission are listed.

For each agency meeting date, the following links are available:

- Assign Meeting Date – Assign the agency to a meeting date.
- Change Date – Change the meeting date assigned to the agency.
- View Data – View the agency's report.
- Change Status - Change the submission status for a report or delete the meeting date.
- Update [Type of Submission] – Change the type of report, the required criteria on a compliance report, or the outstanding issues for an NCFMEA update report.
- View [Historical Information] – View historical documents from the e-folder.
- Upload [3<sup>rd</sup> Party Comments] – Upload 3<sup>rd</sup> Party comments and enter requests for oral comments. If documents have been uploaded for the agency's meeting date, the documents uploaded can be displayed.

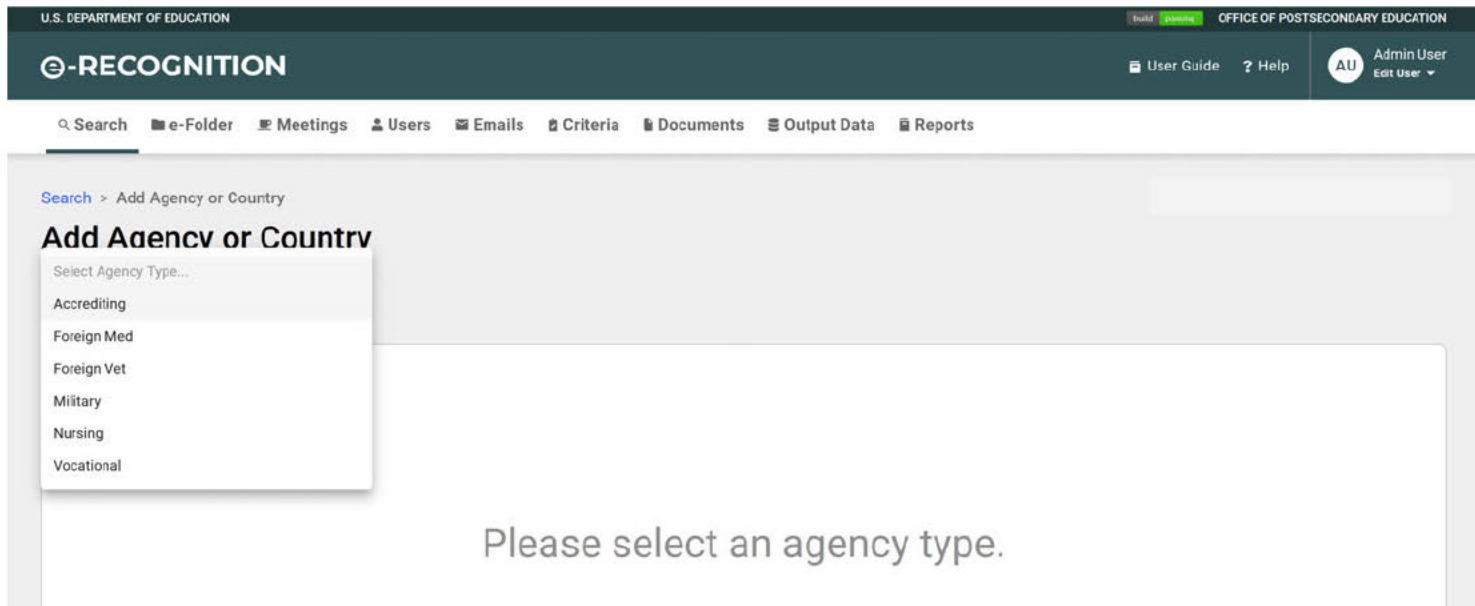
The screens to perform these functions are described in the following sections.

For archived and deleted meeting dates, no links to modify meeting date information will display. The 3<sup>rd</sup> Party Comments column will contain a 'View' link to allow you to display these documents.

## 2.1 Manage Agencies and Countries

To add a new agency or country, click the **Add Agency or Country** button. To update the agency or country, click the 'Update' link under the Agency Name. The *Update Agency* screen will display.

If you are adding an agency or country, you will first need to select the type from the dropdown and click the **Go** button.



The screenshot shows the e-RECOGNITION system interface. At the top, there is a dark green header with the U.S. DEPARTMENT OF EDUCATION logo on the left and the OFFICE OF POSTSECONDARY EDUCATION logo on the right. Below the header, there is a navigation bar with the e-RECOGNITION logo and several menu items: Search, e-Folder, Meetings, Users, Emails, Criteria, Documents, Output Data, and Reports. On the right side of the navigation bar, there are links for User Guide and Help, and a user profile icon labeled 'AU Admin User Edit User'. The main content area is titled 'Add Agency or Country' and features a dropdown menu with the following options: Select Agency Type..., Accrediting, Foreign Med, Foreign Vet, Military, Nursing, and Vocational. Below the dropdown menu, there is a large text prompt that reads 'Please select an agency type.'

If you select 'Foreign Med' from the dropdown, the *Add Country* screen will display, otherwise the *Add Agency* screen will display fields to enter the agency administrator. Required fields are marked by a red asterisk. Enter your changes to the information and click the **Save** button.

# Foreign Med Add Country screen

U.S. DEPARTMENT OF EDUCATION bulk ▶ ▶ OFFICE OF POSTSECONDARY EDUCATION

**e-RECOGNITION** User Guide ? Help AU Admin User  
Edit User ▼

Search e-Folder Meetings Users Emails Criteria Documents Output Data Reports

Search > Add Agency or Country

## Add Agency or Country

Agency Type

Agency Identifier \*  Agency Name \*

**Primary Contact**

Title  Prefix  First Name \*  Middle Initial  Last Name \*

Address Line 1  Address Line 2  Address Line 3  Address Line 4

City  Country  Postal Code

Telephone  Fax  Email (1) \*  Email (2)

**Secondary Contact**

U.S. DEPARTMENT OF EDUCATION bulk ▶ ▶ OFFICE OF POSTSECONDARY EDUCATION

**e-RECOGNITION** User Guide ? Help AU Admin User  
Edit User ▼

Search e-Folder Meetings Users Emails Criteria Documents Output Data Reports

**Secondary Contact**

Title  Prefix  First Name  Middle Initial  Last Name

Address Line 1  Address Line 2  Address Line 3  Address Line 4

City  Country  Postal Code

Telephone  Fax  Email (1)  Email (2)

Government-designated Accrediting Agency \*

**Primary Contact**

Title  Prefix  First Name \*  Middle Initial  Last Name \*

Address Line 1  Address Line 2  Address Line 3  Address Line 4

City  Country  Postal Code



### Secondary Contact

Title  Prefix  First Name  Middle Initial  Last Name

Address Line 1  Address Line 2  Address Line 3  Address Line 4

City  Country  Postal Code

Telephone  Fax  Email (1)  Email (2)

Embassy \*

### Primary Contact

Title  Prefix  First Name \*  Middle Initial  Last Name \*

Address Line 1  Address Line 2  Address Line 3  Address Line 4

City  Country  Postal Code

### Other Contact (for example, attorney or school contact)

Title  Prefix  First Name  Middle Initial  Last Name

Address Line 1  Address Line 2  Address Line 3  Address Line 4

City  Country  Postal Code

Telephone  Fax  Email (1)  Email (2)

Back Create

If you select 'Foreign Vet' from the dropdown, the *Add Agency* screen for Foreign Vet will display fields to enter the primary and secondary contact. Otherwise, the *Add Agency* screen will display fields to enter the agency administrator.

# Foreign Vet Manage Agency screen

## Add Agency or Country

Agency Type

Foreign Vet ▼

Agency Identifier \*  Agency Name \*

### Primary Contact

Title  Prefix  First Name \*  Middle Initial  Last Name \*

Address Line 1  Address Line 2  Address Line 3  Address Line 4

City  Country  Postal Code

Telephone  Fax  Email (1) \*  Email (2)

### Secondary Contact

Title  Prefix  First Name  Middle Initial  Last Name

Address Line 1  Address Line 2  Address Line 3  Address Line 4

City  Country  Postal Code

Telephone  Fax  Email (1)  Email (2)

Back

Create

## Accrediting, Vocational, Nursing or Military Degree-Granting Manage Agency screen

U.S. DEPARTMENT OF EDUCATION build **person** OFFICE OF POSTSECONDARY EDUCATION

**e-RECOGNITION** User Guide ? Help **AU** Admin U Edit User

Search e-Folder Meetings Users Emails Criteria Documents Output Data Reports

Search > Add Agency or Country

### Add Agency or Country

Agency Type  
Vocational

Agency Identifier \* Agency Name \*

Address Line 1 Address Line 2 City State Zip Ext.

State: Select Zip: 12345 Ext.

#### Agency Administrator Information

Title Prefix First Name \* Middle initial Last Name \*

Prefix: Select

Telephone: 123-456-7890 Ext. Fax: 123-456-7890 Email \*: example@ed.gov

Back Create

## 2.2 Assign Analyst

To assign an Analyst to an agency or country, click the 'Assign' link in the Action column. The *Assign Analyst* screen will display.

### Search

ID: All | Name: Select | Type: All | State: All | Include: Select | Status: All

Submission Type: All | Meeting Date: All | Analyst: All | [Reset](#) [Search](#)

[Add Agency Or Country](#) [Send Email](#) 142 Agencies [Email Blast Archive](#)

ID	Name	Type	State	Last Login	Locked	Analyst	Action
AARDVARK	AAARDVARK	Accrediting	WV	----	No	----	⋮
ABCAA	ABC Accrediting Agency	Accrediting	CO	05/19/2022	No	Paul	Update Agency Analysis Information Reset Password Assign Analyst Add New Report Unlock Agency User
ABCD	ABCD Accrediting Agency	Accrediting	DC	----	No	Chris	
ABCDE	ABCDE Agency	Accrediting	VT	05/31/2022	No	INOV	
ABCDEFM	ABCDE FM	Foreign Med	----	05/31/2022	No	Chris	

Search > Assign Analyst

### Assign Analyst

Assign Analyst:

[Back](#) [Assign](#)

Select the Analyst from the dropdown and click the **Assign** button.

### 2.3 Assign Meeting Date

To assign a meeting date and submission type, click the 'Add New Report' link under the Action column heading. For agencies, the *Add New Report* screen will display.

## Search

ID: All | Name: Select | Type: All | State: All | Include: Select | Status: All  
Submission Type: All | Meeting Date: All | Analyst: All [Reset] [Search]

Add Agency Or Country

Send Email

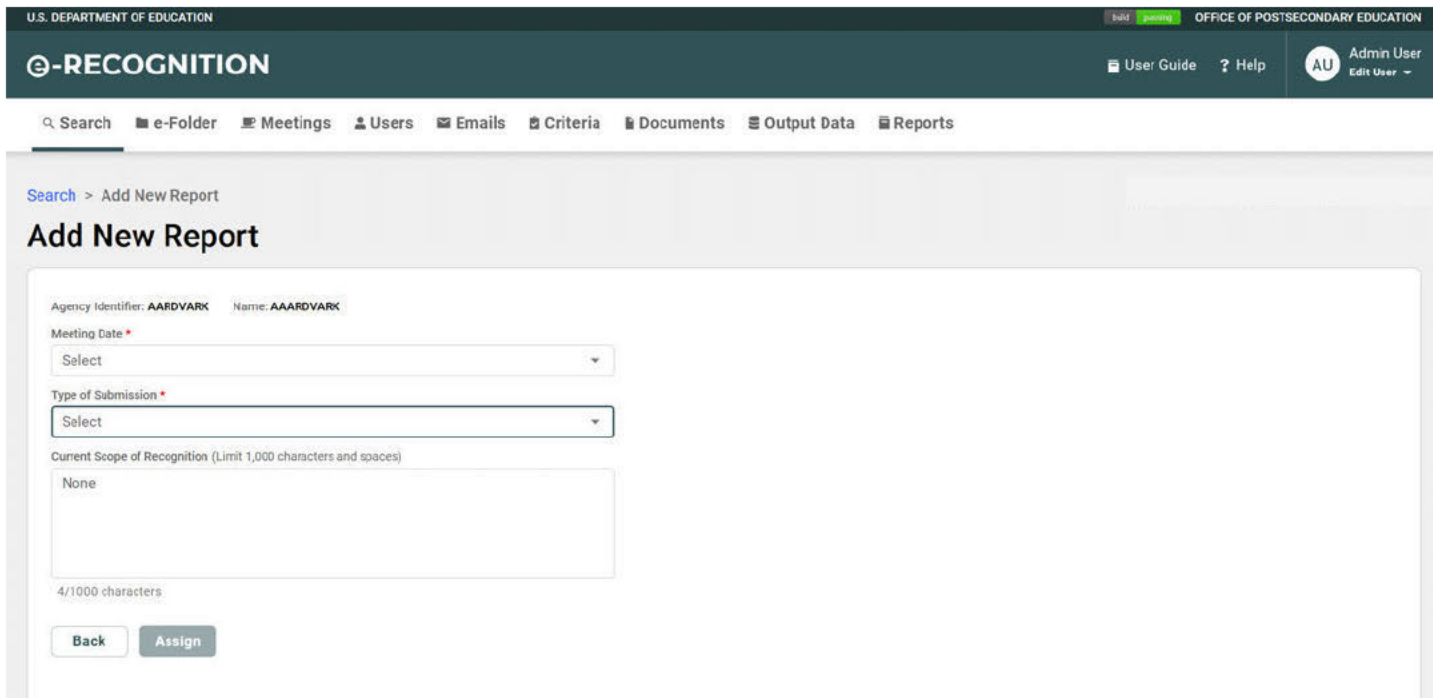
142 Agencies

Email Blast Archive

<input type="checkbox"/>	ID	Name	Type	State	Last Login	Locked	Analyst	Action
<input type="checkbox"/>	AARDYARK	AAARDVARK	Accrediting	WV	----	No	----	
<input type="checkbox"/>	ABCAA	ABC Accrediting Agency	Accrediting	CO	05/19/2022	No	Paul	
<input type="checkbox"/>	ABCD	ABCD Accrediting Agency	Accrediting	DC	----	No	Chris	
<input type="checkbox"/>	ABCDE	ABCDE Agency	Accrediting	VT	05/31/2022	No	NOV	
<input type="checkbox"/>	ABCDEFM	ABCDE FM	Foreign Med	----	05/31/2022	No	Chris	
<input type="checkbox"/>	ABCDEFV	ABCDE FV	Foreign Vet	----	05/31/2022	No	Christian Alfaro	

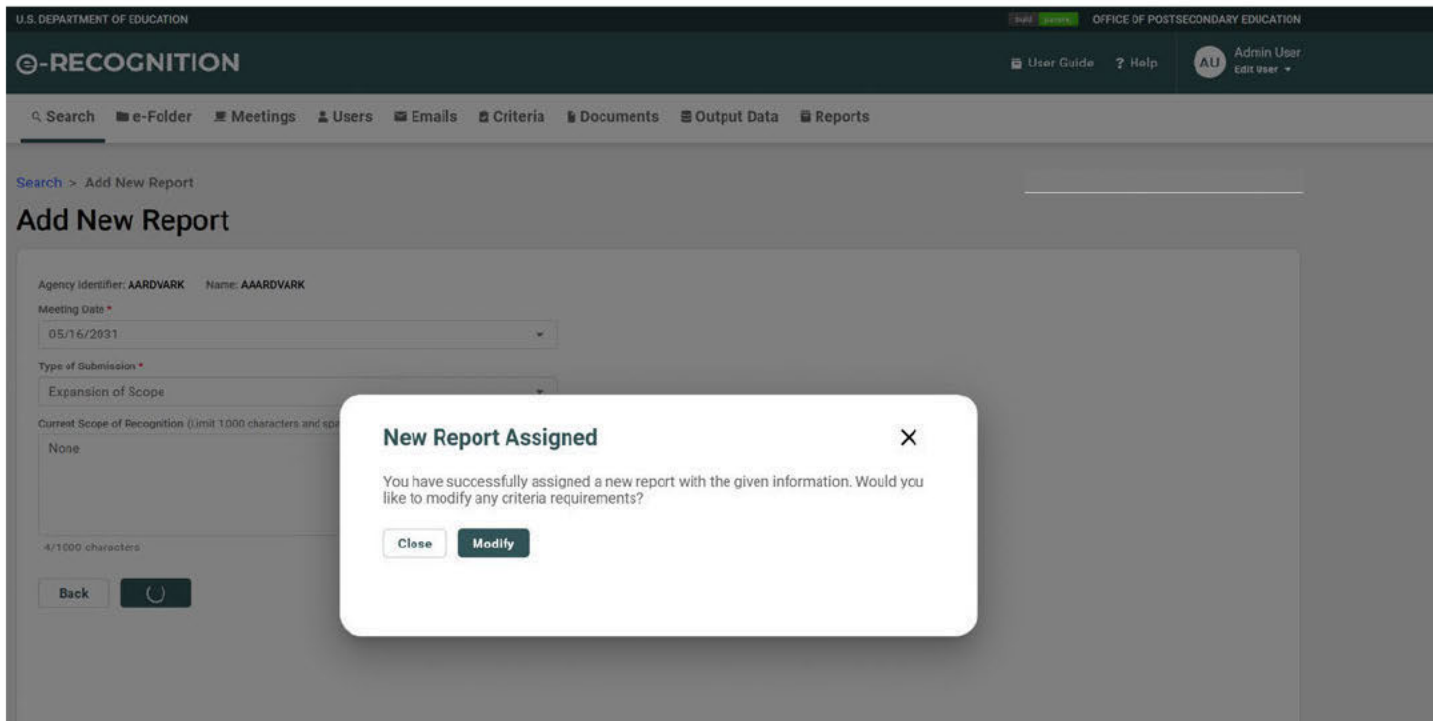
- Update Agency
- Analysis Information
- Reset Password
- Assign Analyst
- Add New Report
- Unlock Agency User





Select the meeting date and type of submission from the dropdowns. You can also change the current scope of recognition, if necessary.

When you click assign, a popup asking if you would like to modify any criteria requirements will appear.



[Search](#) > [Assign Scope](#)

## Assign Scope

 Agency Identifier: **AAARDVARK**    Name: **AAARDVARK**    Meeting Date: **05/16/2031**

Type of Submission \*

Expansion of Scope

Current Scope of Recognition (Limit 1,000 characters and spaces)

None

4/1000 characters

Check the Required box for any of the criteria to force the agency to enter a narrative for the criteria before they submit.

 Select All

Required	Criteria
<b>Basic Eligibility Requirements</b>	
<input type="checkbox"/>	602.10 Link to Federal programs
<input type="checkbox"/>	602.11 Geographic scope of accrediting activities.
602.12 Accrediting Experience	
<input type="checkbox"/>	602.12(a) Accrediting Experience Initial
<input type="checkbox"/>	602.12(b) Expansion of Scope
<input type="checkbox"/>	602.13 Acceptance of the agency by others.
<b>Organizational &amp; Administrative Requirements</b>	

The agency will not be able to submit their report unless they have entered a narrative for all of the criteria for which you check 'Required.' Entering a narrative for the other criteria will be optional. Click the **Save** button after you have finished entering the information.

If you click the 'Assign Meeting Date' link for a country, the *Add New Report* screen will display.

[Search](#) > Add New Report

## Add New Report

Agency Identifier: ABCDEFM Name: ABCDE FM

Meeting Date \*

Select

Type of Submission \*

Select

### Outstanding Issues

Enter any questions requested by the Committee at the last meeting at which the country appeared.

Question 1

0/1000 characters

Question 2

0/1000 characters

Question 3

0/1000 characters

Question 4

0/1000 characters

Select the Meeting Date and Type of Submission from the dropdowns. If you enter an outstanding issue, the country will be required to respond to the issue before they submit their report. If you select 'Update Report' from the dropdown, the screen will redisplay with fields to let you enter the to and from dates for the period the report covers. There are six standard questions for foreign medical reports which will be entered for you. You don't need to add them here. If extra fields are needed, just hit save and more boxes will be added.

## Assign Submission Type

ID: CAYMANISLANDS  
Name: Cayman Islands  
Meeting Date: 04/28/2020

Type of Submission:

Enter the From month and year for the period the report covers:  (e.g., September 2018)

Enter the To month and year for the period the report covers:  (e.g., January 2019)

Note: The standard six questions for update reports (Current status of medical schools, Overview of accreditation activities, Laws and regulations, Standards, Processes and procedures, and Schedule of upcoming accreditation activities) will be added for you. Do not enter them here.

**Outstanding Issues:**  
Enter any questions requested by the Committee at the last meeting at which the country appeared.

1.
2.
3.
4.

If you click the 'Assign Meeting Date' link for a foreign veterinary agency, the *Assign Meeting Date and Submission Type* screen will display with only the meeting date and meeting type dropdowns displayed. Select a value from both dropdowns and click the **Save** button.

## 2.4 Analysis Information

To update the Analysis information, click the 'Analysis Information' link under the Action column. This information is included on the staff report. Administrators can update the scope of recognition and other information which is not report-specific. Report-specific information is entered by the analyst.

The *Analysis Information* screen displays as follows for agencies:

Search > Analysis Information

## Analysis Information

The information below will be included in the staff report on the Recommendation page and under Part I: General Information about the Agency. Enter the analysis information and click the Save button.

ID: AARDVARK Name: AAARDVARK

Year of initial listing as a recognized agency

Date of last Department decision

Current Scope of Recognition (Limit 1,000 characters and spaces)

0/1000 characters

Requested Scope of Recognition (Limit 1,000 characters and spaces)

0/1000 characters

General Information about the Agency (Limit 7,500 characters and spaces)

0/7500 characters

Recognition History (Limit 7,500 characters and spaces)

0/7500 characters

Back

Submit



The current and requested scope of recognition do not display for nursing and vocational agencies.

The *Analysis Information* screen displays as follows for countries and foreign veterinary agencies:

U.S. DEPARTMENT OF EDUCATION build pending OFFICE OF POSTSECONDARY EDUCATION

**e-RECOGNITION** User Guide ? Help AU Admin User Edit User

Search e-Folder Meetings Users Emails Criteria Documents Output Data Reports

Search > Analysis Information

## Analysis Information

The information below will be included in the staff report. Enter the analysis information and click the Save button.

ID: **TESV** Name: **foreignvet**

Report Title  Prepared Month and Year:

Background (Limit 7,500 characters and spaces)  
  
0/7500 characters

Recognition History (Limit 7,500 characters and spaces)  
  
0/7500 characters

Enter the analysis information and click the **Submit** button. Spell character counter is available for the text fields. Click on the back button to return to the *Search* screen.

## 2.5 Change Meeting Date

To change the agency or country's assigned meeting date, click the 'Change Meeting Date' link in the Action column for the report you would like to modify.

The screenshot shows the e-Recognition system interface. At the top, there is a header with 'U.S. DEPARTMENT OF EDUCATION', 'OFFICE OF POSTSECONDARY EDUCATION', and 'e-RECOGNITION'. Below the header is a navigation bar with 'Search', 'e-Folder', 'Meetings', 'Users', 'Emails', 'Criteria', 'Documents', 'Output Data', and 'Reports'. The main content area is titled 'Search' and contains several filters: ID (All), Name (Select), Type (All), State (All), Include (Select), Status (All), Submission Type (All), Meeting Date (All), and Analyst (All). There are 'Reset' and 'Search' buttons. Below the filters, there are buttons for 'Add Agency Or Country', 'Send Email', and '142 Agencies'. A table displays search results for agency 'AARDVARK'. The table has columns: ID, Name, Type, State, Last Login, Locked, Analyst, and Action. The first row shows 'AARDVARK' with 'AAARDVARK' as the name, 'Accrediting' as the type, and 'WV' as the state. Below this, there is a sub-table with columns: Meeting Date, Staff Report, Status, Submit Date, Type of Submission, Historical Information, 3rd Party Comments, Meeting User, and Action. The sub-table contains several rows of data. A dropdown menu is open for the 'Action' column of the first row in the sub-table, showing options: View Data, Change Meeting Date, Change Status, Assign Scope, Upload 3rd Party Comments, and Assign Meeting User. A blue arrow points to the 'Change Meeting Date' option.

Select a meeting date and click the **Change** button to change the meeting date. Click **Back** to return to the *Admin Main* screen.

## 2.7 View Agency/Country Data

To display the report for an agency or country, click the 'View Data' link. The *Instructions* screen will display.

Search &gt; Instructions

## Instructions

Meeting Date: 05/16/2031 Name: AAARDVARK ID: AARDVARK Type of Submission: Expansion of Scope Report Status: N/A

View As Agency

[Instructions](#) [Step 1](#) [Step 2](#) [Step 3](#) [3rd Party Comments](#) [Review and Submit](#) [Historical Information](#)

This website is used to submit your petition for recognition or enter your agency's response to a staff analysis document. It is divided into steps that guide you through the process.

### Step 1

Review and update your agency's contact information.

### Step 2

Enter a response explanation for each applicable criterion for recognition listed in CFR Part 602 Subpart B.

Upload supporting documents to demonstrate your agency's compliance with each criterion.

### Step 3

View the Table of Contents which lists the criterion which have been answered and the supporting documentation which has been uploaded.

### Review and Submit

Display a printable file of your report in PDF format. Submit your application for review by the Accreditation Group.

### Historical Information

View historical information such as decisions or transcripts from previous committee meetings.

[Back](#)

Click these links to display the report information:

- [Step 1 – View the address and contact.](#)

- Step 2 – View the narratives or responses & supporting documents uploaded.
- Step 3 – View the table of contents.
- 3<sup>rd</sup> Part Comments
- Review and Submit
- Historical Information

Click Search to return to the *Administrator Search* screen.

## 2.8 Change Status

Click 'Change Status' under the Action column to change the status of the desired report.

The screenshot shows the 'Change Status' form in the e-Recognition system. The form is titled 'Change Status' and includes the following elements:

- Metadata:** ID: AARDVARK, Name: AAARDVARK, Meeting Date: 05/16/2031, Status: N/A.
- New Status:** A dropdown menu with 'Select' as the current option.
- Status Change Comments:** A text area for entering comments, with a character count of 0/255.
- Buttons:** 'Back' and 'Submit' buttons.

The New Status dropdown will only include appropriate statuses. (e.g., A 'Final Review' status will not be included unless the agency was previously placed in Final Review status by the reviewer.) Select the new status, enter a comment to explain why you are changing the status, and click the **Save** button.

## 2.9 Change Submission Type

To change the report submission type, click the 'Assign Scope' link in the Action column of the desired report. The *Assign Scope* screen will display.

Search > Assign Scope

## Assign Scope

Agency Identifier: AARDVARK Name: AAARDVARK Meeting Date: 01/01/2027

Type of Submission \*

Renewal Petition

Current Scope of Recognition (Limit 1,000 characters and spaces)

None

4/1000 characters

Check the Required box for any of the criteria to force the agency to enter a narrative for the criteria before they submit.

Select All

Required	Criteria
	Basic Eligibility Requirements
<input type="checkbox"/>	602.10 Link to Federal programs

Select the type of submission from the dropdown and enter any necessary changes to the current scope of recognition. If the type of submission is 'Expansion of Scope,' 'Compliance Report,' or 'Other Report,' you can check the criteria for which the agency is required to enter a narrative. Click the **Assign** button to save your changes.



## 2.10 View Historical Documents

To view historical documents for the agency or country, click the 'View' link in the Historical Information tab under View Data in the Action column for the desired report. The *Historical Information* screen will display. Click on a link to view a document.

The screenshot shows the 'Historical Information' screen in the e-RECOGNITION system. At the top, there is a navigation bar with the U.S. Department of Education logo and the Office of Postsecondary Education. The main header includes 'e-RECOGNITION' and user information for 'INCVAS Admin'. Below the header is a search bar and a menu with options like 'e-Folder', 'Meetings', 'Users', 'Emails', 'Criteria', 'Documents', 'Output Data', 'Reports', and 'System'. The main content area shows the 'Historical Information' tab selected, with a warning message: 'Warning: You have read only access to the report.' Below this is a table of historical documents.

Meeting Date	Document
02/22/2017	ABHES February 2017 Transcript
02/22/2017	SDO Decision Letter Fall 2017
06/23/2016	ABHES S2016 Senior Department Officials (SDO) Decision Letter
06/23/2016	ABHES June 2016 Transcript
12/11/2012	ABHES F2012 Senior Department Official's (SDO) Decision Letter
12/11/2012	ABHES F2012 Transcript--Consent Agenda
06/01/2011	ABHES June 2011 Senior Department Official's Decision Ltr
06/01/2011	ABHES June 2011 Transcript Portion
05/30/2007	May 2007 Transcript
05/30/2007	May 2007 Sec Decision Ltr
06/01/2006	ABHES June 2006 Secy. decision letter
06/01/2006	ABHES June 2006 transcript portion
12/01/2004	Dec 2004 ABHES transcript portion
12/01/2004	Dec 2004 ABHES Secy. decision letter

## 2.11 3<sup>rd</sup> Party Comments

To upload 3<sup>rd</sup> party comments, click the 'Upload 3<sup>rd</sup> party comments' link in the Action menu that corresponds to the meeting date. The *3<sup>rd</sup> Party Comments* screen will display. Files uploaded on this screen are available for the agency to view and comment on.

## Search

ID: All | Name: Select | Type: All | State: All | Include: Select | Status: All

Submission Type: All | Meeting Date: All | Analyst: All

[Reset](#) [Search](#)

[Add Agency Or Country](#) [Send Email](#) **142 Agencies** [Email Blast Archive](#)

ID	Name	Type	State	Last Login	Locked	Analyst	Action	
<input type="checkbox"/> ^ AARDVARK	AAARDVARK	Accrediting	WV	----	No	----		
Meeting Date	Staff Report	Status	Submit Date	Type of Submission	Historical Information	3rd Party Comments	Meeting User	Action
<input type="checkbox"/> 05/16/2031	----	N/A	----	Expansion of Scope	0	0		
<input type="checkbox"/> 05/16/2031	----	N/A	----	Expansion of Scope	0	0		
<input type="checkbox"/> 01/01/2027	----	N/A	----	Other Report	0	0		
<input type="checkbox"/> 01/01/2027	----	N/A	----	Compliance Report	0	0		

- View Data
- Change Meeting Date
- Change Status
- Assign Scope
- Upload 3rd Party Comments
- Assign Meeting User

## Upload 3rd Party Comments

ID: AARDVARK Name: AAARDVARK Meeting Date: 05/16/2031

1. Indicate if the comment is Oral or Written.

Oral  Written

2. Enter the requestor and date.

Requested By \*  Date \*

3. Indicate if the comment is PRO or CON.

Pro  
 Con  
 Other

4. Enter the file title and click the "Choose File" button to select the file.

Title of the file \*

Upload

No File Chosen

Select the appropriate responses to questions 1 through 3. Enter the title of the file and click the **Choose** button to locate the file you wish to upload on your desktop. Click the **Update** button to upload the screen. The document will be added to the e-folder when it is saved.

The uploaded files are shown on the screen. Click the 'file name' link to view a file. To hide a file, click the corresponding **Hide** button is found under the action menu. The document will be hidden from the e-folder also.

---

## 3 Meeting Date and User Functions

This section describes functions which are performed by administrators to maintain users, meeting dates, and criteria.

### 3.1 Manage Meeting Dates

To add or update a meeting date, click the 'Meetings' link at the top of the screen. The *Meetings* screen will display with a list of meeting dates. You can add, change, or archive a meeting date through this screen. However, meetings are automatically archived 90 days after the meeting date. If it has been less than a year since the meeting date, an 'Unarchive' link will

display to allow the meeting to be unarchived. Click the link to unarchive the meeting. The user ID and date the meeting was archived will display on the screen. When you are ready to re-archive the meeting, click the 'Archive' link under the Action column.

## Meetings

To change a meeting date, click the Modify Date link. To archive a meeting date, click the archive link.

Meeting Type: All Meeting Date: All Archived By:  Reset Search

Add Meeting Date 145 Entries

Meeting Date	Type	Date Final Report Available to the Public	Date Added	Date Modified	Status	Modified By	Action
05/21/2031	NCFMEA	----	05/16/2022	05/16/2022	Unarchived	Paul Florek	⋮
05/16/2031	NACIQI	----	05/06/2022	05/06/2022	Unarchived	INOVAS Admin	⋮
01/01/2029	Foreign Vet	08/08/2029	04/15/2022	04/15/2022	Unarchived	Christian Alfaro	⋮
01/01/2028	NCFMEA	08/08/2028	04/15/2022	04/15/2022	Unarchived	Christian Alfaro	⋮
01/01/2027	NACIQI	08/08/2028	04/15/2022	04/15/2022	Unarchived	Christian Alfaro	⋮
03/22/2025	NACIQI	03/21/2022	03/01/2022	03/01/2022	Unarchived	Charity Helton	⋮

### 3.1.1 Add Meeting Date

Click the **Add Meeting Date** button to add a new meeting date. The following screen will display:

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e-RECOGNITION User Guide ? Help Admin User Edit User

Search e-Folder Meetings Users Emails Criteria Documents Output Data Reports

Meetings > Add Meeting Date

## Add Meeting Date

Meeting Date:

Type:

Date Final Staff Reports Available to the Public:

If this date is left blank, reports will be made available on the meeting date.

Back Create

Enter the meeting date and select the meeting type (Foreign Vet, NACIQI, Degree Granting, or NCFMEA). To make the final staff reports available to the public before the meeting date, enter a date in the 'Date Final Staff Reports Available to the Public' field. Click the **Create** button. The new meeting date will be shown on the *Manage Meeting Dates* screen.

### 3.1.2 Modify Meeting Date

To change a meeting date, click the 'Modify Date' link in that row. The *Modify Meeting Date* screen will display.

The screenshot shows the 'Meetings' section of the e-RECOGNITION system. At the top, there is a navigation bar with 'U.S. DEPARTMENT OF EDUCATION' and 'OFFICE OF POSTSECONDARY EDUCATION'. Below this is a search bar and a navigation menu with items like 'e-Folder', 'Meetings', 'Users', 'Emails', 'Criteria', 'Documents', 'Output Data', and 'Reports'. The 'Meetings' section has a sub-header 'Meetings' and a brief instruction: 'To change a meeting date, click the Modify Date link. To archive a meeting date, click the archive link.' Below this are search filters for 'Meeting Type' (set to 'All'), 'Meeting Date' (set to 'All'), and 'Archived By'. There are 'Reset' and 'Search' buttons. A table of meeting entries is displayed, with columns for Meeting Date, Type, Date Final Report Available to the Public, Date Added, Date Modified, Status, Modified By, and Action. The table contains three rows of data. The 'Action' column for each row has a dropdown menu with 'Modify Date' and 'Archive' options. A blue arrow points to the 'Modify Date' option in the dropdown for the first row.

Meeting Date	Type	Date Final Report Available to the Public	Date Added	Date Modified	Status	Modified By	Action
05/21/2031	NCFMEA	- - - -	05/16/2022	05/16/2022	Unarchived	Paul Florek	⋮ Modify Date Archive
05/16/2031	NACIQI	- - - -	05/06/2022	05/06/2022	Unarchived	INOVAS Admin	⋮
01/01/2029	Foreign Vet	08/08/2029	04/15/2022	04/15/2022	Unarchived	Christian Alfaro	⋮

Change the information and click the **Modify Date** button.

## 3.2 Manage Users

To view or update users, click the 'Users' link at the top of the screen. The *User* screen will display with a list of users. You can add, edit, or delete users through this screen. You can also assign committee members.

The following functions are available on this screen:

- Click a column heading to resort the users.
- Click the **Add User** button to add a new user.
- Click the **Assign Committee Members** button to assign committee members to a meeting.
- Click the 'Edit' link to update user information.
- Click the 'Delete' link to remove a user account. Click OK on the pop-up which displays to delete the user account.



### 3.2.1 Add User

Click the **Add User** button to add a user. *The Add User screen will display.*

The screenshot shows the 'Add User' form in the e-RECOGNITION system. The form is located within a navigation bar that includes 'U.S. DEPARTMENT OF EDUCATION', 'OFFICE OF POSTSECONDARY EDUCATION', and 'e-RECOGNITION'. The breadcrumb trail indicates the user is in the 'Users' section, specifically on the 'Add User' page. The form fields are as follows:

- First Name \***: Text input field.
- Last Name \***: Text input field.
- Phone**: Text input field.
- Email \***: Text input field.
- Access Level \***: Radio button menu with options: Admin, Analyst, Committee, e-Folder Only, Reviewer, and Super Admin.
- Committee Type**: Dropdown menu with 'Select' as the current value.
- Assigned Reviewers**: Dropdown menu with 'Select' as the current value.

At the bottom of the form are two buttons: 'Back' and 'Add'.

Required fields are marked by a red asterisk. Enter the user information and select the appropriate user access level from the radio button menu. If the user is a committee member, select the type of committee. If the user is an analyst, click the reviewer names in the list. Click the **Save** button to add the user. When a user account is added, the username and password are set to the first and last name. When the user logs in the first time, they will be required to change their password.

### 3.2.2 Edit User

Click the 'Edit' link from the Action menu to edit a user's information. The *Edit* screen will display with the user's information.



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**e-RECOGNITION** User Guide ? Help AU Admin User Edit User

Search e-Folder Meetings **Users** Emails Criteria Documents Output Data Reports

Users > Edit User

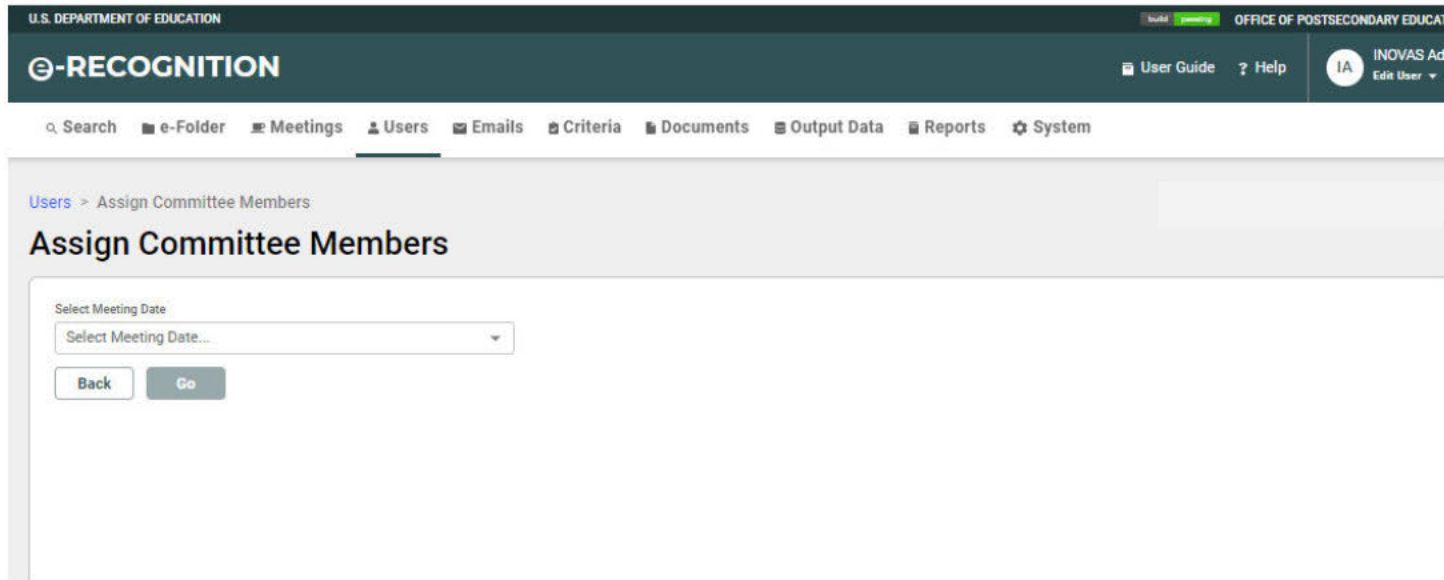
## Edit User

First Name * <input type="text" value="Testing"/>	Last Name * <input type="text" value="Accred"/>
Phone <input type="text"/>	Email * <input type="text" value="test@test.edu"/>
Access Level * <input type="checkbox"/> Admin <input checked="" type="checkbox"/> Analyst <input type="checkbox"/> Committee <input type="checkbox"/> e-Folder Only <input type="checkbox"/> Reviewer <input type="checkbox"/> Super Admin	
Committee Type <input type="text" value="Select"/>	Assigned Reviewers <input type="text" value="2 Selected"/>
<input type="button" value="Back"/> <input type="button" value="Update"/>	

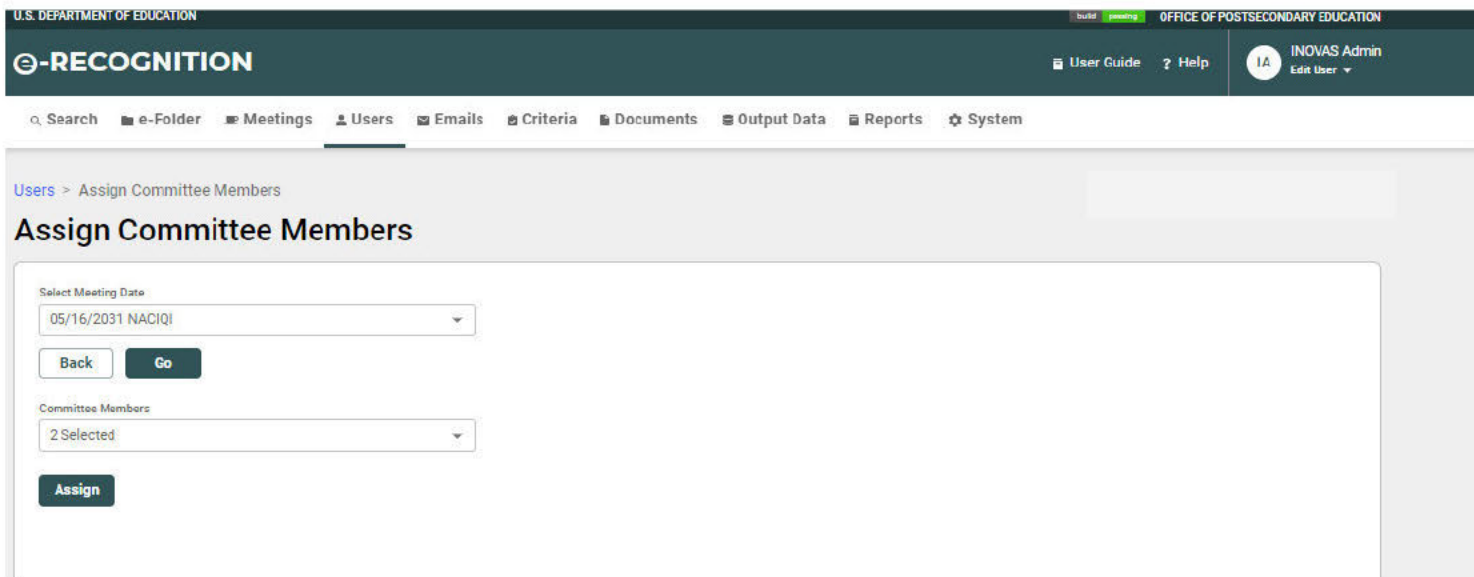
Enter your changes to the user information and select the appropriate access level from the radio button menu to assign the level of access. If the user is an analyst, check the box next to the reviewer names in the Assigned Reviewer list. Click the **Save** button to save your changes

### 3.2.3 Assign Committee Members

Click the **Assign Committee Members** button to assign committee members for a meeting.



To assign committee members to a meeting date, select a meeting date from the dropdown and click the **Go** button. The list of committee members for that meeting type will display.



Any members already assigned to that meeting are highlighted and checked. Check the names of the committee members to select or unselect them. Click the **Assign** button to save the changes.

### 3.3 Manage Emails

To view or update the text of emails sent from the e-Recognition system, click the 'Email' link at the top of the screen. The *Manage Emails* screen will display. You can update the text of the emails which are sent when the reviewer sets the agency/country to resubmit or final review

status.

## Manage Emails

Select an email type from the dropdown to view and update the email.

Enter the emails of the staff who should be bcc'd on all draft, final, and submission emails and click the Save button. The emails must be separated by a comma.

Email  BCC Emails

Please select an email type.

To update or preview the emails, select the email type from the dropdown. The email selected will display.

## Manage Emails

Select an email type from the dropdown to view and update the email.

Enter the emails of the staff who should be bcc'd on all draft, final, and submission emails and click the Save button. The emails must be separated by a comma.

Email	BCC Emails	
Final Analysis Email	herman.bounds@ed.gov, Valerie.LeFor@ed.gov	Save BCC Email

Enter any changes to the email and click the Submit button. *Last Edited: 2/18/2022 6:55:53 PM by: Roger Delacruz*  
When the reviewer clicks the "Finalize Submission" button, this email is sent to the agency contact.

Email Subject \*

Final Analysis Email

Dear [Agency Contact First Name Last Name].

Email Body \*

The purpose of this e-mail is to inform you that you may gain access to a copy of your agency's final Department staff report, third-party comments, and requests to make an oral presentation and your original submission at the E-Recognition Web site: <https://surveys.ope.ed.gov/erecognition>

The report has been forwarded to the National Advisory Committee on Institutional Quality and Integrity (NACIQI) and will become part of our official record of your agency.

You may log on with the same ID and Password provided to you during the initial submission process. Once you have logged in, you may edit your contact information if you so choose.

The NACIQI meeting will be held virtually on July 27th-29th, 2021. You will receive an email containing personalized dial in details, access code, and conference weblink.

If you have any questions or need more information, please feel free to call me at (202) 453-7615.

Email Closing \*

Herman Bounds, Jr., Ed.S.  
Director, Accreditation Group

Back

Submit

Enter your changes to the existing text and click the **Submit** button.

### 3.4 Manage Criteria

To view or update the text of the criteria, click the 'Criteria' link at the top of the screen. The *Criteria* screen will display. Through this screen, you can update the text for the agency criteria and the questions for the countries.

The screenshot shows the 'Criteria' management interface. At the top, there is a dark header with 'U.S. DEPARTMENT OF EDUCATION' on the left, 'OFFICE OF POSTSECONDARY EDUCATION' on the right, and a user profile 'AU Admin User' with an 'Edit User' dropdown. Below the header is a navigation bar with icons for Search, e-Folder, Meetings, Users, Emails, Criteria (highlighted), Documents, Output Data, and Reports. The main content area is titled 'Criteria' and contains the following text: 'Select a meeting date and agency type from the dropdowns and click the "Search" button to display the criteria.' Below this text are two dropdown menus: 'Meeting Date' and 'Agency Type', both with 'Select' as the current value. To the right of these dropdowns are 'Reset' and 'Search' buttons. A large, empty rectangular box below the search controls contains the text: 'Please enter your search criteria and click the Search button.'

Select a Meeting Date and Agency Type from the dropdown to view the list of criteria.

## Criteria

Select a meeting date and agency type from the dropdowns and click the "Search" button to display the criteria.

Meeting Date:  Agency Type:

116 Items

Criteria	With Text Box	Action
<b>Basic Eligibility Requirements</b>		
602.10 Link to Federal programs	Yes	⋮
602.11 Geographic scope of accrediting activities.	Yes	⋮
602.12 Accrediting Experience	No	⋮
602.12(a) Accrediting Experience Initial	Yes	⋮
602.12(b) Expansion of Scope	Yes	⋮
602.13 Acceptance of the agency by others.	Yes	⋮
<b>Organizational &amp; Administrative Requirements</b>		
602.14 Purpose and organization	No	⋮
602.14(a) Category of Agency	Yes	⋮

- Add
- Preview
- Update
- Move
- Hide

Rows per page: 100 < 1/2 Pages >

There are five different links for each criterion:

- **Add** - Criteria.
- **Update** - Update the criteria.
- **Hide** - Hide a criteria. Click 'Hide' on the confirmation pop-up to Hide the criteria. Any sub-criteria will be hidden also.
- **Preview** - View the criteria as the agency will see it. (This link is not available for sub-criteria.)
- **Move** - Move criteria to a different section.

### 3.4.1 Add Criteria

Click the 'Add' link to add a new criterion.



[Criteria](#) > Add Criteria

## Add Criteria

Enter the criteria information and click the Add button.

Meeting Date: 04/29/2022 Section: Basic Eligibility Requirements

Criteria Number \*

Title \*

Include Textbox for Agency Response  Yes  No

Description

Paragraph  **B** *I*          

Enter the criteria number and the title. The criteria number must be less than 7 digits or it will register as a sub-criteria and will not be included on the Agency view as a requirement. Sub-criteria has to be associated with a main criteria in order for it to be included in the Agency view. The Criteria title has no character limitations and can be named as desired. Indicate if a textbox should be included for an agency response. If the "Include Textbox for Agency Response" is not checked, the criteria will not show up on the agency view. Enter your text into the textbox. Click the **Save** button to save the new criteria.

Click on the 'Add' link under the main criteria in order to add a sub-criteria. Enter the sub-criteria number and title. The sub-criteria number must be more than 7 digits or it will register as a main-criteria. Indicate if a textbox should be included for an agency response. If the "Include Textbox for Agency Response" is not checked, the criteria will not show up on the agency view. Enter your text into the textbox. Click the **Save** button to save the new criteria.

### 3.4.2 Update Criteria

Click the 'Update' link to edit an existing criterion.



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**e-RECOGNITION** User Guide ? Help AU Admin User Edit User

Search e-Folder Meetings Users Emails Criteria Documents Output Data Reports

Criteria > Update Criteria

## Update Criteria

Meeting Date: 04/29/2022 Section: Basic Eligibility Requirements

Criteria Number \*

602.10

Title \*

Link to Federal programs

Include Textbox for Agency Response  Yes  No

Description

Paragraph

The agency must demonstrate that--

(a) If the agency accredits institutions of higher education, its accreditation is a required element in enabling at least one of those institutions to establish eligibility to participate in HEA programs; or

(b) If the agency accredits institutions of higher education or higher education programs, or both, its accreditation is a required element in enabling at least one of those entities to establish eligibility to participate in non-HEA Federal programs.

Back Update

Enter any changes to the criteria number and the title. Enter your text into the textbox. Click the **Save** button to save your changes.

### 3.4.3 Preview

Click the 'Preview' link view the criteria as the agency will see it.

## 3.5 Output Data

You can generate downloadable committee or agency data by clicking on the 'Output Data' link. A zip file containing the agency data will be produced.

Select a meeting date from the dropdown, select the agency for which you wish to review data for, select the type of data and click the **Generate Downloadable Data** button. The meeting date dropdown will display both current and archived meeting dates. The screen will redisplay with a dropdown containing the agencies or countries for the meeting.

## Output Data

To begin generating downloadable committee or agency/country data, follow the steps below.

1. Select a meeting date.

Meeting Date

Select

2. Select the agency for which you wish to generate committee reviewable data.

Agency

Select

3. Select the type of data and click the "Generate Downloadable Data" button.

- Committee Data (Includes committee screens with links to view agency narratives, analyst remarks, and documents).
- Agency Data (Narratives in PDF format and documents and an html page from which to display them).

Generate Downloadable Data

- If you select committee date, the zip file will contain all of the committee screens, the documents uploaded by the agency, and both the staff report and the agency report. Analyst remarks are included.
- If you select agency or country data, the zip file will contain the agency report in PDF format. It will also contain all of the documents uploaded by the agency with an HTML page from which to display them.

---

## 4 e-Folder and Blast Emails

This section describes *e-Folder and blast email* screens used by the administrator.

## 4.1 e-Folder

The e-Folder contains all of the documents added to the system by agencies, countries, analysts, or administrators. You can view the documents from this screen. To access *the e-Folder* screen, click the 'e-Folder' link at the top of the screen.

The screenshot shows the e-Recognition application interface. At the top, there is a navigation bar with the U.S. Department of Education logo, the text 'e-RECOGNITION', and user information for 'Admin User'. Below the navigation bar is a search bar and a menu with options: Search, e-Folder, Meetings, Users, Emails, Criteria, Documents, Output Data, and Reports. The main content area is titled 'e-Folder' and contains several search filters: Section (All), Agency/Country (All), Agency Name (Select), Meeting Date (All), Current/Archived (All), Type (All), and Duplicates/Orphans (Select). There are 'Reset' and 'Search' buttons, along with an 'Advanced Search' link. Below the filters, there is a section bar with 'Add Document', 'Hide', and '64696 Documents' buttons, and a 'Print' button. The main area displays a table of documents with the following columns: Agency, Meeting Date, Section, Type, Title, Date Added, Added By, and Action. The table contains 10 rows of document entries.

Agency	Meeting Date	Section	Type	Title	Date Added	Added By	Action
ABCDE	05/21/2031	3rd Party Comments	Agenda	test	06/01/2022	INOVAS Admin	⋮
ABCDE	05/16/2031	3rd Party Comments	----	my response	05/19/2022	Christian PocSecond	⋮
ABCDE	05/16/2031	3rd Party Comments	----	Third Party Comment	05/19/2022	INOVAS Admin	⋮
ABCAA	05/21/2031	3rd Party Comments	----	dsadsa	05/16/2022	Roger Delacruz	⋮
NECHE	03/22/2025	3rd Party Comments	----	test upload	05/16/2022	Charity Helton	⋮
ABCAA	05/16/2031	3rd Party Comments	----	pp	05/16/2022	Paul Florek	⋮
ACEND	05/16/2031	3rd Party Comments	----	regular files names	05/16/2022	Paul Florek	⋮
ABCAA	05/16/2031	3rd Party Comments	----	ppt	05/16/2022	INOVAS Admin	⋮
ACEND	03/22/2025	3rd Party Comments	----	nflkne5	05/16/2022	INOVAS Admin	⋮
ACEND	03/22/2025	3rd Party Comments	----	test5	05/16/2022	INOVAS Admin	⋮

- Click the document title to view the document.
- By default, all documents for current meetings are displayed.
- To filter the list of documents displayed, select a value from the Section, Agency Type, Agency Name, Meeting Date, or Current/Archived, Type, Duplicate/Orphans dropdowns and click the **Search** button.
- To view documents for a single section, click the section tab in the section bar.
- To resort the documents, click a column header.
- To view the next page of documents, click the 'Next' link.

- To view the previous page of documents, click the 'Prev' link.
- You can add, edit, or search documents in the e-folder. These functions are explained in the following sections.

## 4.2 Add a Document to the e-Folder

From the *e-Folder* screen, you can add documents to the e-folder. Administrators can add historical documents, 3<sup>rd</sup> party comments, correspondence, and other documents from this screen. To add a document to the e-Folder, click on the 'e-Folder' link at the top of the screen. On the *e-Folder* screen, click on the 'Add Document' link. The Add a Document to the *e-Folder* screen will display.

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**e-RECOGNITION** User Guide ? Help Admin User Edit User

Search e-Folder Meetings Users Emails Criteria Documents Output Data Reports

e-Folder > Add e-Folder Document

### Add e-Folder Document

To upload a document to the e-Folder:

- Select an agency, meeting, and section from the dropdowns.
- When you select a section from the dropdown, the document type dropdown will populate with types for that section (if any).
- Enter the document information, click the 'Choose File' button to select the document from your desktop, and click the 'Add Document' button. Required field \*

Agency/Country: Select

Meeting Date: Select Section: Select

Document Type: Select

Document Title: \*

Upload: Choose No File Chosen

Note: The file you attach must not be open. The path and file name are limited to 250 characters. Valid file types are Word, Excel, Powerpoint, Gif, .JPG, .RTF, .TXT, HTML, or PDF.

Comments (Limit 1,000 characters and spaces)

0/1000 characters

Back Reset Add

Historical and 3<sup>rd</sup> Party Comment documents added on this screen will also display for agencies, analysts, and committee members.

To add a Document:

- If the document is for an agency, select it from the Agency dropdown.
- The screen will redisplay with the Meeting Date dropdown populated with that



agency's meeting dates. If the document is for a specific meeting date, select it from the dropdown.

- Select the section from the dropdown.
- If you select Section - Correspondence or Section - Other from the dropdown, the screen will redisplay with the Document Type dropdown populated with document types for that section.
- If you select Section – 3<sup>rd</sup> Party Comments from the dropdown, the screen will redisplay with a radio option to select whether the comment was Pro or Con.

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**e-RECOGNITION** User Guide ? Help AU Admin User Edit User

Search e-Folder Meetings Users Emails Criteria Documents Output Data Reports

e-Folder > Add e-Folder Document

## Add e-Folder Document

To upload a document to the e-Folder:

- Select an agency, meeting, and section from the dropdowns.
- When you select a section from the dropdown, the document type dropdown will populate with types for that section (if any).
- Enter the document information, click the 'Choose File' button to select the document from your desktop, and click the 'Add Document' button. **Required field \***

Agency/Country \*

Meeting Date \*

Section \*

Comment Type \*  
 Pro  Con  Other

Document Title \*

Upload \*  
 No File Chosen

Note: The file you attach must not be open. The path and file name are limited to 250 characters. Valid file types are Word, Excel, Powerpoint, .Gif, .JPG, .RTF, .TXT, HTML, or PDF.

Comments (Limit 1,000 characters and spaces)

0/1000 characters

- Enter a title for the document.
- Click the **Choose File** button and select the document from your desktop.
- You may enter additional information about the document in the comments box.
- Click the **Add** button.
- The *e-Folder* screen will redisplay with a message that your document has been saved.
- The document you added will be the first one displayed on the *e-Folder* screen. It will take a couple of minutes for the document to get uploaded to the TRIM records management system. After that, a link will display on the document's title. Click the

link to display the document.

### **4.3 Edit an e-Folder Document**

The information (meta data) about documents in the e-folder can be updated by the administrator. Only documents which are added by administrators can be updated, documents added by agencies (Section 1) and analysts (Section 2 and Section 3) cannot be edited.

You cannot update the document itself. The admin can update the Agency associated to the document, the meeting date, document type, document title and also add comments. If the wrong document was added or if you have an updated version of the document, you will need to delete the document and then add the new one.

To edit a document, click on the 'e-Folder' link at the top of the screen. When the *e-Folder* screen displays, click the 'Edit' link for the document you wish to update.

### e-Folder

Section:  Agency/Country:  Agency Name:  Meeting Date:  Current/Archived:   
 Type:  Duplicates/Orphans:    [Advanced Search](#)

**64696 Documents**

<input type="checkbox"/>	Agency	Meeting Date	Section	Type	Title	Date Added	Added By	Action
<input type="checkbox"/>	ABCDE	05/21/2031	3rd Party Comments	Agenda	<a href="#">test</a>	06/01/2022	INOVAS Admin	
<input type="checkbox"/>	ABCDE	05/16/2031	3rd Party Comments	----	<a href="#">my response</a>	05/19/2022	Christian PocSe	
<input type="checkbox"/>	ABCDE	05/16/2031	3rd Party Comments	----	<a href="#">Third Party Comment</a>	05/19/2022	INOVAS Admin	
<input type="checkbox"/>	ABCAA	05/21/2031	3rd Party Comments	----	<a href="#">dsadsa</a>	05/16/2022	Roger Delacruz	
<input type="checkbox"/>	NECHE	03/22/2025	3rd Party Comments	----	<a href="#">test upload</a>	05/16/2022	Charity Helton	
<input type="checkbox"/>	ABCAA	05/16/2031	3rd Party Comments	----	<a href="#">pp</a>	05/16/2022	Paul Florek	

The e-Folder Edit screen displays.

e-Folder &gt; Edit e-Folder Document

## Edit e-Folder Document

Agency/Country \*  
ABCDE

Meeting Date \* 05/21/2031

Section \* 3rd Party Comments

Comment Type \*  
 Pro  Con  Other

Document Title \*  
test

Comments (Limit 1,000 characters and spaces)  
test

4/1000 characters

[Back](#) [Edit](#)

- Enter your changes to the document information.
- If you select a different agency from the dropdown, the meeting date dropdown will populate with meeting dates for that agency.
- You can only update the section or document type for documents in Section – Correspondence and Section – Other.
- If you change the section, the screen will redisplay with the Document Type dropdown populated with document types for that section.



e-Folder &gt; Edit e-Folder Document

## Edit e-Folder Document

Agency/Country \*  
ABCDE

Meeting Date \*  
05/21/2031

Comment Type \*  
 Pro  Con  Other

Document Title \*  
test

Comments (Limit 1,000 characters and spaces)  
test

4/1000 characters

Select

3rd Party Comments ✓

Agency

Analyst

Correspondence

Historical

Other

- Click the **Edit** button.
- The *e-Folder* screen will display with a message that the document has been updated.

## 4.4 Search the e-Folder

To search documents, click on the 'e-Folder' link on the top of the screen. When the *e-Folder* screen displays, click the 'e-Folder Search' link in the upper left corner. The *Search e-Folder* screen will display.

The screenshot shows the 'e-Folder' search interface. At the top, there is a navigation bar with 'U.S. DEPARTMENT OF EDUCATION' and 'OFFICE OF POSTSECONDARY EDUCATION'. Below this is the 'e-RECOGNITION' logo and a user profile for 'Admin User'. A search bar is located at the top left. The main content area is titled 'e-Folder' and contains a search filter section with dropdown menus for 'Section', 'Agency/Country', 'Agency Name', 'Meeting Date', and 'Current/Archived'. There are also buttons for 'Reset', 'Search', and 'Advanced Search'. Below the filters, there is a table of documents with columns for 'Agency', 'Meeting Date', 'Section', 'Type', 'Title', 'Date Added', 'Added By', and 'Action'. The table contains 10 rows of data, each representing a document with a checkbox, agency name, meeting date, section, type, title, date added, and user name.

<input type="checkbox"/>	Agency	Meeting Date	Section	Type	Title	Date Added	Added By	Action
<input type="checkbox"/>	ABCDE	05/21/2031	Agency	Agenda	test	06/01/2022	Admin User	⋮
<input type="checkbox"/>	ABCDE	05/16/2031	3rd Party Comments	----	my response	05/19/2022	Christian PocSecond	⋮
<input type="checkbox"/>	ABCDE	05/16/2031	3rd Party Comments	----	Third Party Comment	05/19/2022	INOVAS Admin	⋮
<input type="checkbox"/>	ABCAA	05/21/2031	3rd Party Comments	----	dsadsa	05/16/2022	Roger Delacruz	⋮
<input type="checkbox"/>	NECHE	03/22/2025	3rd Party Comments	----	test upload	05/16/2022	Charity Helton	⋮
<input type="checkbox"/>	ABCAA	05/16/2031	3rd Party Comments	----	pp	05/16/2022	Paul Florek	⋮
<input type="checkbox"/>	ACEND	05/16/2031	3rd Party Comments	----	regular files names	05/16/2022	Paul Florek	⋮
<input type="checkbox"/>	ABCAA	05/16/2031	3rd Party Comments	----	ppt	05/16/2022	INOVAS Admin	⋮
<input type="checkbox"/>	ACEND	03/22/2025	3rd Party Comments	----	nflkne5	05/16/2022	INOVAS Admin	⋮
<input type="checkbox"/>	ACEND	03/22/2025	3rd Party Comments	----	test5	05/16/2022	INOVAS Admin	⋮

To search for documents in the e-folder:

- Enter your search criteria.
- By default, only Current meetings will be searched. To search archived meetings, select archived from the Archived/Current Meetings dropdown.
- If you select an agency from the dropdown, the meeting date dropdown will populate with meeting dates for that agency.
- To search document titles or comments, enter the word or words you wish to search for in the Search For text field. By default, the document or narrative must contain all of the words you enter. If you want to search for any of the words or an exact phrase, select that option from the dropdown.

- Click the **Search** button.
- The *e-Folder Search Results* screen will display with a list of the documents that match your search criteria.
- Your search criteria will be displayed at the top of the screen.
- Select a value from the dropdowns and click the **Search** button to filter the search results by meeting date or section.
- Click the document title to display the document.
- Click on a column heading to sort the results by that column.
- Click the 'Next Page' link to display the next 100 documents which met your search criteria.
- Click the 'Prev Page' link to display the previous 100 documents which met your search criteria.
- Click the 'New Search' link to return to the main *Search e-Folder* screen to start a new search.

## 4.5 Manage Document Types

To update the document types used in the e-folder, click the 'Document' link at the top of the screen. The *Manage Document Type* screen will display. Through this screen, you can add and update document types and edit the Reference Tables.

## Document Type

Select a section to view the document types for that section.

Section

Select

Reset

Search

Add Document Type

Manage Reference

40 Document Types

Document Type	Section	Action
Staff Analysis 252	----	⋮
Staff Analysis 252.14	Section 1 – Agency	⋮
Staff Analysis 252	Section 2 – Analyst	⋮
Appeal	Section 4 – Historical Documents	⋮
Historical	Section 4 – Historical Documents	⋮
Historical...	Section 4 – Historical Documents	⋮
Im am test 0516	Section 4 – Historical Documents	⋮
Secretary Decision Letter	Section 4 – Historical Documents	⋮
Staff Analysis 252	Section 4 – Historical Documents	⋮
Transcript	Section 4 – Historical Documents	⋮

Rows per page: 100



1/1 Page



- To view the document types for a section, select the section from the dropdown.

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### Document Type

Select for that section.

1 Document Type

Section	Action
Section 1 - Agency	⋮

- To add a document type to the section, click the **Add New Document Type** link.

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Document Type > Add Document Type

### Add Document Type

Section

Document Type \*

- The *Add Document Type* screen displays.
- Enter the document type and click the **Add** button.
- To Edit a document type, click the 'Edit' link under the Action menu next to that type.

## Document Type

Select a section to view the document types for that section.

Section

Select

Reset

Search

Add Document Type

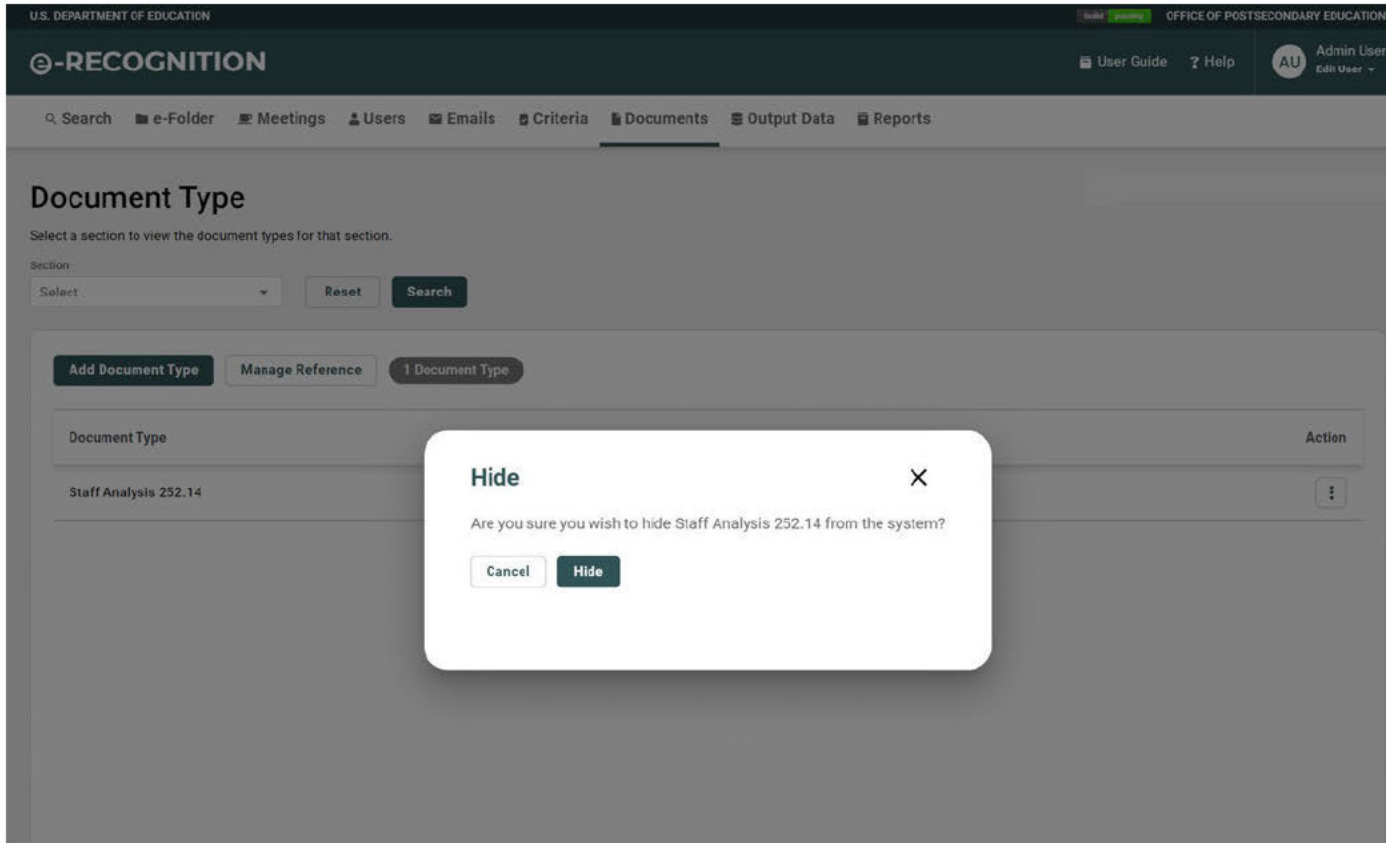
Manage Reference

1 Document Type

Document Type	Section	Action
Staff Analysis 252.14	Section 1 - Agency	

Edit Document Type  
Hide Document Type

- The *Update Document Type* screen displays.
- Enter the changes to the document type and click the **Save** button.
- To Hide a document type, click the 'Hide' link under the Action menu for that document. Click 'OK' on the confirmation pop-up to hide the type.



## 4.6 Blast Email

The *Blast Email* screen allows you to send an email to one or more agencies or countries. To send a blast email, click the 'Send Email to Agencies or Countries' link on upper right corner of the *Administrator Search* screen. The *Blast Email Search* screen displays.

Search &gt; Email Blast Message

## Email Blast Message

From: e-Recognition Helpdesk e-recognition@inovas.net

Recipient Count: 0

Recipients: None

Recipient Options

 Point of Contact  Agency Admin  Agency Analyst  Meeting Analyst

Additional Addresses

Select a Template [Manage Template](#)

Subject \*

Message \*

Add an attachment

 No File Chosen

Test Email Address (Enter only one email address and click on Send Test Email)

- Select a value from the Type, Name, Meeting Date, and/or State dropdown.
- Click the Search button.
- The *Blast Email Search Results* screen displays with a list of agencies that met your search criteria.



- The *Blast Email Search Results* screen displays with a list of agencies that met your search criteria.
- If you want to send the email to all of the agencies listed, click the **All** button otherwise, click the checkbox for the agencies to whom you'd like to send the email.
- Click the **Select Recipients and Continue** button.
- The *Send Email* screen will display.

- The email will be sent from the ASL Helpdesk email address.
- A separate copy of the email and attachments will be saved to the e-Folder for each agency or country.
- If you would like others to receive a copy of the email, enter the email address in the Additional Recipients field.
- Enter the subject and message.
- If you would like to attach a file, click the **Choose File** button and select it from your desktop. You can attach up to three files.
- If you would like to preview the email, enter an email address in to the Send Test Email text box and click the **Send Test Email** button. A copy of the email will be sent so that you are able to preview it prior to sending to the actual desired recipients.
- Click the **Send Email** button.
- You will receive a copy of the email.

