


Directions for Writing, Compiling, Editing, and Submitting the BOE Report in AIMS



General Information – Team Chair & Team Members

1. Log onto AIMS (aims.ncate.org) using your NCATE ID and password.
2. All BOE Report work is done under **Visit Reports**.
3. It is recommended that you type your report in Microsoft Word (or other word processor) and then copy and paste the report into AIMS.
4. The draft report is imported from the previous step prior to editing. Re-importing a report after editing has begun will overwrite any changes that have already been made to the report.
5. The **Draft** button at the bottom of each section of the report creates a PDF format of the entire report. If you click the **Here** button in the message after the PDF has been created, you can view the report in PDF format and can save a copy to your computer (use “Save As” under the File drop down menu).
6. You can move through the report quickly by using the drop down menu in the floating tool bar in the upper left hand corner or by clicking on **Next** or **Previous** at the bottom of each page.
7. As you work, periodically save your document using the “Save” icon () in the floating menu bar in the upper left hand corner or the **Save** button at the bottom of the page.
8. When you are finished writing a section click **Save and Quit** at the bottom of the page. If a dialogue box appears, click **Yes**. This will take you back to the AIMS Visit Reports screen
9. When submitting a report for the next step, click on the **Send Msg** or **Submit Report** button. If you click **Close**, the report will close but NOT be submitted.

I. Writing Assignments – Team Chair

The team chair enters assignments under the “Individual Team Member Reports” by typing the person’s writing assignment next to their name. Click the **Save** button above the textboxes. The chair sends an email to the team informing them that assignments have been posted.

II. Writing the BOE Report-First Draft – Team Chair & Team Members

1. **Team members** click on your name under “Individual Team Member Reports.” This opens the template for the full report. Go to the section you are writing.
2. **Team chairs** click on “BOE Report-First Draft.” This opens the template for the full report. Go to the section you are writing.
3. Enter the *Introduction* and *Conceptual Framework* into the appropriate textboxes and complete all applicable sections of the standards.
4. When two or more team members are writing to the same standard, the entire standard (everyone’s contribution) must be entered into AIMS using one team member’s account.
5. Any other team member, may read (only) another team member’s report by clicking on the icon  to the right of the person’s name. (For team members to read (only) the chairs report they click on the  icon to the right of BOE Report-First Draft in the upper part of the Visit Reports screen.)




III. Submitting the BOE Report to the Team Chair – Team Members

1. Under “Individual Team Member Reports,” click on your name to open the report and go to the last page, *Sources of Evidence*.
2. Click **Next** at the bottom of the *Sources of Evidence* page. This will take you to the “Thank You” page.

3. If you are ready to submit your report, click **Send Msg** to submit it to the team chair who will be notified that your report is complete. You will now be back to the AIMS Visit Reports screen.


IV. Compiling the BOE Report-First Draft – Team Chair


Once the individual team members have submitted their contributions to the BOE report the **BOE chair** must compile the individual contributions into one report.

1. Click on the two page icon  next to **BOE Report-First Draft** (Note: the  icon will not appear until a least one team member has begun to write their report).
2. For each team member, click the check box under the “Report Contribution” column next to the section that the team member wrote. Only one team member can be checked for each section. If two or more team members wrote to a single standard, one person must be designated as the compiler for that standard.
3. After all sections of the report are checked, Click **Go**. If a dialogue box appears, click **Yes**. This will take you back to the AIMS Visit Reports screen.
4. Team members use the  icon to the right of BOE Report-First Draft in their account to read the report; team members cannot click on BOE Report-First Draft.



V. Onsite Editing of the Full BOE Report-First Draft – Team Chair & Team Members



Editing of the full report should be done only after the team chair has imported all sections of the report into a single BOE Report-First Draft document. Team members will work together to read and edit the report. To edit the BOE Report-First Draft:

1. The **BOE chair** clicks on **BOE Report-First Draft**. (Team members click on the  icon to the right of BOE Report-First Draft.) The BOE chair will have a copy of the full report that can be edited and team members a read-only copy of the full report.
2. The team reads and edits the full report together, but only the chair, or a designated typist using the chair’s AIMS account, makes changes.
3. After the last standard has been edited, Click **Save and Quit** at the bottom of the page to close the report. If a dialogue box appears, click **Yes**. This will take you back to the AIMS Visit Reports screen.

After returning home, the chair accesses the report by clicking on **BOE Report-First Draft**. The chair has edit rights. (Non-chair BOE team members can view the report at any time by clicking on the icon  to the right of BOE Report-First Draft. This will be a read-only copy of the full report.

VI. Final Editing and Submitting of the BOE Report-First Draft – Team Chair & Team Members

After the onsite visit, the team chair edits the BOE Report-First Draft, consulting with team members as needed. Consultations may be done by using Comments  (or ) on the “Visit Report” page or by email. The directions below are based on using Comments.

1. Click on **BOE Report-First Draft** and edit the document as needed.
2. To get feedback from team members, click on the **Comments** icon  (or ) to the right of **BOE Report-First Draft** and type your questions or comments.
3. Click on **Submit** at the bottom of the comments box to post your comments. It is highly recommended that an email be sent to team members when comments are posted.
4. Click **Cancel** to close the comments box.






VII. Submitting the BOE Report-First Draft to NCATE – Team Chair

After the edits are completed, the BOE Report-First Draft is submitted to the NCATE staff for review. Team members receive an email notifying them that the BOE Report-First Draft has been submitted to NCATE and that they should review the report for any additional changes that need to be made. To submit the BOE Report-First Draft, the chair should:

1. Click on **BOE Report-First Draft**
2. Go to the last page of the report, *Sources of Evidence* and click **Next** at the bottom of the page. This will take you to the “Thank You” page.
3. If you are ready to submit the first draft report to NCATE for review, click **Send Msg** and an email will be sent to the NCATE office and to team members that the report has been submitted.

VIII. Editing the BOE Report-Second Draft – Team Chair

NCATE staff will review the BOE Report-First Draft and do two things: (1) Make editorial corrections (e.g., misspelled words and grammatical errors) and (2) suggest changes in the comments textbox. To edit the BOE Report-Second Draft:

1. Download the NCATE staff edited report by clicking on the two page icon  next to **BOE Report-Second Draft**.
2. Click **Go** and the BOE Report-Staff edited becomes the BOE Report-Second Draft, and you will be back on the AIMS Visit Reports screen.
3. Click on **BOE Report-Second Draft** to open the report for editing. Where editorial changes have been made by NCATE staff, there will be a large red exclamation mark  but the changes will not be identified in any way.
4. Click on the **Comments** icon  to the right of **BOE Report-Staff-edited** to open the NCATE staff comments. The comments will open in a separate window.
5. Edit the document as needed based on the staff comments.
6. To get feedback from team members, click on the **Comments** icon  (or ) to the right of **BOE Report-Second Draft** and type your questions or comments.
7. Click on **Submit** at the bottom of the Comments box to post your comments. Team members are NOT notified when comments are posted. It is highly recommended that an email be sent to team members when comments are posted.
8. Click **Cancel** to close the comments box. Be sure to submit before you click cancel.

IX. Submitting the BOE Report-Second Draft to the Institution to Correct for Factual Errors – Team Chair

Someone at the institution, usually the NCATE coordinator, will review the BOE Report-Second Draft for factual error. When the BOE Report-Second Draft is completed and submitted, it goes to the institution to correct for factual errors. To submit the BOE Report-Second Draft for factual corrections:




1. Click on **BOE Report-Second Draft** and go to the last page, *Sources of Evidence*. Click **Next** at the bottom of the page. This will take you to the “Are you ready to submit your report?” page.
2. If you are ready submit the report for correction of factual errors, click **Submit Report**. If a dialogue box appears, click **Yes**. This will take you back to the AIMS Visit Reports screen.

After the BOE Report-Second Draft has been submitted, there will no longer be a Draft button to open the report as a PDF file. However, there will be a PDF version of the file in

the column to the right of BOE Report-Second Draft that can be opened and saved or printed.


IX. **Correcting Factual Errors and Submitting the BOE Report-Final Draft – Team Chair**

The institutional representative cannot make changes in the BOE Report-Second Draft itself. He/she writes corrections in Word (or other word processor) and uploads the document into AIMS for you to use to correct factual errors. To edit for factual corrections and submit the BOE Report-Final Draft, the BOE chair should:

1. Click on the icon  in the column to the right of “BOE Report-Factual Corrections.” This will open the factual errors corrections submitted by the institutional representative. Save the document to use for editing the final BOE report.
2. Download the **BOE Report-Second Draft** by clicking on the two page icon  next to BOE Report-Final.
3. Click **Go** and the BOE Report-Second Draft becomes the **BOE Report-Final**, and you will be back on the AIMS Visit Reports screen.
4. Click on **BOE Report-Final** to open the report for editing.
5. Edit the document as needed based on the institution’s corrections for factual errors document that you opened and saved earlier.
6. Although it is not expected that the chair will need to obtain additional information from the team members to correct factual errors, the **Comments** textbox  to the right of BOE Report-Final can be used as described earlier.
7. After all edits are complete, and you are ready to submit the final report, click **Next** at the bottom of the *Sources of Evidence* page. This will take you to the “Are you ready to submit your report?” page.
8. Click **Submit Report**. If a dialogue box appears, click **Yes**. This will take you back to the AIMS Visit Reports screen.

X. **Downloading and Responding to the Rejoinder – Team Chair**

The institution has the opportunity to write a rejoinder to the BOE team’s report and the team chair can write a response to the rejoinder. The institution will have the opportunity to read the chair’s response but cannot submit any additional comments. The chair will receive and email that the institution has submitted a rejoinder or that they have chosen not to respond to the BOE report. To submit a response to the Rejoinder:

1. Click on **Visit Reports**.
2. Click on the download icon  in the column to the right of Rejoinder. This will open the Rejoinder submitted by the institution. Save the document to use for your response.
3. Do one of the following:
 - a) If you have no response to the rejoinder, click on **Chair Response to Rejoinder**; then click on **No Response Needed** to send an email to NCATE that you have no response to the rejoinder.OR
 - b.) Type and save your response to the Rejoinder in Word (or other word processor). Then click on **Chair Response to Rejoinder**, click on **Browse** to locate and open your rejoinder file, click **Upload**, and click **Submit**. If a dialogue box appears, click **Yes**. This will take you back to the AIMS Visit Reports screen