

# Guidelines for Electronic Submission of an Optometric Residency Self-Study

(Developed by ACOE staff and accepted by the Council at its June 19-22, 2019 Annual meeting;  
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Self-study documents have traditionally been submitted as paper copies; however, the Accreditation Council on Optometric Education (ACOE) is now accepting self-studies that are submitted electronically, provided that the content is prepared in accordance with the [ACOE Residency FINAL Version Self-Study 2017 Standards template](#). The following guidelines have been drafted to assist optometric residency programs that are interested in preparing and submitting an electronic self-study.

## Preparing the Electronic Submission of the Program's Self-Study

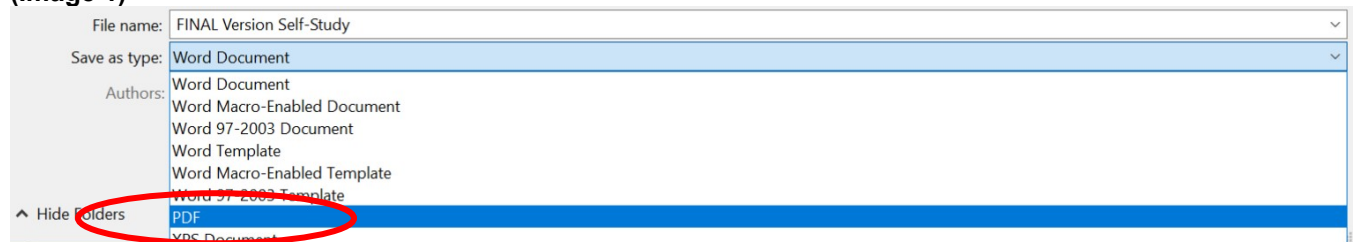
### Overview:

- PDF is the only acceptable electronic version of the final self-study and appendices.
- All appendices are to be bookmarked AND hyperlinked where cited within the self-study.
- USB drives are preferred for the distribution of the self-study and appendices.
- NO PHI in the self-study or appendices.

### 1. Converting the template and appendices to PDF

- Ensure the **ACOE Residency FINAL Version Self-Study 2017 Standards template** is being used to prepare the program's self-study prior to submission. A link to the proper template and 2017 optometric residency standards may be found [here](#).
- Convert the completed final version of the self-study AND all documents provided in the appendices to PDF format.
  - **To convert Word documents** to PDFs you will click on the File tab at the top of the ribbon, click on "Save As" and then "Browse" to choose the folder in which you would like to save the PDF document. Next, name the file, click on the "Save as type" drop down menu (see image 1 below), and choose PDF.

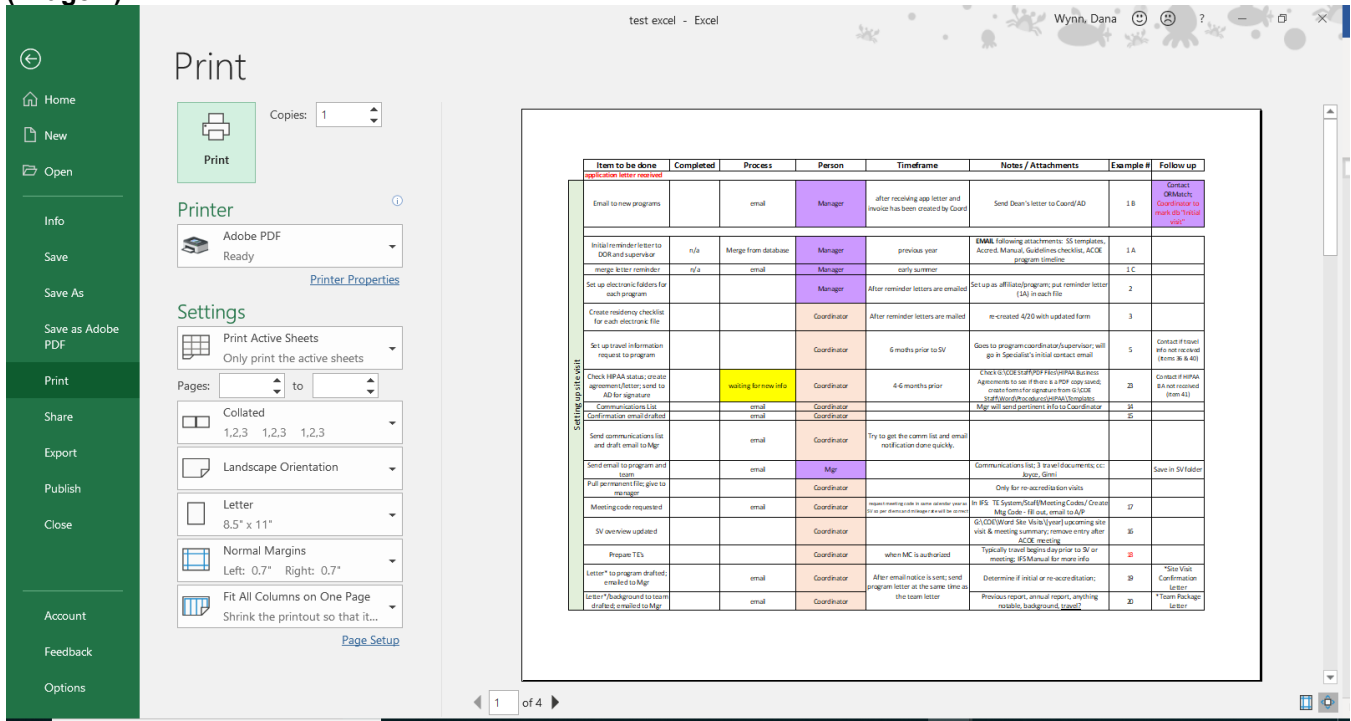
#### (Image 1)



- **To convert Excel documents** to PDFs you will first want to go into the "Print" area to resize your active sheets. In the Print section, you can change the orientation, margins and scaling of each active sheet. Doing this helps to ensure that each excel sheet is readable and has all the information contained on one sheet – i.e. columns continued on additional sheets and broken up (see image below).

Once the above steps have been completed, you may then follow the same steps as you would for a Word document: Click on the File tab at the top of the ribbon, click on "Save As" and then "Browse" to choose the folder in which you would like to save the pdf document; name the file, click on the "Save as type" drop down menu, and choose PDF.

(Image 2)



## 2. Using bookmarks and hyperlinks in the template

Appendices must be bookmarked and hyperlinked within the self-study.

- Each standard and the accompanying appendices must be accurately bookmarked and labeled to ensure that teams and ACOE staff can easily toggle between standards, pages and appendices.
  - When PDF files are combined into a single PDF in Adobe Acrobat, bookmarks are automatically created for each added file. Please visit the [Adobe Page: Thumbnails and Bookmarks](#) for additional guidance, if needed.
- When an appendix is referenced in the body of the self-study template, the PDF version of the appendix must be hyperlinked where it is cited.
  - Hyperlinks may be added to the Adobe PDF final draft version of the self-study by following these steps:
    - Choose **Tools > Edit PDF > Link > Add or Edit**.
      - The pointer becomes a cross hair, and any existing links in the document, including invisible links, are temporarily visible.
    - Drag a rectangle where you want to create a link. This is the area in which the link is active.
    - In the **Create Link** dialog box, choose the options you want for the link appearance.
    - Select one of the following link actions:
      - **Go To A Page View**
        - Click Next to set the page number and view magnification you want in the current document or in another document (such as a file attachment), and then click **Set Link**.
      - **Open A File**

- Select the destination file and click Select. If the file is a PDF, specify how the document should open (for example in a new window or within an existing window), and then click OK.
  - For more detailed instructions explaining how to hyperlink within a PDF, please visit the [Adobe Links and Attachments page](#).
- Hyperlinks to external sites suggested within the narrative of the self-study must be functional. It is acceptable to provide hyperlinks for pages that are published online; however, webpages and online documents must also be provided as a PDF version in the appendices.

### **3. Additional considerations**

- File names of appendices should exactly match the title of item demonstrating compliance, listed in the table of appendices on the last page(s) of the self-study template.
- The preferred method for submission of electronic self-studies is a USB (flash drive) containing the final version template and all hyperlinked appendices.
- **NO PROTECTED HEALTH INFORMATION (PHI)** should be submitted in the self-study. Any information submitted which contains PHI must be deidentified prior to its submission.