Guide to Formatting the Self Study Report
A Resource for Programs

The OTA & PTA Education Accreditation Program has a set of formatting requirements in place to facilitate programs in presenting a document that is easily navigable. These requirements are outlined in detail in the Program Accreditation Handbook, beginning on page 15.

This guide has been created in response to requests for additional information on how to create a PDF file that includes linked appendices. While it is not possible to describe each step in creating such a document, you will find below information on how to get started using Adobe Pro DC.

Self Study Report Document Structure

The SSR is a narrative report based on the OTA & PTA EAP accreditation standards. The narrative will include the following sections (see the Program Accreditation Handbook for further details):

- Introduction/Overview
- Standards and criteria
- Summary
- List of evidence and appendices

Writing the Report

Gather all files that you intend on including as appendices in one folder. This will make it easier to link them to your narrative later.

It is easiest to write the narrative of your report in Microsoft Word where you can take advantage of the Review and Commenting tools when collaborating on sections of the document. When referencing an appendix in the narrative, use the file name of the appendix as will appear in the document tree. (i.e.: "as evidenced in 1.2.1 ABC College Organizational Chart). Format the name of the appendix in another colour or as bolded text such that it will stand out as a link later. You'll do all the linking in Adobe after you have finalized your Word document.

When you have finalized the document, you will click 'Save As' and select *PDF*.

Working with Adobe Pro DC

First, ensure you have the correct version of Adobe. You can download Adobe Pro DC by visiting their website https://acrobat.adobe.com/ca/en/acrobat.html.

There are many online resources available on the Adobe DC Tutorials site to guide you: https://helpx.adobe.com/ca/acrobat/tutorials.html

YouTube also contains numerous tutorials for Adobe DC.

Be sure to take the time to familiarize yourself with the following functions before you begin:

- Attaching files
- Linking parts of the document
- Adding password security
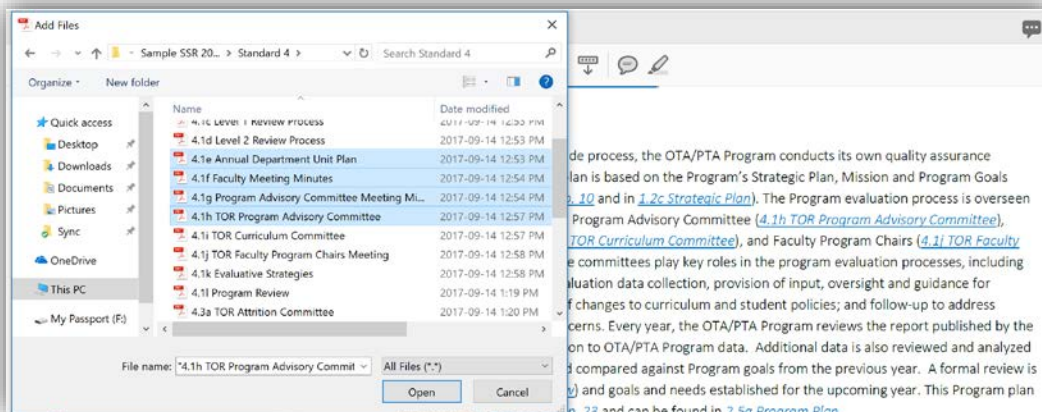
Attaching Appendices

Before you can create your hyperlinks, you will first need to attach your appendices to your document. Begin by locating the paperclip icon on the left side panel:
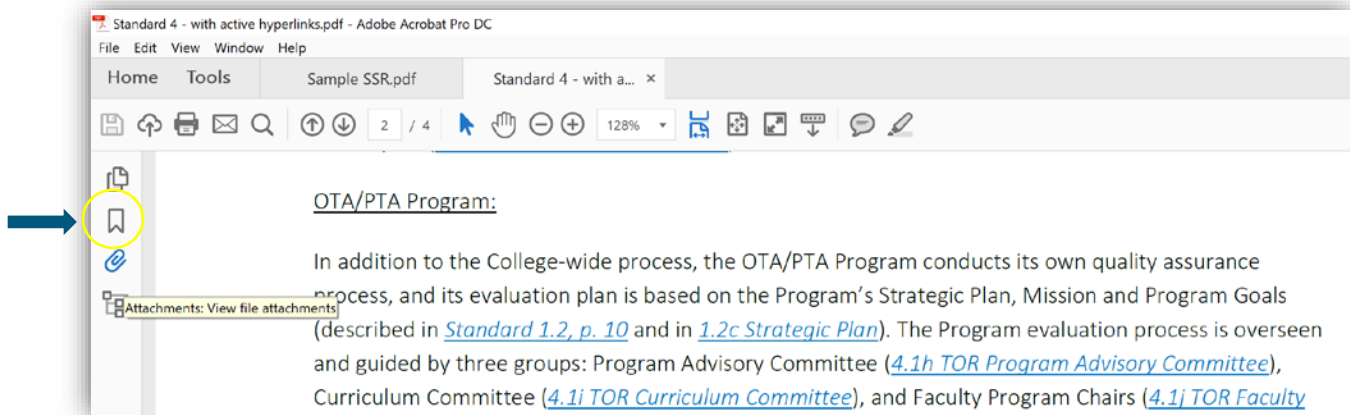
Click on the paperclip icon to open the attachments panel and then click on the paperclip icon with the plus sign to begin attaching files:
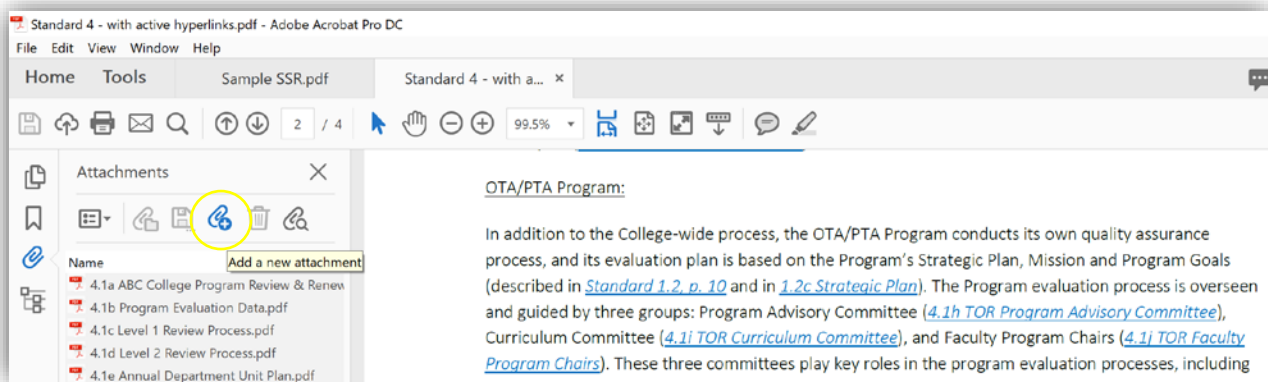

A pop-up will appear to take you to your File Explorer. Locate the folder that contains the appendices you want to attach. Use the shift key and down arrow to select multiple files at once. Then choose Open to begin attaching:
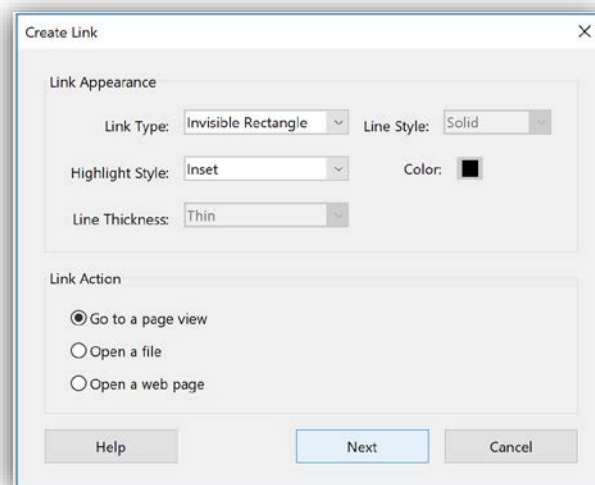

Continue this process until all appendices have been attached.
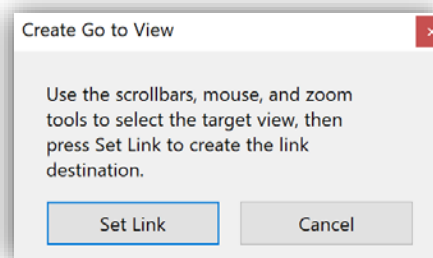
Linking Parts of the Document

Begin by highlighting the text you want to link and right clicking to open the drop-down menu. Select Create Link:
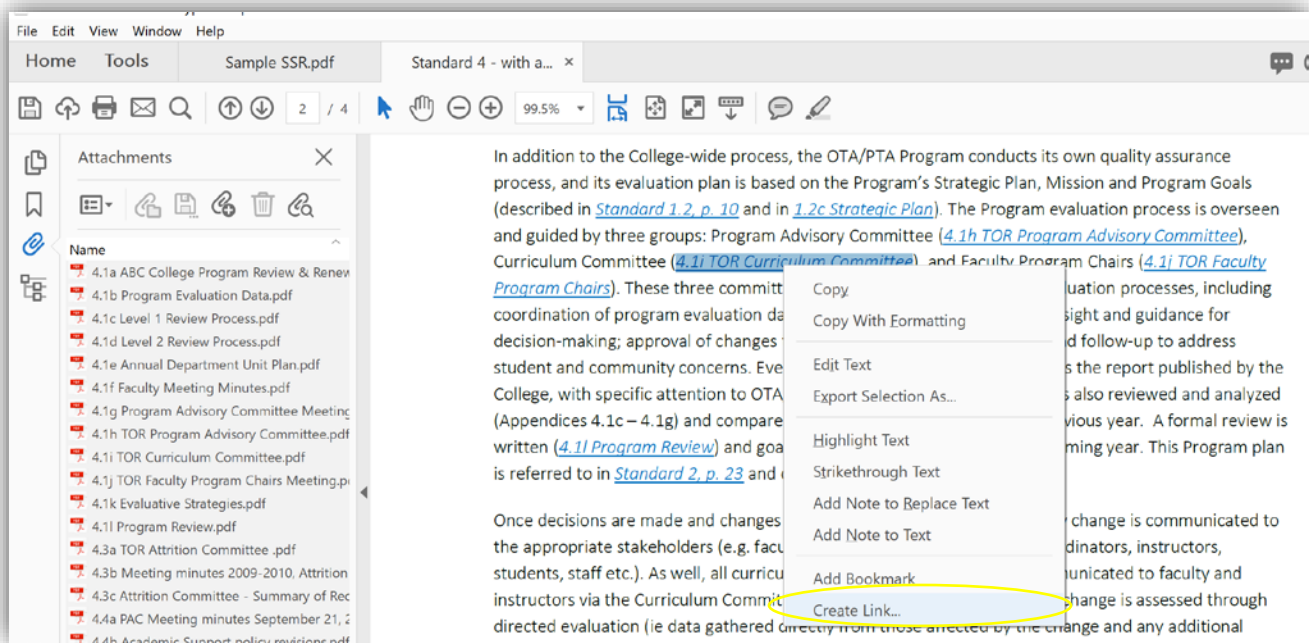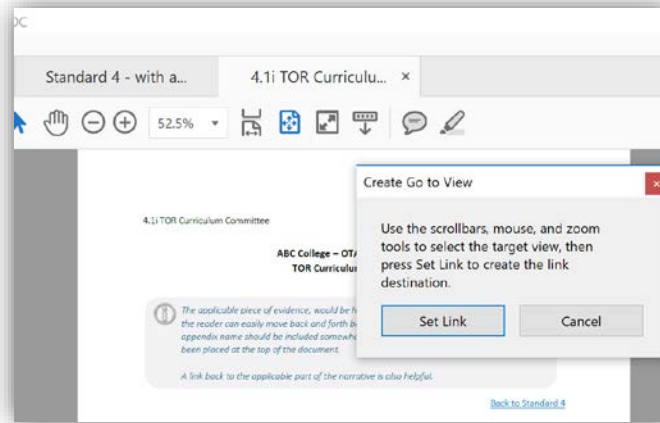

Set the options as follows and select Next:


You'll be asked to:

Select the file you want to link from the list of appendices to the left, and double click to open it. If you are linking to the document as a whole (and not a specific part of the document), click Set Link now:

If you are looking to link to a specific section of a document, you'll want to scroll to the specific location and highlight the beginning of the section with your cursor before clicking Set Link. The hyperlink will now open the document at the section specified.

Your hyperlinks should be set to open as a new tab in the same window. This makes moving back and forth through the document easier:
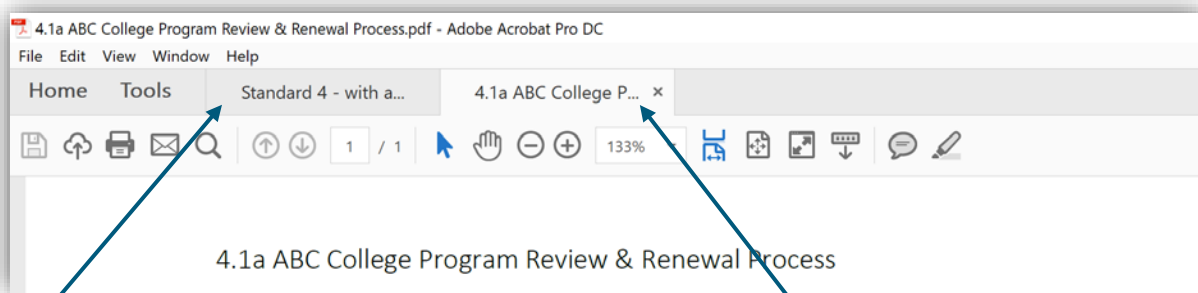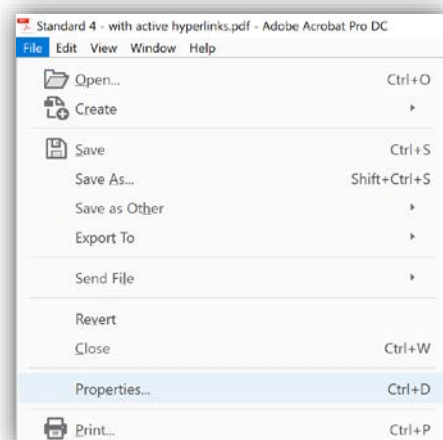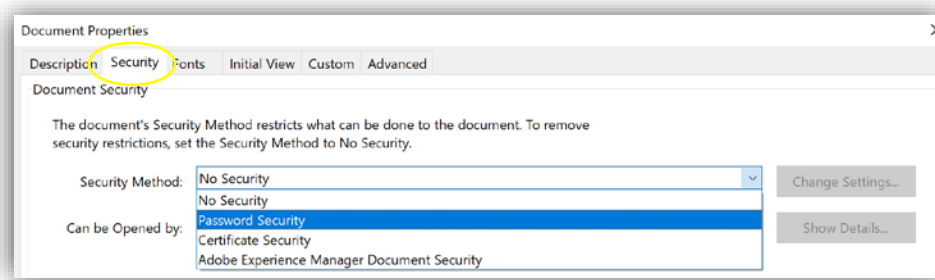

Original narrative document   Newly opened appendix

Adding Password Protection

Before submitting your document to the OTA & PTA EAP, you may wish to add password protection. Begin by selecting File and choose Properties from the drop-down menu:

Select the Security tab and from the Security Method drop-down select Password security:

Select *Require a password to open this document* and enter the password into the Document Open Password field:
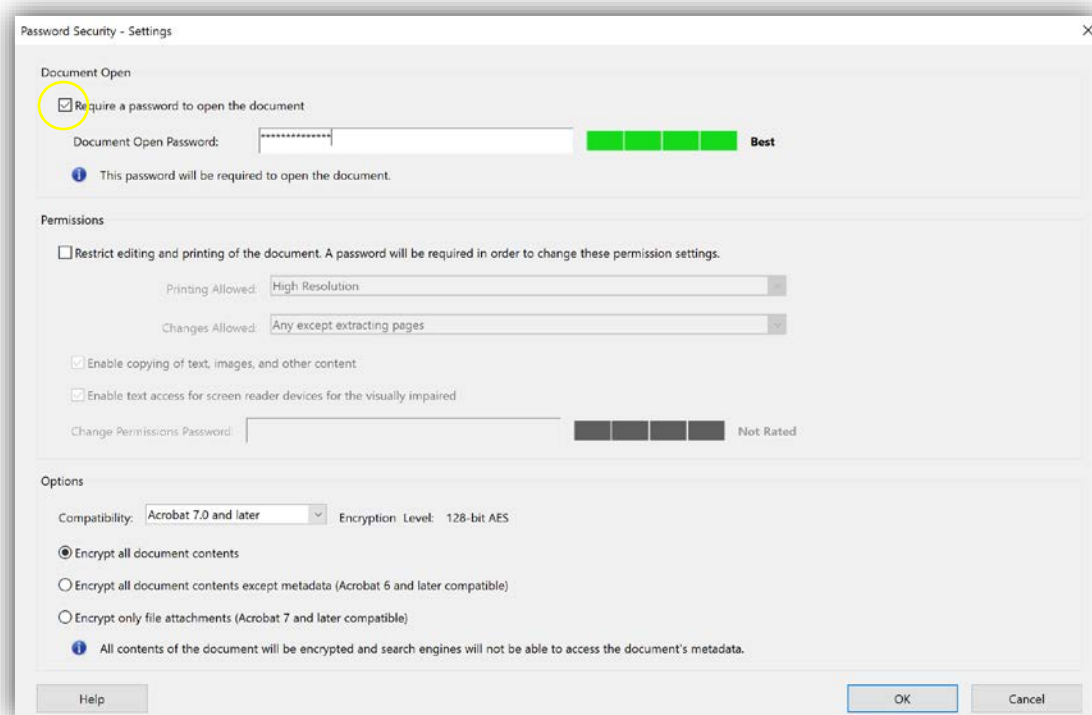
Other Useful Tips

- Give yourself lots of time to format the SSR – a couple of weeks is recommended
- Follow the requirements as listed in the Program Accreditation Handbook closely
- Source support to create and test the links as this step takes time
- Ensure you have left time for testing – be sure that you can navigate the SSR and that all links work as intended
- Continually ask yourself: will the reader lose their place when moving between the narrative and related appendices? Navigating back and forth should be seamless. No scrolling around looking for where you left off.

Still Have Questions?

While we aren't exactly PDF experts, we do know our way around the basic functions. If you have reviewed all the available resources and are still stuck, please drop us a line.