



MANAGING YOUR PEER REVIEWER PROFILE

Canopy User Guide

WELCOME TO CANOPY

As part of its commitment to strengthen its value to members, HLC is excited to introduce peer reviewers to Canopy, a new online system for reviewers to view and update records with HLC.

This guide explains how to access and edit your Peer Reviewer Profile in Canopy. The first time you log into the system, you should review and update each section of your profile. It will take about 30 minutes for you to complete your full profile. HLC recommends having your CV or resume available for reference.

Completing your Peer Reviewer Profile is critical to HLC's ability to assign you to teams. To be eligible to be assigned to reviews, your profile information must be submitted before January 17, 2022.

Going forward, you will not be required to complete each section of your profile each time you need to update your information. You will be able to go into Canopy and edit only the information that has changed, such as employment records, schedule availability, conflicts of interest, etc.

If you have questions about Canopy, please contact HLC using the [Canopy Help Request Form](#).

LOG IN

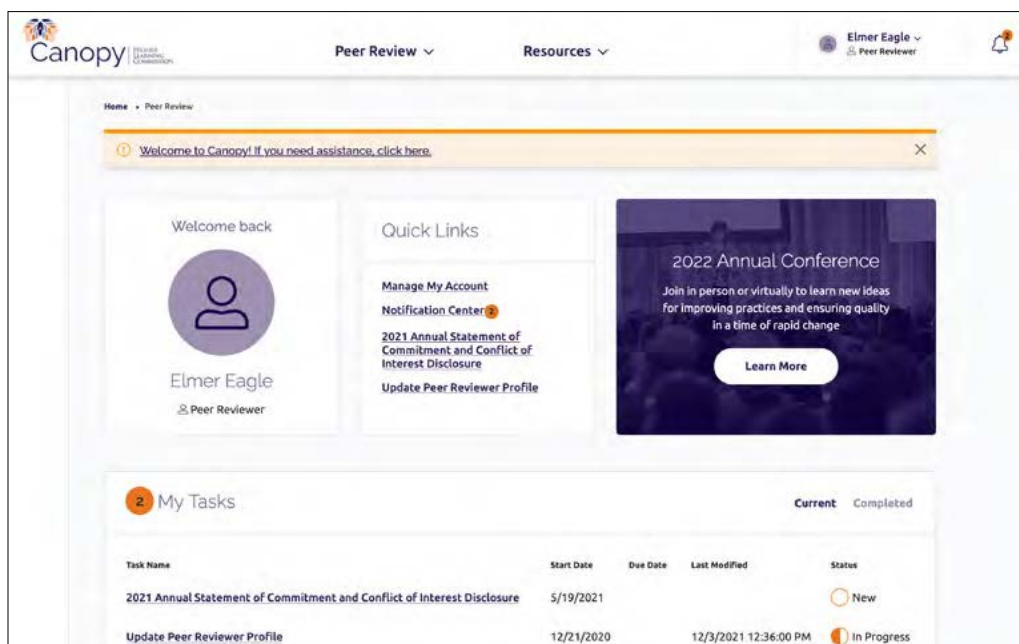
You will receive an invitation to access Canopy from canopyadmin@hlcommission.org. Follow the instructions in the email to create your account password and log into the system at canopy.hlcommission.org.

[Contact HLC](#) if you have not received this email.

DASHBOARD

When you log in, you will be taken to the Peer Review dashboard (see Figure 1).

FIGURE 1: PEER REVIEW DASHBOARD



PEER REVIEWER PROFILE

Click on “Peer Review” at the top of the screen. Select “Update Peer Reviewer Profile” in the drop-down menu (see Figure 2).

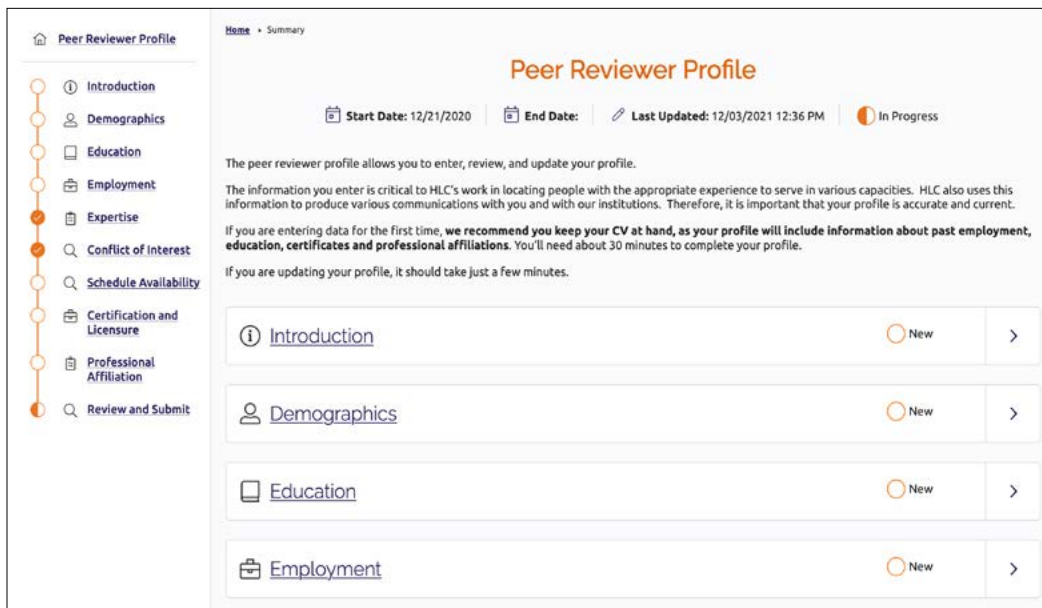
FIGURE 2: PEER REVIEW MENU



This will take you to the Peer Reviewer Profile main screen (see Figure 3). You will need to review, verify and update every section listed in the left navigation bar. Icons in the navigation bar will indicate your progress in completing each section:

- New/not started
- In progress or saved as draft
- Completed

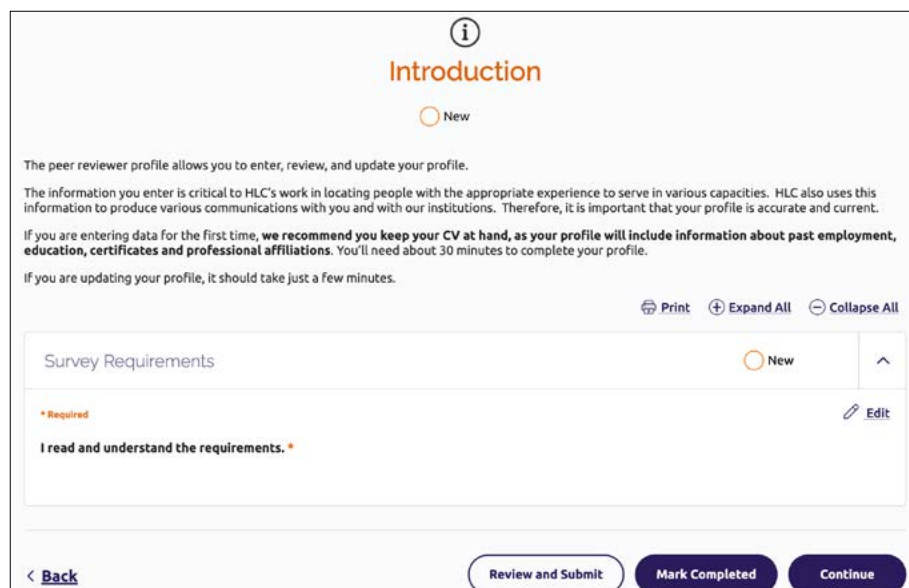
FIGURE 3: PEER REVIEWER PROFILE MAIN SCREEN



INTRODUCTION

Click the Introduction section title in the navigation bar to begin completing your profile. This will take you to the section page (see Figure 4).

FIGURE 4: INTRODUCTION SECTION



Review the statement about using Canopy.

To complete the section, you must acknowledge you have read and understand the requirements:

1. Click “Edit” in the Survey Requirements box.
2. Check the box next to “I read and understand the requirements.”
3. Click “Save” or “Save & Continue” to close the edit screen.
 - “Save” will bring you back to the Introduction section page.
 - “Save & Continue” will take you to the first set of questions in the Demographics section (Personal Information).

DEMOGRAPHICS

This section includes personal information and contact information. You must provide a response for each question marked with an asterisk (*).

FIGURE 5: DEMOGRAPHICS SECTION

Personal Information		
* Required		Edit
Prefix * Mr.	First Name * Elmer	Middle Name
Last Name * Eagle	Informal Name Elmo	Suffix
Gender * Male	Preferred Pronoun * He/Him/His	Ethnicity * - Decline to Answer

Contact Information		
* Required		Edit
Home Street Address *	Home Country *	Home State *

If all the required information is complete and accurate and you don't have any changes, you can click on the “Mark Completed” button at the bottom of the screen (see Figure 6). You will progress automatically to the next section.

FIGURE 6: “MARK COMPLETED” BUTTON

< [Back](#) [Review and Submit](#) **Mark Completed** [Continue](#)

If you need to make changes to your personal or contact information:

1. Click the “Edit” link in the block of questions you need to update.
2. Enter your new information, following any instructions provided on the edit screen.
3. Choose one of the options at the bottom of the screen to save your work (see Figure 7):
 - **Save as Draft:** This allows you to save your answers without completing all required questions on the page. Click this button to save your progress and return to the section page. Note that you will need to return to this section, enter any missing required information and click “Save” or “Save & Continue” in order to mark the section as completed.
 - **Save or Save & Continue:** Use one of these options when you have completed all the required questions. “Save” will close the edit screen and return you to the section page, and “Save & Continue” will take you to the next set of questions.

FIGURE 7: SAVE BUTTONS



EDUCATION

You will need to enter all degrees completed or in progress. To make changes to this section:

- Click the “Add Row” button to add a new degree.
- Click the pencil or trash can icons next to an existing degree to edit or delete it, respectively.

New to Canopy: HLC updated institutional options to include non-member institutions. If you received a degree from an institution not accredited by HLC, you will need to update the entry for that degree by selecting the institution in the Accredited Institution Name field (see Figure 8). The institutions in the Accredited Institution Name field will be filtered by the selected country and state (where applicable). You can either scroll through the list or type ahead to find the correct institution.

FIGURE 8: EDUCATION HISTORY EDIT SCREEN

The screenshot shows a web form titled 'Education History' with a red asterisk indicating required fields. Below the title is a section for 'U.S. Institutions and Degrees' with a note about contacting peerreview@hlcommission.org if an institution is missing. Below that is a section for 'International Degrees' with a note to enter the name in a text box if not listed. The form contains several dropdown menus: 'Country *' (set to 'United States'), 'State *' (set to 'Select'), 'Accredited Institution Name *' (set to 'Select'), and 'Degree Received *' (set to 'Select'). There is also a text input field for 'Year Degree Received *'. Below these fields is a section for 'General Subject Area *' with a list of checkboxes for various fields of study, including Accounting, Aeronautics, Agriculture, Agronomy, Allied Health, Anatomy, Animal Studies, Anthropology, Architecture, Art History, Arts Administration, Astronomy, Aviation, Biblical Studies, Biology, Business - Human Resources, Business Administration w/Concentration, Chemistry, Classical Studies, Communications, Computer and Information Science, Creative Writing, Criminal Justice, Culture Studies, Data Science, Divinity, Earth/Environmental Sciences, and Economics.

When you are finished editing or adding a degree, click “Save as Draft” or “Save” to return to the Education section. Please note:

- If you save a degree as a draft, it will be highlighted in yellow in the degree list. You will need to return to this record, enter all required information and click “Save” or “Save & Continue” in order to be able to mark this section as completed.
- If you edit an existing degree record, it will be highlighted in pink in the degree list.
- If you delete a record, it will remain on the degree list but will be highlighted in red. The record will be deleted when you submit your completed profile.

There are two ways to mark this section as completed:

- When you are finished editing or adding your last degree, click “Save & Continue” to mark the section as completed and move on to the next section.
- Click the “Mark Completed” button at the bottom of the Education section page. This will take you to the next section of the profile.

EMPLOYMENT

In this section, enter your higher education employment history, as well as professional employment experience in other areas that are relevant to your work as a peer reviewer.

Important: If your current primary position is not with an institution, see page 8 for instructions on how to complete the Higher Education Employment section.

FIGURE 9: EMPLOYMENT SECTION

Employment

New

In the Higher Education Employment section, please list your experience working at institutions of higher education as a faculty member, administrator or leader. You do not have to report every experience, such as short-term assignments or student jobs (e.g., graduate assistant).

In the Other Work Experience section, please list your other professional employment experience outside of an institution of higher education (e.g., accountant, chef, engineer, military office, K-12 educator, consultant, etc.). You do not have to report experiences that may not be related to assignments as a peer reviewer (e.g., babysitting, pizza delivery, cashier, child rearing, etc.).

Print Expand All Collapse All

Higher Education Employment New

Other Work Experience New

< Back Review and Submit Mark Completed Continue

To make changes to either category in this section:

- Click the “Add Row” button to add a new employment record.
- Click the pencil or garbage can icon next to an existing record to edit or delete it, respectively.

When you are finished editing or adding an employment record, click “Save as Draft” or “Save” to return to the Employment section. Please note:

- If you save an employment record as a draft, it will be highlighted in yellow in the employment list. You will need to return to this record, enter all required information and click “Save” or “Save & Continue” in order to be able to mark this section as completed.

- If you edit an existing record, it will be highlighted in pink in the employment list.
- If you delete a record, it will remain on the employment list but will be highlighted in red. The record will be deleted when you submit your completed profile.

Mark this section as completed either by clicking “Save & Continue” when you are finished adding or editing your last employment record, or by clicking the “Mark Completed” button at the bottom of the Employment section page.

Higher Education Employment

Enter all your higher education employment. In each employment record, enter the institution’s country, state and city, and then select the institution from the Institution Name drop-down list (see Figure 10).

FIGURE 10: HIGHER EDUCATION EMPLOYMENT EDIT SCREEN

The screenshot shows a web form titled "Higher Education Employment" with a "Form Edit" breadcrumb. A red box highlights the "Country", "State", "City", "Institution Name", and "Job Title" fields. Below these are checkboxes for "Is this your primary institution?" and "Is this position a faculty appointment?". There are also date pickers for "Start Date", "End Date", and "Retired Date". A note at the bottom states: "Please list your faculty appointments, including as a professor, adjunct instructor, or classroom teacher. The primary responsibilities for this section must include the development and delivery of classroom or online instruction to students, either currently or previously in your academic career. Faculty appointments without teaching assignments, as in Library Science, should not be reported here."

Note: The first time you review your Peer Reviewer Profile in Canopy, you may find that some of your records are incomplete. This is due to data cleanup, and you will need to correct these records in order to proceed.

If a current or former position included a faculty appointment with a teaching assignment, fill out the section about faculty appointments/teaching experience for that position (see Figure 11). Please note that you can enter only one academic program per position. If the position involved teaching assignments in multiple programs, please create a separate employment record for each assignment.

FIGURE 11: FACULTY APPOINTMENT QUESTIONS

The screenshot shows the "Faculty Appointment Questions" section. It starts with a note: "Please list your faculty appointments, including as a professor, adjunct instructor, or classroom teacher. The primary responsibilities for this section must include the development and delivery of classroom or online instruction to students, either currently or previously in your academic career. Faculty appointments without teaching assignments, as in Library Science, should not be reported here." Below this is a checked checkbox for "Is this position a faculty appointment?". There are two dropdown menus: "Choose the last status for this faculty appointment type" and "Was your faculty appointment:". A text field is labeled "Most relevant CIP code(s) for your area of teaching/research expertise". Below that is a dropdown for "Select CIP code for program taught" and a large text area for "Additional Description". At the bottom, there are radio buttons for "Level taught" with options: Associate, Bachelor's, Doctoral, Master's, Non-Credit, and Post-Baccalaureate.

In order for the Employment section to be marked as completed, one of your Higher Education Employment records must be selected as your primary institution. If you are not currently employed at an institution, see the options below:

- If you are retired, select the institution you retired from as your primary institution (when editing the employment record, check the box next to “Is this your primary institution?”).
- If you work for a college or university system and were previously employed at one of the institutions in the system, select that institution as your primary institution. Enter your employment information with the system under Other Work Experience.
- If you are self-employed or work for an organization that is not an institution, enter that employment information under Other Work Experience and add a new Higher Education Employment record as a Peer Reviewer at Test HLC Institution (see Figure 12):
 1. Click “Add Row” in the Higher Education Employment category.
 2. Enter the following information in each field:
 - Country:** United States
 - State:** Illinois
 - City:** Chicago
 - Institution Name:** Test HLC Institution - Chicago, IL
 - Job Title:** Peer Reviewer
 3. Check the box next to “Is this your primary institution?”
 4. In the Start Date field, enter today’s date.
 5. Leave the remaining fields blank and click “Save” or “Save & Continue.”

FIGURE 12: EMPLOYMENT RECORD FOR PEER REVIEWER AT TEST HLC INSTITUTION

The screenshot shows a web form titled "Higher Education Employment" with the following fields and values:

- Country ***: United States
- State ***: Illinois
- City ***: Chicago
- Institution Name ***: Test HLC Institution - Chicago, IL
- Job Title ***: Peer Reviewer
- Is this your primary Institution?**
- Start Date ***: 12/10/2021
- End Date ***: (empty)
- Retired (Status)** Retired Date: (empty)

EXPERTISE

This section asks you to select your areas of expertise. To do so, click the “Edit” link on the Expertise section page. You will need to select at least one type of expertise, following the guidance on the edit screen (see Figure 13). Selecting applicable expertise helps HLC staff to select the appropriate people for reviews.

FIGURE 13: EXPERTISE EDIT SCREEN

Home • Form Edit

Expertise * Required

Please choose all that apply based on the following:

- Experience is within past five years
- Experience is a minimum of two years cumulative experience

Expertise *

<input type="checkbox"/> Academic Affairs	<input type="checkbox"/> Admissions and Recruiting	<input type="checkbox"/> Assessment of Student Learning	<input type="checkbox"/> Athletics
<input type="checkbox"/> Branch Campus Operations	<input type="checkbox"/> Budgeting/Finance	<input type="checkbox"/> Career and Technical Education	<input type="checkbox"/> Continuing Education
<input type="checkbox"/> Development/Fundraising	<input type="checkbox"/> Developmental Education	<input type="checkbox"/> Distance Education Teaching/Administration	<input type="checkbox"/> Diversity/Equity/Inclusion
<input type="checkbox"/> Dual Credit/Enrollment	<input type="checkbox"/> Enrollment Management	<input type="checkbox"/> Experiential Learning	<input type="checkbox"/> Facilities Management
<input type="checkbox"/> Faculty Governance	<input type="checkbox"/> Faculty Review and Evaluation	<input type="checkbox"/> First-year Experience	<input type="checkbox"/> General Education
<input type="checkbox"/> Governance	<input type="checkbox"/> Graduate Education	<input type="checkbox"/> Grants and Sponsored Research	<input type="checkbox"/> Hispanic-Serving Institutions
<input type="checkbox"/> Historically Black Colleges and Universities	<input type="checkbox"/> Human Resources	<input type="checkbox"/> Information Technology	<input type="checkbox"/> Institutional Planning
<input type="checkbox"/> Institutional Research	<input type="checkbox"/> Instructional Technology	<input type="checkbox"/> International Programs	<input type="checkbox"/> K-12 Education
<input type="checkbox"/> Military/Military Support	<input type="checkbox"/> Program Design	<input type="checkbox"/> Program Evaluation	<input type="checkbox"/> Religious Affiliations and Faith-based Experience
<input type="checkbox"/> Shared Services Agreements	<input type="checkbox"/> Student Affairs/Services	<input checked="" type="checkbox"/> Thesis/Dissertation Committee	<input checked="" type="checkbox"/> Title IX
<input type="checkbox"/> Tribal Colleges and Universities	<input type="checkbox"/> Workforce Development		

CONFLICT OF INTEREST

In this section, you will disclose any conflicts of interest with HLC member institutions. Be sure to review the two areas about possible conflicts of interest and declare any applicable relationships. For more information about the types of relationships to declare, see [“Objectivity and Conflict of Interest: Information for Peer Reviewers and Institutional Actions Council Members.”](#)

FIGURE 14: CONFLICT OF INTEREST SECTION

Conflict of Interest

Last Updated: 12/3/2021 12:36:00 PM | Completed

In the Self-Reported Conflicts section, please list any Conflicts of Interest with HLC member institutions. In the Consulting Conflicts section, list any significant and relevant consulting experience with HLC member institutions. Do not include information already provided in the Education and Employment sections.

A Conflict of Interest is a situation in which a peer reviewer, because of an Education Relationship, Financial Relationship or other circumstances, cannot fulfill their obligations as a peer reviewer in an objective and independent manner or as otherwise required in compliance with applicable laws and regulations. For definitions and terms related to declaring self-reported conflicts of interest, read HLC’s “Objectivity and Conflict of Interest: Information for Peer Reviewers and Institutional Actions Council Members.”

Print | Expand All | Collapse All

Self-Reported Conflicts	Last Updated: 12/3/2021 12:36:00 PM	Completed	▼
Consulting Conflicts	Last Updated: 12/3/2021 12:36:00 PM	Completed	▼

< Back | Review and Submit | Continue

To make changes to this section:

- Click the “Add Row” button to add a new self-reported conflict or consulting conflict.
- Click the pencil or trash can icon next to an existing record to edit or delete it, respectively.

When you are finished editing or adding a conflict of interest, click “Save as Draft” or “Save” to return to the Conflict of Interest section. Please note:

- If you save a conflict of interest record as a draft, it will be highlighted in yellow in the conflict of interest list. You will need to return to this record, enter all required information and click “Save” or “Save & Continue” in order to be able to mark this section as completed.
- If you edit an existing record, it will be highlighted in pink in the conflict of interest list.
- If you delete a record, it will remain on the list but will be highlighted in red. The record will be deleted when you submit your completed profile.

Mark this section as completed either by clicking “Save & Continue” when you are finished adding or editing your last conflict of interest record, or by clicking the “Mark Completed” button at the bottom of the Conflict of Interest section page.

SCHEDULE AVAILABILITY

Here you will be able to indicate your availability to conduct reviews and/or travel. This section is optional, but it helps HLC better align your schedule with available review types.

FIGURE 15: SCHEDULE AVAILABILITY SECTION

Schedule Availability

New

Please enter periods of time when you will be unavailable for any HLC evaluations, unavailable to travel or prefer not to travel, or available to conduct an evaluation on short notice (one month to a week before an event).

Print Expand All Collapse All

Black-out Dates New

Unable to Travel New

Short Notice Dates New

< Back Review and Submit Mark Completed Continue

There are three types of dates you can enter in this section:

- **Black-out Dates:** Dates you are unavailable to do **any** reviews, including virtual reviews such as panel reviews. Enter dates of work or personal commitments, such as vacations or conferences, so you are not invited to do reviews that conflict with your schedule.
- **Short Notice Dates:** Dates you can do reviews with very little advance notice.
- **Unable to Travel (New to Canopy):** The default assumption is that peer reviewers are available and able to travel for reviews unless there are black-out dates. If you cannot or prefer not to travel, but are still available for virtual reviews, enter the dates you are unable to travel in this section.

FIGURE 16: UNABLE TO TRAVEL EDIT SCREEN

To add a new date in one of these categories, click the “Add Row” button. Click the pencil or trash can icon next to an existing date to edit or delete it, respectively.

When you are finished editing or adding a date, click “Save as Draft” or “Save” to return to the Schedule Availability section. Please note:

- If you save a date as a draft, it will be highlighted in yellow in the date list. You will need to return to this record, enter all required information and click “Save” or “Save & Continue” in order to be able to mark this section as completed.
- If you edit an existing date record, it will be highlighted in pink in the date list.
- If you delete a record, it will remain on the date list but will be highlighted in red. The record will be deleted when you submit your completed profile.

Mark this section as completed either by clicking “Save & Continue” when you are finished adding or editing your last date record, or by clicking the “Mark Completed” button at the bottom of the Schedule Availability section page.

CERTIFICATION AND LICENSURE

Enter any certifications or licensure items in this section. Click the “Add Row” button to add a new certification or licensure item. Click the pencil or trash can icon next to an existing record to edit or delete it, respectively.

FIGURE 17: CERTIFICATION AND LICENSURE SECTION

If you have a certification or license from a national entity, in the State field please select the state where the organization’s headquarters is located. If that is unknown, you may select the state where you live.

When you are finished editing or adding a record, click “Save as Draft” or “Save” to return to the Certification and Licensure section. Please note:

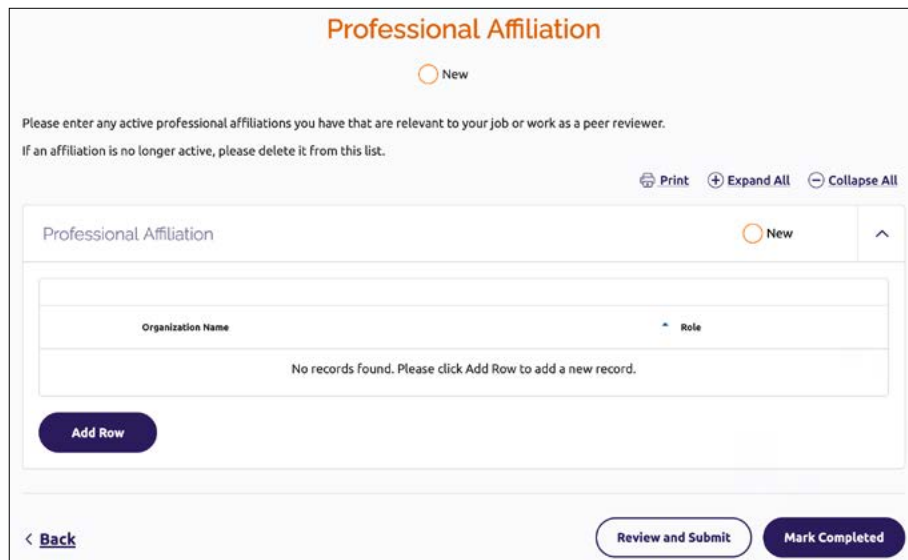
- If you save a record as a draft, it will be highlighted in yellow in the certification and licensure list. You will need to return to this record, enter all required information and click “Save” or “Save & Continue” in order to be able to mark this section as completed.
- If you edit an existing record, it will be highlighted in pink in the certification and licensure list.
- If you delete a record, it will remain on the list but will be highlighted in red. The record will be deleted when you submit your completed profile.

Mark this section as completed either by clicking “Save & Continue” when you are finished adding or editing your last date record, or by clicking the “Mark Completed” button at the bottom of the Certification and Licensure section page (do this if you do not have any certifications or licensures to report).

PROFESSIONAL AFFILIATION

Enter any Professional Affiliations. Click the “Add Row” button to add a new affiliation. Click the pencil or trash can icon next to an existing record to edit or delete it, respectively.

FIGURE 18: PROFESSIONAL AFFILIATION SECTION



When you are finished editing or adding a record, click “Save as Draft” or “Save” to return to the Professional Affiliation section. Please note:

- If you save a record as a draft, it will be highlighted in yellow in the affiliation list. You will need to return to this record, enter all required information and click “Save” or “Save & Continue” in order to be able to mark this section as completed.
- If you edit an existing record, it will be highlighted in pink in the affiliation list.
- If you delete a record, it will remain on the list but will be highlighted in red. The record will be deleted when you submit your completed profile.

Mark this section as completed either by clicking “Save & Continue” when you are finished adding or editing your last record, or by clicking the “Mark Completed” button at the bottom of the Professional Affiliation section page (do this if you do not have any professional affiliations to report).

REVIEW AND SUBMIT

The last section requires you to review all the sections to see what is in progress, what hasn't been started and what is complete. If there are required questions with missing answers, you will not be able to submit the form and you will be prompted to answer these questions (see Figure 19).

If all questions have been answered, you may check the box to confirm accuracy and submit the changes to HLC.

FIGURE 19: REVIEW AND SUBMIT PAGE

The screenshot shows the 'Review and Submit' interface. At the top, it says 'Review and Submit' and 'Last Updated: 12/03/2021 02:43 PM' with an 'In Progress' indicator. There are buttons for 'Print', 'Expand All', and 'Collapse All'. Below is a list of sections:

Section	Status	Last Updated
Introduction	New	
Demographics	New	
Education	New	
Employment	Completed	12/03/2021 02:43 PM
Expertise	Completed	12/03/2021 12:36 PM
Conflict of Interest	Completed	12/03/2021 12:36 PM
Schedule Availability	New	
Certification and Licensure	New	
Professional Affiliation	New	

A red box at the bottom contains the message: 'One or more required questions are missing. Please review your answers and try again.' To the right of this message is a 'Mark All Completed' button.