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Purpose of this Document

This document provides the Administrative Leaders and their divisions with a framework they can use to guide assessment within their units to support Florida State College at Jacksonville’s mission.

*The mission of Florida State College at Jacksonville is to provide high value, relevant life-long education that enhances the intellectual, social, cultural and economic development of our diverse community.*

This document specifically addresses the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) Principle of Accreditation 7.3, which requires colleges to assess expected outcomes of its administrative support services and demonstrate the extent to which the outcomes are achieved.

Introduction

The ultimate purpose of administrative support services assessment is to ensure services are provided effectively in order to achieve the mission and goals of the College and service its areas. These services include activities that occur outside of the classroom that complement the academic programs and enhance the overall student experience. Assessment is not evaluation; assessment is about collection, analysis, and interpretation of data and information related to an issue or area of interest, primarily to make changes or improvements. Assessment is the process of ongoing and continuous improvement.

Assessment can benefit administrators and staff by:

- Helping to clarify the mission of a division or unit and its role in achieving the college’s mission, and identifying the key activities that need to occur to achieve the division’s mission and goals.
- Providing coherence and direction to the division or unit’s work.
- Providing administrators and staff with better information about how their services are viewed by their “customers” and what areas need improvement.
- Helping administrators make informed, evidence-based decisions about resource allocation, the need to re-consider, improve, or expand services, and more.
- Ensuring that resources are being allocated in the most effective way possible – where they’ll have the greatest impact on helping the college achieve its mission.
Taskstream
The College’s current Assessment Management System, Taskstream, is where assessment data is entered and stored. All administrative units will enter required data, which include unit information and all areas of the assessment cycle. Instructions to complete each step of the assessment process are included in the Appendices.

Unit Information
Each operational unit have the following standing requirements: mission statement, vision statement, unit goals.

Mission statement
A mission statement articulates the purpose of a unit. The mission statement declares what the unit does and what it intends to achieve, and has a connection to the overall mission and goals of the college. Mission statements should clearly and effectively communicate WHAT you do, for WHOM, WHY you do it, and HOW you do it. It gives the department/unit a unique identity. Mission statements are not routinely changed, but should be reviewed every assessment cycle (every two years).

Mission Statement Example
The mission of the Office of Strategic Priorities is to promote continuous improvement of the institution by facilitating meaningful assessment, leading strategic planning activities and supporting student success work through participation in Achieving the Dream.

Vision Statement
A vision statement expresses the current and future objectives of a unit. The vision statement is intended as a guide to help the unit make decisions that align with its philosophy and declared set of goals. It can be thought of as a roadmap to where the unit wants to be. Vision statements are not routinely changed but should be reviewed every assessment cycle (every two years).

Vision Statement Example
The Offices of Institutional Effectiveness and Strategic Priorities will provide timely, high-quality, accessible information and analysis for informed decision making in support of the College’s mission and strategic plan.

Unit Goals
Goals indicate the major priorities of each unit during the assessment cycle and should align to the college’s strategic priorities. Generally, goals address what the unit wants to accomplish. They are accompanied by outcomes which are measured by establishing specific actions that will
provide data that inform administrators and other key stakeholders of the progress being made towards achieving the goal. Units goals are updated every assessment cycle (every two years).

**Assessment Cycle**
The assessment cycle for administrative support services is a two-year cycle. A full assessment cycle has four components:

- **Assessment Plan**
- **Assessment Plan Results**
- **Plan for Use of Results**
- **Status Report**

The following sections provide the details of the assessment plan component of the assessment cycle each administration unit.

**Assessment Plan**
The Assessment Plan records how each unit will achieve the unit goals in the current cycle as well as the measures that will be used. As part of creating the assessment plan, each unit should review its mission statement, vision statement, and unit goals to determine measures and targets for their outcomes. The assessment plan should reflect the initiatives or improvement the decision makers have identified as priorities for the administrative year. Each unit should have a minimum of 2 outcomes (selected from the unit goals), with at least 2 measures.

There are two types of measures used in administrative assessment, direct and indirect. Direct measurements refer to a measurement strategy that require units to actively demonstrate achievement levels related to institutional and unit specific objectives. Indirect measures refer to
students or client perceptions of the effectiveness and efficiency of services rendered. (More information is available under Assessment Plan Writing Support). These measures are designed to collect findings about stakeholders’ attitudes, perceptions, feelings, values, etc.

Each measure consists of four parts: description, target, timeline, and responsible personnel.

- **Description**: statements of intention, describing a task to accomplish or a goal to meet.
- **Target**: communicate clearly the expected level of accomplishment for a measure; must always indicate what is expected to be achieved in this single, current administrative year.
- **Timeline**: estimated time period for when measure will be completed
- **Responsible Personnel**: the person/people responsible for implementing measure

**Assessment Plan Example:**

**Outcome**: The Office of Strategic Priorities will facilitate the Collegewide academic outcomes assessment process.

**Measure**:

Measure Description: During the 2018-19 academic outcomes assessment cycle, we will review all programs submitting assessment plans.

Target: 100% of active programs will submit plans to assess program learning outcomes.

Timeline: June 2019

Responsible Personnel: AVP for Strategic Priorities

**Assessment Plan Results**

Once the data have been collected, the next phase of the administrative assessment process is to analyze the results. Analysis of the collected data and information is the responsibility of each unit. Results are discussed and compared against the performance target.

Did the data show results that met the pre-determined target?

It is ok if the target was not met, but the findings should include a discussion of why the target was not met. Findings must include a discussion of each measure, along with disaggregation of
data by ethnicity and socioeconomic status, when available. Findings should also include relevant evidence (attach evidence when possible).

**Assessment Plan Results Example:**

Summary of Findings: As of 6/25/19, 85% of credit programs and as of 6/17/19, 91% of PSAV programs submitted 2018-19 assessment plans. (Evidence of workshops would be attached).

Results: Not Met

**Plan for Use of Results**

The Plan for Use of Results is perhaps the most challenging step in the assessment cycle – commonly referred to as ‘closing the loop’. This is where the assessment results are used to inform changes or improvements. The units will document one or more changes that will be made with the intention of refining an outcome. Every unit must have a plan for use of results during each assessment cycle. The number of actions included in this plan will vary from unit to unit. It is important that the actions planned can be completed within the assessment cycle, and with available resources.

A Plan for Use of Results will be completed even if all outcomes are met or exceeded. This is an opportunity to highlight the exemplary assessment efforts, and discuss the next step(s) in enhancing your area.

It should be noted that the Plan for Use of Results requires action or a change. Continuing to monitor and collect data is not a change and may not be used as part of an action plan. The assessment cycle assumes data will continue to be collected and all outcomes monitored.

**Plan for Use of Results Example:**

Action Details:
1. Review committees composed of stakeholders from representative academic areas will be formed to begin review of academic areas, engaging stakeholders more meaningfully in the assessment process.
2. Meeting reminders, along with deadlines, will be sent out to review committee at designated intervals.
3. Supervisors will be notified regarding meeting and deadlines, as an additional source of support.

Implementation Timeline: Fall 2020
Status Report

Units implement their actions the year after reporting assessment results. They follow-up and report on their actions by providing implementation details and evidence – what actions were actually implemented, when, by whom? What improved as a result of these actions?

Units provide evidence that they have taken reasonable steps to implement planned actions to achieve improvements, by completing a status report and attaching evidence of the action completion. The status report should include any evidence of improvement that are a result of the action taken.

Status Report Example:

Current Status: Completed

Details of Current Action Status: Teams were formed in Summer 2019. Professional development was provided to help norm the use of the common rubric prior to evaluation of assessment plans.

Review Process

All administrative units undergo a review process. The purpose of this process is to provide feedback to those involved with the assessment cycle and to improve future assessment cycles. There are two types of review, performed in sequence. Rubrics for both review types are available in the assessment management system. Each area of the assessment cycle will be reviewed independently.

Content Review

The first level of review for assessment reports is a content review. This review is the responsibility of a cross functional, non-academic leadership committee. This review is intended to ensure that assessment meets the minimum requirements required by the college. All areas of assessment (assessment plan, assessment plan results, use of results, and status report) undergo a content review. The content reviewer is responsible for making sure that any outcomes, measures, and targets are appropriate to the specific unit under review. At the discretion of the content reviewer, an area may be returned for updates as part of the content review. If updates are required, the responsible personnel should submit this within two weeks. Content reviews are typically completed in the month following the submission of assessment documentation.
Quality Review

The second level of review for assessment reports is a quality review. This review is overseen by the Office of Strategic Priorities. The purpose of the quality review is to provide guidance and feedback that can be used to improve future assessment cycles. Quality reviewers do not send assessment reports back to programs for any changes. All feedback provided is to be used for improving future cycles. As with the content review, all areas of assessment undergo a quality review.

Quality reviews typically begin immediately after content reviews, and may take up to two months to complete.

Use of Assessment Reports

Assessment is not linear and finite; it is continuous and seeks to assess program development on an annual basis. Administrative assessment is intended to help units review, analyze, and improve support services provided to the campus. The assessment process is vital to the effectiveness of the college as it aids units in determining how well they are functioning. The use of assessment reports when seeking to gain or renew accreditation is prevalent throughout the college. Assessment reports can, and will, be pulled by the Institutional Effectiveness office as needed for accreditation purposes.

Assessment Cycle Timeline

- Assessment Plan
  - Completed in even numbered years
  - Due by program area at end of October
  - Content review completed by end of November
  - Quality review completed by end of January

- Assessment Plan Results
  - Completed in even odd years
  - Due by program area at end of May
  - Content review completed by end of June
  - Quality review completed by end of August

- Plan for Use of Results
  - Completed in odd numbered years
  - Due by program area at end of October
  - Content review completed by end of November
  - Quality review completed by end of January
• Status Reports
  o Completed in even numbered years
  o Due by program area at end of May
  o Content review completed by end of June
  o Quality review completed by end of August

The Assessment Plan is documented in the early fall (typically October) of each even calendar year. As part of creating the assessment plan, each program should review its mission statement, operational outcomes, and determine measures and targets for their outcomes.

Assessment Plan Results are documented in the summer (typically May) of each odd calendar year. The findings include necessary data for each outcome. Insights gained from analysis of the collected data are documented for each outcome. The findings section concludes with an overall reflection of all data collected for the program.

The Plan for Use of Results are documented in the early fall (typically October) of each odd calendar year. These actions are then completed over the next academic year, with supporting data also collected to gauge the impact of the changes.

The assessment cycle concludes with a Status Report, which is documented in the summer (typically May) of each even calendar year. The status report reflects the actions taken, lessons learned during the implementation of the actions, impact of the actions, and next steps.
Assessment Plan Writing Support

Administrative Outcomes Taxonomy

Source: Shults Dorime-Williams Support Outcomes Taxonomy
Outcomes Verb Wheel
### Direct vs. Indirect Measures

<table>
<thead>
<tr>
<th>Direct</th>
<th>Indirect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Record</td>
<td>Survey</td>
</tr>
<tr>
<td>Compliance Report</td>
<td>Interview</td>
</tr>
<tr>
<td>Query</td>
<td>Focus Group</td>
</tr>
<tr>
<td>Evaluation Report</td>
<td>Evaluation</td>
</tr>
<tr>
<td>Audit Report</td>
<td></td>
</tr>
<tr>
<td>Call logs</td>
<td></td>
</tr>
</tbody>
</table>

**Examples of Direct Assessment:**
The Office of Strategic Priorities will create a series of professional learning courses to bring awareness to both academic and non-academic assessment.

Compile and count the number of errors on transcripts reported by students.

**Examples of Indirect Assessment:**
The Office of Strategic Priorities will deploy a survey after each professional learning course to solicit feedback on the effectiveness of each presentation.

Conduct a focus group of Registrar office staff on accuracy issues.
Appendices
Appendix I-SACSCOC Principle 7.3

The institution identifies expected outcomes of its administrative support services and demonstrates the extent to which the outcomes are achieved. (Administrative effectiveness)

Rationale and Notes
It is critical that administrative support services are provided effectively in order for the institution to obtain its strategic goals as well as operational efficiency. Administrative support service units normally include offices and departments such as finance and procurement, facilities and physical plant, administrative services, development/advancement, research office, the president’s office, etc. These offices serve the educational mission of the institution in a much more indirect way than do offices related to educational programs or academic and student services, but they are just as critical for the ability of the institution to achieve its mission. The efficient operation of these units is critical whether these functions are provided internally or outsourced to a contractor.

While these units rarely have “expected learning outcomes,” “expected outcomes” for administrative units typically include outcomes such as efficiency and quality of service targets (e.g., energy usage, response times, error rates, “clean report” targets, satisfaction rates); monetary targets (e.g., fund-raising targets, research grant targets, auxiliary income targets). Many times, the goals are explicit parts of the budgeting process or components of the strategic plan. For this standard, institutions should interpret “expected outcome” in a manner consistent with that administrative unit’s role in the institution. It is the institution’s responsibility to explain how and why these expected outcomes are determined.

In many cases, administrative outcomes are hard to separate from student support outcomes. Examples would include public safety, which has an administrative function but also generally has a co-curricular student support function, and financial aid, which likewise has a budgetary function as well as a co-curricular educational function. Generally, these “dual function” units would be addressed in Standard 8.2.c (Student outcomes: academic and student services). If those units are instead addressed in this standard, it is incumbent on the institution to explain how this determination follows from its mission and organizational structure; it is strongly suggested that this explanation appear in both standards of the Compliance Certification. While institutions may organize functions differently, it is expected that all administrative services engage in a process to evaluate their effectiveness.

Institutions should determine the organizational levels at which assessment is useful and efficient for administrative units. This tends to vary greatly across institutions due to size and complexity of the institution, and explicit decisions regarding organizational structure. Institutions are not required or expected to use the same assessment procedures for their administrative structure as those used for units that have specific student learning expectations. Reviewers should be
mindful that administrative effectiveness can be achieved in a variety of ways and the mentality that “one size fits all” is inappropriate and diminishes the individual missions of institutions. This is especially true regarding the use of language to describe processes; for example, “assessment,” “evaluation,” “goals,” “outcomes,” and “objectives” may have precise meaning to a reviewer; but, the institution may have a meaningful effectiveness system even if it is not as precise with its language as the reviewer would like.

NOTE ON SAMPLING

There is an expectation that an institution is required to be able to demonstrate administrative effectiveness for all key administrative activities. The volume of material represented by all this activity can be quite large, especially at larger and more complex institutions. To this end, an institution may provide a sampling of the effectiveness of its administrative units at the time of its comprehensive review. Sampling, for the purpose of accreditation, includes the following three elements: (1) a representation that is mindful of the institution’s mission; (2) a valid cross-section of units from across the administrative organizational chart, with every major division represented; and (3) a compelling case – presented in the institution’s narrative – as to why the sampling and assessment findings are an appropriate representation of the institution’s administrative services. Sampling does not preclude the institution from having effectiveness data/analysis available on all units. It is the prerogative of a SACSCOC On-Site Committee to conduct a more in-depth review of an institution’s data/findings/analysis on the effectiveness of all its administrative activities than provided via sampling.
## Non-Academic Assessment Review Rubric - Assessment Plan

<table>
<thead>
<tr>
<th></th>
<th>Emerging</th>
<th>Meets Expectations</th>
<th>Exceeds Expectations</th>
<th>Score/Level</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of goals in assessment plan</strong></td>
<td>There are fewer than two goals included in the assessment plan</td>
<td>There are two goals included in the assessment plan</td>
<td>There are three or more goals included in the assessment plan</td>
<td></td>
</tr>
<tr>
<td><strong>Number of measures per goal</strong></td>
<td>There are fewer than two measures per goal in the assessment plan</td>
<td>There are at least two measures per goal in the assessment plan</td>
<td>There are at least two measures per goal in the assessment plan and each measure provides a clear connection to the associated goal</td>
<td></td>
</tr>
<tr>
<td><strong>Type of measures per outcome</strong></td>
<td>At least one goal in the assessment plan does not include a direct measure*</td>
<td>The majority of goals in the assessment plan include at least one direct measure*</td>
<td>All goals in the assessment plan include at least one direct measure*</td>
<td></td>
</tr>
<tr>
<td><strong>Description of measures</strong></td>
<td>The measures are not adequately described, do not include details about the assessment activity, and do not provide a clear connection to the goal</td>
<td>The majority of measures are adequately described, include details about the assessment activity, and provide a clear connection to the goal</td>
<td>All measures are adequately described, include details about the assessment activity, and provide a clear connection to the goal</td>
<td></td>
</tr>
<tr>
<td><strong>Target</strong></td>
<td>For the majority of the measures, the target is absent, unclear or not appropriate for the assessment activity</td>
<td>For the majority of the measures, the target is clear and appropriate for the assessment activity</td>
<td>For all measures, the target is clear and appropriate for the assessment activity</td>
<td></td>
</tr>
<tr>
<td><strong>Supporting attachments</strong></td>
<td>For the majority of the measures, supporting attachments are not included</td>
<td>For the majority of the measures, supporting attachments are included as appropriate</td>
<td>For all measures, supporting attachments are included as appropriate</td>
<td></td>
</tr>
</tbody>
</table>
### Non-Academic Assessment Review Rubric - Assessment Results

<table>
<thead>
<tr>
<th></th>
<th>Emerging</th>
<th>Meets Expectations</th>
<th>Exceeds Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary of Results</strong></td>
<td>Results are shown for some goals.</td>
<td>Results are shown for the majority of the goals, aggregated and communicated to the unit.</td>
<td>Results are shown for all goals, aggregated and communicated to the unit</td>
</tr>
<tr>
<td><strong>Selection of Results</strong></td>
<td>The selected results are appropriate to the summary of findings for at least one goal</td>
<td>The selected results are appropriate to the summary of findings for the majority of goals</td>
<td>The selected results are appropriate to the summary of findings for all goals</td>
</tr>
<tr>
<td><strong>Supporting documentation</strong></td>
<td>The majority of results do not provide supporting documentation to support the findings of the assessment</td>
<td>The majority of results provide supporting documentation to support the findings of the assessment</td>
<td>All results provide supporting documentation to support the findings of the assessment</td>
</tr>
</tbody>
</table>
Appendix III-Assessment Plan Template

Unit Name:___________________________________________________________

The unit will continue its 2019-20 assessment plan (if this option is selected, no further information is required. Duplicate plan in Taskstream.)

NOTE: This option can only be selected if 2019-20 was the first year of the assessment plan

The unit will create a new assessment plan for 2020-21 (if this option is selected, proceed to next section)

Unit Goal 1:

<table>
<thead>
<tr>
<th>Measure 1 (Direct)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe the assessment activity. Be sure to provide a direct connection between the activity and goal.</td>
<td></td>
</tr>
<tr>
<td>What is the target for success for the assessment activity?</td>
<td></td>
</tr>
<tr>
<td>In which term(s) within the 2019-20 academic year will the assessment activity occur?</td>
<td></td>
</tr>
<tr>
<td>Who is responsible for carrying out the assessment activity?</td>
<td></td>
</tr>
</tbody>
</table>

Measure 2 (Direct or Indirect)

<table>
<thead>
<tr>
<th>Measure 2 (Direct or Indirect)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe the assessment activity. Be sure to provide a direct connection between the activity and goal.</td>
<td></td>
</tr>
<tr>
<td>What is the target for success for the assessment activity?</td>
<td></td>
</tr>
<tr>
<td>In which term(s) within the 2019-20 academic year will the assessment activity occur?</td>
<td></td>
</tr>
<tr>
<td>Who is responsible for carrying out the assessment activity?</td>
<td></td>
</tr>
</tbody>
</table>

Unit Goal 2:
## Measure 1 (Direct)

<table>
<thead>
<tr>
<th>Describe the assessment activity. Be sure to provide a direct connection between the activity and goal.</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the target for success for the assessment activity?</td>
</tr>
<tr>
<td>In which term(s) within the 2019-20 academic year will the student assessment activity occur?</td>
</tr>
<tr>
<td>Who is responsible for carrying out the assessment activity?</td>
</tr>
</tbody>
</table>

## Measure 2 (Direct or Indirect)

<table>
<thead>
<tr>
<th>Describe the assessment activity. Be sure to provide a direct connection between the activity and goal.</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the target for success for the assessment activity?</td>
</tr>
<tr>
<td>In which term(s) within the 2019-20 academic year will the assessment activity occur?</td>
</tr>
<tr>
<td>Who is responsible for carrying out the assessment activity?</td>
</tr>
</tbody>
</table>

### Helpful Terms

- **Unit Goal**: Statement of long range intended outcome of the unit.
- **Direct Measure**: Assessment that measures attainment of unit goals via objective information (e.g., average service time, number of tasks completed, attendance at events).
- **Indirect Measure**: Assessment that measures attainment of unit goals via information other than objective information, and often attempts to evaluate opinions or perceptions (e.g., surveys, interviews).
- **Target**: Threshold that indicates success for a particular assessment activity. For example, “90% of requests will be resolved within 3 business days.”
Appendix IV-Taskstream Guides
Taskstream Instructions: Adding or Editing a Mission Statement

2. Click on your designated workspace.

3. Click on Mission Statement on the left-hand side.

4. Click the green Check Out button on the top right of the page.

5. Click Edit on the right side.

6. You can then enter or update the current mission statement in the Mission Statement Text area. Please use the Check Spelling and Character Count buttons for accuracy.

7. Once done, click Submit on the top right.

8. Click Return to Work Area to confirm the Mission Statement is updated.
Taskstream Instructions: Adding or Editing a Vision Statement

2. Click on your designated workspace.

3. Click on **Vision Statement** on the left-hand side.

4. Click on the green **Check Out** button on the top right.

5. Click on **Add: Text & Image** at the bottom of the screen.

6. Enter vision statement in the text box and **check spelling**.

7. Click **Save and Return**.

8. This will take you back to the main screen, where you will confirm the vision statement is accurate. If updates are needed, click **Edit** and repeat the steps above.

9. If you are satisfied with the vision statement, click the **Check In** button on the top right.

Taskstream Instructions: Adding or Editing a Vision Statement
October 2020
Taskstream Instructions: Entering Unit Goals

2. Click on your designated workspace.
3. Click on Unit Goals on the left-hand side of the screen.
4. Click Check Out on the top right side of the screen.
5. Click Create New Set.
6. Create a name for the outcome set and click Continue.
7. This will take you back to the main page, where you can create outcomes for each set, and map the goals as needed.
8. Once done, click the Check In button on the top right of the screen.
Taskstream Instructions: Entering a New Assessment Plan

2. Click on your designated workspace.
3. Select **Assessment Plan** under the 2020-2021 Assessment Cycle on the left-hand side of the screen.
4. Select the green **Check Out** button on the top right of the screen.
5. You will either create a new assessment plan or copy an existing plan based on your assessment cycle.
6. If you choose to create a new assessment plan, select that button and click **ok** on the message that appears. Then click on **Select Set**.
7. Click on **Select Existing Set**.
8. Choose the appropriate outcome set (you may view the set for each outcome by clicking **view set**) and click continue.
9. You will then choose which outcome will be measured (can be one or all) and click on **Accept and return to plan**.

Taskstream Instructions: Entering a New Assessment Plan
November 2020
10. You will then select **Add new measure** to the right of the outcome.

11. You will then complete all of the information and click **Apply Changes**. At this point, you are able to attach any supporting documentation by clicking **Add/Edit Attachment and Links**.

12. You will repeat steps 10 and 11 for each outcome being measured. Once you are finished entering the information, you will click the **Check In** button.

13. To submit your assessment plan, you will click on **Submission & Read Reviews**.

14. Scroll down to the appropriate area that was worked on and click **Submit Work**.
Taskstream Instructions: Copying an Existing Assessment Plan

2. Click on your designated workspace.

3. Select **Assessment Plan** under the 2020-2021 Assessment Cycle on the left-hand side of the screen.

4. Select the green **Check Out** button on the top right of the screen.

5. You will either create a new assessment plan or copy an existing plan based on your assessment cycle.

6. If you choose to copy an existing plan, select that button, then the radio button next to the plan you would like to use, and then click **Submit**.

7. This will copy both the outcomes and measures previously used. At this point, please thoroughly review the measures used and edit as needed by clicking the **Edit** button.

8. You will be able to edit all of the fields. Once done, click on **Apply Changes**.

Taskstream Instructions: Copying an Existing Assessment Plan
November 2020
9. At this point, you are able to attach any supporting documentation by clicking **Add/Edit Attachment and Links**.

10. You will repeat steps 8 and 9 for each outcome being measured. Once you are finished entering the information, you will click the **Check In** button.

11. To submit your assessment plan, you will click on **Submission & Read Reviews**.

12. Scroll down to the appropriate area that was worked on and click **Submit Work**.
Taskstream Instructions: Entering Assessment Plan Results

2. Click on your designated workspace.
3. Select Assessment Plan Results under the current Assessment Cycle on the left-hand side of the screen.
4. Select the green Check Out button on the top right of the screen.
5. Scroll down to the first measure and click Add Findings.
6. In this area, you will enter the Summary of Findings, which details the results of the assessment plan. You will also select if the measure was not met, met, or exceeded. Once done, click Submit.
7. Repeat step 6 for all measures until complete. Once done, click on **Check In**.

8. Once all information is updated, click on **Submission & Read Reviews**.

9. Scroll down to the appropriate assessment cycle, and click **Submit Work**.
Taskstream Instructions: Entering Use of Results

2. Click on your designated workspace.

3. Select **Use of Results** under the 2019-20 Assessment Cycle on the left-hand side of the screen.

4. Select the green **Check Out** button on the top right of the screen.

5. Under Actions, select **Select Set**.

6. Click on **Create New Operational Plan**.
7. Click on **Select Set**.
8. Click on **Select Existing Set** at the top of the screen.

9. Select desired Outcome Set and then select **Continue**.

10. Select outcomes associated with current Assessment Plan and then select **Accept and Return to Plan** on the top right.

11. Select **Add New Action** under the desired outcome.
12. Complete the information as thoroughly as possible, and then click on Apply Changes.

13. Continue this process until there is an update for all outcomes. Once done, click on Check In.

14. Once all information is updated, click on Submission & Read Reviews.

15. Scroll down to the appropriate assessment cycle, and click Submit Work.
Taskstream Instructions: Entering Status Report

2. Click on your designated workspace.
3. Select **Status Report** under the appropriate Assessment Cycle on the left-hand side of the screen.
4. Select the green **Check Out** button on the top right of the screen.
5. Select **Add Status** next to the measure.
6. Click on the drop-down arrow on the **Current Status** box and select one of the following: Not Started, In Progress, Completed, or Not Implemented. A short narrative should be included in the **Additional Information** box. Once complete, click on **Submit**.
7. You will then be able to add any supporting attachments.

8. You will repeat steps 6 and 7 for all measures. Once done, click **Check In**.

9. Once all information is updated, click on Submission & Read Reviews.

10. Scroll down to the appropriate assessment cycle, and click **Submit Work**.
Taskstream Instructions: Downloading PDF version of data

1. Login to Taskstream.
2. Click on your participating area.
3. Click on the appropriate assessment cycle year.
4. Click on PDF on the top right.
5. When the PDF is available, you will receive a notification with directions on the homepage under “messages” (right side of the screen).
Taskstream Instructions: Unlocking Submitted Work

Please note that only current assessment cycles can be unlocked. Once an assessment cycle is reviewed and complete, it will be administratively locked and you will need to contact the OSP to unlock.

2. Click on your designated workspace.
3. Click on the Submissions and Review tab on the top right.
4. Scroll down to the area you would like to unlock and click Cancel Submission.
5. This will unlock the submitted work so that edits can be made.
6. Once edits are completed, be sure to go back into the Submissions & Reviews tab to resubmit the work.
Taskstream Instructions: Viewing Assessment Data

2. Click on your designated workspace.

3. On the left-hand side, click on the information you would like to view.

4. Click on the bar to expand the section.

5. You will be able to view data entered in each section.