University of Houston Clear Lake
Office of Institutional Effectiveness

AMS Taskstream User Manual

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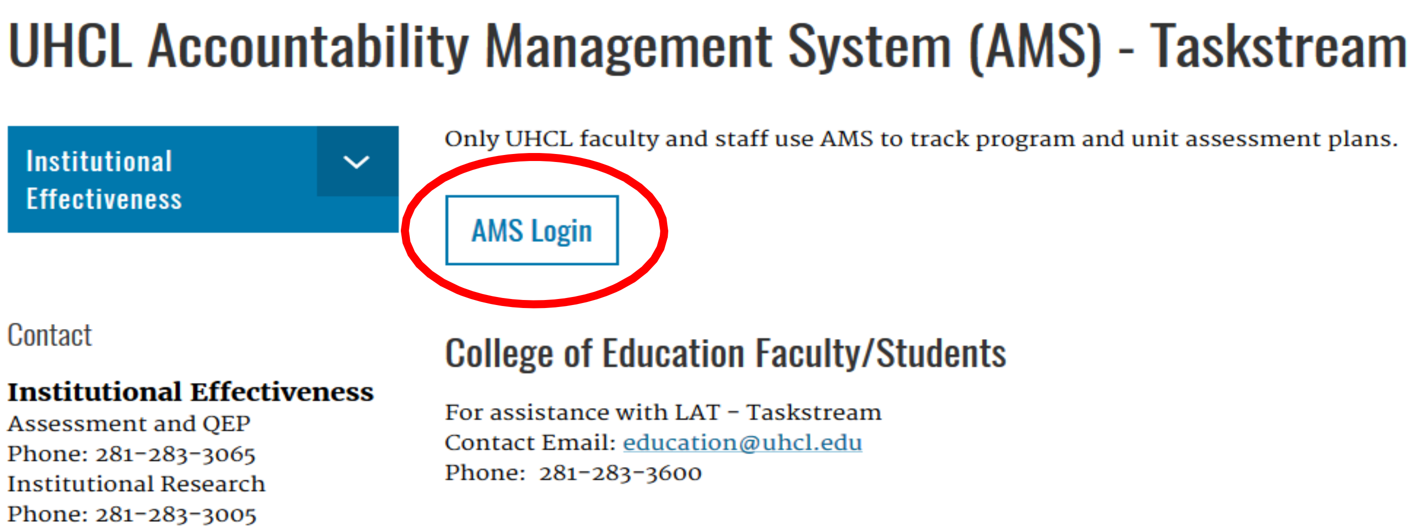
WELCOME TO UHCL AMS – ACCOUNTABILITY MANAGEMENT SYSTEM

This QuickStart Guide provides step-by-step information about navigating through the system and entering data into your assessment plan.

HOW DO I ACCESS AMS?

Login is now: https://www.uhcl.edu/about/administrative-offices/taskstream/ although www.uhcl.edu/taskstream will redirect you to the current login page. Use your UHCL credentials to login (same userID and password as email).

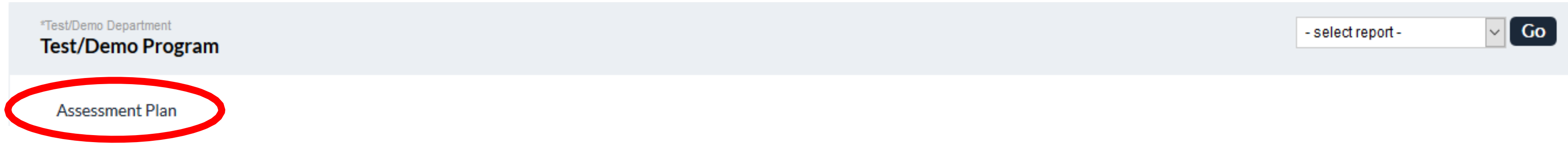


If you have login issues or need an account set-up, please contact the OIE department.

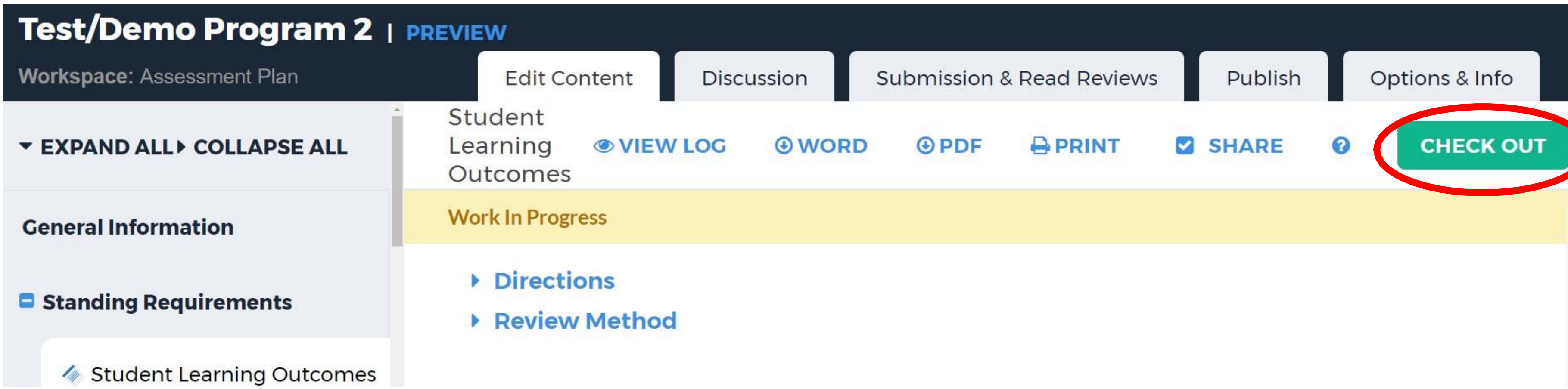
Technical Problems: Taskstream Mentoring Services help@taskstream.com 1-800-311-5656 press 2.

General Tips:

1. To open your plan, click on Assessment Plan from the Home page.



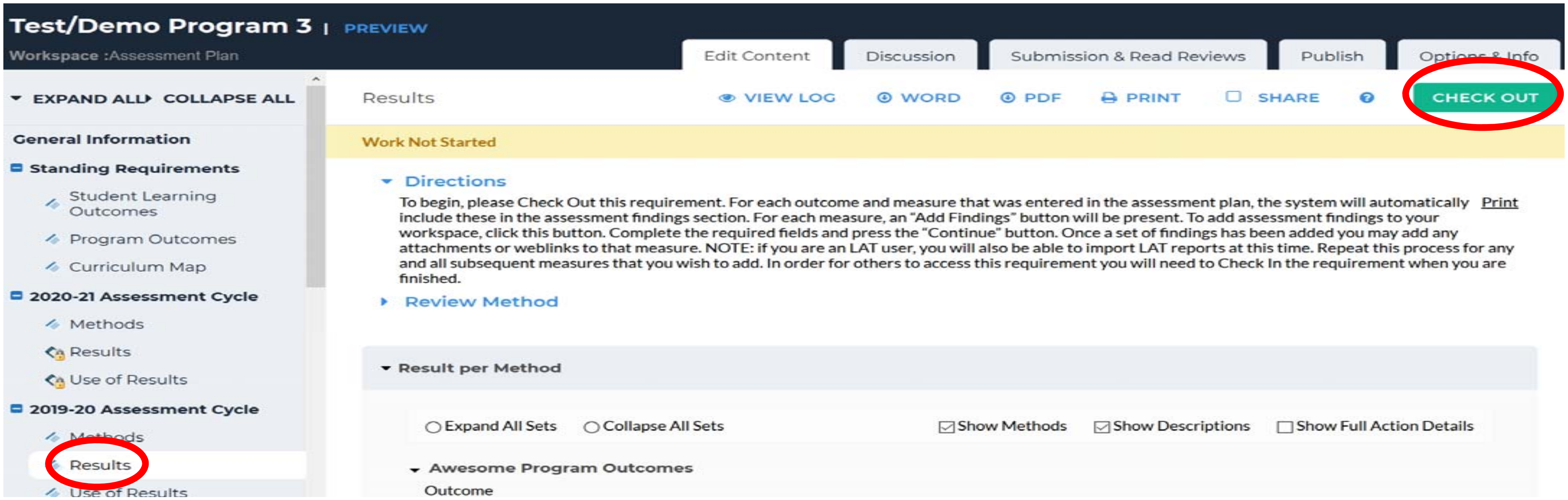
2. You must "Check Out" the area to edit it.



3. When the plan is completed and ready for review, you must submit **each** section individually. The sections are not automatically submitted to the reviewers. Details for submitting a plan are provided at the end of this Guide.

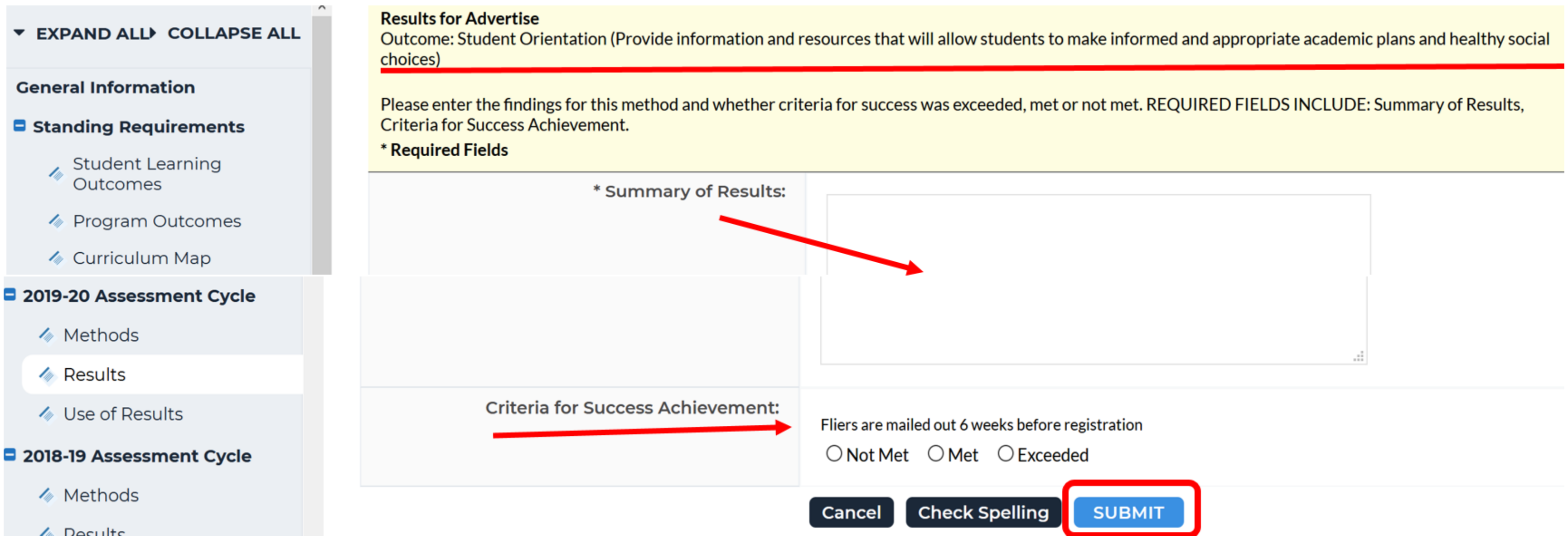
Step 1: Enter Results for 2019-2020

To enter results, click on the "Results" tab located in the left column. Then click "Check Out." Your methods will be visible in Results for 2019-2020 for reference. **Please note, you must click "Check Out" before you can make changes to Results.

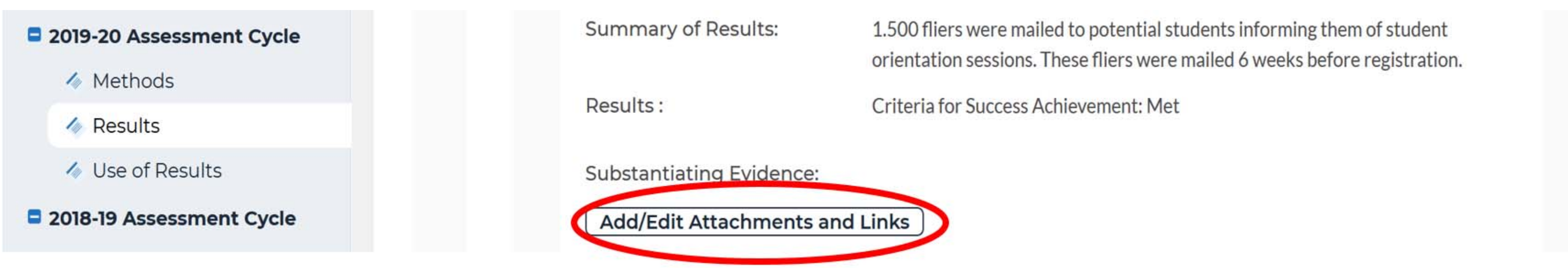


Then click on "Add Results."

Clicking “Add Result,” will open the area into which you will enter your assessment findings. Notice the Standing Requirement (SLO or PO) is visible in the top of the yellow box and the Criteria for Success is below the Summary of Results box. Required fields here are Summary of Results and Criteria for Success Achievement. Results should be quantitative. Please include what or who was assessed (e.g. majors, students in particular courses, users of your department) and number of students or users assessed. Then click “Submit.”



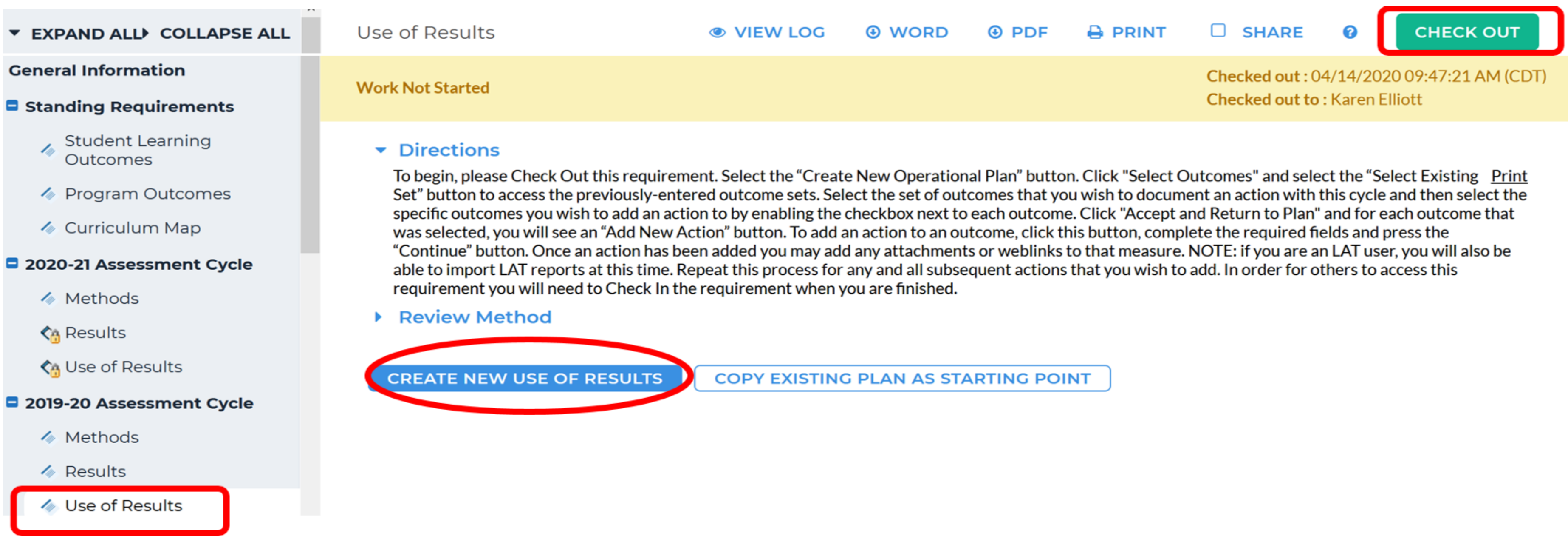
You can also enter substantiating materials to results. Once you click “Submit,” and are returned to the Results page, use “Add/Edit Attachments and Link” button below your Results. Substantiating Evidence could be an Excel spreadsheet of your assessment results, redesigned recruitment materials, or an annual report you prepare for your department. Adding these types of documents will support your “Summary or Results,” but you should still enter a complete summary in the box.



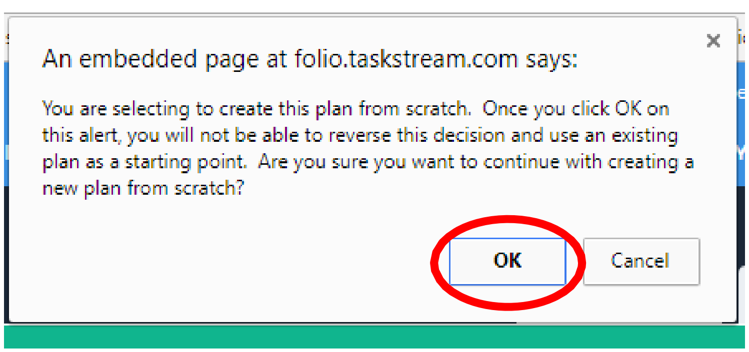
Step 2: Enter Use of Results for 2019-2020

To enter “Use of Results,” click the tab on the left column. Then click “Check Out.”

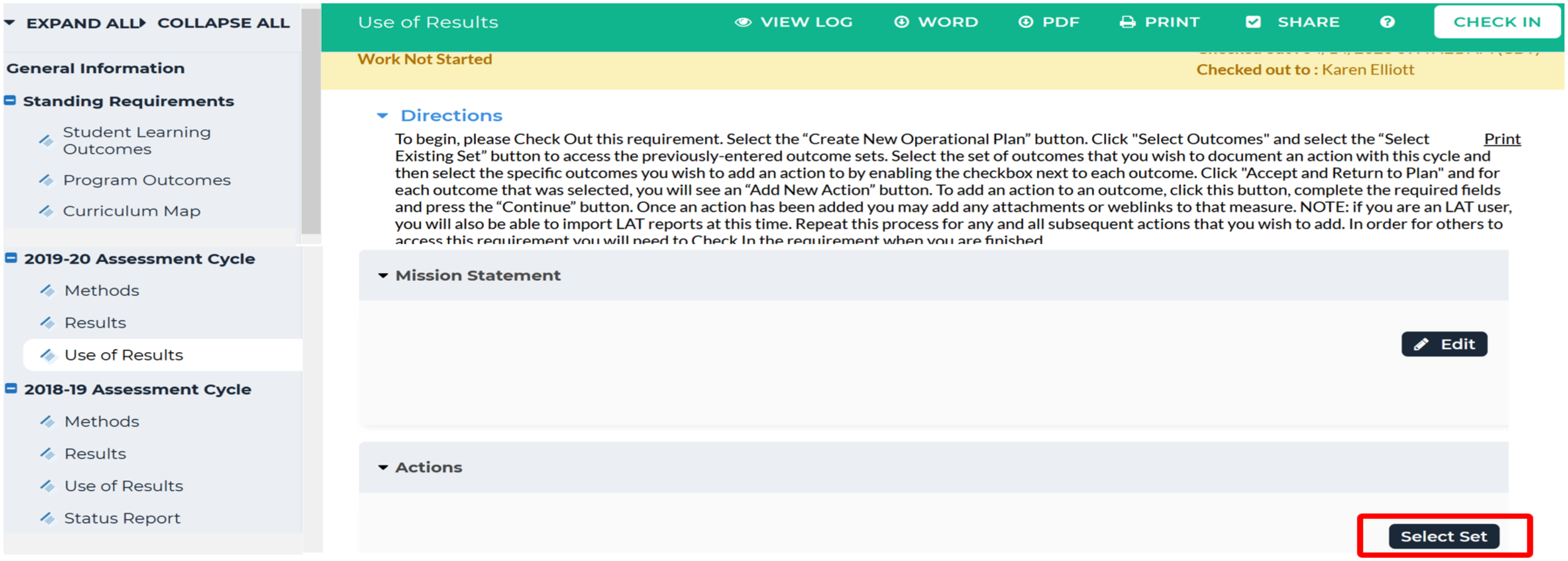
Once you have checked out “Use of Results,” you will be asked if you want to create new use of results or copy existing plan. **Because the results and use of results change each year, you need to select “Create New Use of Results.”**



That selection will bring up a pop-up informing you that you cannot reverse this decision. Click “OK.”

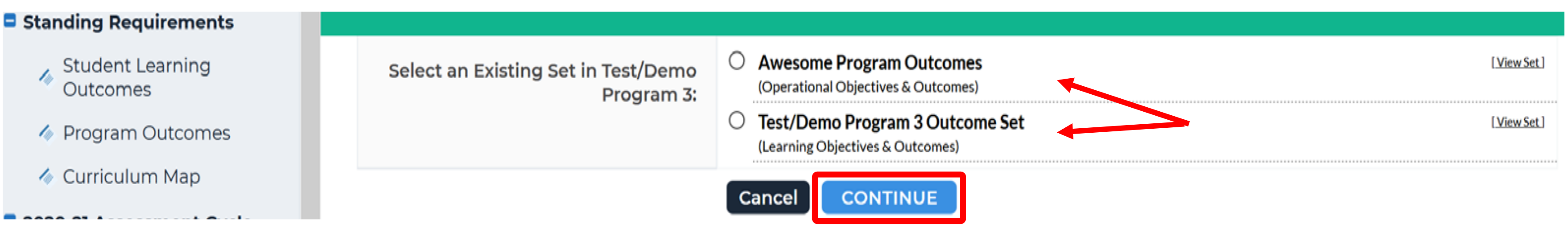


Then you will have to link your Standing Requirements. Click on “Select Set.”

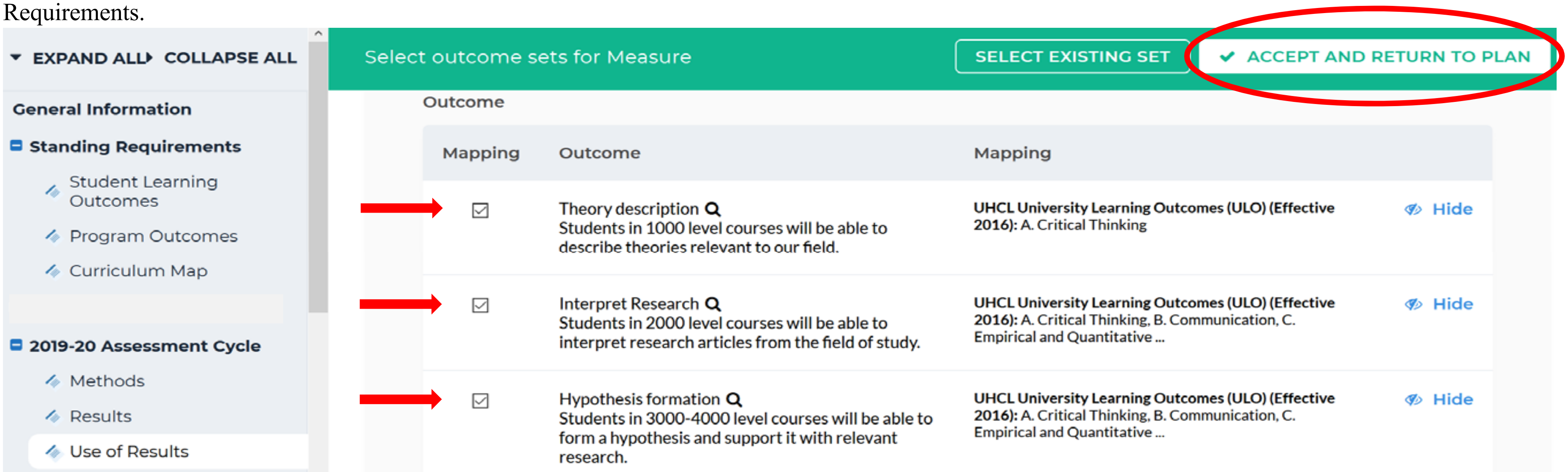


Then choose “Select Existing Set.”

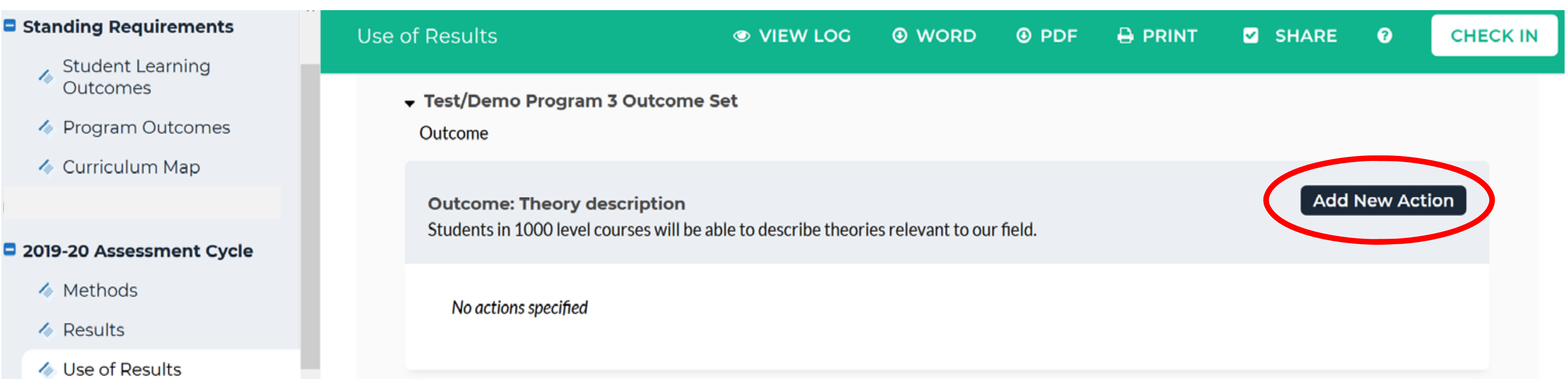
For **each** of your Standing Requirement sets (Program Outcomes and Student Learning Outcomes if applicable), you will need to select the set and click “Continue.”



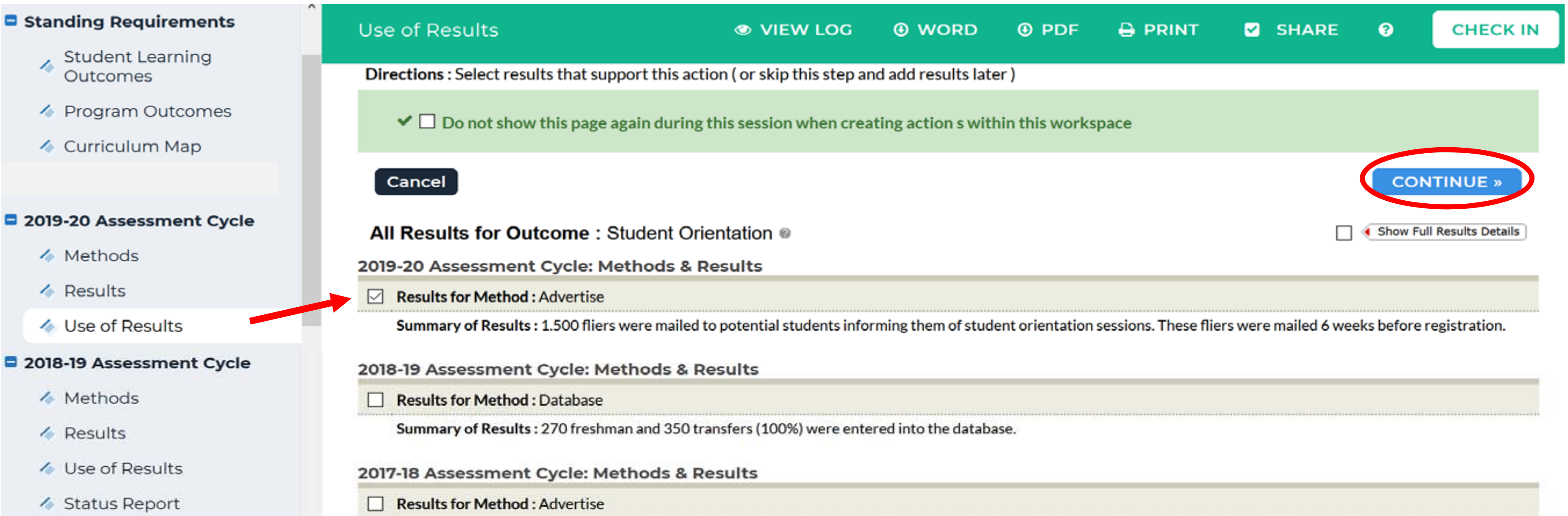
Then select all of the outcomes you wish to include and click on "Accept and Return to Plan" at the top of the page. Repeat if needed for other sets of Standing Requirements.



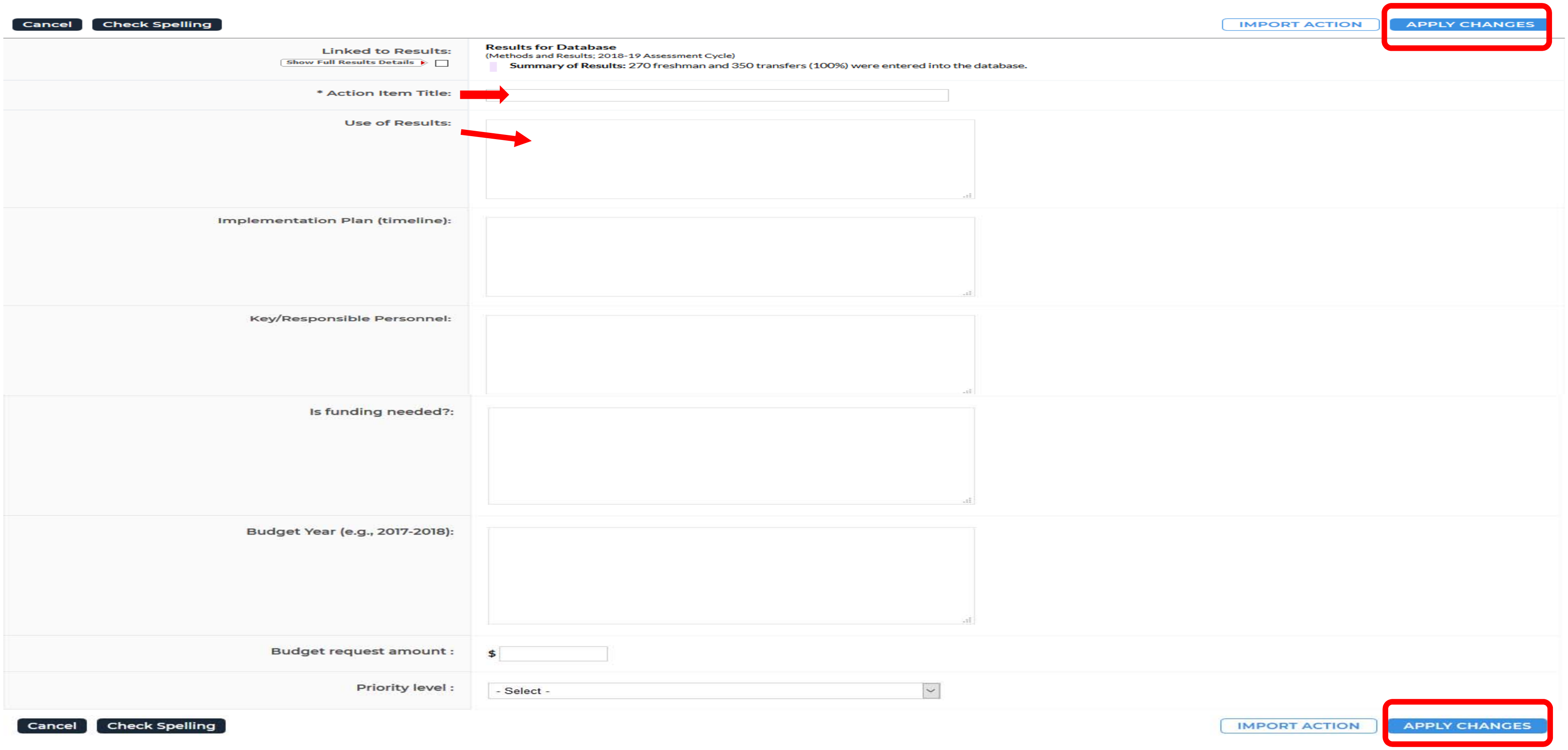
Once you have added all your Standing Requirements, you are ready to enter your "Use of Results." To enter them, click on the button called "Add New Action."



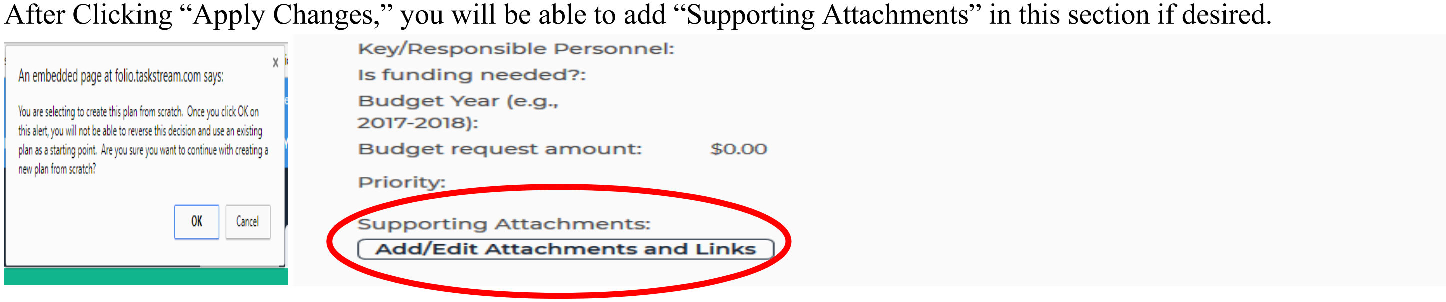
You will then see a screen to select which results should be linked to this "Use of Results." Select the results for the assessment cycle you are working in and click "Continue."



A "Use of Results" screen will appear. At the top, you will see your linked "Summary of Results." Give your entry a title based on the Standing Requirement name or your Results. Then enter your "Use of Results." This section is essential for closing the loop and moving toward **continuous improvement**. Ideally, "Use of Results" is a narrative paragraph reflecting a discussion of the results with the faculty and/or staff in your department. Then click the "Apply Changes" button at the top or bottom of the page.

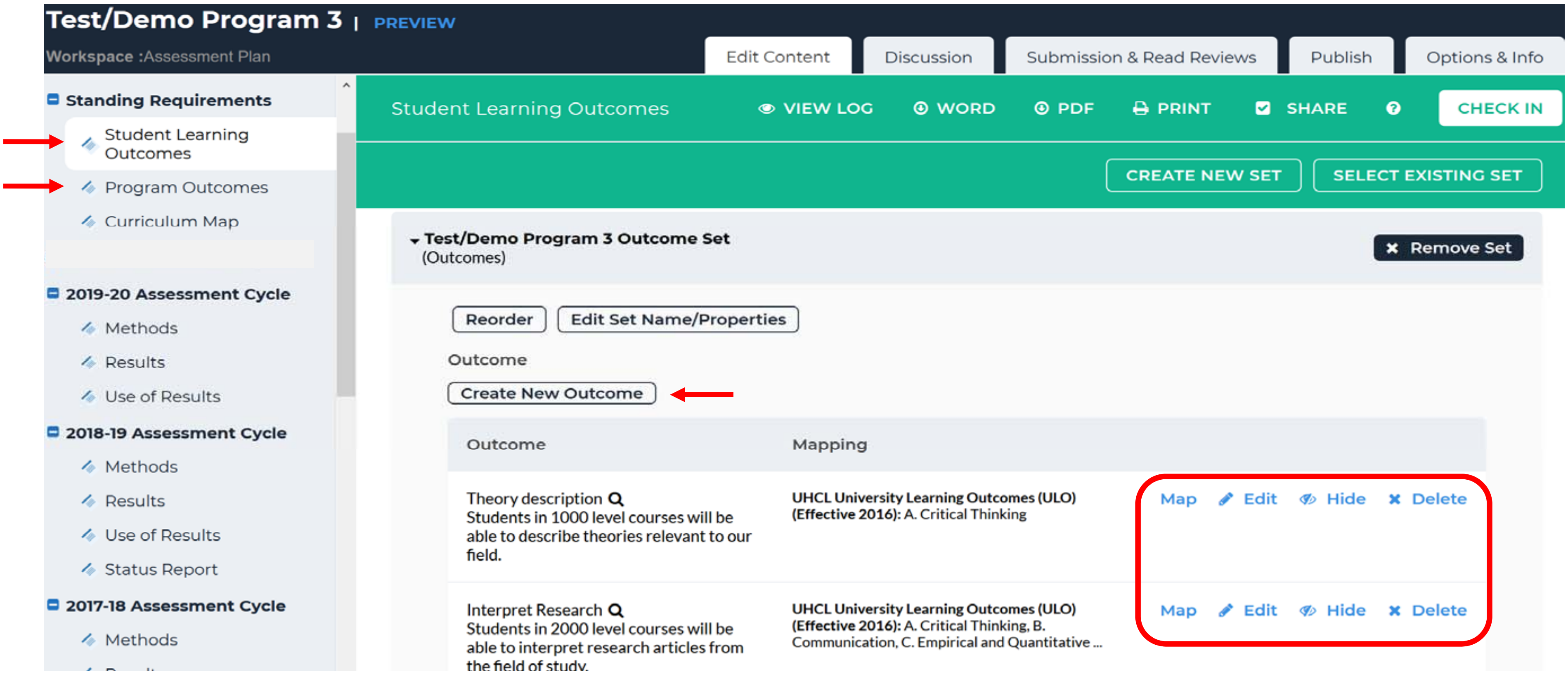


After Clicking "Apply Changes," you will be able to add "Supporting Attachments" in this section if desired.



Step 3: Review Standing Requirements (Student Learning Outcomes and Program Outcomes)

Once you have completed the 2019-2020 cycle, you are ready to plan for 2020-2021. The first step is to review your "Standing Requirements" and make any necessary changes.

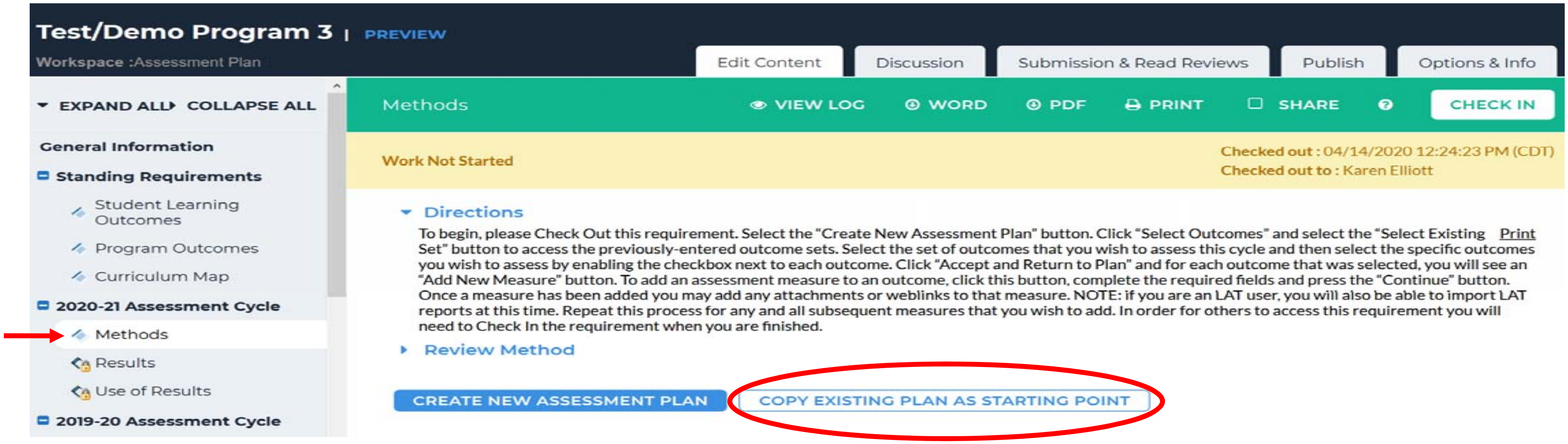


You can create a new set, create a new outcome, edit an existing outcome, edit mapping, hide an outcome, or if the outcome was never used you can delete the outcome. All of these options are on the right once the SLO or PO set is checked out.

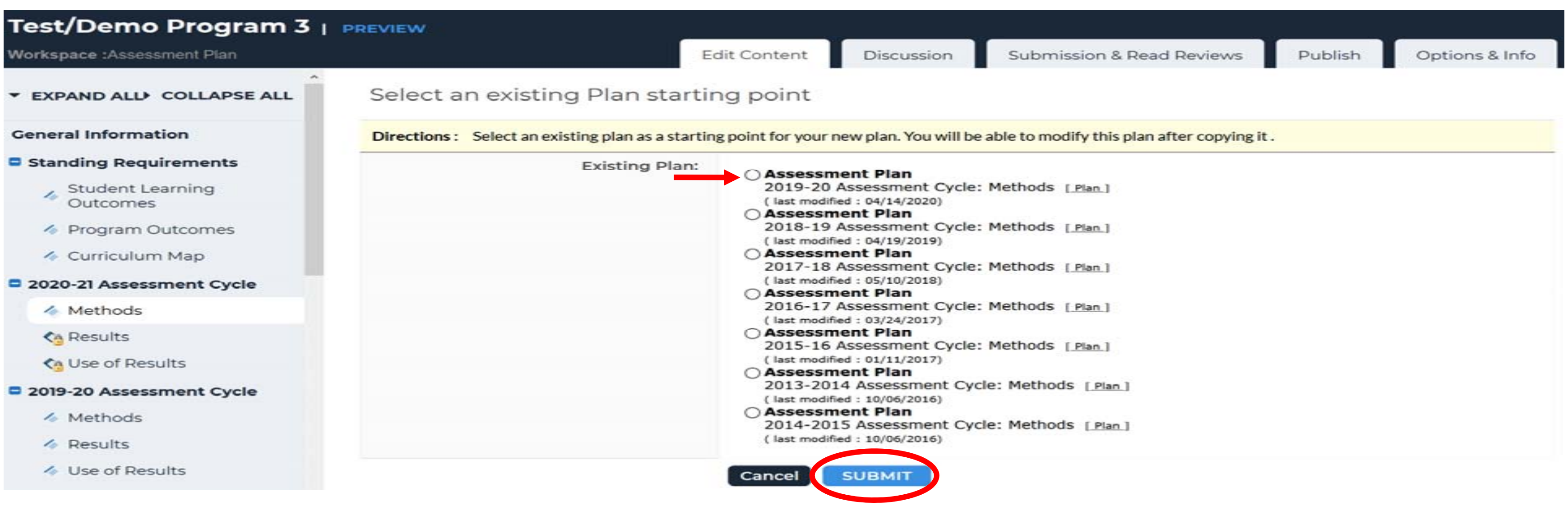
Step 4: Roll-over and Revise Methods for 2020-2021

Once you have reviewed and made necessary changes to your "Standing Requirements," you can roll over and edit your "Methods" for 2020-2021.

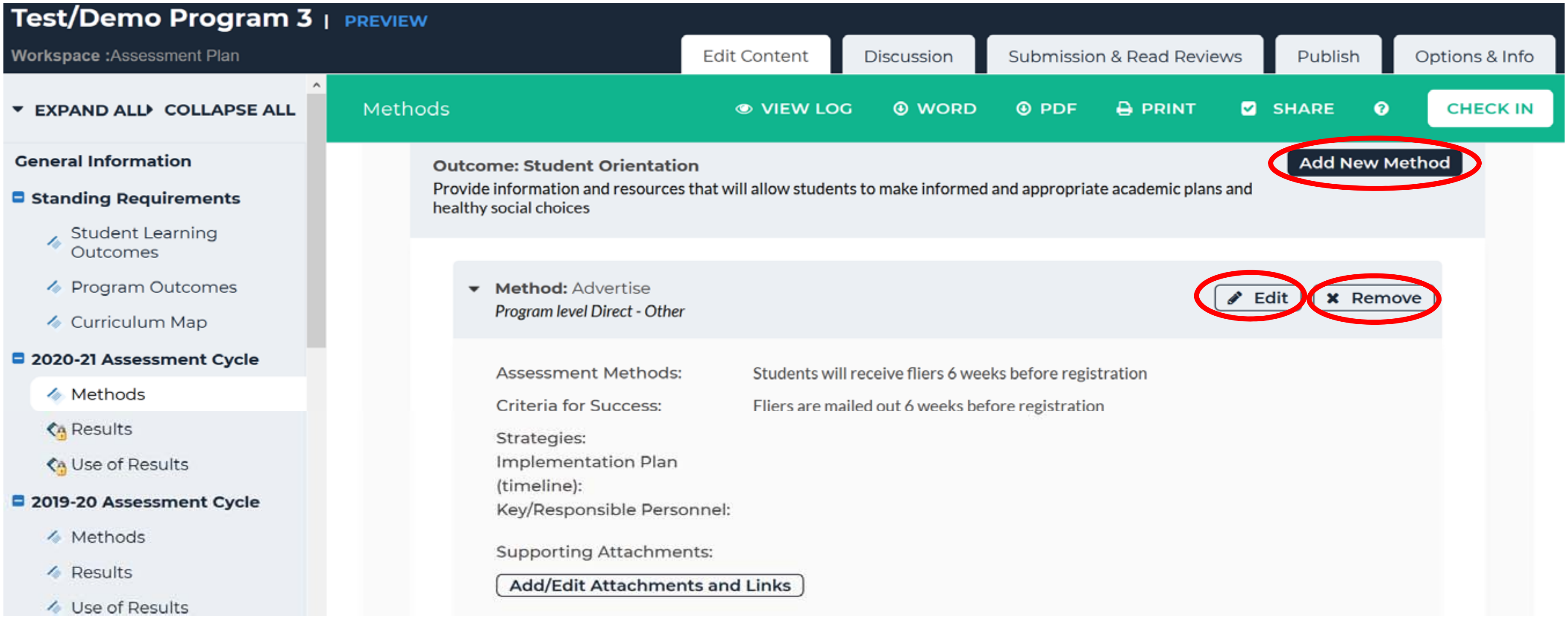
To roll-over "Methods," you must first "Check Out" the area. Then click on "Copy Existing Plan as Starting Point."



Select the plan you wish to roll-over generally the one from the last assessment cycle and click "Submit."

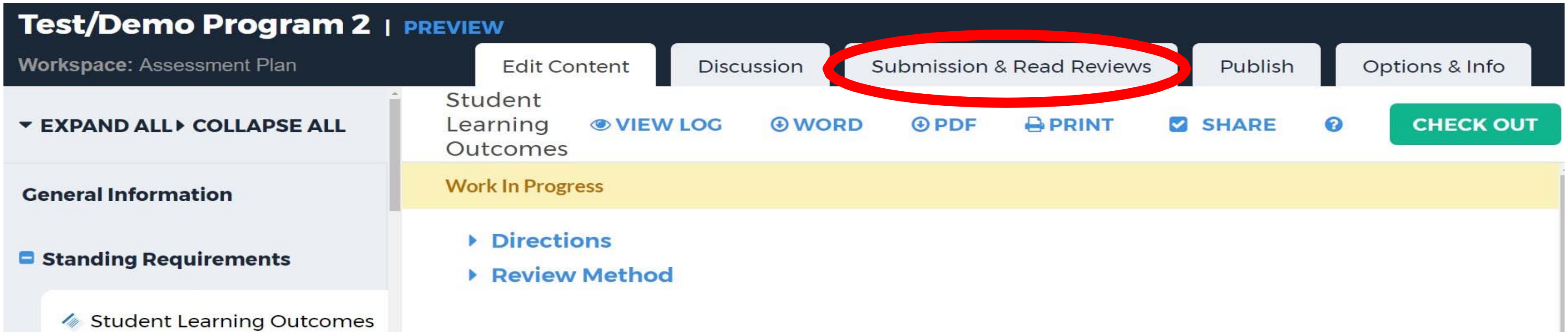


Then you can add a new method, remove a method you do not wish to measure during this cycle, or edit a method as needed.

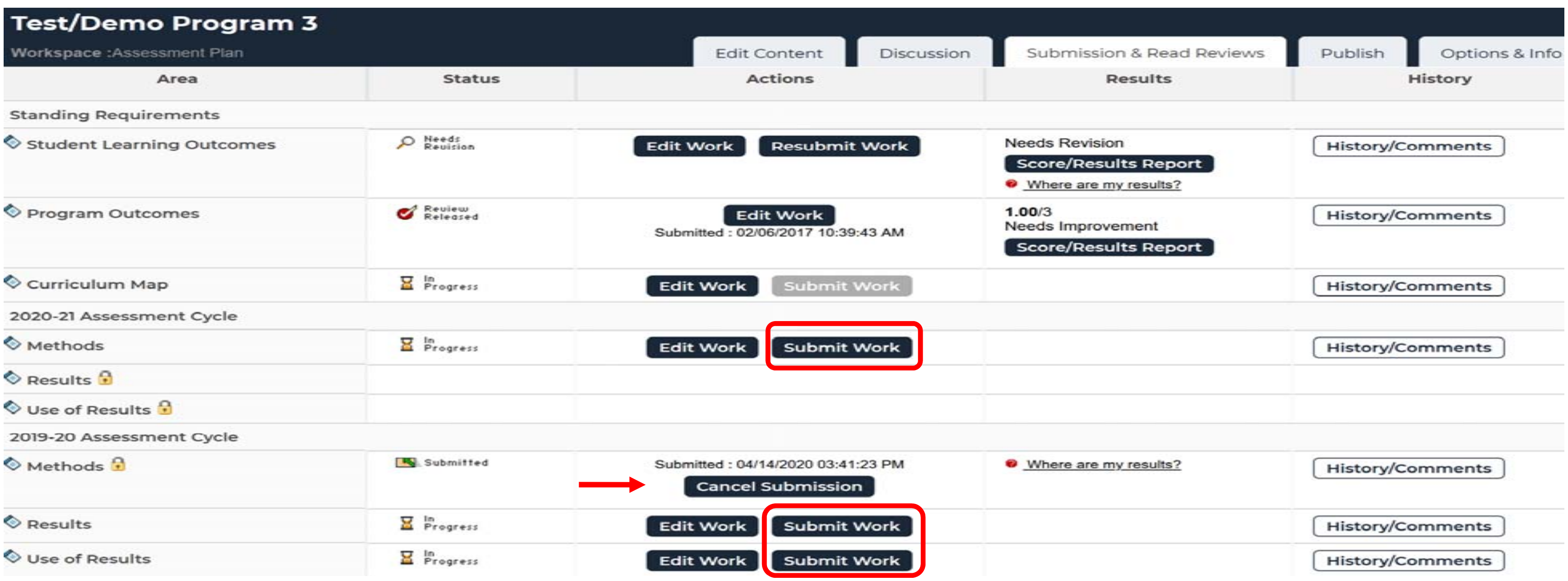


Step 5: Submit Assessment Components for Review.

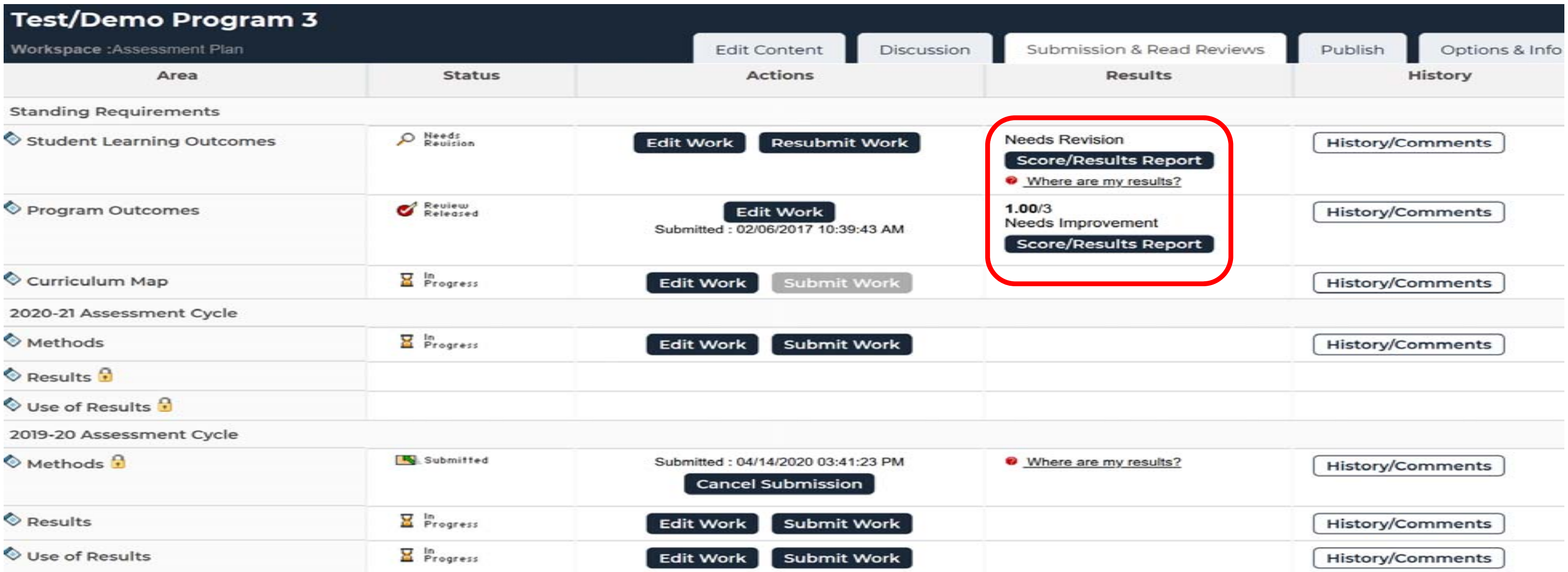
Once edits are complete and you are ready to submit your assessment plan for review, please click on the Submission and Read Reviews tab.



Click on the Submit Work buttons for 2019-2020 Results and Use of Results, and 2020-2021 Methods. If you submit a section and then realize you need to make an edit in that section, you can click on Cancel Submission. That will unlock the section and allow editing. *****Submission cannot be canceled if the section has already been reviewed.**



This screen also allows you to see comments made by a reviewer after the review has been completed. Click on Score/Results Report in a row that has been submitted and reviewed. You will see the rubric used, section score, and comments made by the reviewer. This report will provide feedback for this section ONLY. Each section will receive a score and results report.



The last column, History/Comments, shows the history of each section.

Test/Demo Program 3

Workspace :Assessment Plan

Edit Content | Discussion | Submission & Read Reviews | Publish | Options & Info

Area	Status	Actions	Results	History
Standing Requirements				
Student Learning Outcomes	Needs Revision	Edit Work Resubmit Work	Needs Revision Score/Results Report Where are my results?	History/Comments
Program Outcomes	Review Released	Edit Work Submitted : 02/06/2017 10:39:43 AM	1.00/3 Needs Improvement Score/Results Report	History/Comments
Curriculum Map	In Progress	Edit Work Submit Work		History/Comments
2020-21 Assessment Cycle				
Methods	In Progress	Edit Work Submit Work		History/Comments
Results				
Use of Results				
2019-20 Assessment Cycle				
Methods	Submitted	Submitted : 04/14/2020 03:41:23 PM Cancel Submission	Where are my results?	History/Comments
Results	In Progress	Edit Work Submit Work		History/Comments
Use of Results	In Progress	Edit Work Submit Work		History/Comments

After clicking on History/Comments, a new screen will show date and time, action during that session, the person's name logged in, and ALL reports on a particular section of the plan.

07/05/2016 03:05 pm (CDT)	Needs Revision	Cecelia Croft	Score: 3.00 (out of 3) Very Good View full review report
07/05/2016 03:06 pm (CDT)	Checked Out	Cecelia Croft	
07/05/2016 03:15 pm (CDT)	Checked In	Cecelia Croft	
07/05/2016 03:15 pm (CDT)	Resubmitted	Cecelia Croft	
07/06/2016 08:52 am (CDT)	Needs Revision	Cecelia Croft	Score: 3.00 (out of 3) Very Good View full review report

Assessment Training/Workshop Calendar 2020

ONE-ON-ONE TRAINING

90-120 minute one-on-one training for faculty and staff (academic, co-curricular, and administrative plans) will be available May 1 – October 30. Instructions on assessment, creating, and completing an assessment plan will be provided. Training will be held in faculty and staff offices. **You must contact your Assessment Coordinator to schedule an appointment.** Assessment Coordinator information is at the bottom of the page.

AMS OPEN WORKSHOPS

All workshops will be held in the UCT/HR Training Room, B2132.
Drop by any time for one-on-one help in completing your assessment plans for AY19-20 and AY20-21.

2:00 p.m. – 4:00 p.m.	October 19 (Monday)
9:00 a.m. – 11:00 a.m.	October 20 (Tuesday)
10:00 am. – 12:00 p.m.	October 21 (Wednesday)
1:30 p.m. – 3:30 p.m.	October 22 (Thursday)
8:30 a.m. – 10:30 a.m.	October 23 (Friday)

October 30, 2020 – Deadline to submit all Assessment Plans.

Assessment Coordinators
Karen Elliott, elliott@uhcl.edu, ext. 3053 (academic plans)
Carmen Conley, conley@uhcl.edu, ext. 3007 (co-curricular and administrative plans)

Executive Director of Planning and Assessment
Pat Cuchens, cuchens@uhcl.edu, ext. 3065