

AMS Taskstream User Manual

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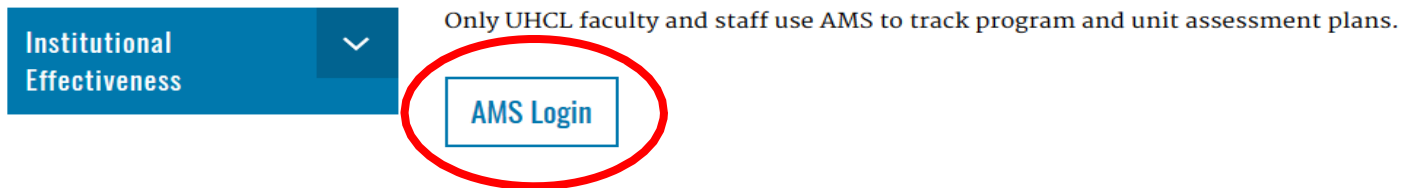
WELCOME TO UHCL AMS – ACCOUNTABILITY MANAGEMENT SYSTEM

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).

UHCL Accountability Management System (AMS) - Taskstream



Institutional Effectiveness

Only UHCL faculty and staff use AMS to track program and unit assessment plans.

AMS Login

Contact

Institutional Effectiveness

Assessment and QEP
Phone: 281-283-3065
Institutional Research
Phone: 281-283-3005

College of Education Faculty/Students

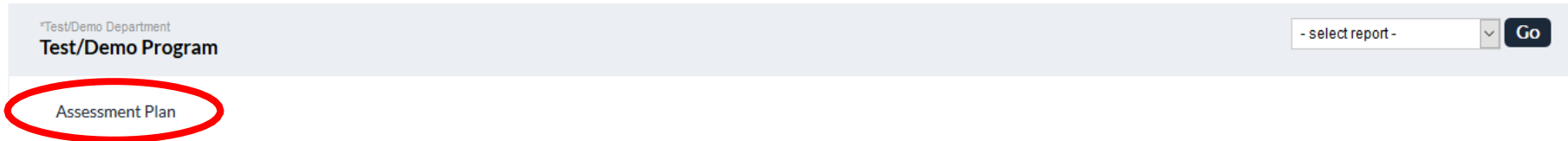
For assistance with LAT - Taskstream
Contact Email: education@uhcl.edu
Phone: 281-283-3600

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

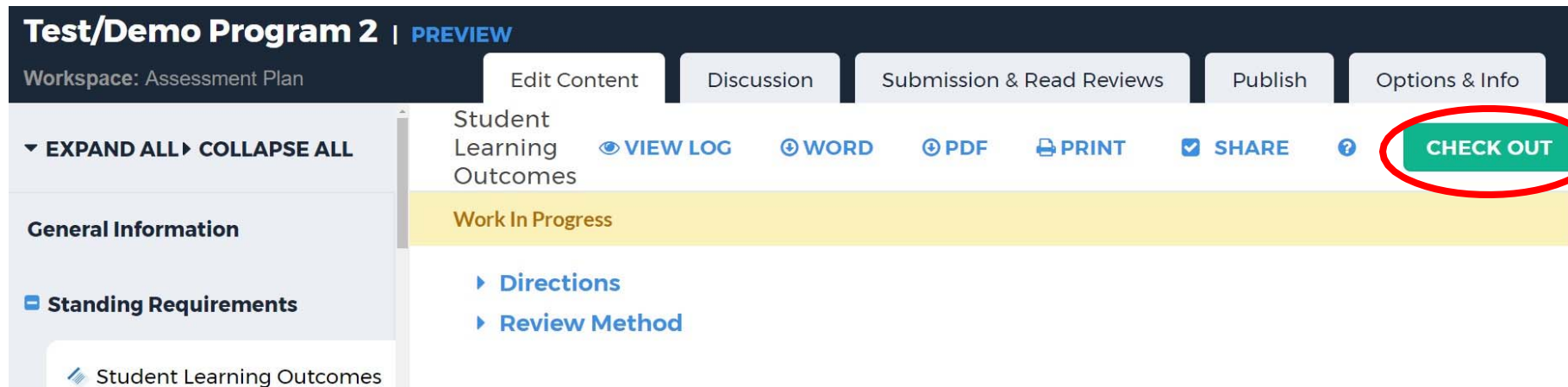
Technical Problems: Taskstream Mentoring Services help@taskstream.com 1-800-311-5656 press 2.

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.

The screenshot shows the 'Test/Demo Program 3 | PREVIEW' workspace. The left sidebar is expanded to show the '2019-2020 Assessment Cycle' with the 'Results' tab selected and circled in red. The main content area displays 'Work Not Started' and 'Directions' for the 'Results' tab. The 'CHECK OUT' button in the top right navigation bar is also circled in red.

Then click on “Add Results.”

The screenshot shows the 'Add Results' interface. The left sidebar is expanded to show the '2019-2020 Assessment Cycle' with the 'Results' tab selected. The main content area displays the 'Outcome: Student Orientation' and the 'Method: Advertise' section. The 'Add Results' button in the bottom right corner is circled in red.

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.”

EXPAND ALL COLLAPSE ALL

General Information

- Standing Requirements
 - Student Learning Outcomes
 - Program Outcomes
 - Curriculum Map
- 2019-20 Assessment Cycle
 - Methods
 - Results
 - Use of Results
- 2018-19 Assessment Cycle
 - Methods
 - Results

Results for Advertise
Outcome: Student Orientation (Provide information and resources that will allow students to make informed and appropriate academic plans and healthy social choices)

Please enter the findings for this method and whether criteria for success was exceeded, met or not met. REQUIRED FIELDS INCLUDE: Summary of Results, Criteria for Success Achievement.

*** Required Fields**

* Summary of Results:

Criteria for Success Achievement:

Fliers are mailed out 6 weeks before registration

Not Met Met Exceeded

Cancel
Check Spelling
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.

2019-20 Assessment Cycle

- Methods
- Results
- Use of Results

2018-19 Assessment Cycle

Summary of Results: 1,500 fliers were mailed to potential students informing them of student orientation sessions. These fliers were mailed 6 weeks before registration.

Results : Criteria for Success Achievement: Met

Substantiating Evidence:

Add/Edit Attachments and Links

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.”**

EXPAND ALL COLLAPSE ALL Use of Results VIEW LOG WORD PDF PRINT SHARE ? CHECK OUT

General Information

- Standing Requirements
 - Student Learning Outcomes
 - Program Outcomes
 - Curriculum Map
- 2020-21 Assessment Cycle
 - Methods
 - Results
 - Use of Results
- 2019-2020 Assessment Cycle
 - Methods
 - Results
 - Use of Results

Work Not Started

Checked out : 04/14/2020 09:47:21 AM (CDT)
Checked out to : Karen Elliott

Directions

To begin, please Check Out this requirement. Select the “Create New Operational Plan” button. Click “Select Outcomes” and select the “Select Existing Print Set” button to access the previously-entered outcome sets. Select the set of outcomes that you wish to document an action with this cycle and then select the specific outcomes you wish to add an action to by enabling the checkbox next to each outcome. Click “Accept and Return to Plan” and for each outcome that was selected, you will see an “Add New Action” button. To add an action to an outcome, click this button, complete the required fields and press the “Continue” button. Once an action has been added you may add any attachments or weblinks to that measure. NOTE: if you are an LAT user, you will also be able to import LAT reports at this time. Repeat this process for any and all subsequent actions that you wish to add. In order for others to access this requirement you will need to Check In the requirement when you are finished.

Review Method

CREATE NEW USE OF RESULTS COPY EXISTING PLAN AS STARTING POINT

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

An embedded page at folio.taskstream.com says:

You are selecting to create this plan from scratch. Once you click OK on this alert, you will not be able to reverse this decision and use an existing plan as a starting point. Are you sure you want to continue with creating a new plan from scratch?

OK Cancel

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

Use of Results VIEW LOG WORD PDF PRINT SHARE CHECK IN

Work Not Started Checked out to: Karen Elliott

Directions

To begin, please Check Out this requirement. Select the “Create New Operational Plan” button. Click “Select Outcomes” and select the “Select Existing Set” button to access the previously-entered outcome sets. Select the set of outcomes that you wish to document an action with this cycle and then select the specific outcomes you wish to add an action to by enabling the checkbox next to each outcome. Click “Accept and Return to Plan” and for each outcome that was selected, you will see an “Add New Action” button. To add an action to an outcome, click this button, complete the required fields and press the “Continue” button. Once an action has been added you may add any attachments or weblinks to that measure. NOTE: if you are an LAT user, you will also be able to import LAT reports at this time. Repeat this process for any and all subsequent actions that you wish to add. In order for others to access this requirement you will need to Check In the requirement when you are finished.

Mission Statement Edit

Actions Select Set

Then choose “Select Existing Set.”

Select outcome sets for Measure SELECT EXISTING SET ACCEPT AND RETURN TO PLAN

Outcome Sets

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.”

Select an Existing Set in Test/Demo Program 3:

Awesome Program Outcomes (Operational Objectives & Outcomes) [View Set]

Test/Demo Program 3 Outcome Set (Learning Objectives & Outcomes) [View Set]

Cancel 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.

EXPAND ALL COLLAPSE ALL

Select outcome sets for Measure

SELECT EXISTING SET ACCEPT AND RETURN TO PLAN

Mapping	Outcome	Mapping	
<input checked="" type="checkbox"/>	Theory description Students in 1000 level courses will be able to describe theories relevant to our field.	UHCL University Learning Outcomes (ULO) (Effective 2016): A. Critical Thinking	Hide
<input checked="" type="checkbox"/>	Interpret Research Students in 2000 level courses will be able to interpret research articles from the field of study.	UHCL University Learning Outcomes (ULO) (Effective 2016): A. Critical Thinking, B. Communication, C. Empirical and Quantitative ...	Hide
<input checked="" type="checkbox"/>	Hypothesis formation Students in 3000-4000 level courses will be able to form a hypothesis and support it with relevant research.	UHCL University Learning Outcomes (ULO) (Effective 2016): A. Critical Thinking, B. Communication, C. Empirical and Quantitative ...	Hide

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.”

Standing Requirements

Student Learning Outcomes

Program Outcomes

Curriculum Map

2019-20 Assessment Cycle

Methods

Results

Use of Results

Use of Results

VIEW LOG WORD PDF PRINT SHARE ? CHECK IN

Test/Demo Program 3 Outcome Set

Outcome

Outcome: Theory description
Students in 1000 level courses will be able to describe theories relevant to our field.

Add New Action

No actions specified

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.”

The screenshot displays the 'Use of Results' interface. On the left is a sidebar with a tree view containing three main sections: 'Standing Requirements' (with sub-items: Student Learning Outcomes, Program Outcomes, Curriculum Map), '2019-20 Assessment Cycle' (with sub-items: Methods, Results, Use of Results), and '2018-19 Assessment Cycle' (with sub-items: Methods, Results, Use of Results, Status Report). A red arrow points from the 'Use of Results' item in the 2019-20 Assessment Cycle section to the main content area.

The main content area has a green header bar with the title 'Use of Results' and several utility icons: VIEW LOG, WORD, PDF, PRINT, SHARE, and a 'CHECK IN' button. Below the header, there are instructions: 'Directions : Select results that support this action (or skip this step and add results later)'. A green box contains a checkbox with a checkmark and the text 'Do not show this page again during this session when creating action s within this workspace'. There are 'Cancel' and 'CONTINUE »' buttons. A 'Show Full Results Details' button is also present.

The main content is organized by assessment cycle:

- All Results for Outcome : Student Orientation** (with a 'Show Full Results Details' button)
- 2019-20 Assessment Cycle: Methods & Results**
 - Results for Method : Advertise
 - Summary of Results : 1.500 fliers were mailed to potential students informing them of student orientation sessions. These fliers were mailed 6 weeks before registration.
- 2018-19 Assessment Cycle: Methods & Results**
 - Results for Method : Database
 - Summary of Results : 270 freshman and 350 transfers (100%) were entered into the database.
- 2017-18 Assessment Cycle: Methods & Results**
 - Results for Method : Advertise

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.

Cancel Check Spelling IMPORT ACTION **APPLY CHANGES**

Linked to Results: Show Full Results Details

Results for Database
(Methods and Results; 2018-19 Assessment Cycle)
Summary of Results: 270 freshman and 350 transfers (100%) were entered into the database.

* Action Item Title:

Use of Results:

Implementation Plan (timeline):

Key/Responsible Personnel:

Is funding needed?:

Budget Year (e.g., 2017-2018):

Budget request amount: \$

Priority level:

Cancel Check Spelling IMPORT ACTION **APPLY CHANGES**

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

An embedded page at folio.taskstream.com says:
You are selecting to create this plan from scratch. Once you click OK on this alert, you will not be able to reverse this decision and use an existing plan as a starting point. Are you sure you want to continue with creating a new plan from scratch?

OK Cancel

Key/Responsible Personnel:
Is funding needed?:
Budget Year (e.g., 2017-2018):
Budget request amount: \$0.00
Priority:

Supporting Attachments:
Add/Edit Attachments and Links

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.

Test/Demo Program 3 | PREVIEW
Workspace :Assessment Plan

Standing Requirements

- Student Learning Outcomes
- Program Outcomes
- Curriculum Map

2019-20 Assessment Cycle

- Methods
- Results
- Use of Results

2018-19 Assessment Cycle

- Methods
- Results
- Use of Results
- Status Report

2017-18 Assessment Cycle

- Methods

Student Learning Outcomes

VIEW LOG WORD PDF PRINT SHARE CHECK IN

CREATE NEW SET SELECT EXISTING SET

Test/Demo Program 3 Outcome Set (Outcomes) Remove Set

Reorder Edit Set Name/Properties

Outcome

Create New Outcome

Outcome	Mapping	
Theory description Q Students in 1000 level courses will be able to describe theories relevant to our field.	UHCL University Learning Outcomes (ULO) (Effective 2016): A. Critical Thinking	Map Edit Hide Delete
Interpret Research Q Students in 2000 level courses will be able to interpret research articles from the field of study.	UHCL University Learning Outcomes (ULO) (Effective 2016): A. Critical Thinking, B. Communication, C. Empirical and Quantitative ...	Map Edit Hide Delete

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.”

The screenshot shows the 'Test/Demo Program 3 | PREVIEW' workspace for an 'Assessment Plan'. The top navigation bar includes 'Edit Content', 'Discussion', 'Submission & Read Reviews', 'Publish', and 'Options & Info'. The main content area is titled 'Methods' and shows a 'Work Not Started' status. A yellow banner indicates it was 'Checked out : 04/14/2020 12:24:23 PM (CDT)' by 'Karen Elliott'. The 'Directions' section provides instructions on how to create a new assessment plan or copy an existing one. At the bottom, there are two buttons: 'CREATE NEW ASSESSMENT PLAN' and 'COPY EXISTING PLAN AS STARTING POINT', with the latter circled in red. The left sidebar shows a navigation menu with 'Methods' selected under the '2020-21 Assessment Cycle'.

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

The screenshot shows the 'Test/Demo Program 3 | PREVIEW' workspace for an 'Assessment Plan'. The main content area is titled 'Select an existing Plan starting point'. A yellow banner provides directions: 'Select an existing plan as a starting point for your new plan. You will be able to modify this plan after copying it.' Below this, there is a list of existing plans with radio buttons next to each. The first option, 'Assessment Plan 2019-20 Assessment Cycle: Methods [Plan.]', is selected. At the bottom, there are two buttons: 'Cancel' and 'SUBMIT', with the latter circled in red. The left sidebar shows a navigation menu with 'Methods' selected under the '2020-21 Assessment Cycle'.

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.

The screenshot displays the 'Test/Demo Program 3 | PREVIEW' workspace. The top navigation bar includes 'Edit Content', 'Discussion', 'Submission & Read Reviews', 'Publish', and 'Options & Info'. The left sidebar shows a navigation menu with 'EXPAND ALL' and 'COLLAPSE ALL' options, and sections for 'General Information', 'Standing Requirements', '2020-21 Assessment Cycle', and '2019-20 Assessment Cycle'. The '2020-21 Assessment Cycle' section is expanded to show 'Methods', 'Results', and 'Use of Results'. The main content area is titled 'Methods' and features a green header with 'VIEW LOG', 'WORD', 'PDF', 'PRINT', 'SHARE', and 'CHECK IN' options. The 'Outcome: Student Orientation' section is visible, with the text 'Provide information and resources that will allow students to make informed and appropriate academic plans and healthy social choices'. Below this, the 'Method: Advertise' section is expanded, showing 'Program level Direct - Other' and a list of assessment details: 'Assessment Methods: Students will receive fliers 6 weeks before registration', 'Criteria for Success: Fliers are mailed out 6 weeks before registration', 'Strategies: Implementation Plan (timeline):', and 'Key/Responsible Personnel:'. The 'Supporting Attachments:' section includes an 'Add/Edit Attachments and Links' button. The 'Add New Method' button is circled in red, and the 'Edit' and 'Remove' buttons for the 'Advertise' method are also circled in red.

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.

The screenshot shows the top navigation bar for 'Test/Demo Program 2 | PREVIEW'. The 'Submission & Read Reviews' tab is highlighted with a red circle. Below the navigation bar, there are tabs for 'Edit Content', 'Discussion', 'Submission & Read Reviews', 'Publish', and 'Options & Info'. The 'Submission & Read Reviews' tab is active, showing a 'Work In Progress' status and a 'CHECK OUT' button. The left sidebar contains 'General Information' and 'Standing Requirements'.

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.**

The screenshot shows the 'Test/Demo Program 3' interface with a table of assessment components. The table has columns for Area, Status, Actions, Results, and History. The 'Submit Work' buttons for '2020-21 Assessment Cycle' and '2019-20 Assessment Cycle' are highlighted with red boxes. A red arrow points to the 'Cancel Submission' button for the '2019-20 Assessment Cycle' Methods row.

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

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.

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	

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