

AMS Taskstream Guide

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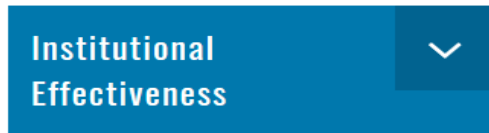
WELCOME TO UHCL AMS – ACCOUNTABILITY MANAGEMENT SYSTEM

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

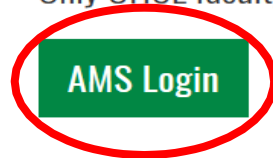
HOW DO I ACCESS AMS?

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



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



Contact

Institutional Effectiveness

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

College of Education Faculty/Students

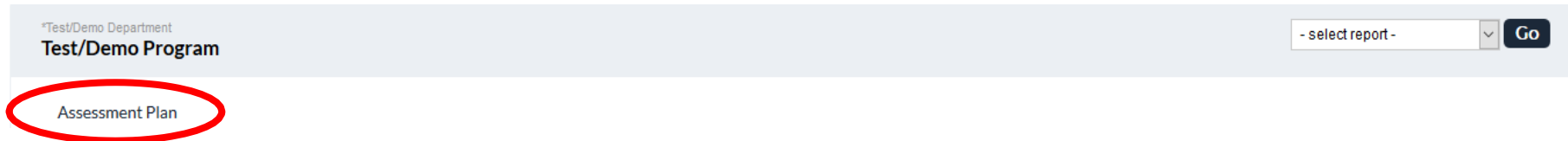
For assistance with LAT – Taskstream
Contact Email: education@uhcl.edu
Phone: 281-283-3600

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

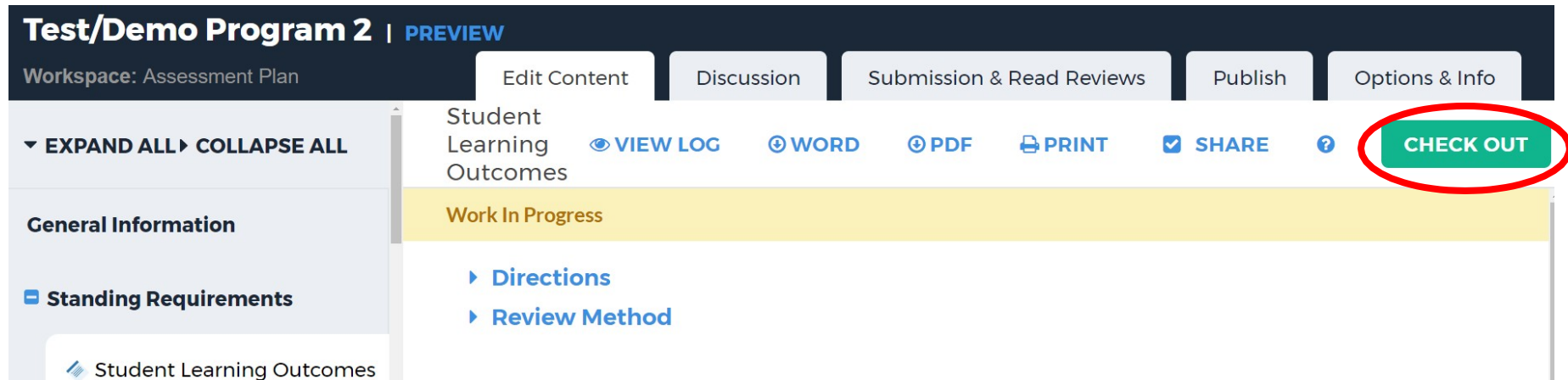
Technical Problems: Taskstream Mentoring Services help@taskstream.com 1-800-311-5656 press 2.

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 2018-2019

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 2018-2019 for reference. **Please note, you must click “Check Out” before you can make changes to Results.

Test/Demo Program | PREVIEW

Workspace :Assessment Plan

EXPAND ALLCOLLAPSE ALL

General Information

Standing Requirements

- Student Learning Outcomes
- Program Outcomes
- Curriculum Map

2018-19 Assessment Cycle

- Methods
- Results**
- Use of Results
- Status Report

Results

VIEW LOGWORDPDFPRINTSHARECHECK OUT

Work Not Started

Directions

To begin, please Check Out this requirement. For each outcome and measure that was entered in the assessment plan, the system will automatically include these in the assessment findings section. For each measure, an "Add Findings" button [Print](#) will be present. To add assessment findings to your workspace, click this button. Complete the required fields and press the "Continue" button. Once a set of findings 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 measures 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

Result per Method

Expand All SetsCollapse All Sets

Show MethodsShow DescriptionsShow Full Action Details

Then click on “Add Results.”

Student Learning Outcomes

Program Outcomes

Curriculum Map

2018-19 Assessment Cycle

- Methods
- Results**
- Use of Results

Strategies:Teach with an open question and answer forum.

Implementation Plan3 hours a week for 2 weeks.

(timeline):

Key/Responsible Personnel:Dr. Ma

Results for Math Camp

Add Results

No Results Added

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.”

Standing Requirements

- Student Learning Outcomes
- Program Outcomes
- Curriculum Map

2018-19 Assessment Cycle

- Methods
- Results**
- Use of Results
- Status Report

2017-18 Assessment Cycle

- Methods
- Results
- Use of Results
- Status Report

Results for Advise
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:**

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

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.

Results [VIEW LOG](#) [WORD](#) [PDF](#) [PRINT](#) [SHARE](#) [CHECK IN](#)

Key/Responsible Personnel :

Results for Advise [Edit](#) [Remove](#)

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](#)

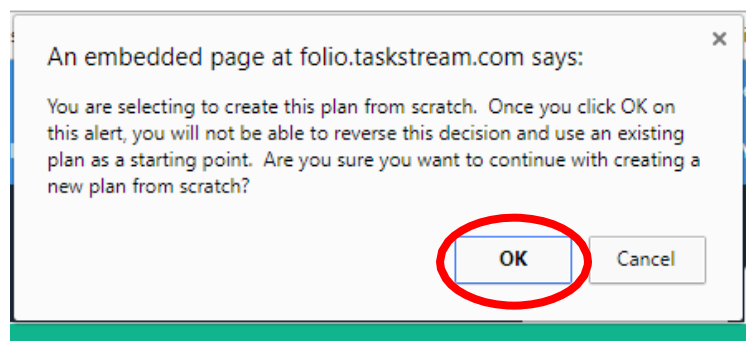
Step 2: Enter Use of Results for 2018-2019

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.”**

The screenshot shows a web interface for 'Use of Results'. On the left, a sidebar lists navigation options: 'Standing Requirements' (Student Learning Outcomes, Program Outcomes, Curriculum Map), '2018-19 Assessment Cycle' (Methods, Results, **Use of Results**, Status Report), and '2017-18 Assessment Cycle' (Methods, Results). The 'Use of Results' option is highlighted with a red box. The main content area has a yellow header with 'Work Not Started' and 'Checked out : 05/22/2018 08:22:49 AM (CDT)'. Below this, there are sections for 'Directions' and 'Review Method'. At the bottom, two buttons are visible: 'CREATE NEW USE OF RESULTS' (highlighted with a red oval) and 'COPY EXISTING PLAN AS STARTING POINT'.

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.”

The screenshot shows the 'Use of Results' page. On the left is a sidebar with a tree view containing 'Standing Requirements' (with sub-items 'Student Learning Outcomes', 'Program Outcomes', and 'Curriculum Map'), '2018-19 Assessment Cycle' (with sub-items 'Methods', 'Results', 'Use of Results', and 'Status Report'), and '2017-18 Assessment Cycle' (with sub-items 'Methods' and 'Results'). The 'Use of Results' item is selected. The main content area has a green header with 'Use of Results' and navigation links: 'VIEW LOG', 'WORD', 'PDF', 'PRINT', 'SHARE', and 'CHECK IN'. Below the header is a 'Directions' section with instructions on how to use the system. Underneath is a 'Review Method' section. Further down are two expandable sections: 'Mission Statement' and 'Actions'. The 'Actions' section is currently expanded, showing a 'Select Set' button at the bottom right, which is circled in red.

Then choose “Select Existing Set.”

The screenshot shows a dialog box titled 'Select outcome sets for Measure'. It has a green header bar with two buttons: 'SELECT EXISTING SET' (circled in red) and 'ACCEPT AND RETURN TO PLAN' (with a checkmark icon). Below the header, there is a section titled 'General Information' and a sub-section 'Standing Requirements'. Under 'Standing Requirements', there is a section '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.”

The screenshot shows the 'Import Outcome Set' dialog box. It has a dark blue header with the word 'PREVIEW' and several tabs: 'Edit Content', 'Discussion', 'Submission & Read Reviews', 'Publish', and 'Options & Info'. The main content area is titled 'Import Outcome Set'. It contains a section 'Select an Existing Set in Test/Demo Program 3:' with two radio button options: 'Awesome Program Outcomes (Operational Objectives & Outcomes)' and 'Test/Demo Program 3 Outcome Set (Learning Objectives & Outcomes)'. Both options have a '[View Set]' link to their right. Red arrows point from the 'Test/Demo Program 3 Outcome Set' option to the 'CONTINUE' button. At the bottom, there are two buttons: 'Cancel' and 'CONTINUE' (circled in red).

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.

Select outcome sets for Measure

(Outcomes)

Mapping	Outcome	Mapping
<input checked="" type="checkbox"/>	Theory description Q Students in 1000 level courses will be able to describe theories relevant to our field.	TX- University of Houston-Clear Lake- Core Curriculum: Communication Skills, Critical Thinking Skills, UHCL University Learning Outcomes (ULO) (Effective 2016): A. Critical Thinking, B. Communication
<input checked="" type="checkbox"/>	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 ...
<input checked="" type="checkbox"/>	Hypothesis formation Q 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 ...
<input checked="" type="checkbox"/>	Design study Q Master's level students will be able to evaluate and synthesize relevant research in order to design a study of their own.	UHCL University Learning Outcomes (ULO) (Effective 2016): A. Critical Thinking, B. Communication, C. Empirical and Quantitative ...

ACCEPT AND RETURN TO PLAN

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.”

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.

No actions specified

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.”

Standing Requirements

- Student Learning Outcomes
- Program Outcomes
- Curriculum Map

2018-19 Assessment Cycle

- Methods
- Results
- Use of Results**
- Status Report

2017-18 Assessment Cycle

- Methods
- Results

Use of Results VIEW LOG WORD PDF PRINT SHARE CHECK IN

Directions : Select results that support this action (or skip this step and add results later)

☒ Do not show this page again during this session when creating action s within this workspace

Cancel CONTINUE » Show Full Results Details

All Results for Outcome : Student Orientation

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

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.

2015-16 Assessment Cycle: Methods & Results

☐ Results for Method : Increase orientation

You will now see the screen where you enter “Use of Results.” At the top, you will see your linked “Summary of Results.” You will need to give your entry a title based on the Standing Requirement name or your Results. Then enter your “Use of Results.” This section is an essential one for closing the loop and moving toward **continuous improvement**. Ideally, “Use of Results” would be 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.

CancelCheck Spelling

IMPORT ACTIONAPPLY 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 :
- Select -

CancelCheck Spelling

IMPORT ACTIONAPPLY 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?
OKCancel

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 2018-2019 cycle, you are ready to plan for 2019-2020. The first step is to review your “Standing Requirements” and make any necessary changes.

The screenshot displays the 'Test/Demo Program 3' interface. The left sidebar shows the 'Standing Requirements' section with 'Student Learning Outcomes' and 'Program Outcomes' highlighted by red arrows. The main content area is titled 'Student Learning Outcomes' and includes a 'CREATE NEW SET' button. Below this, the 'Outcome Sets' section shows a table of outcomes and their mappings. A red arrow points to the 'Create New Outcome' button. A red box highlights the action buttons (Map, Edit, Hide, Delete) for each outcome row.

Outcome	Mapping	Actions
Theory description Q Students in 1000 level courses will be able to describe theories relevant to our field.	TX- University of Houston-Clear Lake- Core Curriculum: Communication Skills, Critical Thinking Skills, UHCL University Learning Outcomes (ULO) (Effective 2016): A. Critical Thinking, B. Communication	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.

*****If you make changes to your standing requirements, please resubmit for review.**

Step 4: Roll-over and Revise Methods for 2019-2020

Once you have reviewed and made necessary changes to your “Standing Requirements,” you can roll over and edit your “Methods” for 2019-2020.

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

Test/Demo Program 3 | PREVIEW

Workspace :Assessment Plan

EXPAND ALL COLLAPSE ALL

General Information

- Standing Requirements
 - Student Learning Outcomes
 - Program Outcomes
 - Curriculum Map
- 2019-2020 Assessment Cycle**
 - Methods
- 2018-19 Assessment Cycle
 - Methods

Methods

Work Not Started

Checked out : 04/15/2019 02:57:14 PM (CDT)
Checked out to : UHCL Manager

Directions

To begin, please Check Out this requirement. Select the "Create New Assessment 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 assess this cycle and then select the specific outcomes you wish to assess 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 Measure" button. To add an assessment measure to an outcome, click this button, complete the required fields and press the "Continue" button. Once a measure 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 measures 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 ASSESSMENT PLAN 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.”

Test/Demo Program 3 | PREVIEW

Workspace :Assessment Plan

EXPAND ALL COLLAPSE ALL

General Information

- Standing Requirements
 - Student Learning Outcomes
 - Program Outcomes
 - Curriculum Map
- 2019-2020 Assessment Cycle**
 - Methods
- 2018-19 Assessment Cycle
 - Methods
 - Results
 - Use of Results
 - Status Report

Select an existing Plan starting point

Directions : Select an existing plan as a starting point for your new plan. You will be able to modify this plan after copying it .

Existing Plan:

- ☒ **Assessment Plan**
2018-19 Assessment Cycle: Methods [Plan]
(last modified : 05/22/2018)
- ☐ **Assessment Plan**
2017-18 Assessment Cycle: Methods [Plan]
(last modified : 05/10/2018)
- ☐ **Assessment Plan**
2016-17 Assessment Cycle: Methods [Plan]
(last modified : 03/24/2017)
- ☐ **Assessment Plan**
2015-16 Assessment Cycle: Methods [Plan]
(last modified : 01/11/2017)
- ☐ **Assessment Plan**
2013-2014 Assessment Cycle: Methods [Plan]
(last modified : 10/06/2016)
- ☐ **Assessment Plan**
2014-2015 Assessment Cycle: Methods [Plan]
(last modified : 10/06/2016)

Cancel 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.

EXPAND ALLCOLLAPSE ALL

General Information

Standing Requirements

2019-20 Assessment Cycle

2018-19 Assessment Cycle

Methods

Student Learning Outcomes

Program Outcomes

Curriculum Map

Methods

Results

Use of Results

Status Report

VIEW LOGWORDPDFPRINTSHARECHECK IN

Outcome: Student Orientation

Provide information and resources that will allow students to make informed and appropriate academic plans and healthy social choices

Method: Advertise

Program level Direct - Other

EditRemove

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):Key/Responsible Personnel:

Supporting Attachments:

Add/Edit Attachments and Links

Step 5: Submit Assessment Components to OIE for Review.

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

The screenshot shows the 'Test/Demo Program 2' interface. The top navigation bar includes tabs for 'Edit Content', 'Discussion', 'Submission & Read Reviews' (highlighted with a red circle), 'Publish', and 'Options & Info'. Below the navigation bar, there's a 'Workspace: Assessment Plan' section. On the left, a sidebar contains 'EXPAND ALL' and 'COLLAPSE ALL' buttons, followed by 'General Information' and 'Standing Requirements'. The main content area shows 'Student Learning Outcomes' with a 'Work In Progress' status. Below this, there are links for 'Directions' and 'Review Method'. A 'CHECK OUT' button is visible on the right.

Click on the Submit Work buttons for 2018-2019 Results and Use of Results, and 2019-2020 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. The top navigation bar includes tabs for 'Edit Content', 'Discussion', 'Submission & Read Reviews' (selected), 'Publish', and 'Options & Info'. Below the navigation bar, there's a 'Workspace: Assessment Plan' section. The main content area displays a table of assessment components with their submission status and actions.

Component	Status	Actions	Details	History/Comments
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
2019-20 Assessment Cycle				
Methods	In Progress	Edit Work, Submit Work		History/Comments
2018-19 Assessment Cycle				
Methods	Submitted	Cancel Submission	Submitted : 04/15/2019 03:08:06 PM 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
Status Report		Edit Work		

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				
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
2019-20 Assessment Cycle				
Methods	In Progress	Edit Work Submit Work		History/Comments
2018-19 Assessment Cycle				
Methods	Submitted	Submitted : 04/15/2019 03:08:06 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
Status Report		Edit Work		

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 Workshop Calendar 2019

All sessions in the UCT/HR Training Room, B2132

AMS TRAINING CALENDAR

In this 90-minute workshop, we will review Taskstream's AMS system and answer questions that you may have regarding your assessment plan. Please bring your notes or previous plans with you. Before attending the workshop, you must be enrolled in the AMS system. If you are unable to log in, please notify the Assessment Coordinator in the OIE office. No registration is required but RSVP is preferred because of limited seats.

2:00 p.m. – 3:30 p.m. May 20 (Monday)
8:30 a.m. – 10:00 a.m. June 18 (Tuesday)
9:00 p.m. – 10:30 p.m. July 17 (Wednesday)
3:00 p.m. – 4:30 p.m. August 22 (Thursday)
9:30 a.m. – 11:00 a.m. September 20 (Friday)

ASSESSMENT DISCUSSIONS – BROWN BAG

Join the assessment staff to discuss topics related to assessment. Bring your lunch. Drinks and dessert provided.

12:00 p.m. – 1:00 p.m. May 6 (Monday) --- Assessment Kickoff: share your angst/joy for the 2019-2020 assessment cycle
12:00 p.m. – 1:00 p.m. June 4 (Tuesday) --- Using the best methodology for the best results
12:00 p.m. – 1:00 p.m. August 8 (Thursday) --- Gathering results and figuring out what to do with them
12:00 p.m. – 1:00 p.m. September 6 (Friday) --- Assessing the assessment. Now what?
12:00 p.m. – 1:00 p.m. October 9 (Wednesday) --- Houston has the 610 loop; UHCL has the assessment loop. Let's talk about roadblocks.

October 31, 2019 – Deadline to submit all Assessment Plans.

Assessment Coordinators

Karen Elliott, elliott@uhcl.edu, ext. 3053

Carmen Conley, conley@uhcl.edu, ext. 3007

Executive Director of Planning and Assessment

Pat Cuchens, cuchens@uhcl.edu, ext. 3065

AMS OPEN WORKSHOPS

Drop by any time for one-on-one help in completing your assessment plans for FY18-19 and FY19-20.

9:00 a.m. – 11:00 a.m. October 21 (Monday)
1:30 p.m. – 3:30 p.m. October 22 (Tuesday)
2:00 p.m. – 4:00 p.m. October 23 (Wednesday)
8:30 a.m. – 10:30 p.m. October 24 (Thursday)
9:00 a.m. – 11:00 a.m. October 25 (Friday)