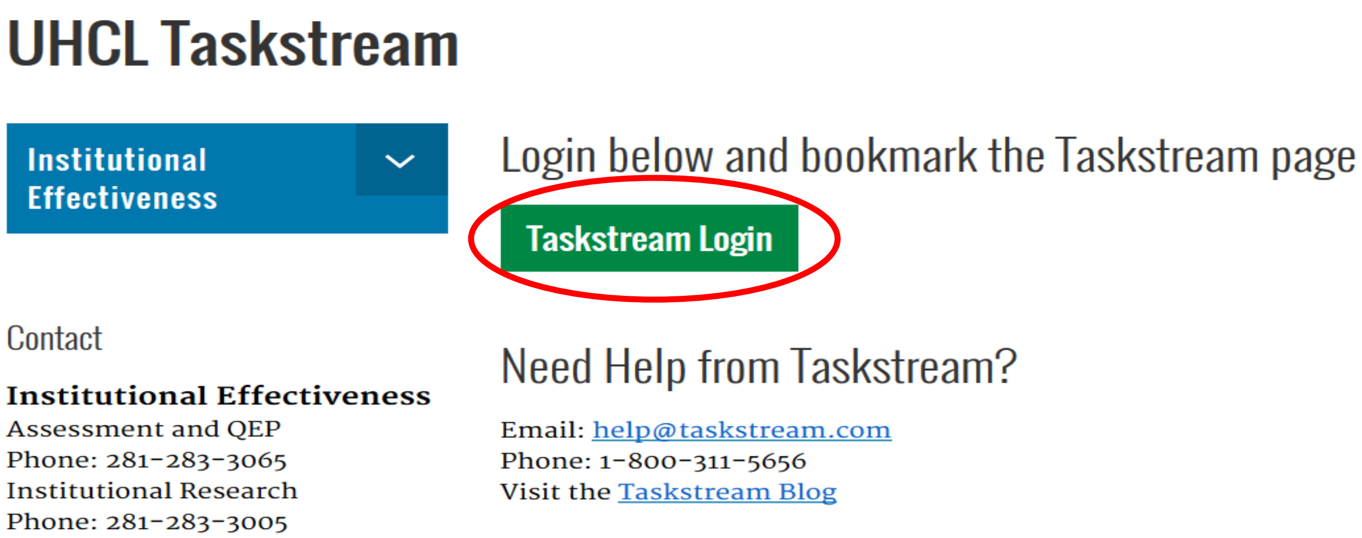
University of Houston Clear Lake
Office of Institutional Effectiveness

AMS Taskstream Guide

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).

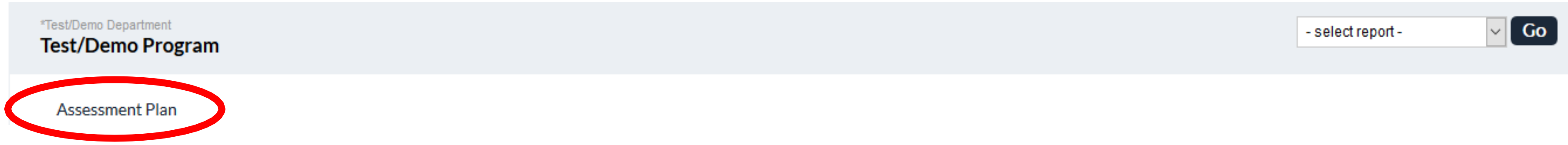


If you have login issues or need an account set-up, please contact the OIE department.

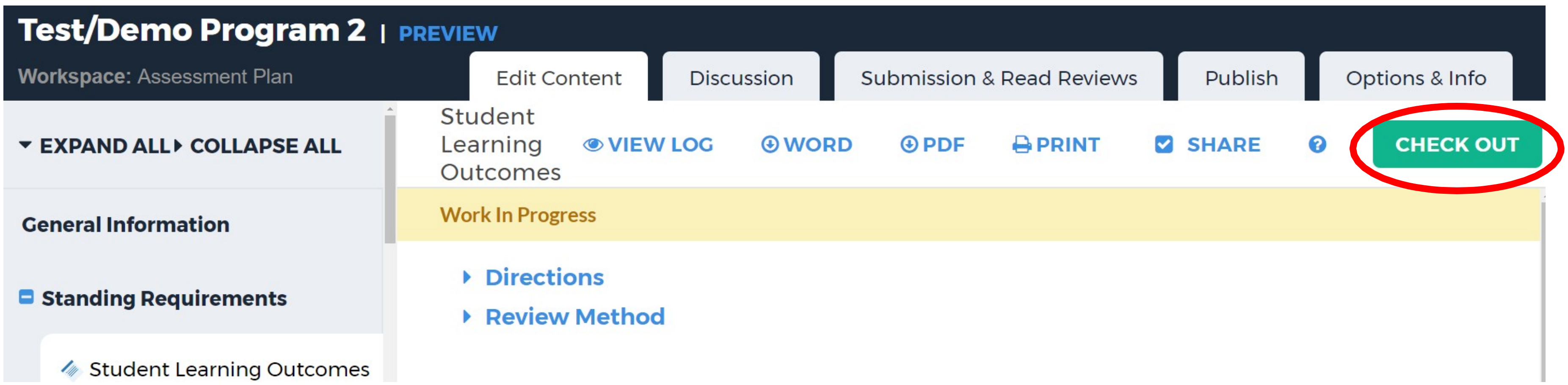
Technical Problems: Taskstream Mentoring Services help@taskstream.com 1-800-311-5656 press 2.

General Tips:

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



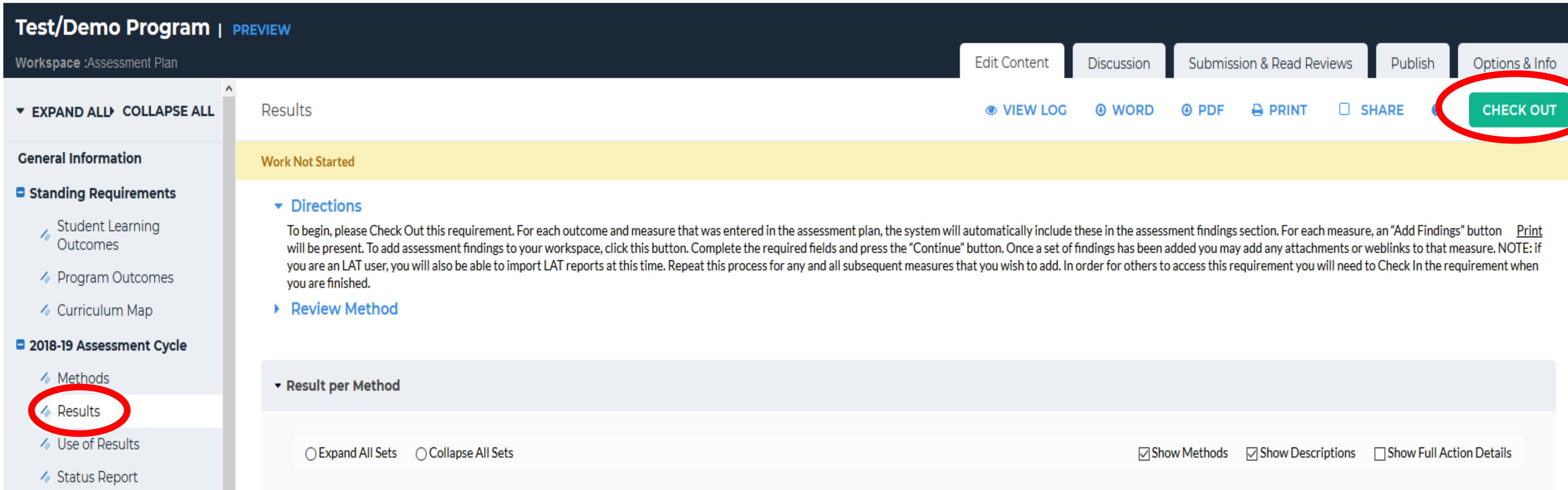
2. You must "Check Out" the area to edit it.



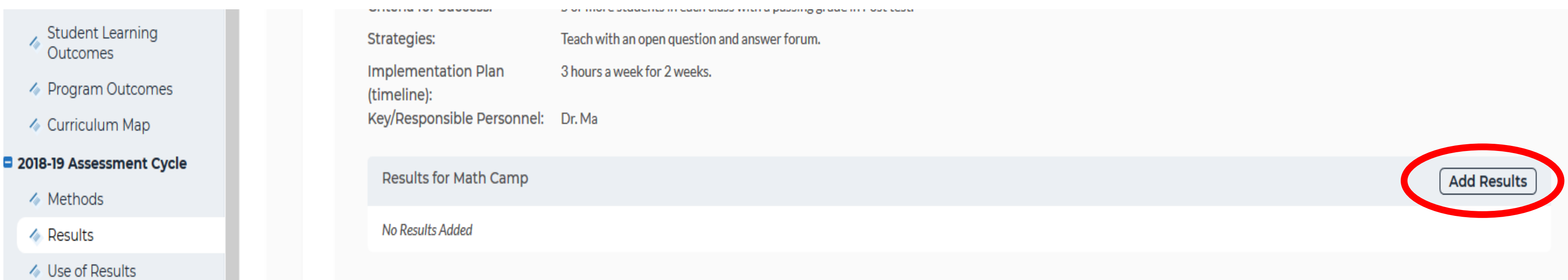
3. When the plan is completed and ready for review, you must submit **each** section individually. The sections are not automatically submitted to the reviewers. Details for submitting a plan are provided at the end of this Guide.

Step 1: Enter Results for 2018-2019

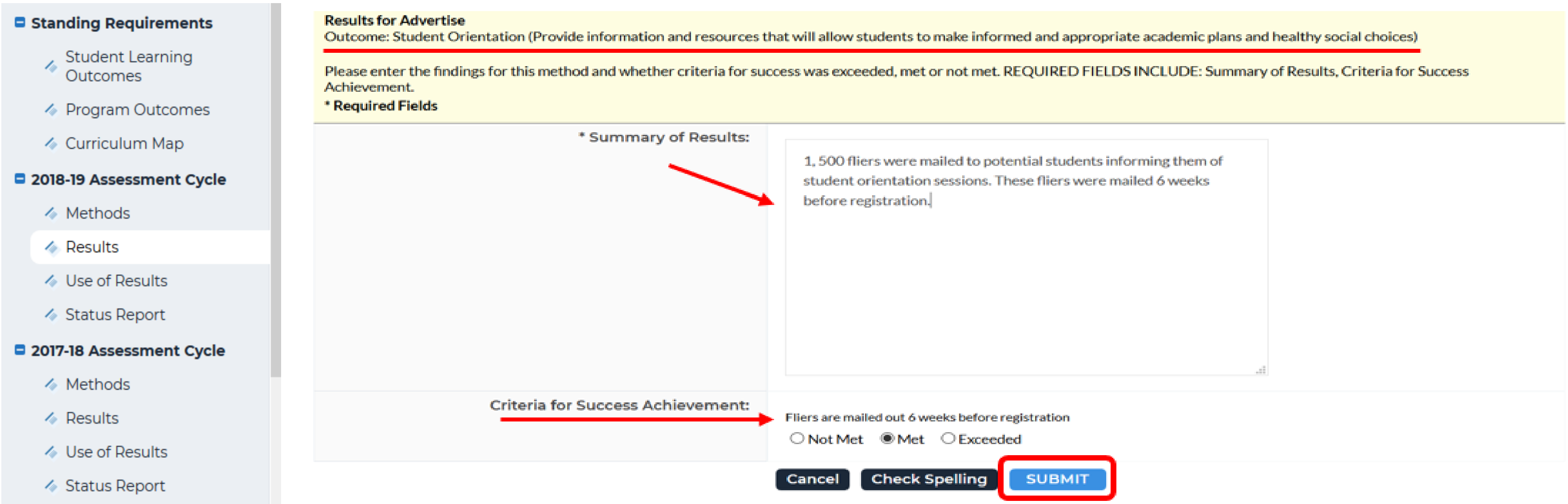
To enter results, click on the “Results” tab located in the left column. Then click “Check Out.” Your methods will be visible in Results for 2018-2019 for reference. **Please note, you must click “Check Out” before you can make changes to Results.



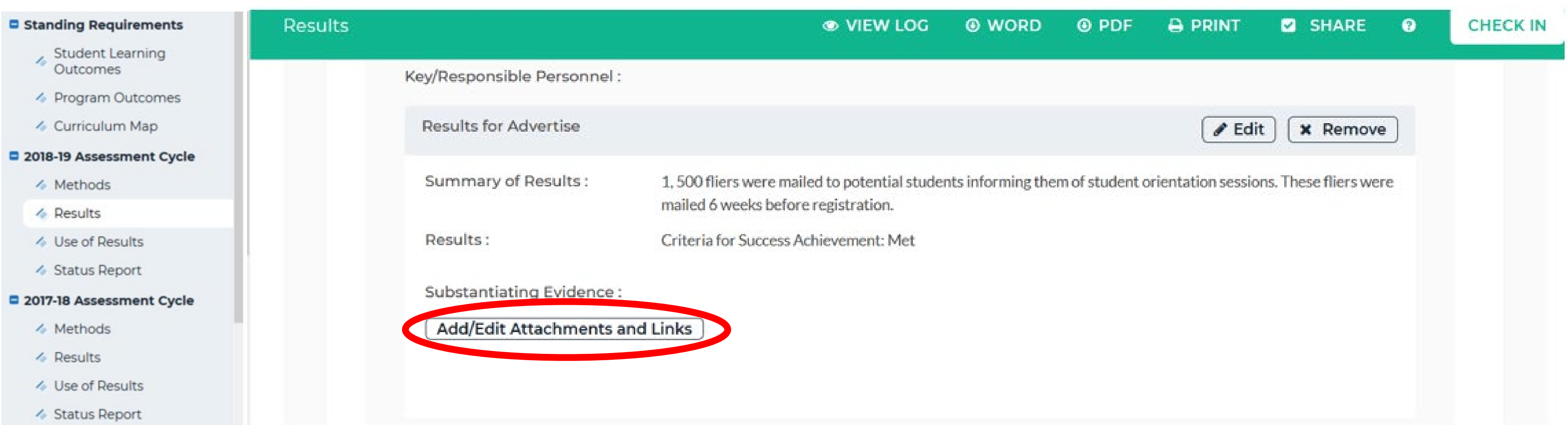
Then click on “Add Results.”



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.”



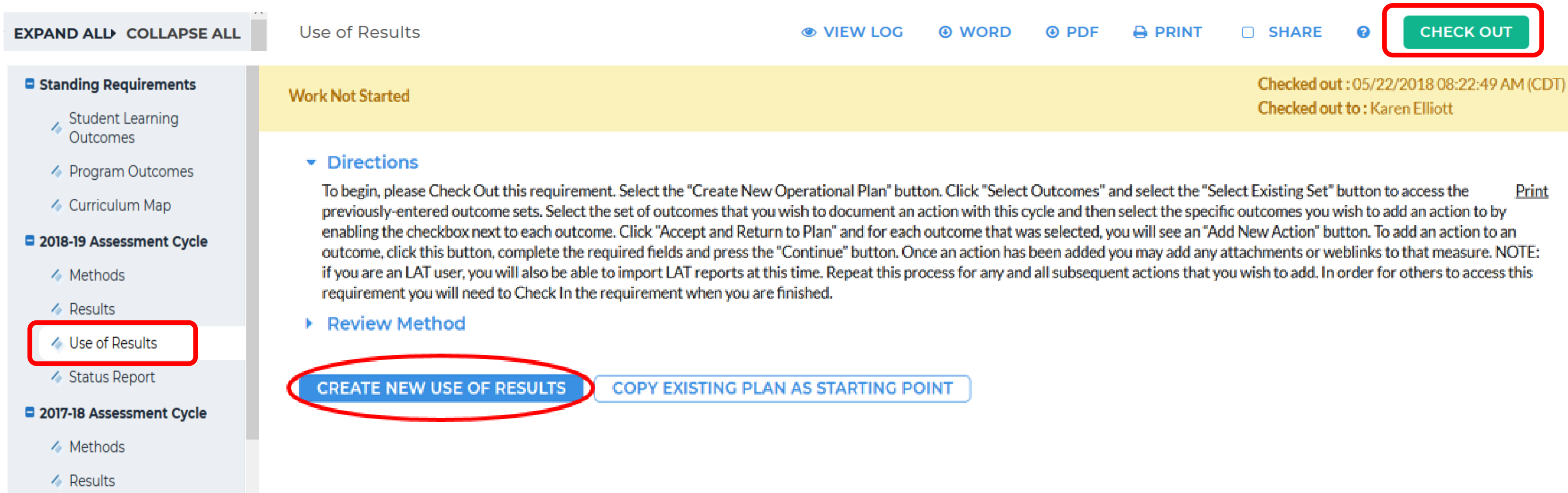
You can also enter substantiating materials to results. Once you click “Submit,” and are returned to the Results page, use “Add/Edit Attachments and Link” button below your Results. Substantiating Evidence could be an Excel spreadsheet of your assessment results, redesigned recruitment materials, or 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.



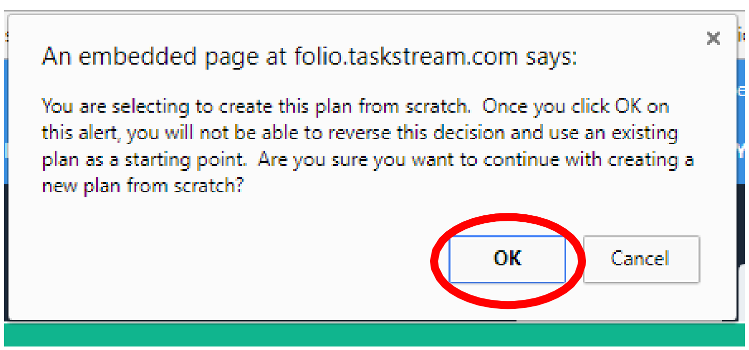
Step 2: Enter Use of Results for 2018-2019

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

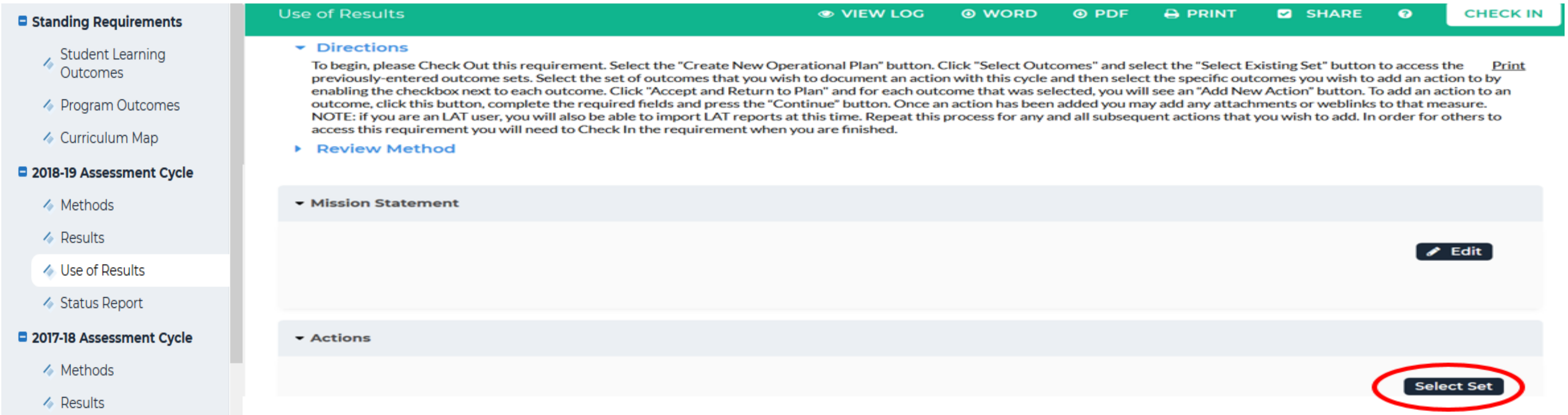
Once you have checked out “Use of Results,” you will be asked if you want to create new use of results or copy existing plan. **Because the results and use of results change each year, you need to select “Create New Use of Results.”**



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

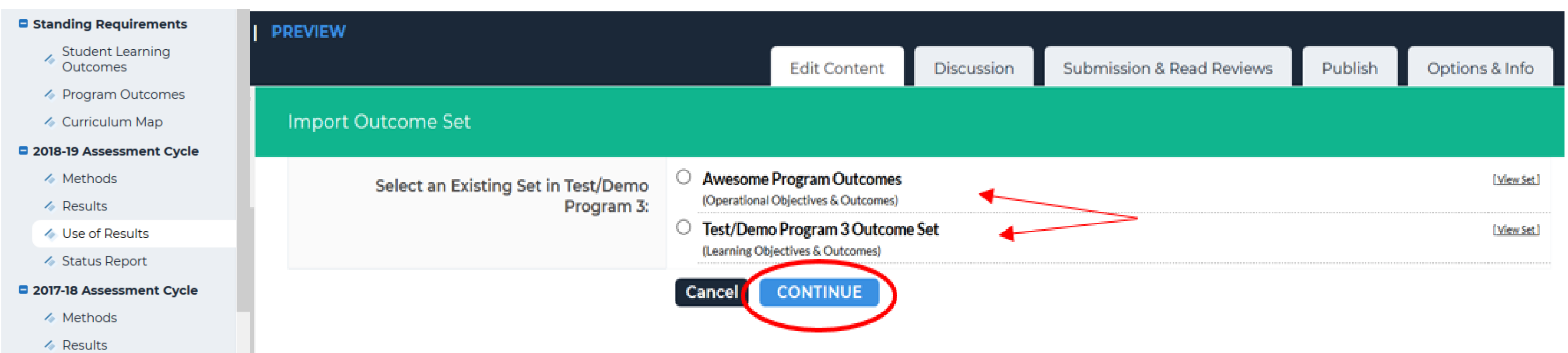


Then you will have to link your Standing Requirements. Click on “Select Set.”

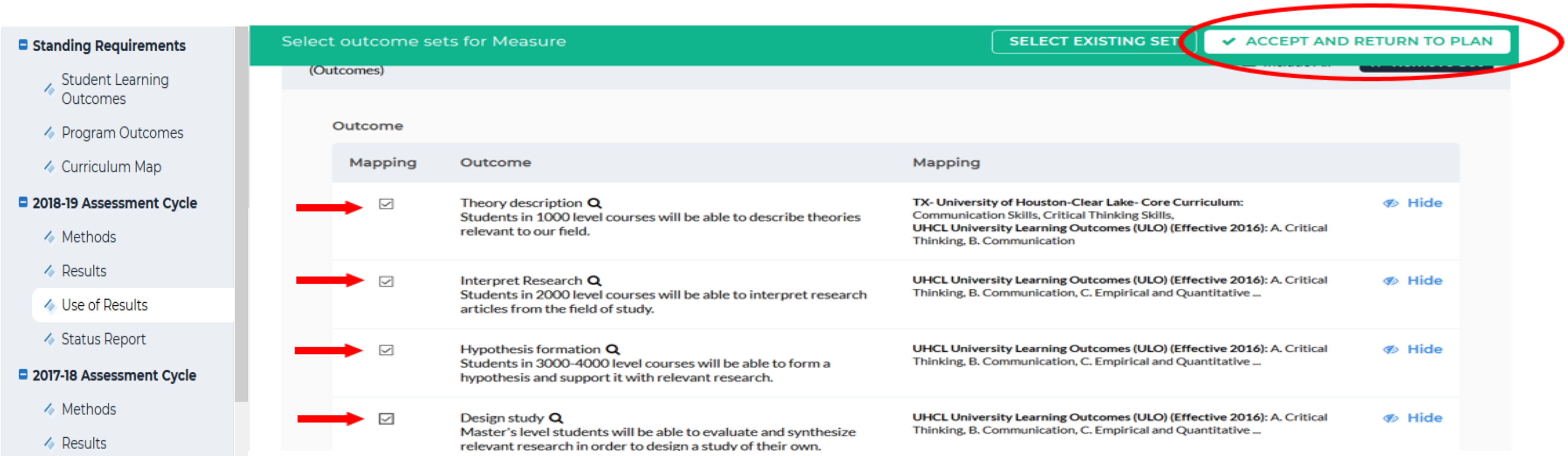


Then choose “Select Existing Set.”

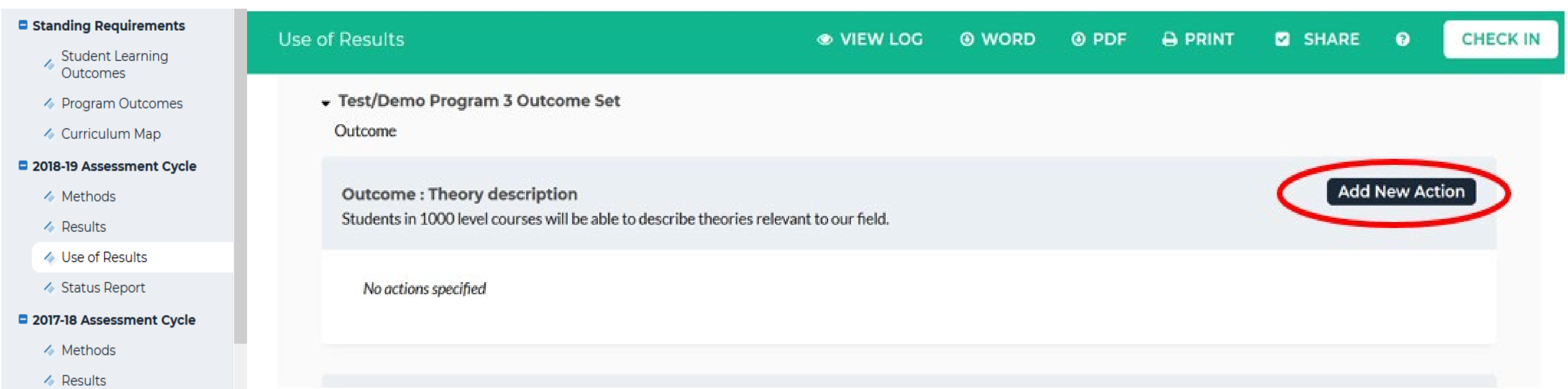
For each of your Standing Requirement sets (Program Outcomes and Student Learning Outcomes if applicable), you will need to select the set and click “Continue.”



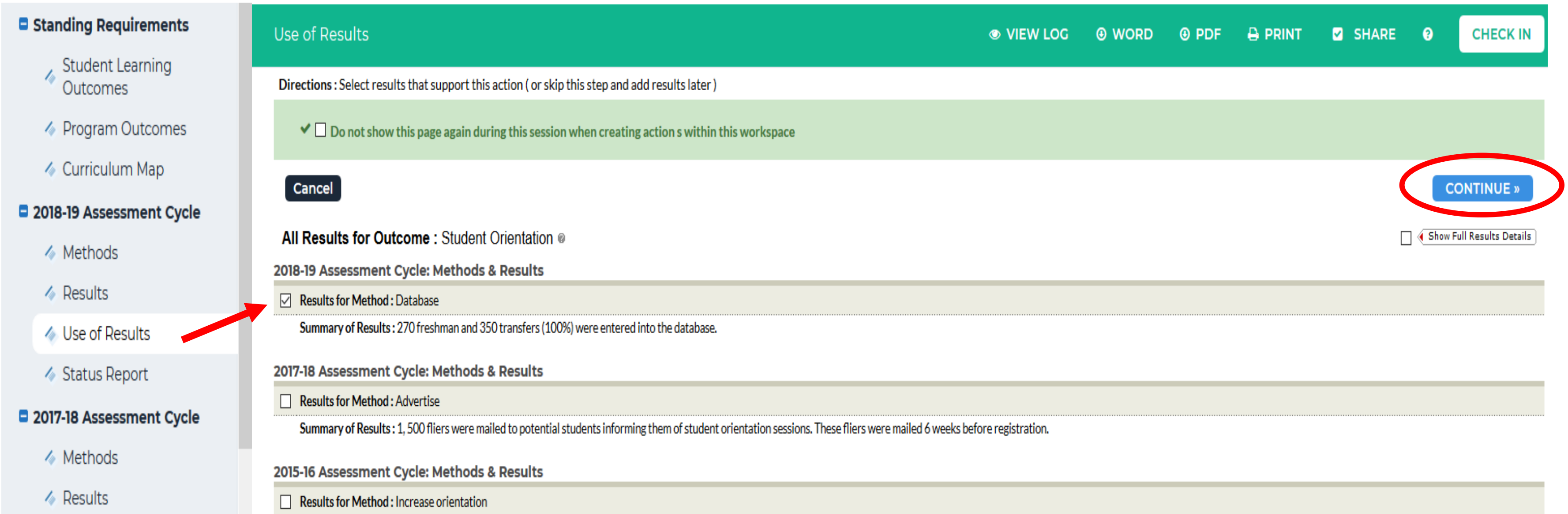
Then select all of the outcomes you wish to include and click on "Accept and Return to Plan" at the top of the page. Repeat if needed for other sets of Standing Requirements.



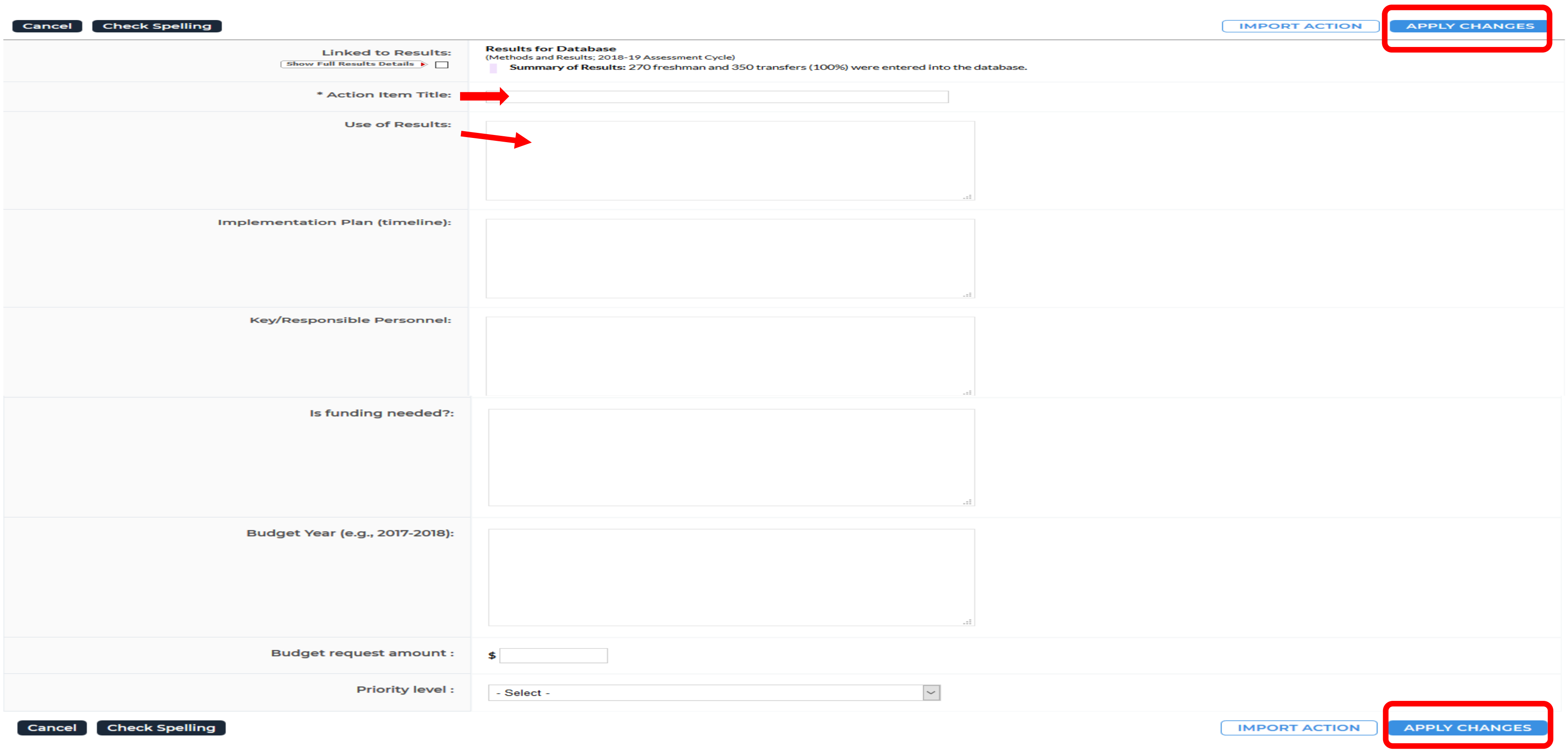
Once you have added all your Standing Requirements, you are ready to enter your "Use of Results." To enter them, click on the button called "Add New Action."



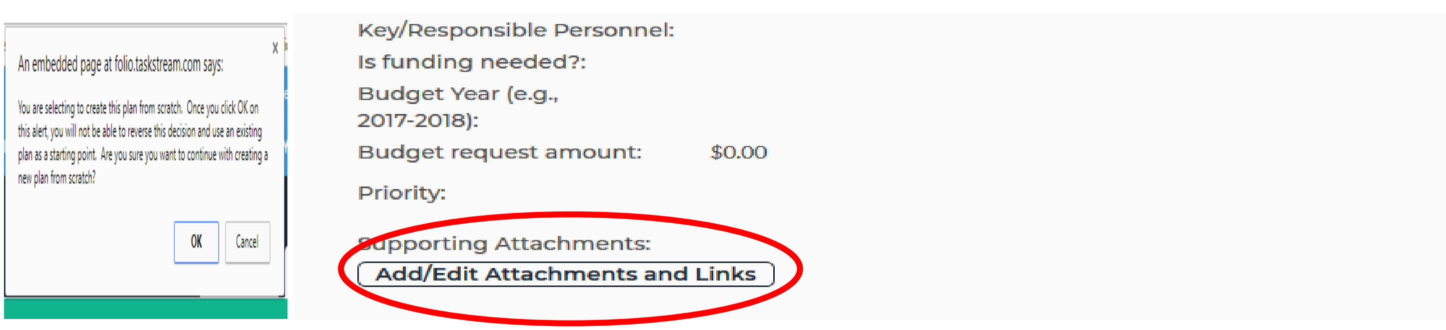
You will then see a screen to select which results should be linked to this “Use of Results.” Select the results for the assessment cycle you are working in and click “Continue.”



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.

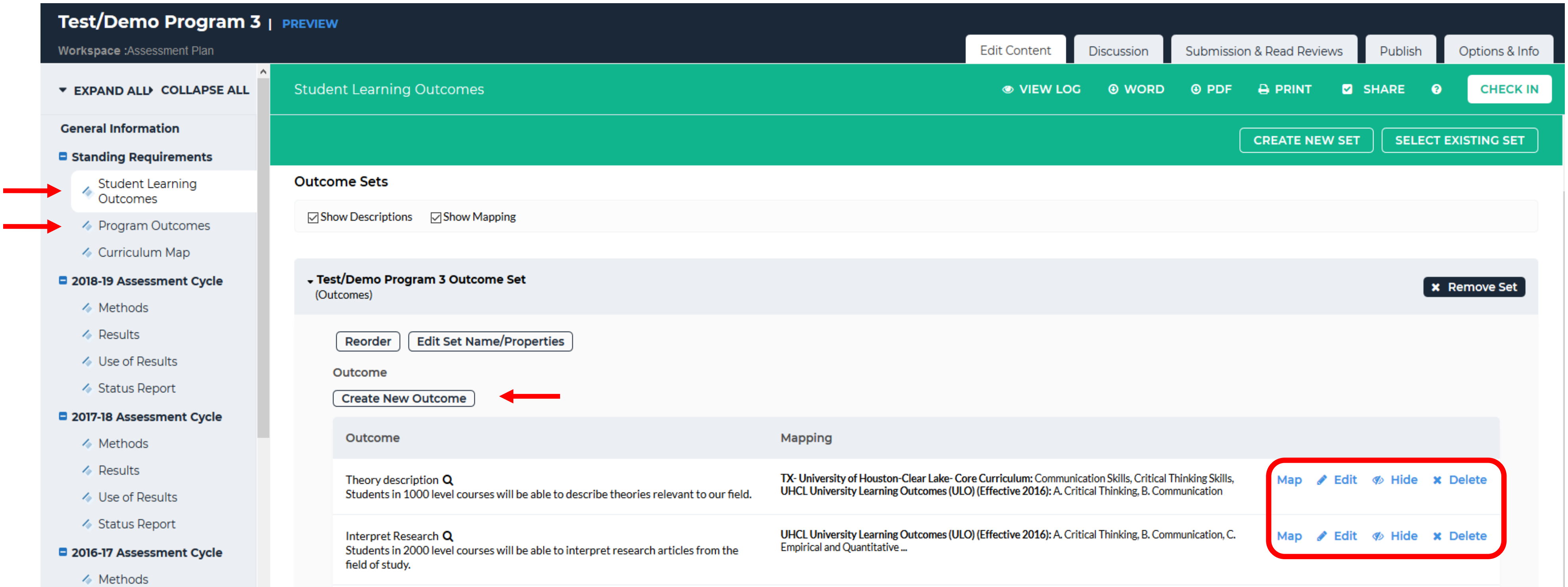


After Clicking "Apply Changes," you will be able to add "Supporting Attachments" in this section if desired.



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

Once you have completed the 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.



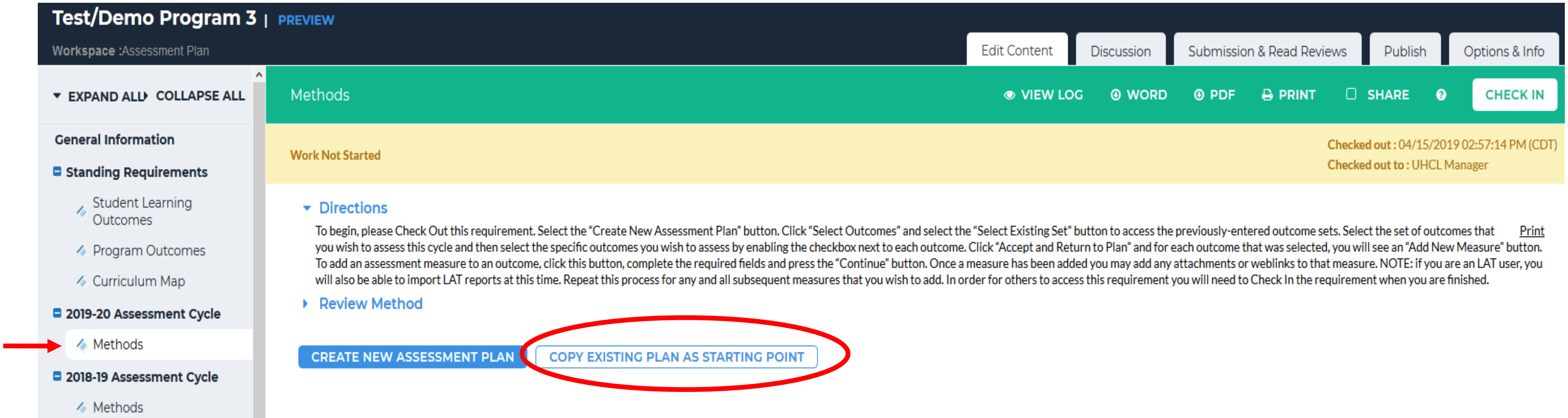
You can create a new set, create a new outcome, edit an existing outcome, edit mapping, hide an outcome, or if the outcome was never used you can delete the outcome. All of these options are on the right once the SLO or PO set is checked out.

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

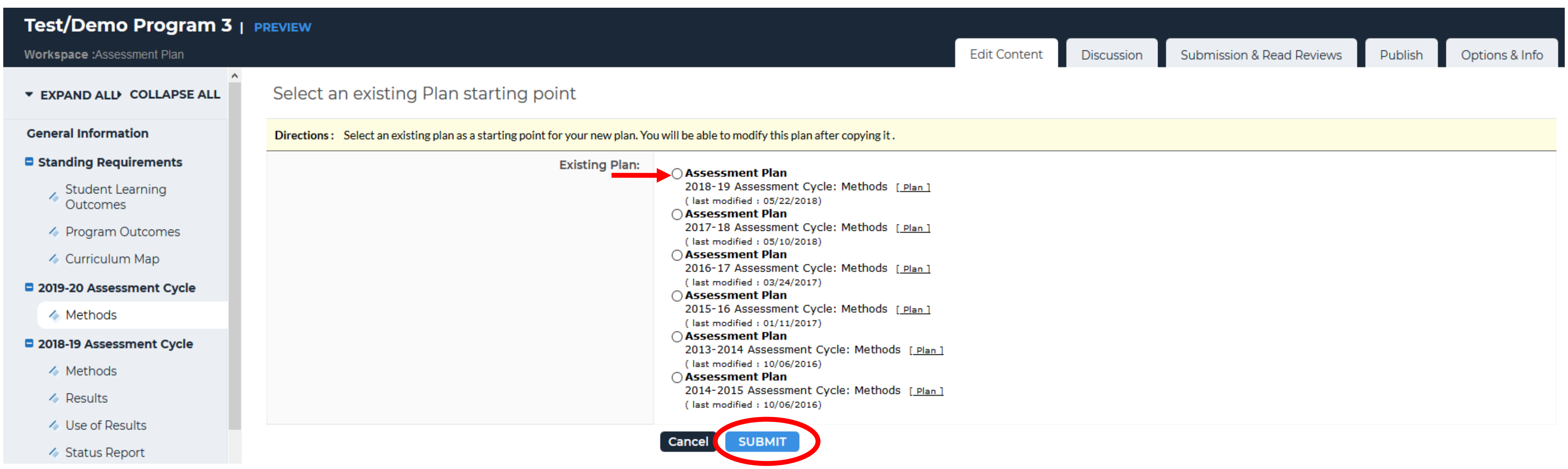
Step 4: Roll-over and Revise Methods for 2019-2020

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

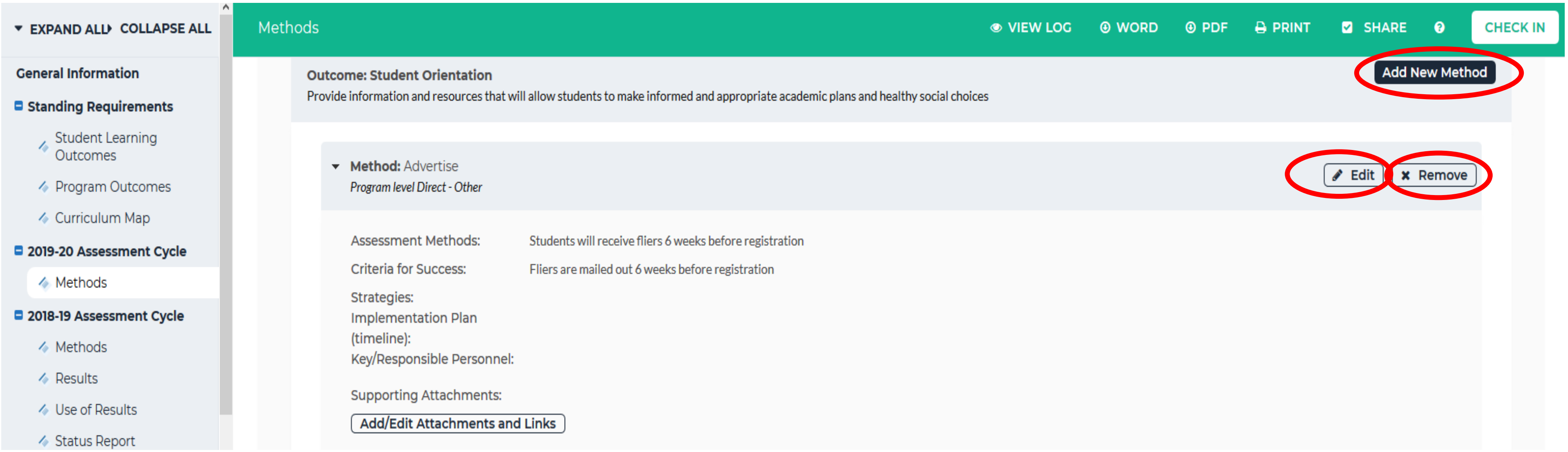
To roll-over “Methods,” you must first “Check Out” the area. Then click on “Copy Existing Plan as Starting Point.”



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

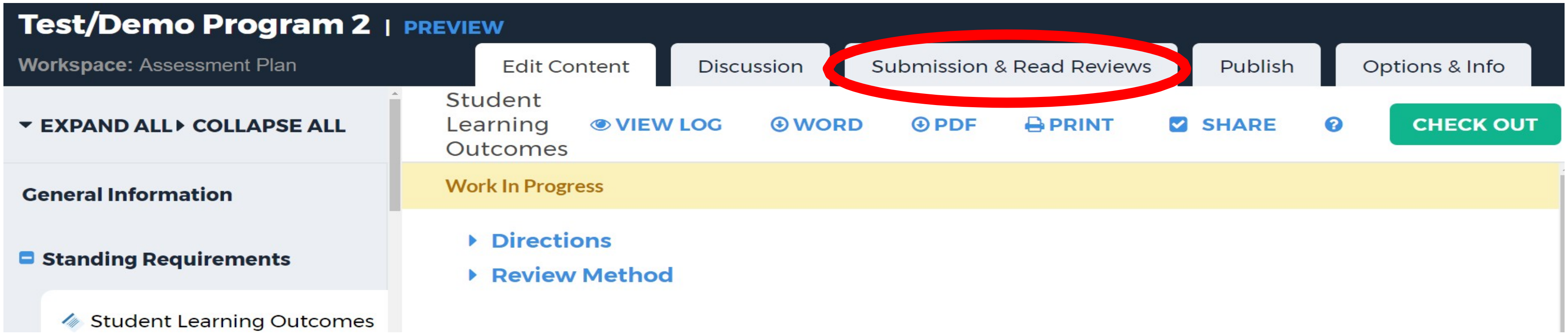


Then you can add a new method, remove a method you do not wish to measure during this cycle, or edit a method as needed.

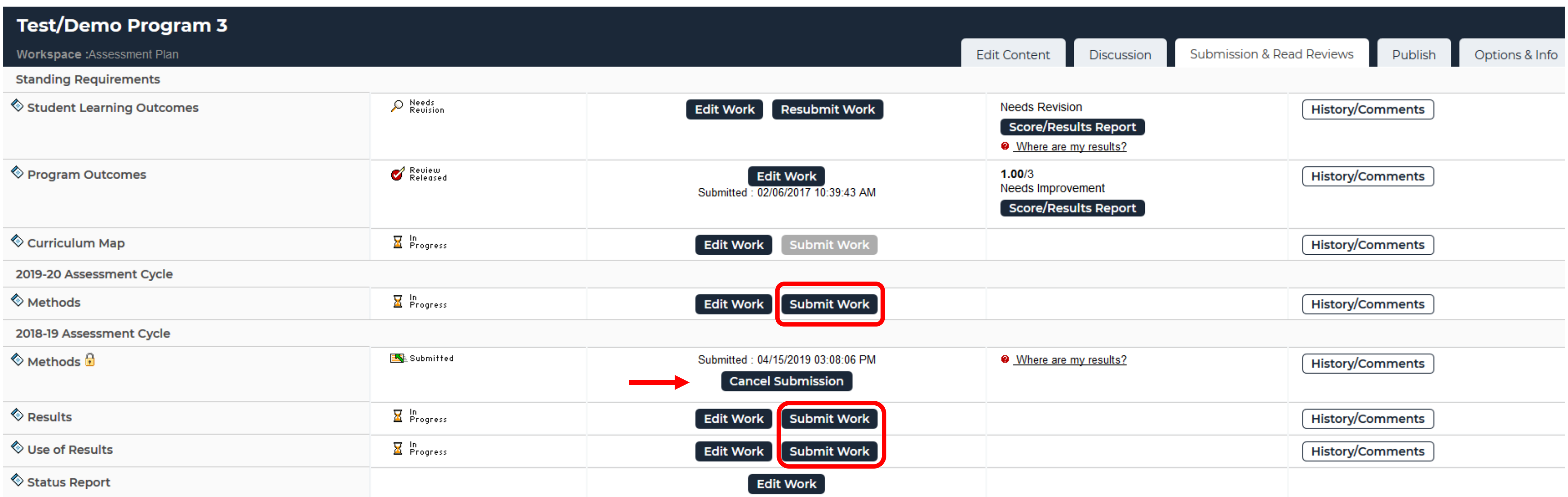


Step 5: Submit Assessment Components to OIE for Review.

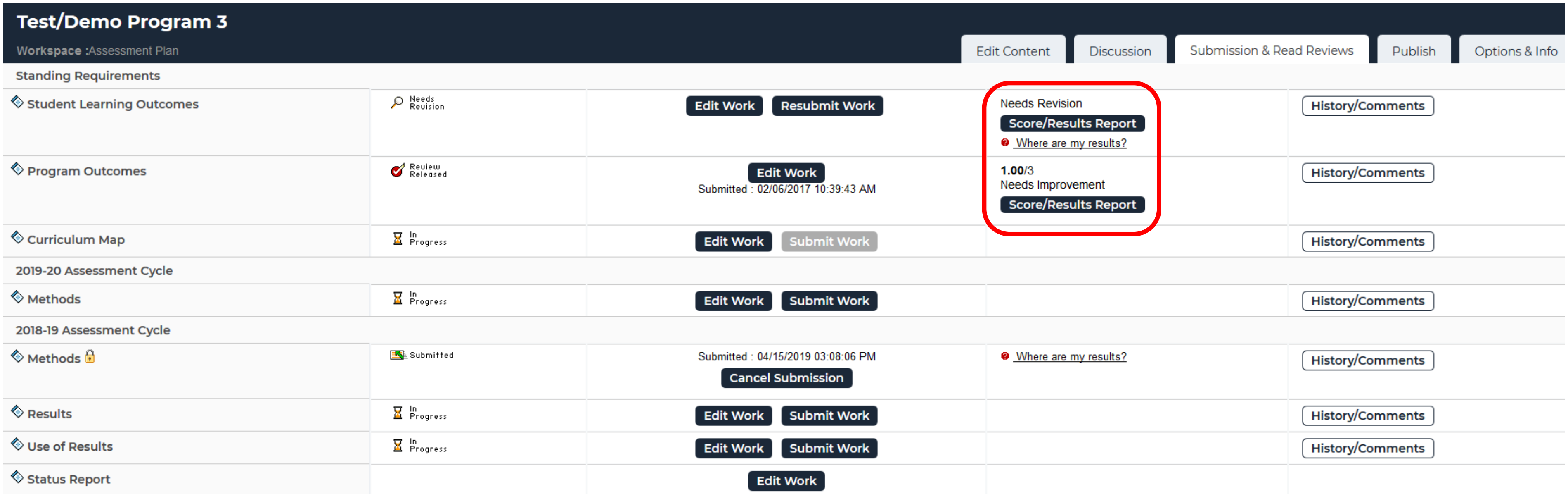
Once edits are complete and you are ready to submit your assessment plan to OIE for view, please click on the Submission and Read Reviews tab.



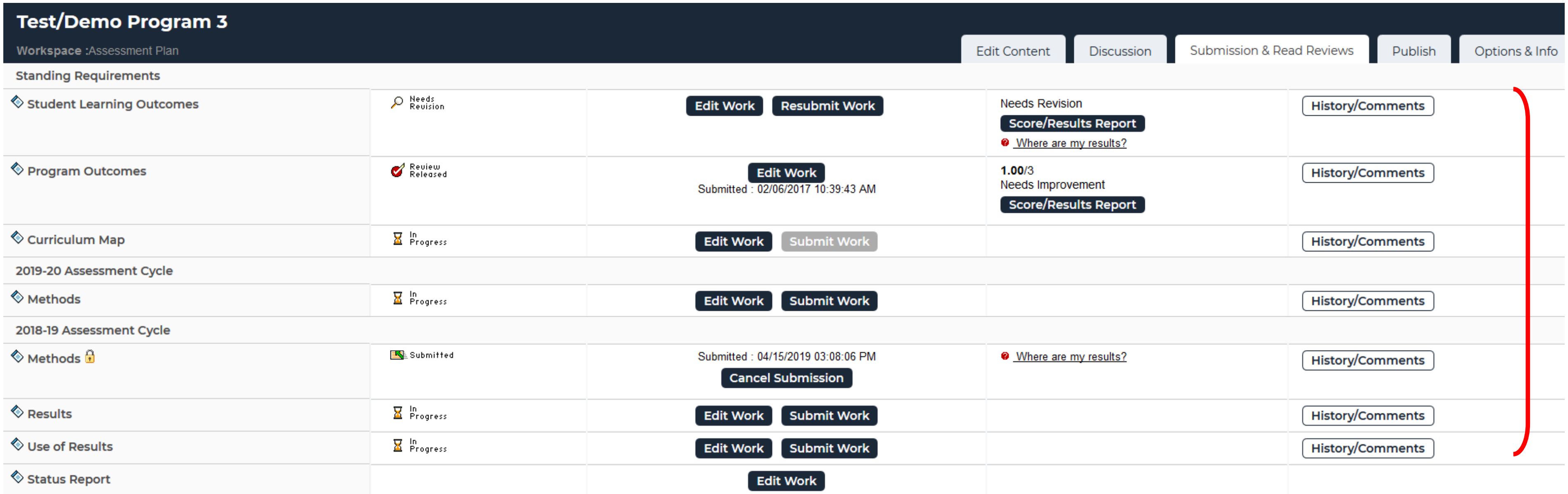
Click on the Submit Work buttons for 2018-2019 Results and Use of Results, and 2019-2020 Methods. If you submit a section and then realize you need to make an edit in that section, you can click on Cancel Submission. That will unlock the section and allow editing. ***Submission cannot be canceled if the section has already been reviewed.**



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.



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.

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)

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)

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