Editing Assessment Plans in TracDat

A supplement to the TracDat User Guide
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RUN REPORTS

To run reports to see the results for your department, click REPORTS tab.
B. Click **Run** next to the report you desire. In this case, you want to select **Unit Assessment Report – Four Column**.

*This report will appear as a four column report, which shows the outcomes and the results you’ve entered for each.

   i. The first column will list outcomes.
   ii. The second column will list means of assessment and criterion.
   iii. The third column will list your results
   iv. The fourth column will list your actions and follow-ups

C. If you select nothing and click **Open Report** the resulting report will show all outcomes, assessment methods, results and action plans that have ever been entered, regardless of the cycle dates.
D. If you wish to narrow the results, select appropriate filters (all are optional), then click **Open Report** at the bottom of the screen. (Note: to de-select filters, use keyboard command CTRL-mouse click.) For example, to pull a report for a particular cycle, select the **Assessment Cycle** desired and then click **Open Report**.
MANAGE DOCUMENTS
To see all your documents, organize them in folders, and to upload frequently-used documents, click on the main DOCUMENTS tab.

To organize folders, click on Document Repository. You have a default “General” folder.
Click **Add New Folder** at the bottom of the screen to create a new folder. When the dialog box appears, simply type the name you want to use for the folder and then click **Save**. In order to keep the documents organized it is helpful to name folders by assessment cycle.
If you would like to rename a folder, click **Rename Folder**, enter the new folder name and click **Save**.
To add a document, click button **Add New Document** at the bottom of the screen. Click **Browse**, select your document and click **Save**. The name auto populates with the file name. To change the name, type over the **Name**.
To view all related documents (ones that you previously related to assessment methods or results), click the sub-tab **Related Documents**.
To Share a folder with another unit, click **Document Repository**, then click **Share Folder**. Next, choose the unit(s) you want to share the folder with and mark the checkbox next to that unit(s).
Handling Changes to Assessment Plans

If there are no changes to your outcome or assessment method

- For now, do nothing
- When you collect data, add a new result (see #8)
- Choose the appropriate Assessment Cycle so that it is clear what cycle the result belongs to. *(Note: The Assessment Cycle drop down box is in a screen that appears after you select both the appropriate outcome and the particular assessment method for which you have new results.)*
1) If you have changes to the assessment method, but not the outcome
   a. Inactivate old method by un-checking the **Active** box
   b. Add new method (see #7).
2) If you need to make minor wording changes to the outcome
   a. Click on the **PLAN** tab.
   b. Click **Outcomes** below in the gray toolbar.
   c. Click **Edit** next to the outcome you wish to update.
   d. Copy and paste old wording into **Changes to Outcome** box
   e. Make your changes to the outcome wording, then click **Save Changes**
3) If you need to make major changes to the outcome
   a. Click on the PLAN tab.
   b. Click Outcomes below in the gray toolbar.
   c. Click Edit next to the outcome you wish to update.
   d. Under Outcome Status choose no longer desired
   e. Follow steps in #6 to create new outcome
4) If you will not be using the outcome this cycle, but plan to again
   a. Click on the **PLAN** tab.
   b. Click **Outcomes** below in the gray toolbar.
   c. Click **Edit** next to the outcome you wish to update.
   d. Under **Outcome Status** choose **inactive**
ADDING A NEW OUTCOME

If you need to add a new outcome

a. Go to the Plan tab
b. Click Outcomes below in the gray toolbar.
c. At the bottom of the screen, click button Add New Outcome.
d. Enter a name for the outcome in **Outcome Name** and add a brief description in the **Outcome** box.
e. For **Outcome Type**, select from the following:
   i. “Operational” if the outcome is related to a non-academic unit
   ii. “Learning” if outcome is related to student learning outcome
f. For **Outcome Status**, select from the following:
   i. “Active” if outcome is currently being assessed
   ii. “Inactive” if not assessing this outcome during the current cycle
   iii. “no longer using” if outcome is no longer relevant
g. Click **Save Changes** at the bottom of screen.
h. Click **Return** to see the list of outcomes.
ADDING A NEW ASSESSMENT METHOD

If you need to add a new assessment method
a. Go to the Plan tab
b. Select Means of Assessment in the gray tool bar
c. Your list of outcomes will appear in the drop down menu for Outcome Name.
d. Select the outcome for which you wish to set the means of assessment.
e. Click Add New Assessment Method
f. In **Assessment Method** box, write a brief description of how the outcome will be assessed/measured.

f. In the **Criterion** box, write your benchmark or other standard for measuring the success of your outcome.

b. If relevant, indicate your timeline in the **Schedule** box.

d. Click **Save Changes** at the bottom.

e. Click **Return** to see the list of outcomes.
ADDING A NEW RESULT

If you need to add a result

a. Click the main RESULTS tab and click Add Result on the button at bottom of the screen.
b. Click **Select** next to the outcome for which you want to enter results.
c. If you’ve added a means of assessment for the outcome, it will show up in a pop-up window.
d. Click **Select** next to the “Assessment Method” for that outcome in the pop-up window.
e. In the **Results** box, enter *short description* of the findings of the assessment method for that outcome. Result should be relevant to the criterion, if criterion was added.

f. **Result Date** will automatically fill in the current date. Reports can be filtered by this date. If result occurred earlier than the date of entry, you can change the date to reflect this.
g. Use drop-down menus for the **Result Type** and **Assessment Cycle**. (Note: these are required fields.)

h. For **Result Type**, select from the following:
   i. “Criterion Met” if the result has met the criterion set for that outcome
   ii. “Criterion Not Met” if the result has not met the criterion set for that outcome
   iii. “Inconclusive” if the result is inconclusive
i. For **Assessment Cycle**, select the correct dates for the cycle in which your results were assessed.
j. Click **Save Changes** at the bottom of the window.

k. To add an action to your result, click “add action” on the right-hand side.
I. Type action into box
   m. Click **Save Changes**