

User Manual

Version 1.0 - August 24, 2010

Table of Contents

1. College Assessment Reporting Data System (CARDS) Overview.....	3
1.1. Plan Types and Creation	3
1.2. Annual Plan Content.....	3
1.3. System User Types.....	3
CARDS System Work Flow and Assessment Plan Lifecycle	3
2. Initiating a CARDS Session	6
2.1. Accessing the CARDS System.....	6
2.2. Logging into CARDS	6
2.2.1. CARDS User Entry Panel	8
2.2.2. CARDS Administrator Entry Panel	8
2.2.3. Learning Plans.....	9
2.2.4. Administrative Plans.....	9
2.3 Icons Used with CARDS Administrative and Learning Plan Displays	10
3. CARDS User Actions.....	11
3.1 Adding an Outcome to a Learning or Administrative Plan	11
3.2 Updating an Outcome	14
3.3 Finalizing and Locking an Assessment Plan	14
3.4. Modifying a Plan that has been returned for Update by the Plan Administrator.....	15
3.5 Implementing a Plan and Documenting Results	16
4. CARDS Administrator Actions.....	20
4.1. Approving Assessment Plan Outcomes	20
4.2. Requesting Modifications to Plan Outcomes	23
4.3. Approving Plan Data and Results (Completing a Plan).....	26
4.4. Returning a plan for revised data and results	28

1. College Assessment Reporting Data System (CARDS) Overview

The College Assessment Reporting Data System combines software that creates web pages based on user actions along with a database that stores Learning and Administrative Assessment Plan information entered or updated by system users and administrators. Specifically, the system is a repository for entering, monitoring, and updating annual progress plans for all academic and administrative units at Trinity Valley Community College

1.1. Plan Types and Creation

The Cards Systems monitors two types of Annual Progress Plans:

- Administrative Annual Plans
- Learning Enhancement Annual Plans (LEAP)

Both plan types are created in the CARDS system annually by the Office of Institutional Research for all reporting units at the college. Learning Enhancement Annual Plans are created for use by Academic and Workforce Education Division Chairpersons. Administrative Annual Plans are created for all non-academic units, including some administrative plans for academic unit managers or administrators.

1.2. Annual Plan Content

When annual plans are created, they are merely a shell that is available for use by each reporting unit. Prior to entering data in the system, users determine what their annual goals are for improving student learning or enhancing the operation of their area of responsibility. Goals are divided into more specific areas of action with predicted or desired outcomes and a method of measuring progress/success. After these outcomes are determined, they are entered into the CARDS system. Each annual plan in the CARDS system can have multiple outcomes. Administrative plans have Administrative Outcomes and Learning Enhancement Annual Plans have Learning Outcomes. This has led to some terminology confusion. Often we generically speak of learning outcomes as LEAPs and Administrative Plans as AOs.

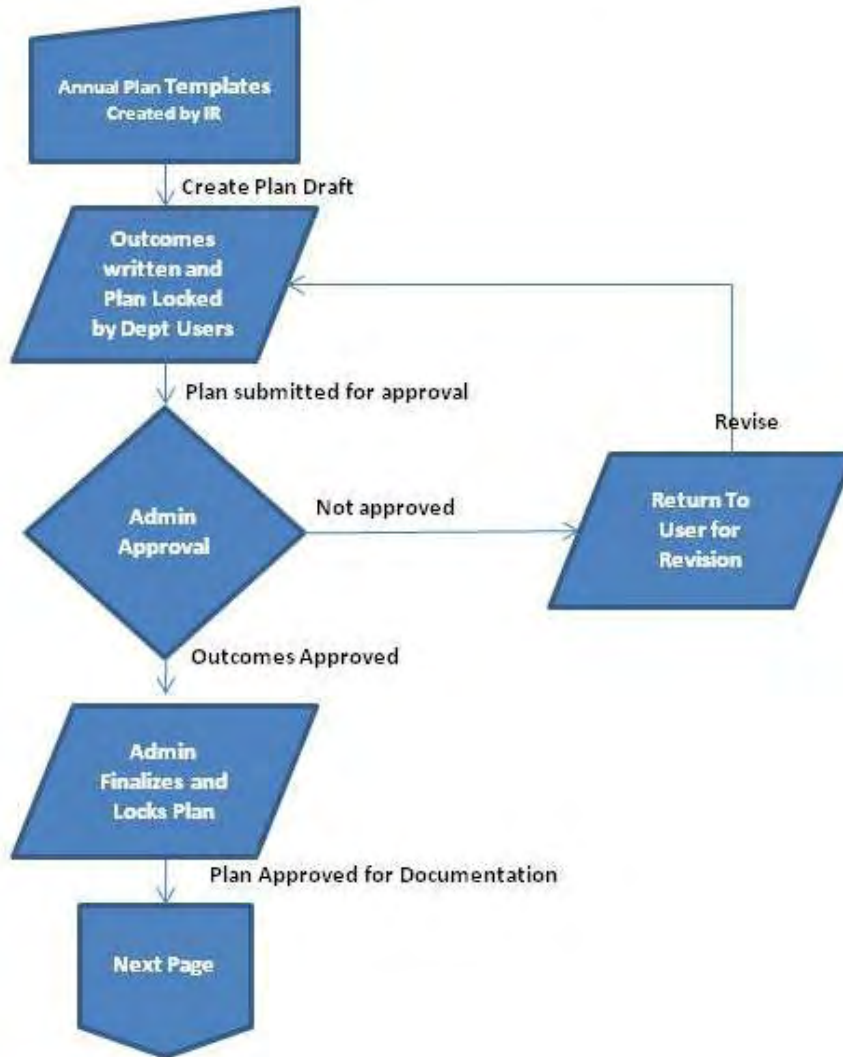
1.3. System User Types

Personnel using the CARDS system are either designated as users or administrators. User indicates someone that can enter outcomes for an annual plan, update outcomes, and enter result data as actions are completed. Administrators approve created outcomes and results. Administrators can also return created outcomes and outcome results for user editing. Most plan administrators are also users for at least one annual plan.

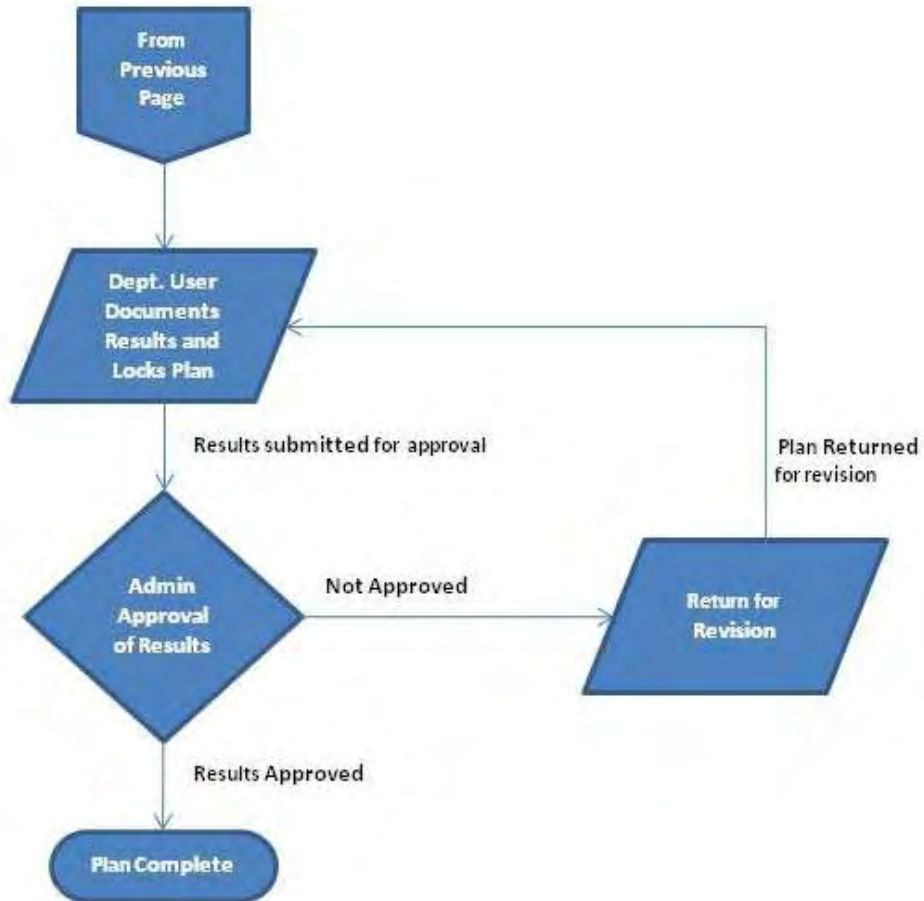
CARDS System Work Flow and Assessment Plan Lifecycle

Diagrams on the following pages illustrate the flow of an Annual Plan and its outcomes through the CARDS system from creation to completion:

CARDS Assessment Plan Lifecycle



CARDS Assessment Plan Lifecycle (cont.)



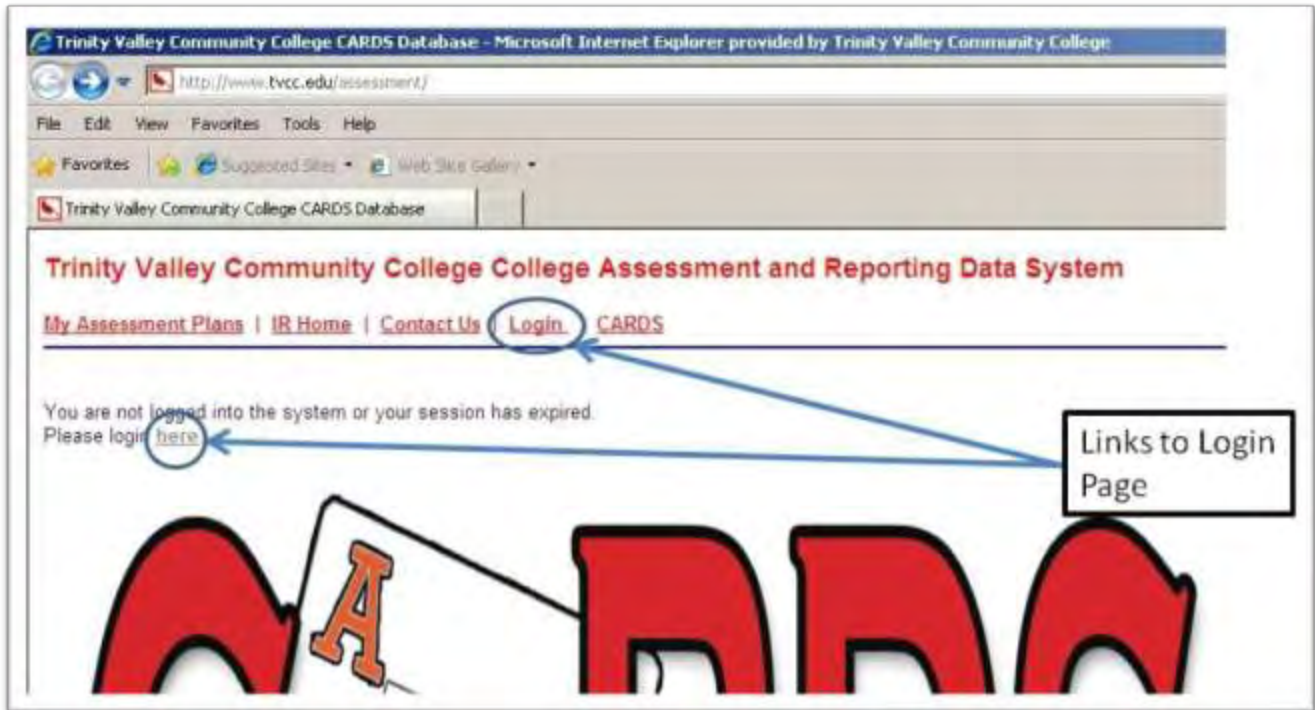
2. Initiating a CARDS Session

2.1. Accessing the CARDS System

The web-based CARDS system can be accessed using the following address:

<http://www.tvcc.edu/assessment>

A miniature representation of the welcome screen is shown below:



After the page opens, click on either one of the links circled in the above graphic and you will be directed to the CARDS Login page.

2.2. Logging into CARDS

- On the Login page (Graphic on the following page) enter your Username and Password, then click on the submit button. (Upon assignment of a user or administrator role in the CARDS system, the Institutional Research Office will email or call you with your assigned Username and Password). Your username and password can also be retrieved by clicking on the “Forgot your Login Information? Please [click here](#)” link on the login page. If you click the link, you will be redirected to a page where you can enter your TVCC email address, after clicking the **Submit** button on the page, the CARDS system will send an email to your TVCC address with your username and password. Additionally, you can always call the Institutional Research Office at 903-675.6282 or 903-670-2643.

Trinity Valley Community College College Assessment Reporting Data System (CARDS)

Enter your Username and Password, then click "Submit" to log in to the Assessment Reporting Tool, and work on your assessment plans. Contact the Office of Planning and Institutional Effectiveness if you need assistance (675-6282 or [email here](#)).

Username:

Password:

Forgot your Login Information? Please [click here](#)

CARDS Home Page

- b. After logging into the system, you will be directed to your personal Assessment Plan page.
 - If you are an Assessment Plan user, you will have access to your assessment plan(s) and be able to enter or update administrative or learning outcomes. Each uncompleted plan is represented as a row of cards that correspond to the level of progress made towards completion of the plan.
 - If you are a plan administrator, you will be able to monitor/approve the plans and outcomes that you administer as well as add or update outcomes for any plans for which you are directly responsible. Plans that you administer will always be displayed above plans for which you are directly responsible.
 - Previous year plans will also be displayed in your account until they are archived out of the system. If the plan has been completed. The word "Completed" will be displayed in place of the row of cards.

Several examples of personal pages are in the following sections.

2.2.1. CARDS User Entry Panel

The graphic below shows a users page with one assessment plan. Note the blue bar with the text “You are USER for the following plans...”

The screenshot displays the user interface for a user named Marshall Reeves. At the top, there are navigation links: My Assessment Plans, Home, Contact Us, Logout, CARDS Home, My Reports, and Search. Below this is a user information section with buttons for 'Edit Your Info' and 'Change Password'. The user's details are: Name: Marshall Reeves, Campus: TVCC-Athens, Address: Athens - GSC106, Campus Phone: (903) 670-2643, Email: mreeves@tvcc.edu, and Last login: 8/12/2010 11:29:45 AM.

Below the user information is a section titled 'Assessment Plan Workflow' with a yellow box containing the text: 'The status of each of your plans is listed below. Any currently required actions for a plan are highlighted in yellow. Click a highlighted yellow area to work on that plan. Remember to Finalize and Lock each of your plans after you finish working on it.'

A blue bar indicates 'You are USER for the following plans...'. Below this, the user's affiliation is shown: College/Division: Institutional Effectiveness, Department/Unit: Institutional Planning. The section is titled 'ADMINISTRATIVE OUTCOMES' and 'Administrative Planning Unit: Institutional Planning'. A timeline shows 'EARLY SUMMER BEFORE YEAR BEGINS', 'SEPT. 1 - AUG. 31', and 'EARLY FALL AFTER YEAR ENDS'. The workflow steps are: 'FY11 Plan' (highlighted in yellow), 'CREATE PLAN 01' (highlighted in yellow), 'ADMINISTRATOR APPROVAL', 'IMPLEMENT PLAN', 'DOCUMENT OUTCOMES', 'ADMINISTRATOR APPROVAL', and 'Finalize & Lock Plan'.

2.2.2. CARDS Administrator Entry Panel

If the user is also an administrator for one or more plans, the administered plans will be listed under a blue bar with the text “You are ADMINISTRATOR for the following plans...” as illustrated below:

The screenshot displays the user interface for an administrator. A blue bar indicates 'You are ADMINISTRATOR for the following plans...'. Below this, the user's affiliation is shown: College/Division: Academic Education, Department/Unit: Division-Fine Arts. The section is titled 'ADMINISTRATIVE OUTCOMES' and 'Administrative Planning Unit: Division-Fine Arts'. A timeline shows 'EARLY SUMMER BEFORE YEAR BEGINS', 'SEPT. 1 - AUG. 31', and 'EARLY FALL AFTER YEAR ENDS'. The workflow steps are: 'FY11 Plan', '10 CREATE PLAN 01', 'ADMINISTRATOR APPROVAL', 'IMPLEMENT PLAN', 'DOCUMENT OUTCOMES', and 'ADMINISTRATOR APPROVAL'.


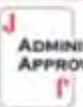



2.2.3. Learning Plans

The displayed items for learning plans use red images. The following graphic shows one active learning plan and one plan with all actions completed. These items would be displayed under the blue bar with the “You are USER for the following plans....” text as shown in section 2.2.1.

College/Division: Academic Education
Department/Unit: Sociology

LEAPS - LEARNING ENHANCEMENT ANNUAL PLANS


Program: Sociology

	MID SUMMER BEFORE IMPLEMENTATION	IMPLEMENTATION	MID SUMMER AFTER IMPLEMENTATION
FY10 Plan			
			

College/Division: Academic Education
Department/Unit: AAT- Education

LEAPS - LEARNING ENHANCEMENT ANNUAL PLANS

Program: AAT- Education

	MID SUMMER BEFORE IMPLEMENTATION	IMPLEMENTATION	MID SUMMER AFTER IMPLEMENTATION
FY09 Plan			

College/Division: Academic Education
Department/Unit: Geography

LEAPS - LEARNING ENHANCEMENT ANNUAL PLANS

Program: Geography

	MID SUMMER BEFORE IMPLEMENTATION	IMPLEMENTATION	MID SUMMER AFTER IMPLEMENTATION






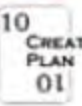
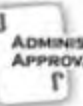



2.2.4. Administrative Plans

Administrative plans use gray images. Like the learning plans, the following would appear below the blue bar with the text “You are USER for the following plans....”

College/Division: Academic Education
Department/Unit: Division Social Sciences

ADMINISTRATIVE OUTCOMES

Administrative Planning Unit: Division-Social Sciences

	EARLY SUMMER BEFORE YEAR BEGINS	SEPT. 1 - AUG. 31	EARLY FALL AFTER YEAR ENDS
FY11 Plan			
			
			Finalize & Lock Plan
FY10 Plan			
			

2.3 Icons Used with CARDS Administrative and Learning Plan Displays

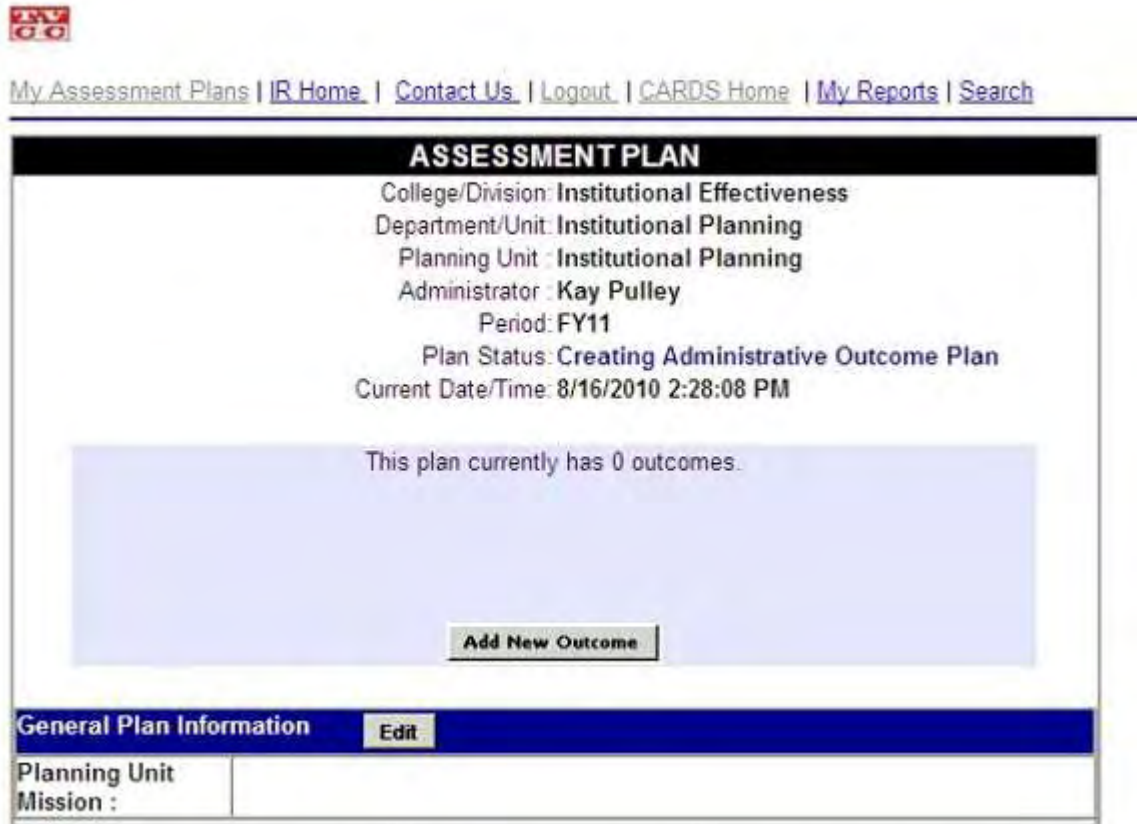
The icons used to display learning or administrative plan status are based on representations of playing cards as displayed in the previous graphics. A tilted card that is outlined in red on your Assessment Plan page indicates that you, as a user or administrator, have an action to complete before the plan can move to another stage or be completed. A tilted card with a gray outline indicates that your counterpart (whether user or administrator) must complete an action to move or complete the plan. Cards are flipped to show value (10 – Create Plan, J – Administrator Approval, Q-Implement Plan, K – Document Outcomes, and A – Administrator Approval of Completed Plan) equating to movement through the plans lifecycle advances. The “10” card and the “K” card can also display the text “10-Revise Plan” or “K-Revise Outcomes” if the administrator has returned a plan for modification of initial outcome content before plan approval or of the outcome data collection and results after the plan has been implemented.

3. CARDS User Actions

3.1 Adding an Outcome to a Learning or Administrative Plan

The steps for adding an outcome to a Learning or Administrative Plan are:

- Log into the CARDS System
- Scroll down your Assessment Plans page until you find the desired plan
- Click on the tilted card (10-Create Plan) and a page similar to the following graphic should appear:



- Click on the **Add New Outcome** button.
- A form will open to allow entry of Outcome information. The form is quite large. The graphic on the following page only represents the top of the page:

- The form has the following sections:
 - Goal (Text box entry)
 - Outcome Description (Text box entry)
 - Implementation Strategy (Text box entry)
 - Assessment Method (Text box entry)
 - Criterion (Text box entry)
 - Relationship to the Learning Initiative (Dropdown list selection)
 - Narrative of the relationship to the Learning Initiative (Text box entry)
 - Relationship to Unit Mission (Text box entry)
 - Select up to 3 Strategic Planning Goals from the following boxes (Dropdown list selection)
 - Relationship to Strategic Plan Goal (Text box entry)
 - Operational Budget Implications (Text box entry – for submitting department use)
 - Personnel Budget Implications (Text box entry – for submitting department use)
 - Equipment Budget Implications (Text box entry – for submitting department use)
 - Personal Notes (Text box entry – suggested for use to document location of results documentation)
 - Data Summary: Analysis & Evaluation (Text box entry)
 - Changes as a Result of Evaluation (Text box entry)
 - Each of the data entry points also has a help link that gives additional instruction on the type of information to enter in the text box or dropdown list. There will not necessarily be an entry in every text box. Additionally, the last two text boxes, Data Summary and Changes as a Result of Evaluation, are not active during outcome creation.
- After all outcome information is entered, users should click on the **Save Changes** button at the bottom of the form. Your browser will display a new page showing a synopsis of the data entered similar to the following example:

ASSESSMENT PLAN

College/Division: Institutional Effectiveness
 Department/Unit: Institutional Planning
 Planning Unit: Institutional Planning
 Administrator: Kay Pulley
 Period: FY11
 Plan Status: Creating Administrative Outcome Plan
 Current Date/Time: 8/16/2010 3:53:22 PM

This plan currently has 1 outcomes.

Move To: [Outcome 1](#)

Add New Outcome

General Plan Information

Planning Unit
 Mission :

Outcome 1

Description & Methodology

Goal
 Improve the tracking of Assessment Plan Status and the administration of the CARDS system

Outcome Description
 Create an environment that promotes the completion of all Assessment plans in the fiscal year of their entry.

Implementation Strategy
 Create monthly reports for distribution to Assessment Plan Administrators with information about the status of all plans under their cognizance

- To return to your Assessment Plan page click on the “My Assessment Plans” link at the top of the Plan Synopsis page.
- Multiple outcomes can be entered for each plan and information about each outcome will appear on the Synopsis page as illustrated in the previous example. This is the same summary of outcomes that your plan administrator will see when approving your plan.

3.2 Updating an Outcome

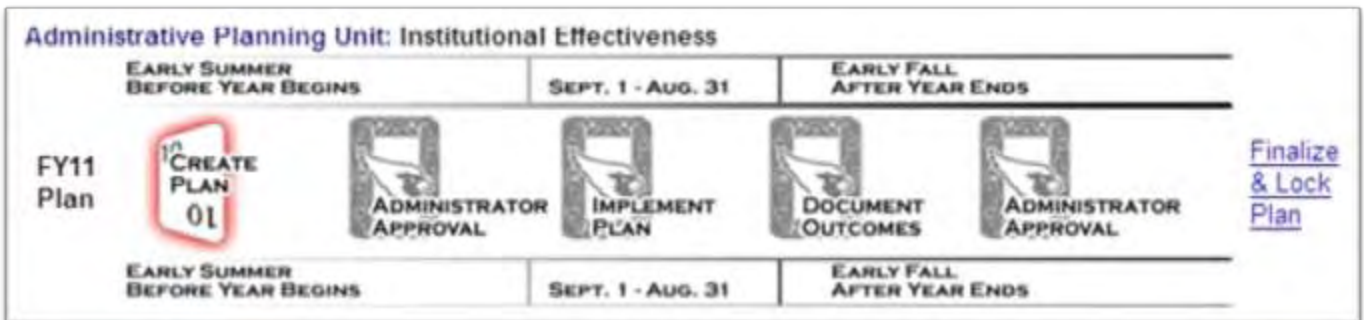
Outcomes can be modified until the plan is finalized & locked for submission to the plan administrator. To update a plan:

- Log into the CARDS system
- Scroll down to the desired plan on your Assessment Plan Page
- Click on the “10-Create Plan” card icon
- The plan synopsis page will be displayed and there are edit buttons for each outcome that will reopen the outcome entry form to allow updates
- After updates/changes have been made, click the Save Changes button on the form.

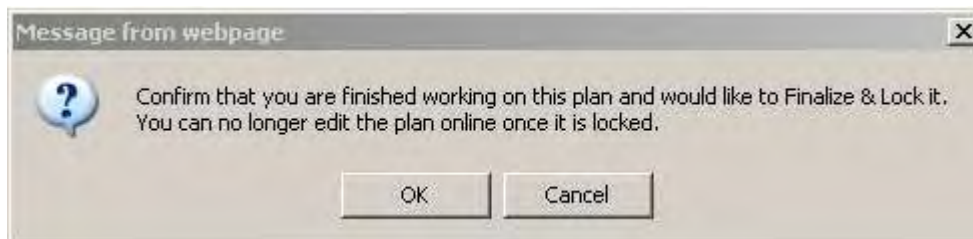
3.3 Finalizing and Locking an Assessment Plan

When all desired outcomes have been added to a Learning or Administrative Assessment plan, the plan must be finalized and locked. This process changes the status of the plan from “10-Create Plan” to “J-Administrator Approval.” The following describes what occurs when locking a plan:

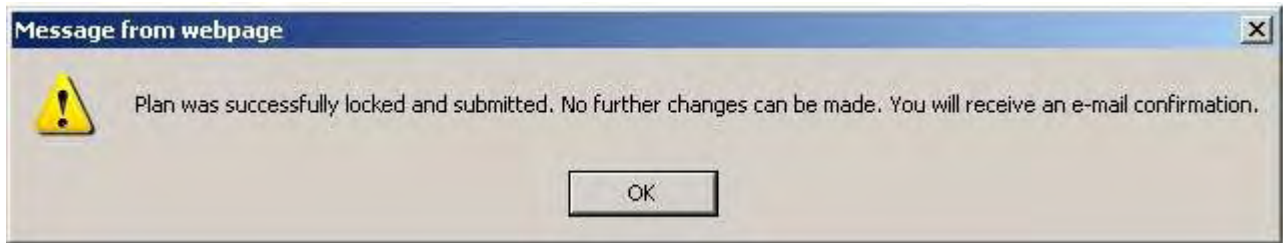
- Log into the CARDS system.
- Scroll down to the desired plan on your Assessment Plan page.
- Click on the “Finalize & Lock Plan” link at the right side of the row of cards associated with the plan as shown below:



- The following warning will pop-up on your screen



- Click the **OK** button in the warning message box to submit the plan for approval. The following message box will then appear:



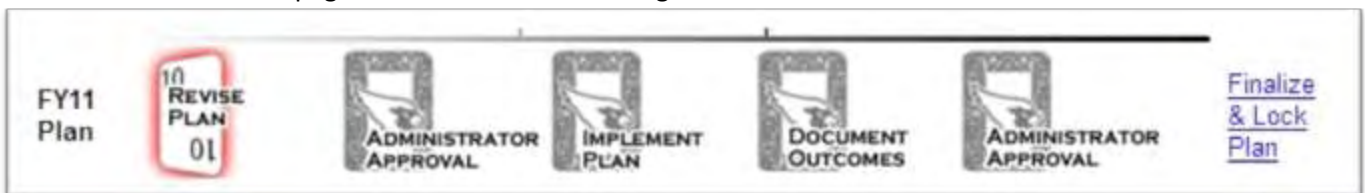
- Click on the **OK** button. The plan will be submitted and both you and your Plan Administrator will receive a copy of a system notification email about the plans changed status.
- On your Assessment Plan page, the row of cards for your plan should now look like the following:



- Notice that the Card for “10 – Create Plan” is now flat. The “J-Administrator Approval” card is now tilted, indicating that action is required.
- The gray border around the tilted card indicates that the required action must be completed by the Plan Administrator.
- You will still be able to click on the “10-Create Plan” card to view plan outcomes, but the content cannot be edited.

3.4. Modifying a Plan that has been returned for Update by the Plan Administrator

- When an administrator returns a plan for outcome revisions, the associated card row on your Assessment Plan page will look like the following:



- Note that the first (10) card is again tilted and outlined in red indicating action is required by the user. Additionally, the text on the card has changed to “Revise Plan”.
- Click on the “10-Revise Plan” card and you will be directed to the synopsis page for the plan.
- Scroll down to the bottom of the page and there is a block of text for Administrator Comments similar to the following

Equipment Budget Implications None
Personal Notes None
Administrator Comments and Departmental Response Comment: Please Add more information about your planned monthly status messages

- After reviewing the Administrator comments, use the Edit button to open the plan entry form and make modifications to the plan as necessary.
- After the changes are made, the plan is resubmitted (Finalized & Locked) in the same method that it was initially submitted (Section 3.3).

3.5 Implementing a Plan and Documenting Results

After an Assessment Plan’s outcome(s) are approved by the administrator, the row of card icons corresponding to the plan on the users Assessment Plan will appear as follows:

ADMINISTRATIVE OUTCOMES					
Administrative Planning Unit: Institutional Planning					
	EARLY SUMMER BEFORE YEAR BEGINS	SEPT. 1 - AUG. 31	EARLY FALL AFTER YEAR ENDS		
FY11 Plan	10 CREATE PLAN 01	J ADMINISTRATOR APPROVAL r	Q IMPLEMENT PLAN 0	DOCUMENT OUTCOMES	ADMINISTRATOR APPROVAL

At this point there is no action required until the activities associated with the approved Outcomes are completed. Before the results of the Outcomes can be documented, the Plan Administrator will have to Lock & Finalize the Assessment plan (Note: this is a second step required by the administrator). To move the Assessment Plan to a stage where outcomes can be documented, the Administrator must lock and finalize the plan on his or her Assessment Plans Page). When the plan has been finalized to allow entry of results data, the row of card icons corresponding to the plan will appear as follows:

ADMINISTRATIVE OUTCOMES					
Administrative Planning Unit: Institutional Planning					
	EARLY SUMMER BEFORE YEAR BEGINS	SEPT. 1 - AUG. 31	EARLY FALL AFTER YEAR ENDS		
FY11 Plan	10 CREATE PLAN 01	J ADMINISTRATOR APPROVAL r	Q IMPLEMENT PLAN 0	K DOCUMENT OUTCOMES	ADMINISTRATOR APPROVAL
					Finalize & Lock Plan

To document results:

- Click on the K-Document Outcomes card. You will be directed to the plan synopsis page.
- Scroll to the bottom of each outcome and you will find a results section similar to the following graphic.

Results <input type="button" value="Edit"/>
Data Summary -- Analysis & Evaluation
Changes as a Result of Evaluation
Status: Not Approved

- Click on the edit button. The outcome entry form will be displayed with all text boxes in gray except for the Data Summary and Changes as a Result of Evaluation boxes.
- Enter outcome result data in the form and click on the Save Changes button at the bottom of the form.
- A changes saved message will be displayed.



- You will be returned to the synopsis page and the results section will show the added text as indicated below:

Results <input type="button" value="Edit"/>
Data Summary -- Analysis & Evaluation Monthly reports were delivered to Plan Administrators and at the end of the planning cycle 90% of the Administrative and Learning Plans were complete. The goal of 95% completion was not met.
Changes as a Result of Evaluation During the next planning cycle, memos about plan status will also be sent to plan users.
Status: Not Approved

- Click on the [My Assessment Plans](#) link at the top of the page to return to your Assessment Plan page
- On the row for the assessment plan you have been documenting, click on the [Finalize & Lock Plan](#) link as illustrated below:

ADMINISTRATIVE OUTCOMES

Administrative Planning Unit: Institutional Planning

	EARLY SUMMER BEFORE YEAR BEGINS	SEPT. 1 - AUG. 31	EARLY FALL AFTER YEAR ENDS	
FY11 Plan	10 CREATE PLAN 01	J ADMINISTRATOR APPROVAL ↑	Q IMPLEMENT PLAN 0	K DOCUMENT OUTCOMES K
			ADMINISTRATOR APPROVAL	Finalize & Lock Plan

- Warning messages will be displayed, similar to those shown when initially submitting outcomes, indicating that the plan will be locked and no changes can be made. Click on the OK button for all warning messages.
- If, after review, the Plan Administrator approves the entered results, the row for the plan on your Assessments page will appear as follows:

ADMINISTRATIVE OUTCOMES

Administrative Planning Unit: Institutional Planning

	EARLY SUMMER BEFORE YEAR BEGINS	SEPT. 1 - AUG. 31	EARLY FALL AFTER YEAR ENDS	
FY11 Plan	COMPLETED			

- If the Plan Administrator requires additional information before approving the completed outcomes, the row for the Assessment Plan display will change to look like the following graphic:

ADMINISTRATIVE OUTCOMES

Administrative Planning Unit: Institutional Planning

	EARLY SUMMER BEFORE YEAR BEGINS	SEPT. 1 - AUG. 31	EARLY FALL AFTER YEAR ENDS	
FY11 Plan	10 CREATE PLAN 01	J ADMINISTRATOR APPROVAL ↑	Q IMPLEMENT PLAN 0	K REVISE OUTCOMES K
			ADMINISTRATOR APPROVAL	Finalize & Lock Plan

- If you need to revise outcomes for plan completion, click on the “K-Revise Outcomes” and you will be redirected to the Plan Synopsis page.
- Scroll to the bottom of the Outcome(s) and review any commentary added by the administrator about the reason the results were rejected.
- Make changes as necessary and click on the Save Changes button at the bottom of the page
- A changes saved message will be displayed



- You will be returned to the synopsis page and the results section will show the added text.
- Click on the [My Assessment Plans](#) link at the top of the page to return to your Assessment Plan page
- In the same manner as use with the initial submission of Outcome results, Finalize & Lock the plan for administrator approval.

4. CARDS Administrator Actions

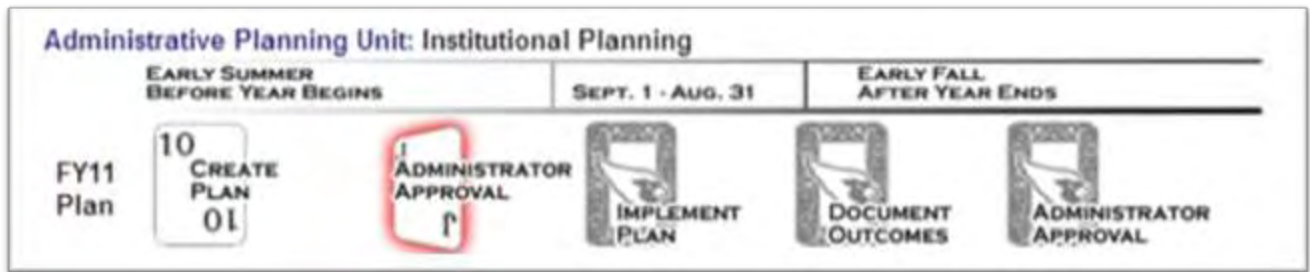
CARDS administrator actions fall into 4 categories:

- Approving outcomes associated with a plan
- Requesting modifications to outcomes associated with a plan
- Accepting Plan data and results (Completing a plan)
- Returning a plan for revised data and results

4.1. Approving Assessment Plan Outcomes

To approve Assessment Plan Outcomes:

- Log into the CARDS system.
- Scan through the assessment plans that you administer, looking for plans with a display row similar to the following:



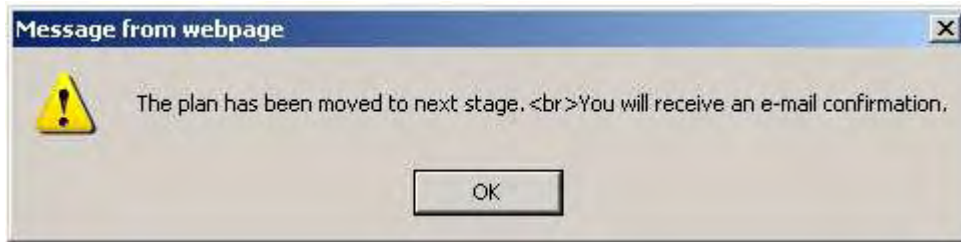
- Click on the tilted card that is highlighted in red.
- You will be redirected to a page with a synopsis of the Plan's outcomes. Similar to the example on the following page, Note these are two graphics, one showing the top of the page and a second showing the outcome approval block that is at the bottom of each displayed outcome:

ASSESSMENT PLAN	
College/Division: Institutional Effectiveness Department/Unit: Institutional Planning Planning Unit : Institutional Planning Administrator : Kay Pulley Period: FY11 Plan Status: Administrator Approval of Plan Current Date/Time: 8/17/2010 10:48:00 AM	
This plan currently has 1 outcomes.	
Move To: Outcome 1	
<input type="button" value="Send it Back for Changes"/>	<input type="button" value="Finalize and Lock the Plan"/>
General Plan Information	
Planning Unit Mission :	
Outcome 1	
Description & Methodology	
Goal Improve the tracking of Assessment Plan Status and the administration of the CARDS system	
Outcome Description Create an environment that promotes the completion of all Assessment plans in the fiscal year of their entry.	
Administrator Comments and Departmental Response <input type="button" value="Add Comment"/>	
No comments exist.	
Status: Not Approved	
<input type="button" value="Approve"/>	

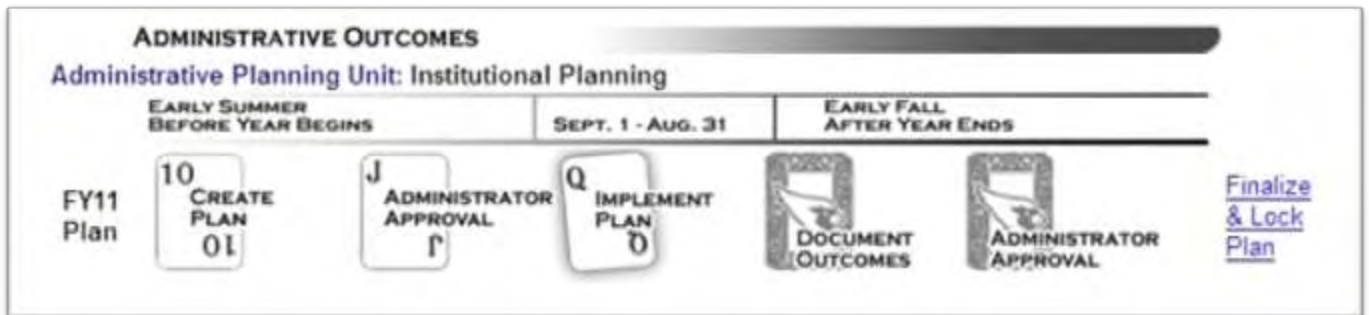
- If after review, the outcomes are deemed to be unacceptable, continue with the procedure outlined in section 4.2.
- If the Outcomes are acceptable, scroll to the bottom of each outcome and click on the **Approve** button in the Status section.
- After approving the outcomes, scroll to the top of the plan synopsis page and click the **Finalize and Lock the Plan** button. You will see the following message box:



- Click on **OK** to complete the movement of the plan to the implementation stage
- The following message will be displayed:



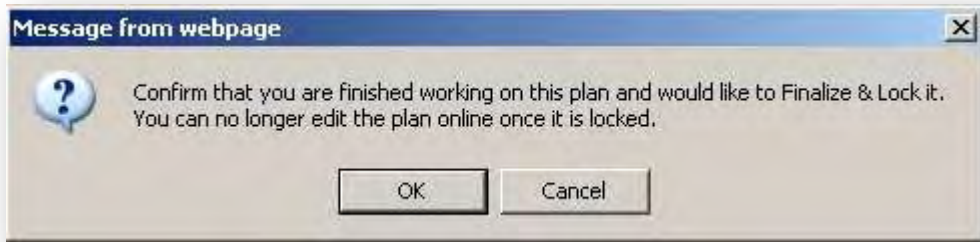
- At this point the CARDS system will send confirmation emails about the move to both you and the plan user.
- If you have not been automatically redirected to your Assessment Plans page, click on the [My Assessment Plans](#) link at the top of the Plan Synopsis page for redirection.
- The row of cards associated with the plan you just approved will appear as follows:



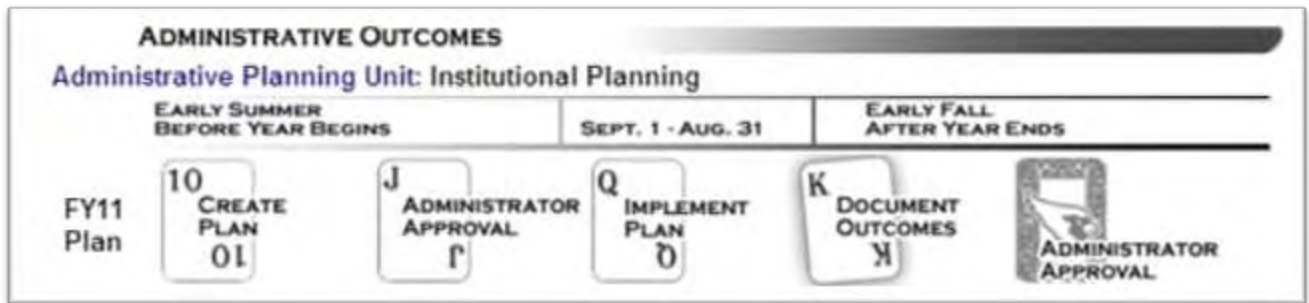
!!Important Warning!!

When a plan is at this stage, the user cannot document any outcome results. You must finalize & lock the plan by clicking on the link provided on the right side of the row. It is advisable to do this now, allowing plan users to document outcome progress/results as they occur.

- After clicking on [Finalize & Lock Plan](#) on the right side of the applicable plan’s row of cards, you will again see the warning/message blocks:



- Email confirmation of the change in the Plans status will be sent to both you and the plan user.
- Click the **OK** button on both messages and the plan’s card row on your Assessment Plans page will display as follows:



- This completes the initial plan approval process. Notice that the “K-Document Outcomes” card is now tilted and outlined in gray. This indicates that action on the plan is now in the hands of the user for documentation of the associated outcomes.

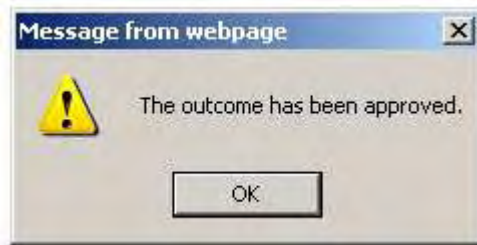
4.2. Requesting Modifications to Plan Outcomes

Upon review of the outcomes associated with a plan, the administrator may determine that more information is required about one or more of the outcomes. In these cases, the administrator should take the following actions:

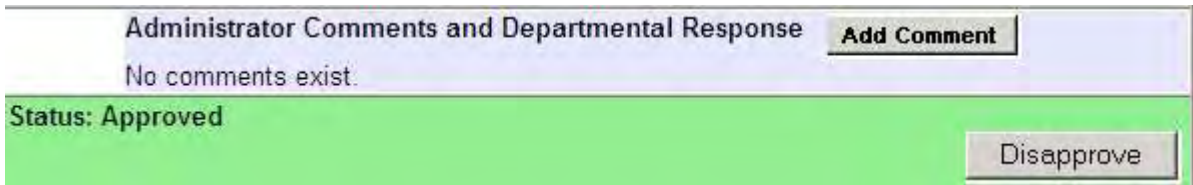
- If not already on the synopsis page for the plan, click on the “J-Administrator Approval” card for the desired plan on your Assessment Plans page (entry point to the system after login).
- You will be redirected to the synopsis page for the plan.
- At the bottom of each outcome synopsis, you will find text blocks that look like the following:



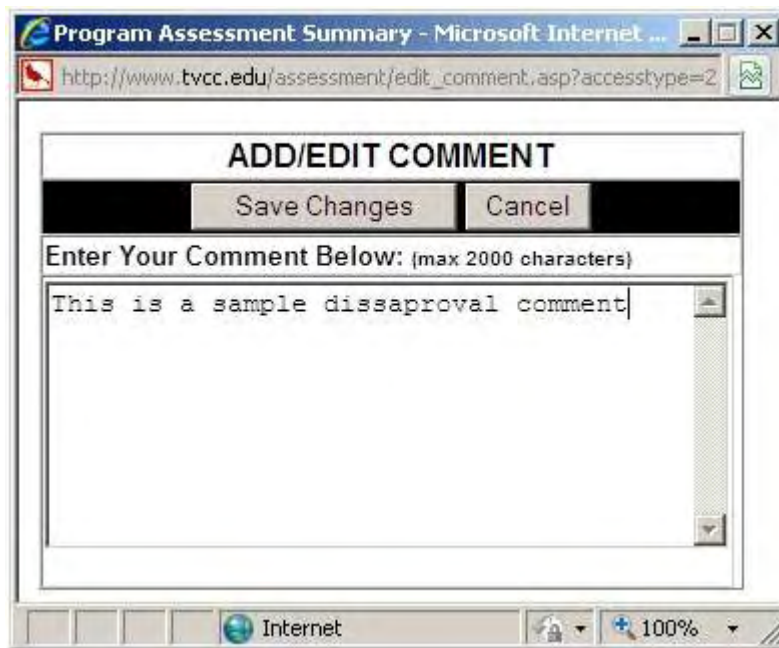
- Individual outcomes can be approved without approving the whole plan by clicking on the **Approve** button. And you will see the following message.



- Click on the **OK** button and the display of the status block for the approved outcome will change to indicate that the outcome is approved



- When an outcome is not ready for approval, Click on the **Add Comment** button, this will open a data entry form for the comment block.



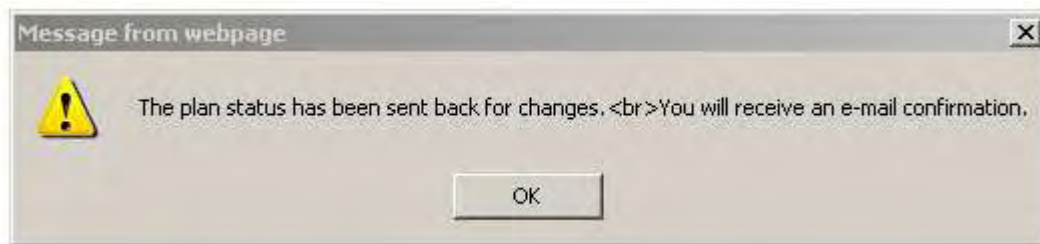
- Add comments to inform the user of the needed modifications. Then click the Save Changes button on the form. You will see the following message block:



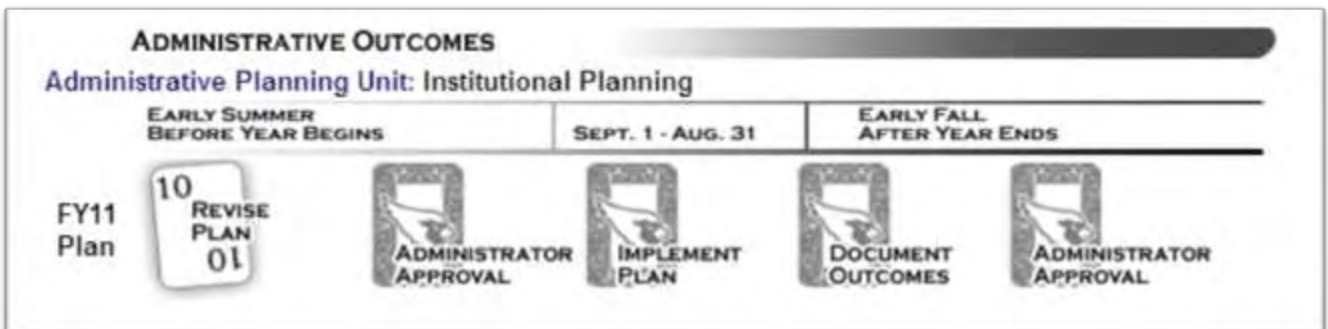
- The comment and approval section for the outcome will now appear as follows:



- Repeat the previous steps as needed for other outcomes associated with the plan.
- After all comments have been added, scroll to the top of the synopsis page and click on the Send it Back for Changes button. You will see the following message:



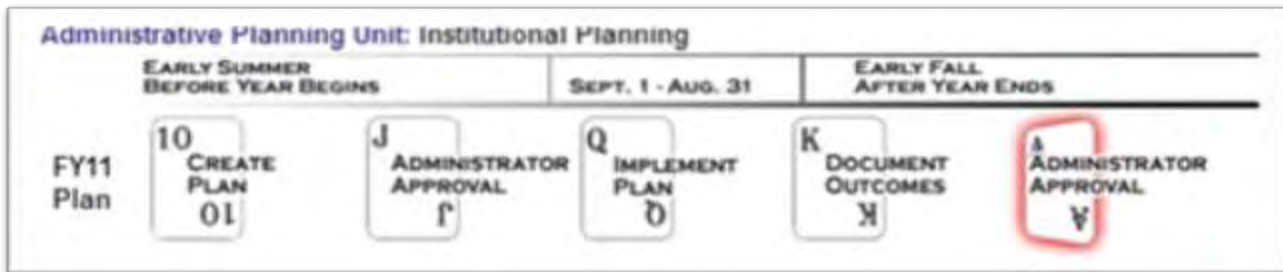
- Email messages will be sent to you and the plan’s user and on your Assessment Plan Page, the display for the plan you sent back for changes will now appear as follows:



- Notice that the “10” card now has the text Revise Plan instead of Create Plan. After the plan’s user makes the required modifications and resubmits the plan for approval, the process will proceed as in section 4.1.

4.3. Approving Plan Data and Results (Completing a Plan)

When an approved Assessment Plan has been updated with outcome results, the plan user will submit the plan for approval/completion. On your Assessment Plans page, the card row for a plan submitted for completion will look similar to the following:



The steps to approve results and complete the plan are very similar to the ones used for initially approving the outcomes associated with the plan:

- Click on the “A-Administrator Approval” card. This will redirect you to the plan synopsis page.
- Scroll down through the outcome(s) and review the entries in the results blocks.
- If the results are not properly documented, skip to Section 4.4.
- If the results are documented satisfactorily, click on the approve button in the results area for each outcome

Results	
Data Summary -- Analysis & Evaluation Results are documented here	
Changes as a Result of Evaluation Changes made as a result of the outcome data are entered here.	
Administrator Comments and Departmental Response	Add Comment
No comments exist.	
Status: Not Approved	
	Approve

- After approving the outcome the status block will change to the following:

Results	
Data Summary -- Analysis & Evaluation Results are documented here and also updated here	
Changes as a Result of Evaluation Changes made as a result of the outcome data are entered here.	
Administrator Comments and Departmental Response	Add Comment
No comments exist.	
Status: Approved	
Disapprove	

- After all outcomes associated with the plan are approved, scroll to the top of the synopsis page and click on the **Finalize and Lock the Plan** button.
- You will receive the following message blocks, click on the **OK** button on each block.



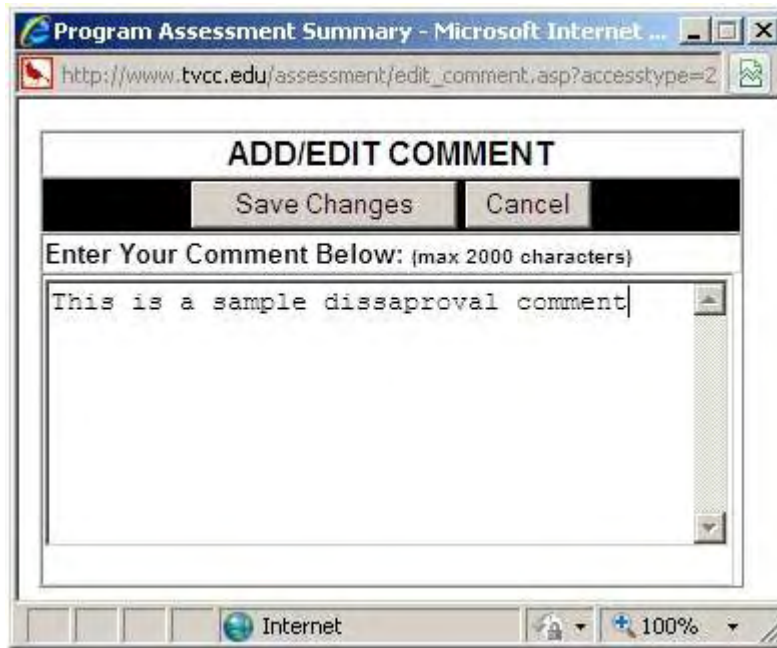
- Emails will be sent to the both you and the plan user indicating that the Assessment Plan has been completed.
- On your Assessment Plans page, the card row for the completed plan will now appear as follows:

ADMINISTRATIVE OUTCOMES		
Administrative Planning Unit: Institutional Planning		
EARLY SUMMER BEFORE YEAR BEGINS	SEPT. 1 - AUG. 31	EARLY FALL AFTER YEAR ENDS
FY11 Plan	COMPLETED 	

4.4. Returning a plan for revised data and results

When a plan has been submitted for completion with outcomes that require additional documentation, it can be returned to the plan user for update in a similar manner to the method used for returning outcomes for update before the plan was approved for implementation.

- On the plan synopsis page, review the outcome results. If results require modification, click on the **Add Comments** button in the results area of the outcome synopsis.
- The comments entry form will open:



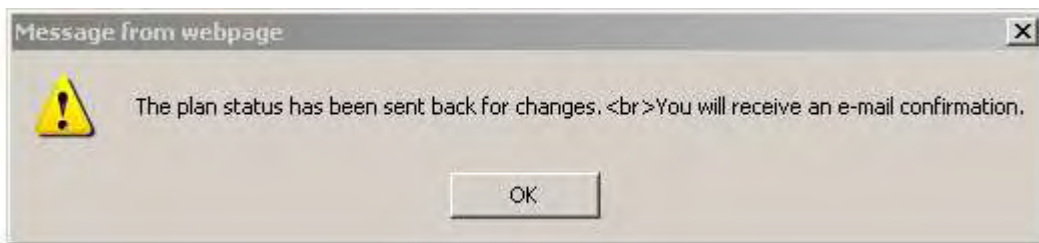
- Add comments to inform the user of the needed modifications. Then click the Save Changes button on the form. You will see the following message block:



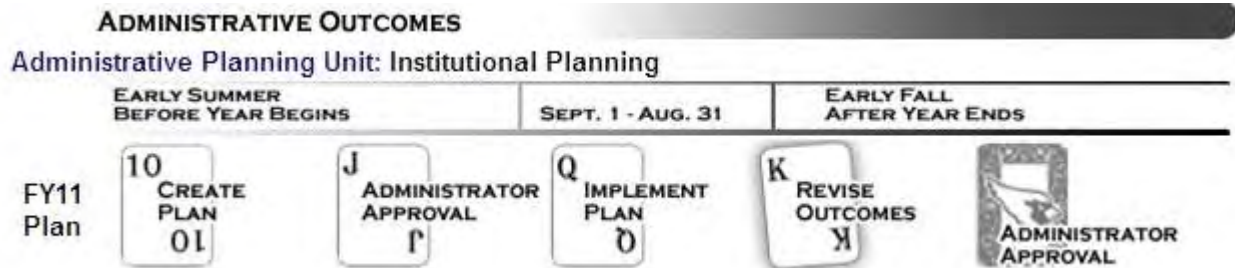
- The comment and approval section for the outcome will now appear as follows:

Results	
Data Summary -- Analysis & Evaluation Results are documented here and also updated here	
Changes as a Result of Evaluation Changes made as a result of the outcome data are entered here.	
Administrator Comments and Departmental Response Add Comment	
Comment: Comment Added Edit Delete	
Status: Not Approved Approve	

- Scroll to the top of the synopsis page and click on the **Send it Back for Changes** button
- You will see the following message:



- Click on the **OK** button. You and the plan’s user will both receive emails indicating the plan has been returned for update.
- You will be redirected to your Assessment Plans page and the card row associated with the returned plan will now look like the following graphic:



- Notice that the “K” card now has the text “Revise Outcomes” There is no further administrator action until the plan is revised and resubmitted for approval.