University of Texas at San Antonio
Planning and Assessment Process for Institutional Effectiveness

Introduction

TracDat software will be used for documenting planning and assessment activities undertaken by each administrative unit, college, department, and academic program as identified by each Vice Presidential area at the University of Texas at San Antonio (UTSA). The model adopted by the University is based on the James Nichols Institutional Effectiveness process and the software is designed by Nuventive, Inc.

The university’s mission statement and strategic goals are articulated in Strategic Plan, UTSA 2016 and clearly identify the future direction and vision of the university. In order to be compliant with our regional accrediting agency, Commission on Colleges, Southern Association of Schools and Colleges, it is important to understand the Principles of Accreditation with regard to planning and assessment:

The institution identifies expected outcomes, assesses the extent to which it achieves these outcomes, and provides evidence of improvement based on analysis of the results in each of the following areas: educational programs, to include student learning outcomes, administrative support services, educational support services, research with its educational mission, if appropriate community/public service within its educational mission.

In addition, core requirement 2.5 of the same Principles states, “The institution engages in ongoing, integrated, and institution-wide research-based planning and evaluation processes that (1) incorporate a systematic review of institutional mission, goals, and outcomes; (2) result in continuing improvement in institutional quality; and (3) demonstrate the institution is effectively accomplishing its mission.”

Planning and assessment at UTSA includes the development, implementation and assessment of each unit, department and programs’ mission, goals, and outcomes. Integration of each of the unit, department, and programs’ outcomes are essential in determining the overall effectiveness at the University. In addition to identifying outcomes--units, departments, and academic programs are responsible for the data collection associated with those outcomes and for providing the use of the results for continuous quality improvement efforts. Assessment activities include annual, on-going systematic unit, department, and academic program outcomes assessment plans/reports.
Assessment Reporting Process

The following format has been used for the planning and reporting of student learning outcomes assessment at UTSA since 2004. TracDat is designed to collect, organize, and support the reporting of these same elements. A description and examples for each of the key elements is provided below.

<table>
<thead>
<tr>
<th>Unit/Department:</th>
<th>Coordinator:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Division:</td>
<td>E-mail:</td>
</tr>
<tr>
<td>Phone:</td>
<td></td>
</tr>
</tbody>
</table>

**1. Mission** - The mission is a broad statement of the unit, department or program’s role, responsibility and scope. It is what functional area does.

**2. Unit Goals:** Two – three statements that describe the long-range intended outcomes of an administrative unit.

Example: *To provide excellent customer service to students served.*

**3. Outcomes:** Three to six specific statements that describe the desired quality (timeliness, accuracy, responsiveness, etc.) of key functions and services within the administrative unit.

Example: *All student scholarship applications will be processed within one week of file completion.*

**4. Outcome Types:**

- **Operational Outcomes** - are statements that lead to considering the unit’s function and most likely deal with continuous quality improvement.

- **Student Learning Outcomes** - specific statements that describe what we want students to know (Knowledge), to be able to do (Skill), or to value (Attitude) as a result of their learning experience.
5. **Assessment Methods:** The techniques or instruments used to measure the outcomes. The methods may be either (a) **Qualitative** methods that rely on descriptions rather than numerical analyses, such as journals, participant observation, interviews and focus groups, and open-ended questions on interviews and surveys; or (b) **Quantitative** methods that rely on numerical scores or ratings such as surveys, inventories, and institutional/departmental data.

6. **Criterion:** A statement that describes the expectation for the level of performance based that is used to determine if the outcome was achieved or not achieved.

7. **Schedule:** A description of the frequency of data collection and analysis. For example, a unit may collect information over the course of both Fall and Spring semesters, but only analyze the information once per academic year.

8. **Results of Assessment/Interpretation and Findings:** A brief description of the analysis, associated findings, and interpretation of the findings that includes an evaluation of what the results may mean to the unit.

9. **Use of Results/Action Plan:** Statements or action plans that have been completed as a result of the data analysis. A brief description of how the unit (a) plans to take action to improve the result based on the interpretation of the current findings, and (b) reports the actions taken or changes made.
**TracDat Terminology**

**Action**: An intervention that might remedy the noted problem/limitation or an ongoing process of review to ensure that the distinction/strength remains a distinction/strength. May be a proposed action that requires follow-up or an action taken/completed.

**Action Plan**: statement of a plan of action for both positive and negative results. What do you plan to do if criterion is not met? What do you plan to do if the criterion is met? Should be stated in future tense.

**Assessment Plan**: Used at the Unit level to record Outcomes, relate the Outcomes to Learning Goals at various organizational levels, document assessment, measures and relate program courses to the Outcomes.

**Assessment Process**: The process of deciding how an outcome will be measured. How will the assessment be done? What are the tasks or activities involved? What are the best ways to evaluate the assessment?

**Assessment Method**: Used to document how attainment of the unit outcomes will be measured that includes a description of the assessment tool and population.

**Assessment Method Type**: Allows users to categorize unit assessment methods, e.g. course embedded, alumni survey, licensure exams, etc.

**Assessment Method Schedule**: When and how often each measure will be taken and analyzed.

**Assessment Method Criterion**: What is the expected level of achievement for an assessment method.

**Assessment Schedule**: How often or when (e.g. February 29, 2008, end of academic year, end of each semester, or annually).

**Assessment Unit**: An organizational unit that has outcomes to be measured to determine program effectiveness.

**Criterion**: A ‘cut-point’ used to distinguish the achievement of an outcome-- often a number. For example, 80% of seniors will demonstrate mastery level skill by scoring 4 out of 5 on a common departmental rubric.

**Feedback Loop**: How the results of the assessment efforts were used to impact the unit.

**Follow-up**: A description of completed actions taken that should always be in past-tense.

**Outcome Name**: A brief name given to an Outcome to organize reporting in TracDat.

**Result**: A summary of the findings/observations and a conclusion or hypothesis based on the analysis of assessment data.

**Use of Results**  What did you do about what you found in terms of results? (See: Follow-up)
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Getting and Using Help

Contacting Your TracDat Administrator

Office of Vice Provost for Accountability and Institutional Effectiveness
Janice Kramer
TracDat Administrator
Email: Janice.kramer@utsa.edu
Phone: x4313
Accessing TracDat

Login to TracDat

To login to TracDat, follow these steps:

Direct Access:

1. Open your Internet browser.
2. In the address field, type: https://tracdat.utsa.edu:8443/tracdat/

Browse to:

1. Open your Internet browser.
2. Enter the location for UTSA into the Address field. (e.g. http://www.utsa.edu/)
3. Press Enter from the keyboard.
4. Click on Administration
5. Click on Institutional Research
6. Click on Assessment
7. Click on TracDat
8. Type in the User Name and Password.
   a. User name is the same as your network ID (e.g. ABC123)
   b. Initial password is 1234
9. Click Login. (Contact your TracDat administrator to obtain your User ID and Password).
   The user name and password are case sensitive therefore they must be unique.

Note: Add TracDat to your Internet Browser “Favorites” so that the address does not need to be typed each time to access TracDat.

Logout of TracDat

To logout of TracDat, follow these steps:

- Click the Logout button at the top of the screen. You will be returned to the login page.
Have You Forgotten Your Password

User Name: Same as your network ID
Password: OR

Contact your TracDat Administrator

Office of Vice Provost for Accountability and Institutional Effectiveness
Janice Kramer
TracDat Administrator
Email: Janice.kramer@utsa.edu
Phone: x4313

Home Page Overview

The Home page is a summary of the assessment activities for the selected unit and provides a quick overview of the unit’s assessment activities. The summary is divided into five major sections that are described below. In addition, the Home page allows the user to change password and other user information including email (See Updating the User Profile).

1. My Assignments provides a list of Tasks that have been assigned to you through TracDat.
2. Overdue Unit Assignments provides a list of outstanding tasks that the user has assigned to others in the unit.
3. **Plan Summary** shows the number of outcomes, assessment methods, dates for both results, actions, and follow-up entries. In addition, the plan summary indicates the number of tasks and whether any of the unit's outcomes do not have an assessment method.

4. **Results Summary** illustrates the total number of documented results, actions, or results without actions.

5. **Goals Summary** shows the number of unit goals and whether any of the unit’s goals do not have a related outcome. (Note: Unless a unit has identified unit goals this will be zero)
Screen Navigation

Selecting a Unit

The pull down list at the top of all major TracDat screens is the Unit Navigation menu. Note: Only used for those users assigned to multiple units, this menu allows the user to select one of the units from their assigned list.

Moving Between Forms

The horizontal bar at the top of all major TracDat screens is the Navigation bar.

The TracDat Bar is divided into six groups to help organize the TracDat components.

- **Home** – an overview to the assessment efforts within a unit
- **Assessment Unit** – unit’s mission, vision and goals as well as the personnel and courses assigned to the assessment unit.
- **Plan** – outcome statements, assessment methods, related courses, and related goals.
- **Results** – observations and findings for an outcome statement based on the assessment method described in the plan
- **Reports** – various reports to document the assessment efforts within a unit.
- **Documents** – a repository of documents (e.g. Word, Excel, Adobe) used by the unit in the assessment efforts such as surveys, rubrics, tables, graphs, etc.

Click on a section, such as **Plan**, to access that set of TracDat components. Then click on one of the text links, such as **Outcomes**, to access the associated set of forms.

Moving Between Fields

The user may navigate through a particular screen in one of two ways:

1. Use the **Tab** button on the keyboard.
2. Use the **mouse**. Point to a field then left click on the field.
Using On-Screen Buttons

The following list of on-screen buttons are those buttons common to most screens in TracDat. Additional buttons associated with specific components of TracDat are described in the related sections in this manual.

**Discard Changes**
Clears text, which has not been saved, from the fields of a screen, and returns user to the previous screen.

**Date**
Allows the user to view the calendar in order to select a date.

**Filter**, **Apply Filter**, and **Clear Filter**
Produces a dialogue box, which allows the selection of a sub-set of records for viewing based on specific criteria (Apply Filter). If a filter is currently active, clicking the filter button removes the filter.

**Help, Form Help**, and **Field Help**
Opens the TracDat help file.

**Logout**
Exits the TracDat application. Users will be returned to the login page.

**Relate Document**
Allows the user to attach a document to an assessment method or result.

**Return**
Returns the user to the previous screen in TracDat. Only active if no changes have been made.

**Save Changes**
To save information entered into TracDat, the user must click the Save Changes button at the bottom of each screen (where present).

**Spell Check**
Locates misspelled words in the content of the active field.
Entering Dates

The user can enter dates in two ways:

1. Type the date in the field.
   **Date Format**: M/D/YYYY
2. Select the date from the drop-down calendar.
   a) Click the **date button** to the right of the date field. A calendar will be displayed. The default for the calendar is the current day, month and year.
   b) Select the month from the **Month** drop-down.
   c) Select the year from the **Year** drop-down.
   d) Click on the **day** in the calendar and the date will appear in the field.

Working with Text

Select
Before editing information, the user must select (highlight) it.

To select information, follow these steps:

1. Place the mouse pointer at the beginning of the text to be selected.
2. Press and hold down the **left** mouse button.
3. Drag the pointer to the end of the text to be selected.
4. Release the mouse button. The information will now be selected.

Copy
To copy text in a text box, follow these steps:

1. Select the text you want to copy.
2. With the mouse, **right-click** over the selected text.
3. Select **Copy** from the menu.

Cut
To cut text from text box, follow these steps:

1. Select the text you want to cut.
2. With the mouse, **right-click** over the selected text.
3. Select **Cut** from the menu.

Paste
To paste text into a text box, follow these steps:

1. The user must first either copy or cut the text to be pasted into the text box.
2. Place the cursor where the text will be pasted.
3. With the mouse, **right-click**.
4. Select **Paste** from the menu.

Note: When cutting and pasting from other units such as WORD into TracDat—**apostrophes and dashes may be transposed into question marks**.
Using Spell Check

To correct misspelled words, follow these steps:

1. Click into a field on any TracDat form.
2. Click the Spell Check button on the toolbar.
3. The misspelled word will appear in the Not in dictionary field.
4. Whenever possible, TracDat supplies a list of alternative spellings in the Suggestions field. Choose the correctly spelled word from the Suggestions field.
5. Click Change to replace the misspelled word with the selected word or Change All, every other occurrence of the misspelled word will be updated to the chosen correction.
6. Repeat for each misspelled word in the selected field.
7. Click Save Changes.

To ignore words which are not misspelled:
   • Click Ignore to Ignore only this occurrence of the word, or click Ignore All to ignore every other occurrence of this word.
Editing, Copying and Deleting Data

All screens in TracDat are set up in the same manner for editing and deleting data. The following steps can be used on any screen you wish to edit or delete data.

To edit data, follow these steps:

1. Navigate to the form you wish to edit data.
2. Click Edit to the right of the item to edit.
3. Enter the new information into the desired field.
4. Click Save Changes.
5. Click Return.

To copy data, follow these steps:

1. Navigate to the form you wish to copy data.
2. Click Copy to the right of the item to edit.
3. Enter the new name of copied data, select the elements to be copied, and select the unit for the data to be copied to.

To delete data, follow these steps:

1. Navigate to the form you wish to delete data.
2. Click Delete to the right of the item to delete.
3. You will need to verify that you want to delete the selected item. Click Yes to delete.

Changing the Order of Data

TracDat allows the user to modify the order that Goals and Outcomes are presented on-screen and in reports.

Use the buttons to change the order of data.
Updating the User Profile

1. Click Profile under the Home tab
2. Update your first and last name, and make sure provide an email address, then click Save Changes.

3. If you want to update your password select Change Password, and make sure you click Save Changes after updating your password.
Unit Setup

Assessment Unit Highlights:

- Update mission and vision statements (General element)
- Updating or adding department/unit level goals (Goals element)
- Lists personnel within the department/unit who have access. Users can be added / deleted (Personnel element).

Recording: Unit Mission and Vision Information

To enter the unit data, follow these steps:

1. Click Assessment Unit from the Navigation bar.
2. Click General.

3. Enter the Unit or Department's mission statement in the Mission Statement field.
4. (Optional) Enter the Department's vision statement in the Vision Statement field.
5. Click Save Changes.
Documenting: Unit Goals

Note: Goals are not required; however if your department or unit has identified goals to which specific outcomes are to be linked —the following procedure is used to document these goals.

To enter a Department goal, follow these steps:

1. Click Assessment Unit from the Navigation bar.
2. Click the Goals.
3. Click Add New Goal.
4. Select the appropriate Goal Type from the pull down menu.
5. Type the Goal in the Goal field.
6. Check the Active box.
7. Click Save Changes.
8. Click Return.

Reviewing: Unit Personnel and Courses
1. Click **Assessment Unit** from the Navigation bar.
2. Click the **Personnel** to review the faculty and/or staff assigned to the unit.
   
   If you need someone added, please contact the TracDat Administrator.
   
   If you need additional required courses to be added, please contact the TracDat Administrator.
Plan

Plan Tab Highlights:

- Entering / Updating unit level outcomes (Outcomes element)
- Entering / Updating assessment methods, criterion levels, and schedules (Assessment Methods element)
- Relating outcomes to courses for course mapping (Related Courses element)
- Relating outcomes to unit, College, and institutional level outcomes (Related Goals element)

Entering Outcomes

The Outcomes element allows the user to document the desired unit outcomes that are to be assessed.

To add a new student learning outcome, follow these steps:

1. Click Plan on the Navigation bar.
2. Click Outcomes.
3. Clicking will bring up the Outcome entry screen.
4. Enter a brief outcome name in the **Outcome Name** field.
5. Enter the full unit outcome in the **Outcome** field.
6. Indicate student learning outcomes (outcomes that are directly related to student developing knowledge, skill, or values) by selecting **Student Learning** in the **Outcome Types** field.
7. Select a Status for the outcome from the **Outcome Status** pull down menu. Choices are:
   - **Active** - the outcome is a current unit outcome
   - **Complete** – the outcome (task) has been completed
   - **No longer a desired outcome** – the outcome has been discontinued by the unit
   - **On-hold** – Not active, but still a desired outcome
8. Enter the date the desired outcome first started being monitored in the **Start Date** field. Click the calendar icon to the right of the date field to select the date from a calendar.
9. For **no longer a desired outcomes**, enter the date the desired outcome stopped being monitored in the **End Date** field; otherwise leave blank.
10. Click **Save Changes**.
11. Click **Return**.

**Note:** To edit or delete an existing student learning outcome see Editing and Deleting Data.


**Entering Assessment Methods**

The Assessment Methods element allows the user to document the means of assessment (measurements), type, criteria for the chosen desired outcome, schedule, and action plan.

To enter a new means of assessment, follow these steps:

1. Click **Plan** from the Navigation bar.
2. Click **Assessment Methods**.
3. Select an outcome from the **Outcome Name** drop-down menu.
4. Click **Add New Assessment Method** will bring up the **Assessment Method** entry screen.
5. Select an **Assessment Method Category** from the drop-down. Choices are:

- Focus Group/Interviews
- Internal/Departmental Evaluation
- Survey/Questionnaire
- Usage Statistics

6. Use the **Assessment Method** field to enter your evaluation process by stating your assessment tool and your assessment action. Please be very specific.

7. Enter the Criterion of the Assessment Method in the **Criterion** field. This is the expected level of performance.

8. Enter when and how often each measure will be taken and data analyzed in the **Schedule/Frequency** field.

9. Check the **Active** box.

10. Click **Save Changes**.

11. Clicking **Return** will return you to the Add New Assessment Method screen.

12. Once you have saved changes, the button to relate documents is activated.

13. (Optional) Click **Relate Document** to relate a document to your Assessment Method. The related document can be either a file or a URL. See “Relating Documents to Assessment Method for more information.” (pg.20)

14. Click **Save Changes**.

15. (Optional) Click **Assign** to assign the assessment method to another user. See Assigning Responsibilities in TracDat Link for more information.

16. Click **Save Changes**.

**Note:** To edit or delete an existing assessment method, see Editing and Deleting Data.
Relating Documents to Assessment Methods

TracDat allows the user to store any document or URL that relates to a specific Assessment Method, e.g. Survey, Rubric, test items.

To relate a document to an Assessment Method, follow these steps:

1. Click [Relate Document] at the bottom of the Assessment Method screen.
2. Select the appropriate link from the menu. Choices are:
   - **New Document**
     - For a New File:
       - Select **File** from the Drop-down.
       - Click the Browse button to the right of the **Upload File** field.
       - Select the file to upload.
       - Click the **Open** button. The name of the file will now appear in the Upload File field.
       - Enter a name for the document in the **Name** field.
       - Select a folder from the drop-down.
       - Click **Relate Document**.
     - For a New URL:
       - Select **URL** from the Drop-down.
       - Enter the website address in the **Web Link** field.
       - Enter a name for the document in the **Name** field.
       - Select a folder from the drop-down.
       - Click **Relate Document**.
   - **Document from Repository** (used for previously uploaded files)
     - Select folder in repository
     - Browse to the desired file
     - Click **Relate**
     - Click Close
   - **Previously Related Document** (used for previously uploaded files and related files)

**Note:** In order to change an existing related document type from a file to a URL, or from a URL to a file, first delete the existing link and then add the new link.
Adding Tasks to an Outcome

When the Tasks tab is clicked, a screen is displayed that allows the user to document tasks associated with a particular outcome.

To add a new task, follow these steps:

1. Click Plan from the Navigation bar.
2. Click Tasks.
3. Select the outcome from the Outcome Name drop-down.
4. Click the Add New Task button.
5. Enter the task in the **Name**
6. (Optional) Enter a more detailed description if needed in the **Description** field.
7. (Optional) Click to assign the task to another user. See Assigning Responsibilities in TracDat Link for more information.
8. Click .
Relating Goals to Outcomes

When the Related Goals tab is clicked, a screen is displayed that allows the user to relate an Outcome to Institution, Unit, Department, and External Unit goals.

To relate a unit outcome to a goal, follow these steps:

1. Click Plan from the Navigation bar.
2. Click Plan.
3. Click the Related Goals tab.
4. Select the Outcome from the drop-down in the Outcome Name field.
5. Click the checkbox to the right of each goal that relates to the selected department outcome. To 'Select All' of the goals, click the checkbox in the title bar above the goals.
6. Repeat for each unit outcome that needs to be related to an Institution, Internal Unit or External Unit goal.
7. Click Save Changes.

Note: To unselect a goal, click the checkbox to the right of the goal that has a checkmark and click Save Changes. The check mark will be removed and the selected department desired outcome will no longer be related to the goal of the selected item.
Results

Results tab Highlights:

- Documenting and viewing of results by learning outcome
- Documenting the use of results for unit improvement (Actions element)

Documenting Unit Results

The Results navigation tab allows the user to document the results (findings/observations) of the assessment. A result may be the documented findings of a study, an informal observation made about student behavior and learning, etc. For example, a finding/observation may be made on the results of an alumni survey. TracDat does not limit the type of finding/observations (results) that can be entered.

Depending on the results, a plan of action may need to be developed. The system will allow the user to document both completed actions taken as well as planned actions that require additional follow-up to document that the planned actions were actually completed.

To add a result, follow these steps:

1. Click Results from the Navigation bar.
2. Click located at the bottom of the screen.
3. Click Select link to the right of the Outcome that the result is related, which will open a Select Assessment Method/Task pop-up.
4. Select **Assessment Method**, **Task**, or **Neither** from the drop-down.
5. Click **Select** to the right of the associated method or task.

6. Enter the complete finding/observation in the **Results** field.
7. Enter the date the finding/observation was made in the **Date** field. If not filled in it unit will use the date of entry.
8. Select the suitable result type from the **Result Type** drop-down. Choices are:
   - **Criterion Met**—the analysis of the Outcome assessment meets the expected level of performance
• **Criterion Not Met**—the analysis of the Outcome assessment fails to meet the expected level of performance. However, may be used for any outcome if deemed appropriate.
  • **Accomplished** – a specific action/activity has been completed and this is the final result
  • **Behind Schedule** – progress toward a specific action/activity is lagging (specific steps to get back on schedule are needed)
  • **Not Started Yet** - a specific action/activity is on hold (explanation is needed)
  • **On Schedule** - progress toward a specific action/activity is as expected
  • **Ahead of Schedule** - progress toward a specific action/activity is better than expected

9. Select the **Result Status** from the drop-down menu. Choices are:
   • **Action Plan Documented**-- An action plan has been entered, but there is no follow-up indicating that that action has been completed.
   • **Action Plan Needed**-- A result has been recorded that requires some action, but the action has not been decided yet.
   • **Annual Cycle Complete**--Either no action is required or an action has been proposed and there is a follow-up indicating that the action has been completed.
   • **No Action Plan Needed**-- No action plan is needed at this time based on the results/findings.

10. (Optional) Any notes the user wants to make about the finding/observations can be entered in the **Notes** field.

11. Click **Save Changes**.

12. To enter a result for a different outcome, click **Change Learning Outcome**, or **Return**.

**Note:** Once you have saved changes, the Action Plan and Related Documents tabs become active at the bottom of the results screen as shown here:
Documenting Use of Results Action Plans & Follow Up

There are two approaches used to document the use of assessment results for unit improvement—actions and follow-ups.

**Entering Actions and Action Plans**

Actions are either

- **Completed** actions or steps that were taken to address a result or finding. (Past tense)
- **Planned** actions or steps that are intended approaches to address a result or finding that require a follow-up to document that the action was taken. (Future tense)

The distinction between these two types of ‘Action’ lies in the necessity to enter a ‘follow-up’ in order to document that the planned actions / steps were completed.

There are two methods to enter actions based on a result:

A. Directly from the Edit Results screen as shown here:

   ![Edit Results Screen](image)

   To enter actions and follow up for a unit finding/observation, follow these steps:

   1. Click the **Action Plan** tab at the bottom of the results entry form.
   2. Click **Add Actions** link on the right side of the screen.
B. Directly from the Result Summary Page as shown here:

To enter actions and follow up for a unit result:

1. Click the **Add Action** link to right of the result to which the action is associated.

Either Method will bring up the Action Entry Screen, shown here.

<table>
<thead>
<tr>
<th>Date</th>
<th>Result</th>
<th>Actions</th>
<th>Related Documents</th>
<th>Result Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/6/2008</td>
<td>Students met the criteria</td>
<td>1</td>
<td>0</td>
<td>Action Plan Documented</td>
</tr>
</tbody>
</table>

2. Enter the action in the **Action** field.
3. Enter the date the action was made in the **Date** field. If not filled in it unit will use the date of entry.
4. Click **Save Changes**.
5. (Optional) Click **Assign** to assign the action to another user. See Assigning Responsibilities in TracDat Link for more information.
6. Click.

**Entering Follow-ups to Action Plans**

To enter follow-up for a planned action related to a unit result, follow these steps:

1. Click **Results** from the Navigation bar.
2. Click the **Show Results** link to expand the list of results
3. Click the **edit** link to bring up the Edit Results screen

4. At the bottom-right of the screen, Click **add Follow-up** link (You may have to scroll to see the link) to the right of the Action that the Follow-up is related, which will open the Edit Follow-up screen.
5. Enter a description of the follow-up in the **Follow Up** field.
6. Enter the date of the follow up in the **Date** field.
7. Click **Save Changes**.

**Note:** To edit or delete Actions or Follow Up data see Editing and Deleting Data.
Relating Data to Results

The Related Data tab provides a means of retaining and managing data that supports a finding/observation. An unlimited number of documents (of any type) can be related to each finding/observation. Once a document is stored, it can be retrieved for viewing or printing by simply clicking the icon or name of the document.

To add a document to the Related Documents tab, follow these steps:

1. Click the Related Documents tab at the bottom of the results entry form.
2. Click the Relate Document link to the right side of the screen.
3. Select the appropriate link from the menu. Choices are:
   
   - New Document
     
     - For a New File:
       
       - Select File from the Drop-down.
       - Click the Browse button to the right of the Upload File field.
       - Select the file to upload.
       - Click the Open button. The name of the file will now appear in the Upload File field.
       - Enter a name for the document in the Name field.
       - Select a folder from the drop-down.
       - Click Relate Document.
     
     - For a New URL:
       
       - Select URL from the Drop-down.
       - Enter the website address in the Web Link field.
       - Enter a name for the document in the Name field.
       - Select a folder from the drop-down.
       - Click Relate Document.
   
   - Document from Repository (used for previously uploaded files)
     
     - Select folder in repository
     - Browse to the desired file
     - Click Relate
     - Click Close
   
   - Previously Related Document (used for previously uploaded files and related files)

Note: In order to change an existing related document type from a file to a URL, or from a URL to a file, first delete the existing link and then add the new link.

Once a document is stored in the Related Data tab, it can be retrieved for on-screen viewing, editing or printing by simply clicking the Name of the File/Group or URL.

Note: Any software required to run the file will need to be installed on the user’s computer in order for the file to be viewed.
Reports

➤ Reports Highlights:
➤ Print and Save reports in pdf / html format

When the Reports tab is clicked from on the navigation bar, a list of available reports and descriptions is shown

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment Plan</td>
<td>This report shows each assessment unit's assessment plan. It does not show the results of each assessment. This report is useful for showing each unit's assessment plan.</td>
</tr>
<tr>
<td>Assessment Report -</td>
<td>This report shows how each assessment unit is supporting the goals of the institution, a reporting unit or an assessment unit. This report is presented in a five column model.</td>
</tr>
<tr>
<td>Five Column</td>
<td>This report shows each assessment unit's outcomes along with the results and any action plans. This report is useful for showing the results for a specific unit. This report is presented in a four column model.</td>
</tr>
<tr>
<td>Assessment Report -</td>
<td>This report shows all the personnel assigned to a unit.</td>
</tr>
<tr>
<td>Four Column</td>
<td>This report list all documents (files) stored in each folder for each unit.</td>
</tr>
<tr>
<td>User and Personnel</td>
<td></td>
</tr>
<tr>
<td>List by Unit</td>
<td></td>
</tr>
<tr>
<td>Documents List</td>
<td></td>
</tr>
</tbody>
</table>

To run a report, follow these steps:

1. Click the run link next to the report that is needed.

2. Select the format of the report from the Format drop-down menu (PDF or HTML)
3. (Optional) Edit the Report Title if needed
4. (Optional) Select Student Learning in Goal Types field.
5. (Optional) Enter a range of dates in the Date fields
6. Click
7. To select a different report click
Available Reports:

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<td>Assessment Report - Four Column</td>
<td>This report shows each assessment unit's outcomes along with the results and any action plans. This report is useful for showing the results for a specific unit. This report is presented in a four column model.</td>
</tr>
<tr>
<td>Course List by Unit</td>
<td>This report shows the courses per unit.</td>
</tr>
<tr>
<td>Course Related to Unit Outcomes</td>
<td>This report lists all the courses which support the outcomes of the selected unit. This report is useful to show courses are used to support an assessment unit's objectives.</td>
</tr>
<tr>
<td>User and Personnel List by Unit</td>
<td>This report shows all the personnel assigned to a unit.</td>
</tr>
<tr>
<td>Documents List</td>
<td>This report lists all documents (files) stored in each folder for each unit.</td>
</tr>
</tbody>
</table>
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