Academic Program User Guide

Student Learning Assessment

Using TracDat™
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.
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.

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**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. Essential Learning Goals:** Two – three statements that describe broad learning concepts, for example clear communication, problem solving, and ethical awareness. A description of what our students will be or what our students will have upon successfully completing the Program.

**Example:** *Know and apply basic research methods in psychology, including research design, data analysis, and interpretation.*

**3. Student Learning Outcomes:** Three to six statements that describe in precise terms the observable behaviors or actions that students will demonstrate that intended learning outcomes have occurred. A description of what we intend for students to know/think (cognitive), feel (affective), or do (behavioral) when they have completed a given course of study. A description of what our students will be able to do.

**Example:** *Graduates in Psychology will be able to apply basic research methods by designing, analyzing, and presenting the results of a psychological experiment.*

**Operational Outcomes** - are statements that lead to considering the unit’s function and most likely deal with continuous quality improvement.
4. **Assessment Methods:** The techniques or instruments used to measure the student learning 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, institutional/departmental data, departmental/course-level exams (locally constructed, standardized, etc.). In addition, the assessment method can be classified as either (a) **Direct** that provide tangible and visible evidence of whether or not a student has achieved the student learning outcome, such as tests (linked to specific learning outcomes), rubrics, portfolios, capstone projects, field supervisor ratings, employer ratings, scores on licensure exams; or (b) **Indirect** that are related to the act of learning (i.e. perceptions about learning) but do not reflect learning itself., such as surveys, focus groups, course evaluation, graduate school acceptance rates, internship evaluation, alumni honors and awards.

5. **Criterion:** A statement that describes the expectation for the level of performance based on specific learning outcomes that are used to determine if the outcome was achieved or not achieved.

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

7. **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 program.

8. **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 program (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 Academic Program 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 program outcomes will be measured that includes a description of the assessment tool and population.

**Assessment Method Type:** Allows users to categorize program 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 program.

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

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

**Student Learning Goals:** Broad statements used to organize the programs assessment effort e.g. To produce graduates who are able to communicate effectively with diverse audiences.

**Student Learning Outcomes:** Specific statements that describe what you intend for the student to know, think or be able to do.

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

**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 program has identified program 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.

Selected Unit: Sample Unit - Academic Assessment Unit

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 program 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 Student Learning 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 programs 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.

<table>
<thead>
<tr>
<th>Student Learning Outcome</th>
<th>Outcome Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graduates will be able to apply basic research methods by designing, analyzing, and presenting the results of an experiment in their discipline.</td>
<td>Currently being assessed</td>
</tr>
</tbody>
</table>

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/program level goals (Goals element)
- Lists personnel within the department/program who have access. Users can be added/deleted (Personnel element).
- List the courses within the department (Courses element) Note: Courses cannot be added or deleted in this section.

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 Program 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: Program Goals

Note: Goals are not required for academic programs; however if your department or program 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. (Note: Academic Programs will only have **Student Learning** as an option)
5. Type the Goal in the **Goal** field.
6. Check the **Active** box.
7. Click **Save Changes**.
8. Click **Return**.
Reviewing: Program 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.
3. (For Academic Programs only) Click Courses to review the list of required courses assigned to the unit.
   If you need additional required courses to be added, please contact the TracDat Administrator.
Plan

Plan Tab Highlights:

- Entering / Updating program level outcomes (Student Learning 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 program, College, and institutional level outcomes (Related Goals element)

Entering Outcomes

The Student Learning Outcomes element allows the user to document the desired program 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 Student Learning Outcomes.
3. Clicking will bring up the Outcome entry screen.
4. Enter a brief outcome name in the **Student Learning Outcome Name** field.
5. Enter the full program outcome in the **Student Learning Outcome** field.
6. Select an outcome type from the **Outcome Types** field. Choices are:
   - Learning - Attitudes/Values
   - Learning – Knowledge
   - Learning – Skills
7. Select a Status for the student learning outcome from the **Outcome Status** pull down menu. Choices are:
   - Active- the outcome is a current program outcome
   - No longer a desired outcome – the outcome has been discontinued by the program
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 (direct, indirect, qualitative, or quantitative), criteria for the chosen desired outcome, schedule, and action plan.

Note: If multiple assessment methods are used to assess an outcome, the assessment methods should be entered individually.

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 Student Learning 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:

<table>
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<th>Capstone Project</th>
<th>Portfolio Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Embedded</td>
<td>Standardized Test/Licensure Exam</td>
</tr>
<tr>
<td>Field Supervisor Rating</td>
<td>Survey/Questionnaire</td>
</tr>
<tr>
<td>Focus Group/Interviews</td>
<td></td>
</tr>
</tbody>
</table>

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 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.
Relating Courses to an Outcome

The Related Courses element allows the user to relate one or more courses to the selected outcome by clicking the checkbox next to each course.

To complete the Related Courses/Activities form, follow these steps:

1. Click **Plan** from the Navigation bar.
2. Click **Related Courses**.
3. Select the outcome from the **Student Learning Outcome Name** drop-down.
4. Click the checkbox to the right of each course that contributes to the attainment of the outcome.
5. Click **Save Changes**.
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 program 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 Student Learning 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. Click Save Changes.
7. Repeat for each program outcome that needs to be related to an Institution, Internal Unit or External Unit goal.

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 program improvement (Actions element)

Documenting Program 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 **Add Result**.
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.

   ![Select Assessment Method/Task](image)

   - **Capstone Project**: Students will prepare a senior research project in the capstone course. The project will be evaluated using the departmental scoring rubric.

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 program 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 Student Learning Outcome assessment meets the expected level of student performance
   - **Criterion Not Met**— the analysis of the Student Learning Outcome assessment fails to meet the expected level of student performance.
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 Student Learning Outcome**, or **Return**.

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

There two approaches used to document the use of assessment results for program 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 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 two methods to enter Actions based on a result:

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

   ![Image of Edit Results screen]

   To enter actions and follow up for a program 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.

   or
To enter actions and follow up for a program 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.

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 program will use the date of entry.
4. Click .
5. (Optional) Click 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 program 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**.
Relating Data to Results

The Related Documents 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>
<th>Run</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment Impact by Unit Objectives</td>
<td>This report shows each assessment unit's assessment plan along with the results and action plans. This report is useful for showing the impact doing assessment has had on an assessment unit.</td>
<td>run</td>
</tr>
<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>
<td>run</td>
</tr>
<tr>
<td>Assessment Report</td>
<td>This report shows how each assessment unit is supporting the goals of the selected unit. This report is presented in a five column model.</td>
<td>run</td>
</tr>
<tr>
<td>Course List by Unit</td>
<td>This report shows the courses per unit.</td>
<td>run</td>
</tr>
<tr>
<td>Course Related to Unit Objectives</td>
<td>This report lists all the courses which support the objectives of the selected unit. This report is useful to show courses are used to support an assessment units objectives.</td>
<td>run</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 Execute Report.
7. To select a different report click Return to Reports List.
### Reports:

<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 - 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 Program 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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