AMS: Preventing Technical Errors in Annual Assessment Reporting

**ANNUAL ASSESSMENT REPORTING IN THE AMS (ASSESSMENT MANAGEMENT SYSTEM)**

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**ADDING NEW DATA TO AN EXISTING OUTCOME THAT HAS NO CHANGES**

For existing outcomes with no changes, annual assessment reporting is completed by adding Data Collection and Analysis (Step 4) and Improvement Actions (Step 5) only. **IMPORTANT:** DO NOT create additional entries in any other steps (e.g. methods and measures).

1. Navigate to unit using search field at top of screen.
2. Click on **Unit Assessment** in navigation on left, then select **Data Collection and Analyses (Step 4)** sub-tab.
3. Locate outcome, then click to expand window to display entry panel if necessary.
4. **NOTE:** Outcomes with prior year Step 4 entries will have a numeric designation [**grey circle with + number**]. DO NOT overwrite or edit any prior year entries.

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5. Select “Add Data Collection and Analyses (Step 4)” [green circle with + symbol] to create a new entry.

6. Enter information into the following fields:
   a. **Submission Date**: This field will be auto-populated with the current date.
   b. **Data Collection and Analyses (Step 4)**: Type text into the box. This field does not accept tables or graphics. Do NOT type only “see attached”. The expectation is for this field to summarize the data collection process and assessment findings. Graphs and tables can be attached in a related document. For more information about reporting data collection and analyses, please visit the OAIE website at [http://www.fullerton.edu/data/assessment/reporting/](http://www.fullerton.edu/data/assessment/reporting/).
   c. **Reporting Period**: Use the drop-down menu to select the year the data were collected (the current reporting period).
   d. **Result**: Use the drop-down menu to select “Assessed and Met” or “Assessed and Not Met”. Do not leave blank, this field is tied to university report calculations.
7. Continue to step 5 (displays on same screen as the step 4 entry)
8. Select “Add Improvement Action (Step 5)” [green circle with + symbol] to create a new entry.

9. Enter information into the following fields:
   a. **Submission Date**: This field will be auto-populated with the current date.
   b. **Improvement Action (Step 5)**: Type text into the box. This field does not accept tables or graphics. DO NOT type only “see attached”. Best practices include addressing improvement actions even when assessment criteria were “met”. For more information about reporting improvement actions, please visit OAIE website at [http://www.fullerton.edu/data/assessment/reporting/](http://www.fullerton.edu/data/assessment/reporting).

10. When done, click [Save] and [Return].
11. Display will update for the outcome. If the outcome has been previously assessed there are now two cycles of Step 4 and Step 5 reported.

**RETIRES UN-NEEDED OUTCOMES (STEP 1)**

An outcome should be retired when it is no longer part of the unit’s assessment, will not be assessed again, or needs major revision and will be replaced by a new outcome.

1. Select unit from drop-down menu at top of screen.
2. Click Unit Assessment tab from navigation on left, then click Plan (Steps 1-3) sub-tab.
3. Locate the outcome to retire, then click on the edit icon to the right of the outcome statement.
4. Place an “X” in front of the Outcome Abbreviation name (Example: XSL-01: Assessment Outcome) to indicate the outcome is retired.
5. Using the drop-down menu, change the **Outcome Status** field to “No Longer In Use”.
6. Enter the **Retired Date**.

![Outcome Abbreviation and Status](image)

7. Click **Save** and **Return**
   - Remaining outcomes may be renumbered at any time.

### METHODS AND MEASURES (STEPS 2 AND 3) CONSIDERATIONS

1. **IMPORTANT**: Only **ONE** active methods and measures (Step 2) and criteria for success (Step 3) entry allowed per outcome. **DO NOT** create a new entry for every reporting cycle as this will impact university reporting. Multiple methods and measures/criteria for success for an outcome are listed within the single entry and remain until they need to be retired.

2. **DO NOT** delete any methods and measures or criteria for success that have been used in prior cycles.
3. **If methods and measures need to be retired and replaced**, retire the methods/measures first, then create a new Step 2 **BEFORE** adding data collection and analysis (Step 4) and Improvement Actions (Step 5). This will ensure that data attaches to the correct methods/measures for the reporting period.
**UPDATING METHODS AND MEASURES WHEN NEW DATA COLLECTED DOES NOT MATCH**

If the data collected for an outcome does not match the existing Methods and Measures (Step 2) and Criteria for Success (Step 3), the methods and measures should be retired and new ones created that support the collected data. **DO NOT** delete any methods and measures or criteria for success that have been used in prior cycles.

**NOTE:** Retire the methods/measures and create a new Step 2 **BEFORE** adding data collection and analysis (Step 4) and Improvement Actions (Step 5) for the reporting period to ensure data attaches to the correct methods/measures.

1. Select unit from drop-down at top of screen.
2. Click **Unit Assessment** tab from navigation on left, then click **Plan (Steps 1-3)** sub-tab.
3. Locate the outcome, then click on the edit icon to the right of the method/measure.

4. Uncheck the “Active” box.
5. Click [Save] and [Return].
   - A method/measure that has been retired can be unretired using the “filter” function.
1. After Retiring the Methods and Measures, create a new Step 2 entry for the outcome.
2. Navigate to outcome, then click to expand window to display entry panel if necessary.
3. Select “Add Methods and Measures (Step 2)” [green circle with + symbol].

4. Enter information into the following fields:
   a. **Active**: Leave this checked.
   b. **Measure Type**: Use drop-down menu to select measure type (e.g. Both, Direct Assessment Only, or Indirect Assessment Only).
   c. **Methods and Measures (Step 2)**: Type text into box. Field should describe at least one method and one measure. For more information about selecting methods and measures, please visit the OAIE website at [http://www.fullerton.edu/data/assessment/reporting/](http://www.fullerton.edu/data/assessment/reporting/).
      - If using multiple measures, list the measures in the same box. Do not create a new measure.
   d. **Criteria for Success (Step 3)**: Type text into box. A criterion for success should be listed for each measure described in **Methods and Measures (Step 2)** field. For more information about setting criteria for success, please visit the OAIE website at [http://www.fullerton.edu/data/](http://www.fullerton.edu/data/).
   e. **Notes**: Optional field.
   f. **Instruments Used**: Use the scrolling menu to select all that apply. Hold the CTRL key and click with mouse to select multiple instruments.

5. When done, click [Save] and [Return].
6. Continue to Steps 4 and 5.
WHAT TO DO WHEN NO DATA WILL BE REPORTED FOR THE ASSESSMENT CYCLE

When a unit is unable to assess and report at least one outcome, completion of the “Annual Assessment Summary” is mandatory.

ANNUAL ASSESSMENT SUMMARY

1. Select unit from drop-down menu at top of screen.
2. Click Unit Assessment tab from navigation on left, then click Annual Assessment Summary sub-tab.
3. Click to expand window to display any prior year entries. DO NOT delete or overwrite.
4. Click the [green circle with + symbol] to create a new entry
5. Select the Academic Year from the drop-down.
6. Select the “Assessment Reporting Status” from the dropdown. **Note:** Completing the summary is optional if a unit has assessed at least one outcome during the reporting period, however, a unit may choose to complete the form as a means of documenting information deemed valuable to the next reporting cycle.
7. Enter a description of the challenges faced that impacted assessment reporting during the reporting cycle, as well as plans to address those challenges.
8. Click [Save] and [Return].
9. Display will update to show multiple entries if prior reports existed.