

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

### TABLE OF CONTENTS

**Adding new data to an existing outcome that has no changes..... 1**

**Retiring un-needed outcomes (Step 1)..... 4**

**Methods and measures (Steps 2 and 3) considerations ..... 5**

**Updating methods and measures when new data collected does not match..... 6**

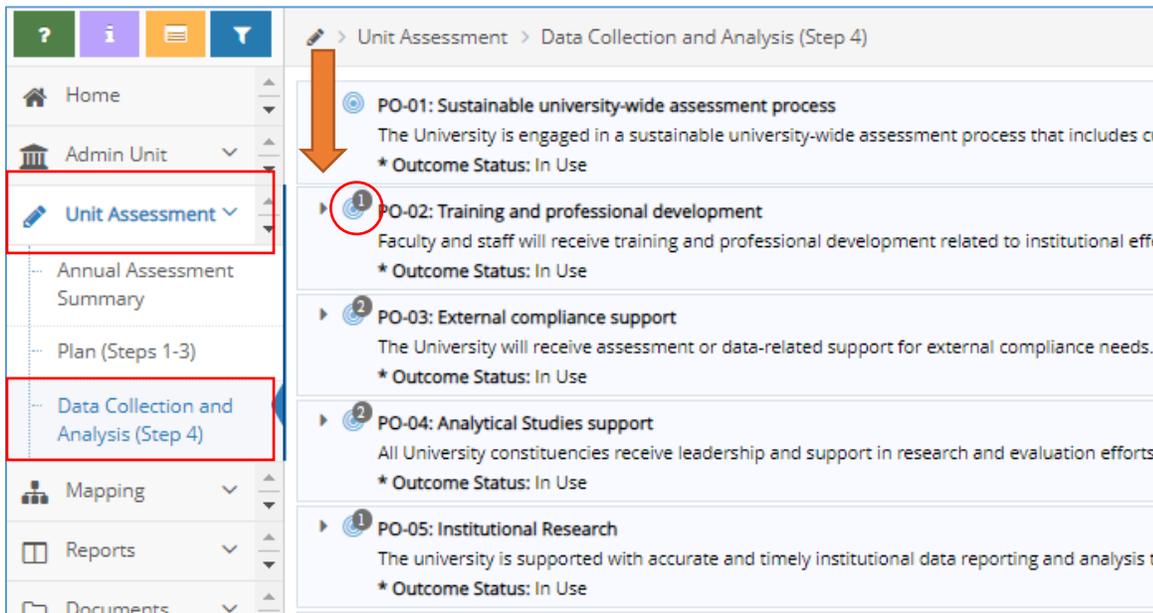
**What to do when no data will be reported for the assessment cycle..... 8**

    Annual assessment summary.....8

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

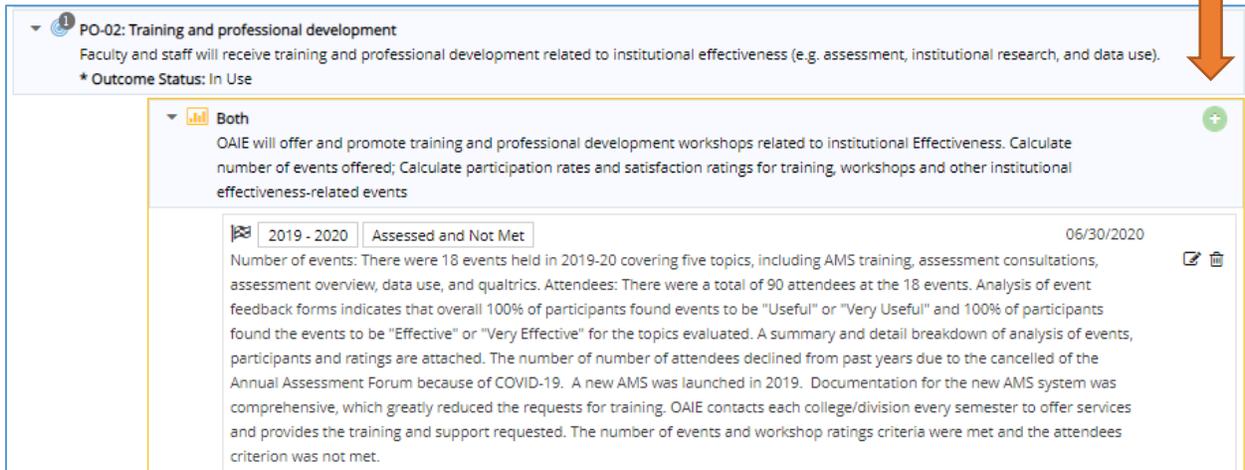
For existing outcomes with no changes, annual assessment reporting is completed by adding Data Collection and Analysis (Step 4) and Improvement Actions (Step 5) only. **IMPORTANT:** DO NOT create additional entries in any other steps (e.g. methods and measures).

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.



## AMS: Preventing Technical Errors in Annual Assessment Reporting

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



PO-02: Training and professional development  
Faculty and staff will receive training and professional development related to institutional effectiveness (e.g. assessment, institutional research, and data use).  
\* Outcome Status: In Use

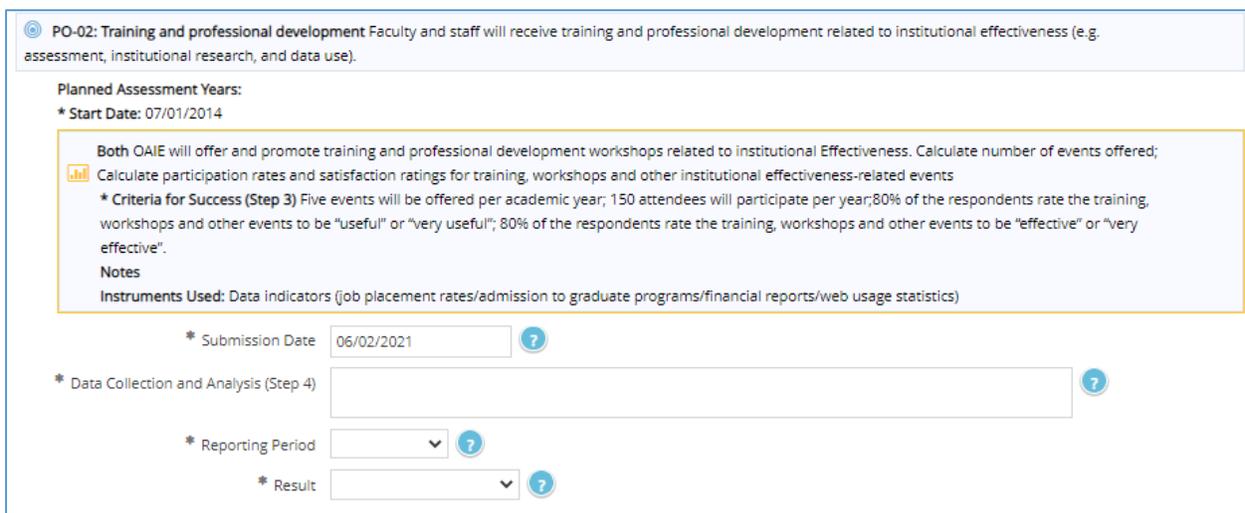
**Both** +  
OAIE will offer and promote training and professional development workshops related to institutional Effectiveness. Calculate number of events offered; Calculate participation rates and satisfaction ratings for training, workshops and other institutional effectiveness-related events

2019 - 2020 Assessed and Not Met 06/30/2020

Number of events: There were 18 events held in 2019-20 covering five topics, including AMS training, assessment consultations, assessment overview, data use, and qualtrics. Attendees: There were a total of 90 attendees at the 18 events. Analysis of event feedback forms indicates that overall 100% of participants found events to be "Useful" or "Very Useful" and 100% of participants found the events to be "Effective" or "Very Effective" for the topics evaluated. A summary and detail breakdown of analysis of events, participants and ratings are attached. The number of number of attendees declined from past years due to the cancelled of the Annual Assessment Forum because of COVID-19. A new AMS was launched in 2019. Documentation for the new AMS system was comprehensive, which greatly reduced the requests for training. OAIE contacts each college/division every semester to offer services and provides the training and support requested. The number of events and workshop ratings criteria were met and the attendees criterion was not met.

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/>.
- 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.



PO-02: Training and professional development Faculty and staff will receive training and professional development related to institutional effectiveness (e.g. assessment, institutional research, and data use).

**Planned Assessment Years:**  
\* Start Date: 07/01/2014

**Both** OAIE will offer and promote training and professional development workshops related to institutional Effectiveness. Calculate number of events offered; Calculate participation rates and satisfaction ratings for training, workshops and other institutional effectiveness-related events  
\* Criteria for Success (Step 3) Five events will be offered per academic year; 150 attendees will participate per year; 80% of the respondents rate the training, workshops and other events to be "useful" or "very useful"; 80% of the respondents rate the training, workshops and other events to be "effective" or "very effective".  
Notes  
Instruments Used: Data indicators (job placement rates/admission to graduate programs/financial reports/web usage statistics)

\* Submission Date  ?

\* Data Collection and Analysis (Step 4)  ?

\* Reporting Period  ?

\* Result  ?

## AMS: Preventing Technical Errors in Annual Assessment Reporting

- Continue to step 5 (displays on same screen as the step 4 entry)
- Select “Add Improvement Action (Step 5)” [green circle with + symbol] to create a new entry.

PO-02: Training and professional development Faculty and staff will receive training and professional development related to institutional effectiveness (e.g. assessment, institutional research, and data use).

Planned Assessment Years:  
\* Start Date: 07/01/2014

Both OAIE will offer and promote training and professional development workshops related to institutional Effectiveness. Calculate number of events offered; Calculate participation rates and satisfaction ratings for training, workshops and other institutional effectiveness-related events  
\* Criteria for Success (Step 3) Five events will be offered per academic year; 150 attendees will participate per year; 80% of the respondents rate the training, workshops and other events to be “useful” or “very useful”; 80% of the respondents rate the training, workshops and other events to be “effective” or “very effective”.  
Notes  
Instruments Used: Data indicators (job placement rates/admission to graduate programs/financial reports/web usage statistics)

\* Submission Date 06/02/2021 ?

\* Data Collection and Analysis (Step 4) ?

\* Reporting Period ?

\* Result ?

\* Required field

Improvement Actions (Step 5) 

Related Documents 

- Enter information into the following fields:
  - Submission Date:** This field will be auto-populated with the current date.
  - 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/>.

PO-02: Training and professional development Faculty and staff will receive training and professional development related to institutional effectiveness (e.g. assessment, institutional research, and data use).

Both OAIE will offer and promote training and professional development workshops related to institutional Effectiveness. Calculate number of events offered; Calculate participation rates and satisfaction ratings for training, workshops and other institutional effectiveness-related events  
\* Criteria for Success (Step 3) Five events will be offered per academic year; 150 attendees will participate per year; 80% of the respondents rate the training, workshops and other events to be “useful” or “very useful”; 80% of the respondents rate the training, workshops and other events to be “effective” or “very effective”.  
Notes

2020 - 2021 Assessed and Met 06/02/2021  
Put some results in here

\* Submission Date 06/02/2021 ?

\* Improvement Actions (Step 5) ?

- When done, click [Save] and [Return].

## AMS: Preventing Technical Errors in Annual Assessment Reporting

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.

The screenshot displays the AMS interface for PO-02: Training and professional development. The outcome status is 'In Use'. Two assessment cycles are shown:

- 2020 - 2021 (Assessed and Met):** Shows improvement actions and related documents.
- 2019 - 2020 (Assessed and Not Met):** Shows a detailed description of events, improvement actions, and related documents.

### RETIRING 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.

The screenshot shows the AMS interface with the 'Unit Assessment' and 'Plan (Steps 1-3)' tabs highlighted in the navigation menu. The outcome PO-08: Assessment and QA dissemination is selected, and the edit icon is circled.

4. Place an “X” in front of the Outcome Abbreviation name (Example: **XSLO-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: XPO-08: Assessment and QA dissemination

\* Outcome (Step 1): CSUF assessment and quality assurance practices are disseminated to external audiences.

\* Outcome Status: No Longer In Use

Planned Assessment Years: [Empty]

\* Start Date: 07/01/2017

Retired Date: 06/07/2021

\* Outcome Type: Performance Outcome

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.

Outcomes (Step 1)

- PO-08: Assessment and QA dissemination
  - CSUF assessment and quality assurance practices are disseminated to external audiences.
  - \* Outcome Status: In Use
  - \* Start Date: 07/01/2017
  - Retired Date:
  - Methods and Measures (Step 2)
    - Student pre and post survey (Active)
      - \* Criteria for Success (Step 3): 70% rate themselves 'very satisfied' or 'satisfied'
      - Notes:
      - Instruments Used: Survey
      - Date Added: 11/12/2019
      - Active: Yes
      - Related Documents
      - Assignment
    - Direct Assessment Only
      - Enter a description of methods and measures here. (Active)
      - \* Criteria for Success (Step 3): Enter your criteria for success here
      - Notes:
      - Instruments Used: Capstone project
      - Date Added: 06/02/2021
      - Active: Yes
      - Related Documents
      - Assignment

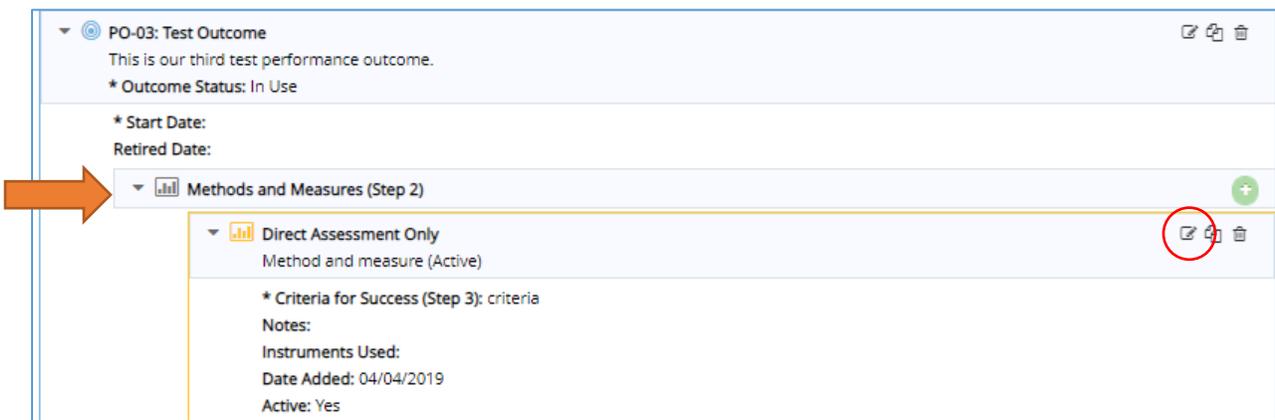
2. **DO NOT** delete any methods and measures or criteria for success that have been used in prior cycles.
3. **If methods and measures need to be retired and replaced**, retire the methods/measures first, then create a new Step 2 **BEFORE** adding data collection and analysis (Step 4) and Improvement 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

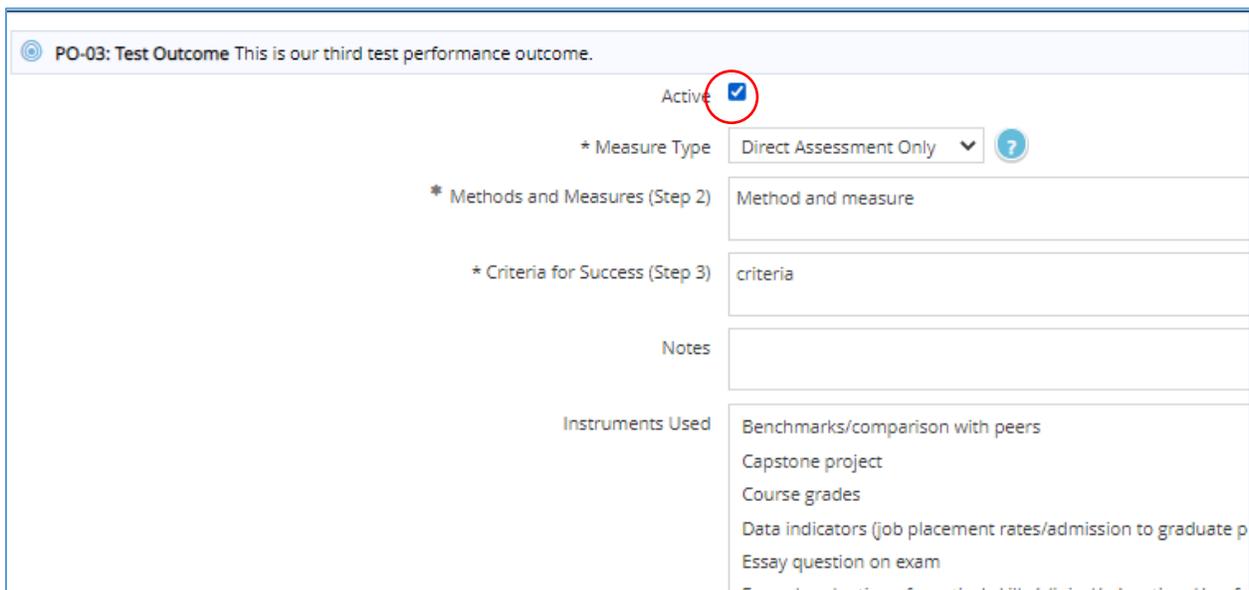
If the data collected for an outcome does not match the existing Methods and Measures (Step 2) and Criteria for Success (Step 3), the methods and measures should be retired and new ones created that support the collected data. **DO NOT** delete any methods and measures or criteria for success that have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

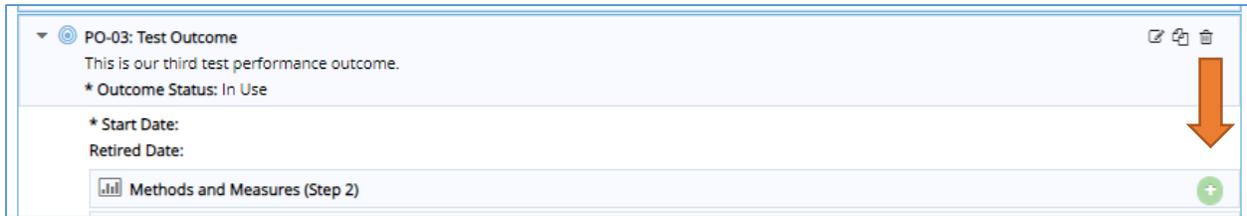


4. Uncheck the “Active” box.
5. Click [Save] and [Return].
  - A method/measure that has been retired can be unretired using the “filter” function.

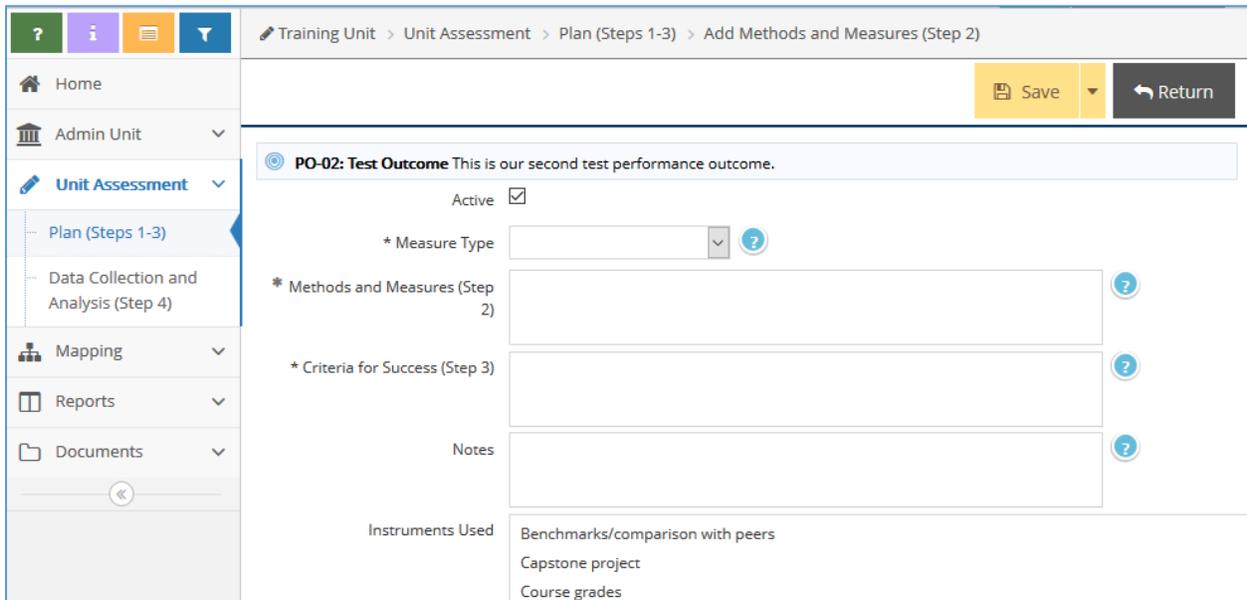


## AMS: Preventing Technical Errors in Annual Assessment Reporting

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/>.
    - 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/>.
  - 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.



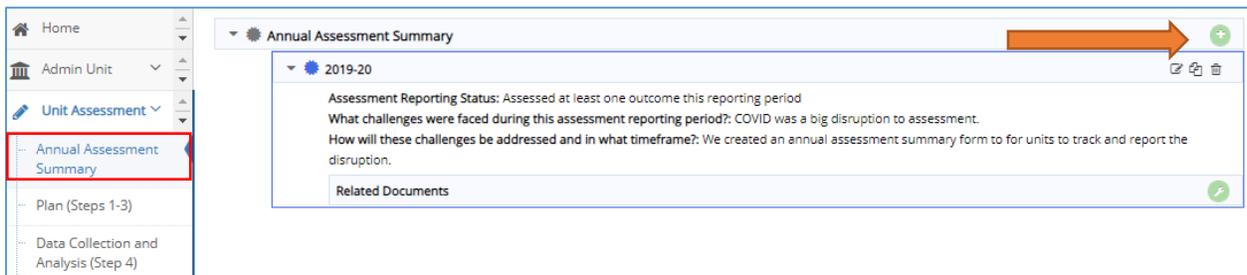
5. When done, click [Save] and [Return].
6. Continue to Steps 4 and 5.

WHAT TO DO WHEN NO DATA WILL BE REPORTED FOR THE ASSESSMENT CYCLE

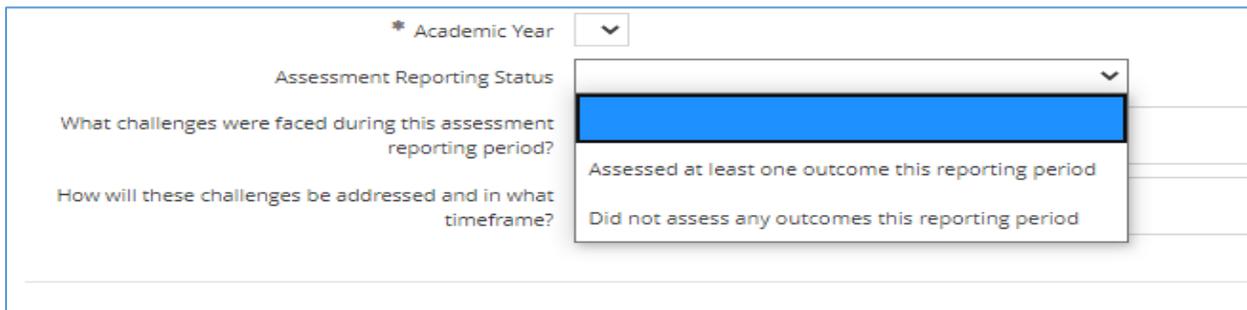
When a unit is unable to assess and report at least one outcome, completion of the “Annual Assessment Summary” is **mandatory**.

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.

