

INSTITUTIONAL SCORECARD (PLANNING) – Taskstream “How-To”

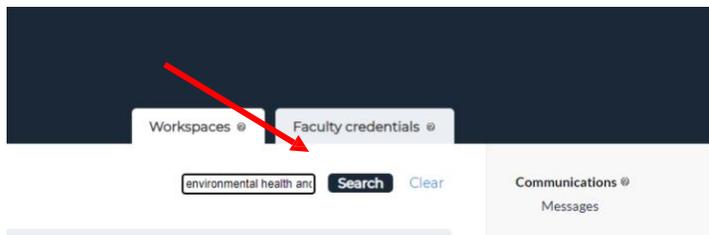
Action Plans – Use reported findings to determine action plans for each OUTCOME

1. Click on Taskstream located at dropdown on homepage (saved to favorites)
<https://login.taskstream.com/signon/>

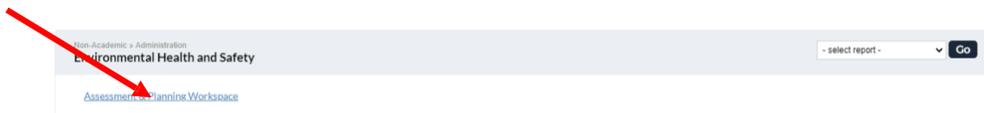
2. Sign In



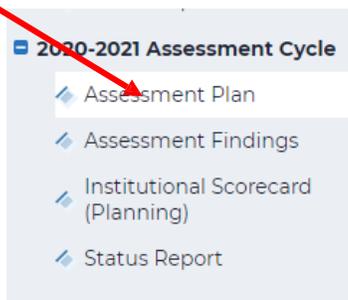
3. Type your area in the search



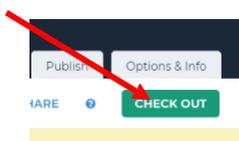
4. Click on Assessment & Planning Workspace



5. Click on Assessment Plan OR Assessment Findings at end of the year on lefthand side



6. Click the green CHECK OUT box



Start by clicking “CHECK OUT”

The screenshot shows the SUNY CANTON user interface. At the top, there is a navigation bar with the SUNY CANTON logo and links for HOME, SHARED RESOURCES, LOCATOR, MESSAGES, and RESOURCE TOOLS. The user's name, Erin Lassial, and options for My Account, Logout, Help, and taskstream | AMS are also visible. Below the navigation bar, the page title is "International Student Initiatives | PREVIEW" and the workspace is "Assessment & Planning Workspace". A secondary navigation bar includes buttons for Edit Content, Discussion, Submission & Read Reviews, Publish, and Options & Info. The main content area is titled "Institutional Scorecard (Planning)" and features a "VIEW LOG" button, a "WORD" icon, a "PDF" icon, a "PRINT" icon, a "SHARE" icon, and a "CHECK OUT" button circled in red. Below this, a yellow banner indicates "Work Not Started". The "Directions" section provides instructions on how to check out the requirement, and the "Review Method" section is also visible. A light blue box at the bottom of the main content area contains the text: "Start working by clicking 'Check Out' above."

Choose CREATE NEW or COPY EXISTING (See below for further explanation of options)

This screenshot shows the same SUNY CANTON user interface as the previous one, but with the "CHECK IN" button highlighted in green. Below the "CHECK IN" button, a yellow banner displays the text: "Work Not Started" and "Checked out: 08/09/2017 09:30:34 AM (EDT)" and "Checked out to: Erin Lassial". The "Directions" and "Review Method" sections are visible. At the bottom of the main content area, two buttons are highlighted: "CREATE NEW OPERATIONAL PLAN" and "COPY EXISTING PLAN AS STARTING POINT".

To build from Institutional Scorecards submitted for previous academic cycles: Click COPY EXISTING

- Most recent cycle is probably best, but you can view your options by clicking “PLAN” next to the option

SUNY CANTON

Erin Lassial My Account Logout Help taskstream | AMS

HOME SHARED RESOURCES LOCATOR MESSAGES RESOURCE TOOLS

International Student Initiatives | PREVIEW

Workspace: Assessment & Planning Workspace

Edit Content Discussion Submission & Read Reviews Publish Options & Info

Select existing Plan starting point

Directions: Select an existing plan as a starting point for your new plan. You will be able to modify this plan after copying it.

Existing Plan:

- Assessment & Planning Workspace**
2015-2016 Assessment Cycle: Institutional Scorecard (Planning) [plan]
- Assessment & Planning Workspace**
2014-2015 Assessment Cycle: Institutional Scorecard (Planning) [plan]

Cancel SUBMIT

Clicking CREATE NEW:

An embedded page at folio.taskstream.com says:

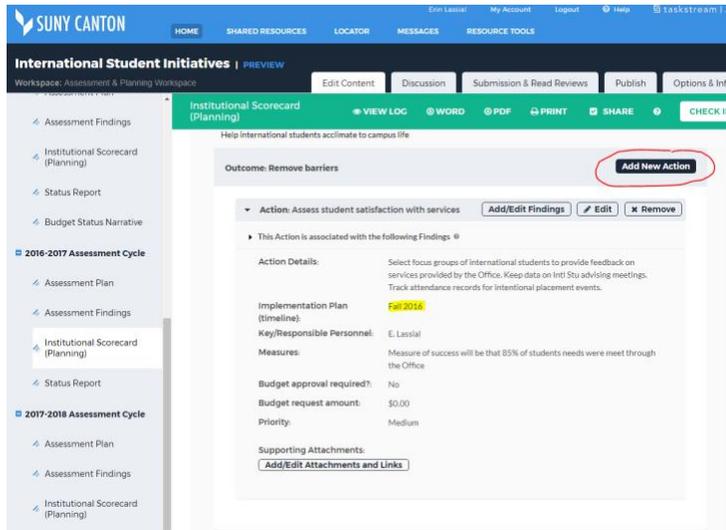
You are selecting to create this plan from scratch. Once you click OK on this alert, you will not be able to reverse this decision and use an existing plan as a starting point. Are you sure you want to continue with creating a new plan from scratch?

OK Cancel

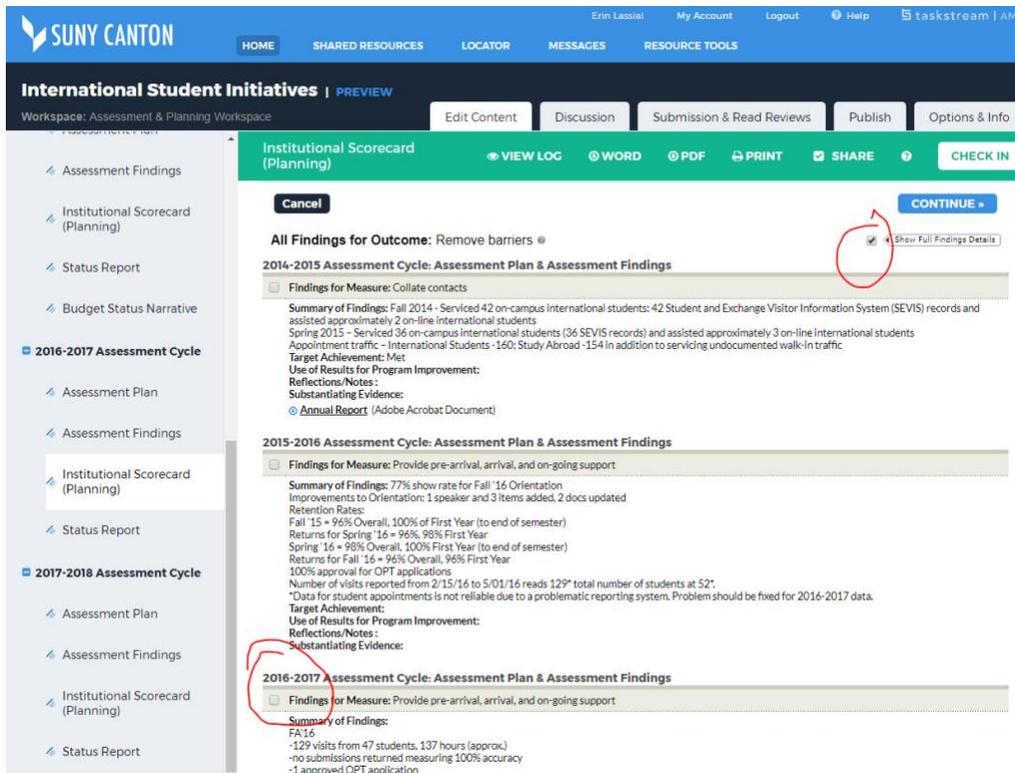
If you chose to COPY EXISTING –

- You can EDIT previously created Actions to reflect changes in the initiative(s)

- Add a new action for an outcome by clicking “ADD NEW ACTION”



ADD NEW ACTION – gives the option to import findings from all cycles including the most updated



Fill in new information and submit by clicking “APPLY CHANGES”

SUNY CANTON | HOME | SHARED RESOURCES | LOCATOR | MESSAGES | RESOURCE TOOLS

Erin Lassial | My Account | Logout | Help | taskstream

International Student Initiatives | PREVIEW

Workspace: Assessment & Planning Workspace

Action Information for: @
Outcome: Remove barriers

Define an action for this outcome by filling out the information below. Once this action is added, then you may add supporting attachments and links in the next step (from the main action plan screen).

* Required Fields

Cancel | Check Spelling | IMPORT ACTION | **APPLY CHANGES**

Linked to Findings: [Show Full Findings Details](#)

Findings for Provide pre-arrival, arrival, and on-going support
(Assessment Plan and Assessment Findings, 2016-2017 Assessment Cycle)

Summary of Findings:

- FA16
 - 129 visits from 47 students, 137 hours (approx)
 - no submissions returned measuring 100% accuracy
 - 1 approved OPT application
 - 2 Change of Level
 - Retention Rate: 98% - lost 1 student for financial reasons
- SP 17
 - 181 visits from 62 students, 137.5 hours (approx)
 - 100% accuracy - no submissions returned to date (still 2 pending OPT 5/30/17)
 - 5 OPT applications submitted - 3 approved, 2 pending
 - 8 Change of Level
 - Retention Rate: 95% - lost 2 students, 1 for financial reasons and 1 for academic reasons
 - Target Achievement: Met
 - Use of Results for Program Improvement:
 - Reflections/Notes: Measure satisfaction with services.
 - Substantiating Evidence:

* Action Item Title:

Action Details:

New ACTION item will appear as you are taken back to previous screen

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Erin Lassial | My Account | Logout | Help | Taskstream

International Student Initiatives | PREVIEW

Workspace: Assessment & Planning Workspace

Edit Content | Discussion | Submission & Read Reviews | Publish | Options & In

Institutional Scorecard (Planning) | VIEW LOG | WORD | PDF | PRINT | SHARE | **CHECK IN**

Supporting Attachments: [Add/Edit Attachments and Links](#)

▼ Action: Blackboard Access Center | Add/Edit Findings | Edit | Remove

► This Action is associated with the following Findings @

Action Details: A Blackboard shell has been created to increase efficiency in communication and points of contact with students. Items such as required immigration forms, SEVIS registration, and applications for OPT/ CPT and SSN will be made available. Items can be completed and submitted on one site without having to rely on email or coming to the office. The office will be able to track who has viewed and/or completed the task and who has not.

Implementation Plan (timeline): Fall 2017

Key/Responsible Personnel: Erin Lassial and Shelly Thompson

Measures: The number of days it takes to collect data will be tracked to assess if this method is more efficient than previous years. Students will also be asked about their experience and preference with the Blackboard initiative.

Budget approval required?: No

Budget request amount: \$0.00

Priority: High

Supporting Attachments: [Add/Edit Attachments and Links](#)

After work is completed use "CHECK IN" to save changes for that session

SUNY CANTON | Erin Lassial | My Account | Logout | Help | taskstream | AMS

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International Student Initiatives | PREVIEW

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Institutional Scorecard (Planning) | VIEW LOG | WORD | PDF | PRINT | SHARE | **CHECK IN**

Work In Progress | Checked out to: Erin Lassial

- Assessment Findings
- Institutional Scorecard (Planning)

Optional – Comments can be made to REVISION HISTORY LOG upon checking back in.

SUNY CANTON | Erin Lassial | My Account | Logout | Help | taskstream | AMS

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International Student Initiatives | PREVIEW

Workspace: Assessment & Planning Workspace

Edit Content | Discussion | Submission & Read Reviews | Publish

Check In Successful

You have checked in the following area: **2016-2017 Assessment Cycle : Institutional Scorecard (Planning)**

[Return to Work Area](#)

Optional

Check in all other areas checked out by you

Add comment to the revision history log:

- Added Action Item to Outcome: Remove Barriers
 - Screen shots made for "How To"
 - Still needed: Complete Institutional scorecard notes for '16-17

What would you like to do next?

Return to work area
 Go to Submission Area

Submit Comment

- Assessment Findings
- Institutional Scorecard (Planning)
- Status Report
- Budget Status Narrative
- 2016-2017 Assessment Cycle**
 - Assessment Plan
 - Assessment Findings
 - Institutional Scorecard (Planning)
 - Status Report
- 2017-2018 Assessment Cycle