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) <u>https://login.taskstream.com/signon/</u>
- 2. Sign In



3. Type your area in the search

| Workspaces Faculty credentials | |
|---------------------------------------|------------------------------|
| environmental health and Search Clear | Communications @ Messages |

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"

| | | | | Erin Lassi | al My Account | Logout | 🕜 Help | ち taskstream AMS | | | |
|--|-----------------|--|--|---|---|---|---|--|--|--|--|
| Y SUNT CANTUN | HOME | SHARED RESOURCES | LOCATOR | MESSAGES | RESOURCE TOOLS | | | | | | |
| | | | | | | | | | | | |
| Workspace: Assessment & Planning W | orkspace | | Edit Content | Discussion | Submission & R | ead Reviews | Publish | n Options & Info | | | |
| Assessment Findings | Înstii (Plar | tutional Scorecard nning) | @ VIEW LO | OG [®] WORD | 🕘 PDF 🔒 P | | SHARE | | | | |
| | Work | Not Started | | | | | | | | | |
| Institutional Scorecard (Planning) | + 0 | Directions | | | | | | | | | |
| 🛷 Status Report | T b s | o begin, please Check Out t outton to access the previou elect the specific outcomes | his requirement. Sele sly-entered outcome you wish to add an ac | et the "Create New (sets. Select the set o tion to by enabling t | Operational/Action PI of outcomes that you v he checkbox next to e | an" button. Sele vish to documer ach outcome. Fr | ct the "Select nt an action wi or each outcor | Existing Set" <u>Print</u> Ith this cycle and then me that was selected, | | | |
| | y b a | rou will see an "Add New Act outton. Once an action has b able to import LAT reports a | tion" button. To add a een added you may a t this time. Repeat thi | n action to an outcor dd any attachments s process for any and | ne, click this button, c or weblinks to that me d all subsequent action | omplete the rec easure. NOTE: it ns that you wish | quired fields ar f you are an LA n to add. In ord | nd press the "Continue" AT user, you will also be ler for others to access | | | |
| 2016-2017 Assessment Cycle | t F | his requirement you will nee Review Method | ed to Check In the rec | quirement when you | are finished. | | | | | | |
| \land Assessment Plan | | | | | | | | | | | |
| Assessment Findings | | Start working by clicking | ; "Check Out" above. | | | | | | | | |
| . Institutional Scorecard | | | | | | | | | | | |

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



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

| | | | | Erin Las | sial My Account | Logout | 🕑 Help | 법 taskstream AMS | | |
|---|----------|------------------------------|------------------------------|---|--|-------------------|---|--------------------|--|--|
| SUNY CANTON | HOME | SHARED RESOURCES | LOCATOR | MESSAGES | RESOURCE TOOLS | | | | | |
| International Student I | nitiativ | 'es preview | | | | | | | | |
| Workspace: Assessment & Planning Wo | rkspace | | Edit Content | Discussion | Submission & Rea | ad Reviews | Publish | Options & Info | | |
| Assessment Findings | Sel | ect existing Plan | starting poin | t | | | _ | - | | |
| Institutional Scorecard | Dire | ctions: Select an existing p | plan as a starting poir | nt for your new plan | . You will be able to mod | ify this plan aft | er copying it. | | | |
| (Planning) | | Existing Plan: | | | | | | | | |
| 🛷 Status Report | | | 20 (la A: 20 (la | 015-2016 Assessm st modified: 10/09/201 55essment & Pla 014-2015 Assessm st modified: 03/19/201 | ent Cycle: Institutiona 6) nning Workspace 1ent Cycle: Institutiona 6) | I Scorecard (F | Planning) <u>(Plan</u> Planning) (<u>Plan</u> | <u>n</u> | | |
| A Budget Status Narrative | | | | | | | | | | |
| 2016-2017 Assessment Cycle | | | Cand | SUBMIT | | | | | | |
| \land Assessment Plan | | | | | | | | | | |

Clicking CREATE NEW:

•

| | . en y a chaannap | | | | | | | | | |
|-----|--|--|----|--|--|--|--|--|--|--|
| | An embedded page at folio.taskstream.com says: | | | | | | | | | |
| R | 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 | | 10 | | | | | | | |
| al. | | | | | | | | | | |

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

| Y SUNY CANTON | Erin Latsial My Account Logout Q Help 5 taskstream AM3 HOME SHARED RESOURCES LOCATOR MESSAGES RESOURCE TOOLS |
|--|--|
| International Student | |
| workspace: Assessment & Planning w | Edit Content Discussion Submission & Read Reviews Publish Options & Info |
| Assessment Findings | Institutional Scorecard ● VIEW LOC ● WORD ● PDF → PRINT ■ SHARE ● CHECK IN (Planning) |
| Institutional Scorecard (Planning) | Cancel All Findings for Outcome: Remove barriers @ |
| Status Report | 2014-2015 Assessment Cycle: Assessment Plan & Assessment Findings |
| Status Report | Einding for Measure Collate contacts |
| Budget Status Narrative | Finality for measure. Collect OnlineLiss Summary of Findings: Fail 2014 - Serviced 42 on-campus international students: 42 Student and Exchange Visitor Information System (SEVIS) records and assisted approximately 2 on-line international students Spring 2015 - Serviced 34 on-campus international students (36 SEVIS records) and assisted approximately 3 on-line international students |
| 2016-2017 Assessment Cycle | Appointment traffic – International Students -160; Study Abroad -154 in addition to servicing undocumented walk-in traffic Target Achievement: Met Use of Results for Program Improvement: |
| Assessment Plan | Substantiating Evidence: © <u>Annual Report</u> (Adobe Acrobat Document) |
| 🍲 Assessment Findings | 2015-2016 Assessment Cycle: Assessment Plan & Assessment Findings |
| | Englines for Measures Provide measured and on-soles support |
| Institutional Scorecard (Planning) | Summary of Findings: 77% show rate for Fall '16 Orientation Improvements to Orientation: 1 speaker and 3 Items added, 2 docs updated Retention Rate: |
| 🔞 Status Report | Fail 15 = 96% Overall, 100% of First Year (to end of semester) Returns for Snirg 16 = 96%, 96% First Year Spring '16 = 96% Overall, 100% First Year (to end of semester) |
| 2017-2018 Assessment Cycle | retourns tor r-ain 1.0 = 70m. Okerail, 70m prist: tear 100% approval for OPT applications Number of visits reported from 2/15/16 to 5/01/16 reads 129° total number of students at 521. "Data for student appointments is not retiable due to a problematic reporting system. Problem should be fixed for 2016-2017 data. |
| i Assessment Plan | Target Achievement: Use of Results for Program Improvement: Reflections/Notes : |
| Assessment Findings | 2016-2017 Ssessment Cycle: Assessment Plan & Assessment Findings |
| Institutional Scorecard (Planning) | Findings or Measure: Provide pre-arrival, arrival, and on-going support Summary of Findings: |
| 🛷 Status Report | -122 visits from 47 students, 137 hours (approx.) -no submissions returned measuring 100% accuracy -1 approved OPT application |

Fill in new information and submit by clicking "APPLY CHANGES"

| A CHNY CANTON | | | | Erin Las | sial My Account | Logout | 0 Help | 5 taskstream A |
|--|--|---|------------------------------------|--|--|---|------------------------|------------------|
| Y SUNT CANTUM | HOME | SHARED RESOURCES | LOCATOR | MESSAGES | RESOURCE TOOLS | | | |
| International Student | Initiativ | es Preview | | | | | | |
| Workspace: Assessment & Planning Wo | | * | Edit Conter | nt Discussion | Submission & Re | ad Reviews | Publish | Options & Infc |
| Assessment Findings Institutional Scorecard (Planning) | Actin Outo Defir links * Rec | on Information for: @ come: Remove barriers he an action for this outcome in the next step (from the ma quired Fields | by filling out t in action plan | he information below. O screen). | nce this action is added, | then you may a | add supporting | attachments and |
| 🛷 Status Report | Ca | ncel Check Spelling | 1 | | C | IMPORT AC | | PPLY CHANGES |
| & Budget Status Narrative | | Linked to Fin Show Full Findings Detail | dings: F | indings for Provide pre- ssessment Plan and Assessme Summary of Findings: | arrival, arrival, and on-g nt Findings; 2016-2017 Asses | oing support sment Cycle) | | |
| 2016-2017 Assessment Cycle | | | | FA16 -129 visits from 47 stud -no submissions returne -1 approved OPT applica -2 Change of Level | ents, 137 hours (approx.) d measuring 100% accurad Ition | У | | |
| Assessment Findings | | | | Retention Rate: 98% - lo SP '17 -181 visits from 62 stud -100% accuracy = no sul | st 1 student for financial re ents, 137.5 hours (approx) missions returned to date | still 2 pending | OPT 5/30/17) | |
| Institutional Scorecard (Planning) | | | | -5 OPT applications sub - 8 Change of Level Retention Rate: 95% - Io Target Achievement: M | nitted - 3 approved, 2 pen st 2 students, 1 for financi at | Sing al reasons and 1 | for academic rea | sons |
| Status Report | | | | Use of Results for Progr Reflections/Notes : Mei Substantiating Evidence | am Improvement: isure satisfaction with serv i: | ric <mark>es.</mark> | | |
| 2017-2018 Assessment Cycle | | | | | | | | |
| 🛷 Assessment Plan | | * Action Item | n Title: | Blackboard Access Center | | | | |
| Assessment Findings | | Action D | etails: | communication and po required immigration f OPT/ <u>CPT</u> and <u>SSN</u> will | nts or contact with stud orms, <u>SEVIS</u> registration be made available. Item | ents. items su n, and applicati s can be comp | ions for leted and | |
| Institutional Scorecard (Planning) | | | | submitted on one site v office. The office will be | vithout having to rely or able to track who has v | email or comi iewed and/or o | ng to the completed | |

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

| | | | | | Erin Lassi | ial My Account | Logout | 🕑 Help | 면 tasi | kstream | | |
|-----------------|--|------------------------|--------------------------------------|---------------------------------|--|---|--|---------------------------------------|---------------|------------|--|--|
| | SUNY CANTUN | HOME | SHARED RESOURCES | LOCATOR | MESSAGES | RESOURCE TOOLS | | | | | | |
| In | ternational Student I | nitiatives | PREVIEW | | | | | | | | | |
| Wo | kspace: Assessment & Planning Wor | kspace | | Edit Content | Discussion | Submission & R | ead Reviews | Publish | 0 | ptions & I | | |
| | Assessment Findings | Institutio (Plannin | onal Scorecard ag) | 👁 VIEW | | D @ PDF 🗧 | PRINT C | SHARE | 0 | СНЕСК | | |
| | Institutional Scorecard (Planning) | | Add/Edit At | tachments and Li | nks | | | | | | | |
| | 🛷 Status Report | | ✓ Action: Black | board Access Cen | iter | Add/Edit Fi | ndings 🖉 | Edit X F | Remove |) | | |
| | Ø Budget Status Narrative | | This Action is a | ssociated with the fo | ollowing Findings @ | | | | | | | |
| □ 2 | 016-2017 Assessment Cycle | | Action Detail | S: | A Blackboard shell I communication and | nas been created to in points of contact wit | icrease efficienc h students. Item | y in Is such as requi | ired | | | |
| | Assessment Plan | | | | immigration forms, SSN will be made av | SEVIS registration, ar ailable. Items can be | /IS registration, and applications for OPT/ CPT and able. Items can be completed and submitted on one | | | | | |
| | Assessment Findings | | | | site without having able to track who ha | to rely on email or co as viewed and/or com | ming to the offic pleted the task a | e. The office ward who has no | ill be ot. | | | |
| | Institutional Scorecard | | Implementat (timeline): | ion Plan | Fall 2017 | | | | | | | |
| | (Planning) | | Key/Respons | ble Personnel: | Erin Lassial and She | lly Thompson | | | | | | |
| | 🛷 Status Report | | Measures: | | The number of days method is more efficient is not a second sec | it takes to collect dat cient than previous ye | a will be tracked ears. Students w | d to assess if th ill also be aske | is d | | | |
| a 2 | 017-2018 Assessment Cycle | | Budget appr | val required? | No | ice and preference w | ith the Blackboa | ard initiative. | | | | |
| | Assessment Plan | | Budget reque | est amount: | \$0.00 | | | | | | | |
| Assessment Flan | | | Priority: | | High | | | | | | | |
| | Assessment Findings | | | | | | | | | | | |
| | Institutional Scorecard (Planning) | | Supporting A | ttachments: tachments and Li | nks | | | | | | | |

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

| | | | | Erin Lassi | ial My Account | Logout | Help | ら taskstream AMS |
|---|-----------------------|-----------------------------|--------------|------------|----------------|--------------|------------------|--------------------|
| SUNY CANTON | HOME SHARED RESOURCES | | LOCATOR | MESSAGES | RESOURCE TOOLS | | | |
| International Student Initiatives preview | | | | | | | | |
| Workspace: Assessment & Planning Work | | | Edit Content | Discussion | Submission & I | Read Reviews | Publish | Options & INfo |
| ♦ Assessment Findings | Instii (Plar | utional Scorecard ining) | © VIEW | | D @PDF | 🖯 PRINT 🛛 | SHARE | 6 CHECK IN |
| Institutional Scorecard | Work | In Progress | | | | Checked | out to: Erin Las | sial |
| (Planning) | | ····· | | | | | | |

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

| V SUNY CANTON | НОМЕ | SHARED RESOURCES | LOCATOR | MESSAGES | RESOURCE TOOLS | LUguut | Спер | 31 |
|--|-------------------|--|---------------------------------|--------------------------------|--------------------------|---------------|---------|-----|
| International Student I | Initiativ | /es preview | | | | | | |
| Workspace: Assessment & Planning Wo | orkspace | | Edit Content | Discussion | Submission & Rea | ad Reviews | Publish | h i |
| Assessment Findings | Ch | eck In Successful | | | | | | |
| Institutional Scorecard (Planning) | You I | nave checked in the followin Pturn to Work Area | ng area: 2016-2017 | Assessment Cycle | e : Institutional Scorec | ard (Planning |) | |
| 🛷 Status Report | Opti | onal | | | | | | |
| Ø Budget Status Narrative | Add | Check in all other areas check comment to the revision h | cked out by you history log: | | | | | |
| 2016-2017 Assessment Cycle | - / - S | Added Action Item to Outcor Screen shots made for "How | me: Remove Barrier v To" | 'S | | | | |
| ♦ Assessment Plan | -S | till needed: Complete Institu | utional scorecard no | tes for '16- <mark>'</mark> 17 | | | | |
| Assessment Findings | | | | | | 11 | | |
| Institutional Scorecard (Planning) | Wha ● R ● G | t would you like to do nex eturn to work area to to Submission Area | tt? | | | | | |
| 🛷 Status Report | Su | bmit Comment | | | | | | |
| 2017-2018 Assessment Cycle | | | | | | | | |