INSTITUTIONAL SCORECARD (PLANNING) – Taskstream "How-To"
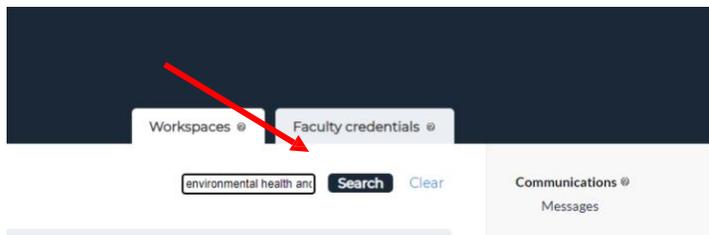
Action Plans – Use reported findings to determine action plans for each OUTCOME

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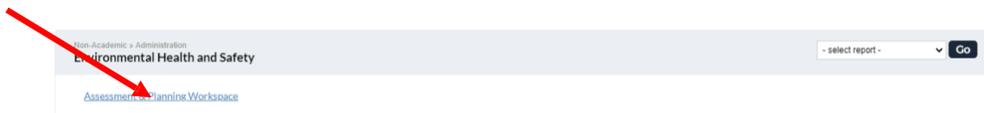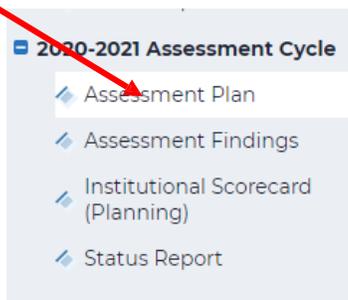
2. Sign In
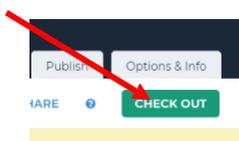

3. Type your area in the search

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"

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
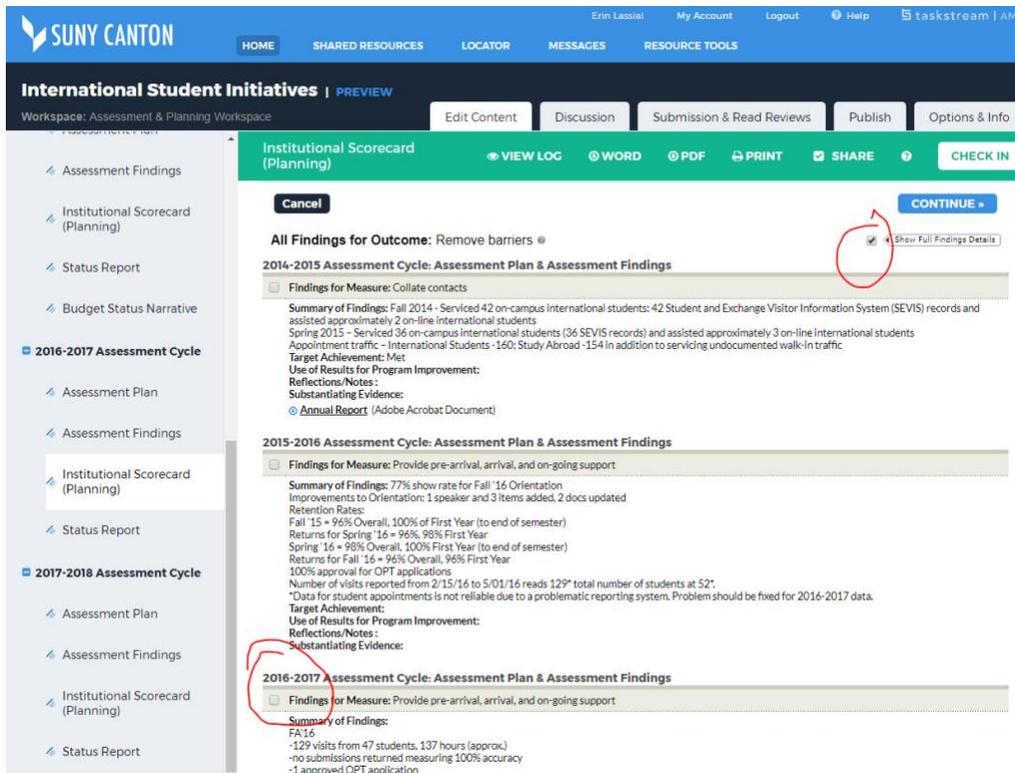
Clicking CREATE NEW:

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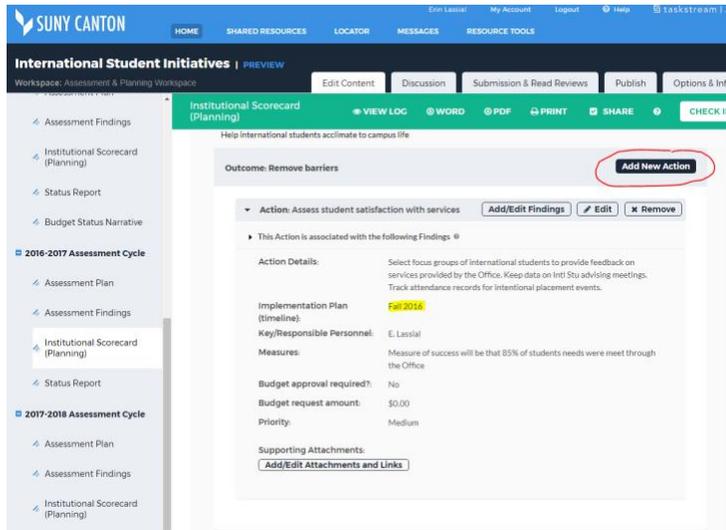
ADD NEW ACTION – gives the option to import findings from all cycles including the most updated

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

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

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

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