Relate a Document to an Assessment Method .................................................................31
Enter Assessment Results..............................................................................................34
Find Your Assessment Results .......................................................................................34
Add an Assessment Result ............................................................................................35
Edit an Assessment Result ............................................................................................37
Move an Assessment Result .........................................................................................38
Delete an Assessment Result .......................................................................................39
Add a Related Document to an Assessment Result ....................................................40
Enter Action Plans Based on Findings .......................................................................43
Find Your Action Plan Based on Findings ..................................................................43
Add Action Plan Based on Findings ............................................................................44
Edit Action Plan Based on Findings ............................................................................46
Delete an Action Plan Based on Findings ....................................................................47
Identify/Enter PLOs and Assessment Methods for the Coming Year .......................48
Document Repository ..................................................................................................51
Find the Document Repository .....................................................................................51
Add a Folder to the Document Repository ..................................................................52
Add Files and URLs to the Document Repository ......................................................53
Tasks in the AMS ..........................................................................................................54
Find Tasks Assigned to You .........................................................................................54
Complete Tasks Assigned to You ................................................................................55
Assign Tasks ..................................................................................................................56
Curriculum Mapping .....................................................................................................63
Find Curriculum Mapping ............................................................................................63
Navigating the Curriculum Map ...................................................................................64
Add and Delete Courses from Your Program’s Curriculum Map ................................65
Rearrange Course Mapping Order ..............................................................................65
Annual Submission .........................................................................................................67
Generating Reports .......................................................................................................71
Find Reports ...................................................................................................................71
Types of Reports in the AMS .......................................................................................72
Filtering Reports in the AMS .......................................................................................72
View a Report ..................................................................................................................73
Save a Report ..................................................................................................................73
Feedback .........................................................................................................................75
Introduction

About AMS Nuventive Improve

What is Nuventive Improve?

Nuventive Improve is an Assessment Management System (AMS) that supports learning outcome assessments, strategic planning, and accreditation. In terms of learning outcomes assessment, the focus of this manual, this tool lets you document, submit, and report program learning objectives (PLOs), assessment methods, assessment results, and program action plans for your annual assessment reporting.

The Nuventive Improve AMS at Penn State

Penn State has implemented the Nuventive Improve AMS for faculty and staff, to facilitate assessment reporting processes currently in place. While the Penn State process for Learning Outcomes Assessment (LOA) implemented in 2016 is unchanged, the Nuventive Improve AMS provides new efficiencies and benefits to the streamline the process.

Advantages include:

- An organized archive of learning outcome assessments and activities over time
- Easy and manageable data entry
- No more copying and pasting PLOs and assessment methods from year to year
- Readily available and manageable curriculum mapping
- A repository for assessment-related documents
- The ability to create, download, and share a variety of reports from year to year.

NOTE: Any degrees (associates, bachelors, masters, and doctoral) and for-credit certificate programs that do not go through a specialized accreditation process are required to participate in the University’s learning outcomes assessment process, the reporting of which is outlined in this document. Programs that do go through a specialized accreditation process, including associated learning outcomes assessment requirements, are required to provide the Office of Planning, Assessment, and Institutional Research (OPAIR) with a copy of their most recent accreditation self-study in lieu of participation in Penn State’s assessment process. Contact your Assessment Liaison (opens in new window) if you’re not sure if this applies to you.

What AMS Users Can Expect in 2020

Academic year 2019-20 is the inaugural year of the Assessment Management System. In order to ease the transition from paper reporting to the online system, key information from programs’ 2019 assessment reports has been pre-loaded into the AMS for your use. This includes:

- General information for your program (name, credential, college/campus, and specialized accreditation status if relevant)
- Previously submitted program learning objectives
- Assessment plans for 2019-20
- OPAIR feedback from your 2019 assessment report (in your Feedback Archive folder)

If you cannot find any of this information, it may be because your program is relatively new. Please contact your Assessment Liaison (opens in new window) to discuss missing information.
Assessment Liaisons
Each college and campus is assigned an Assessment Liaison to support your assessment process. If you need help with the AMS interface or anything assessment related, reach out to your Liaison and they will be happy to assist you. Visit the Assessment Liaison webpage (opens in new window) to find out who your liaison is.

Roles within the AMS
There are two primary roles that apply to assessment users in the AMS: Assessment Leaders and Email Only users. Each role has specific permissions for accessing the AMS and completing tasks within it. This section tells you a little more about the permission roles within the AMS. Certain roles may not have access to each function described in this manual. Contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, if you need assistance.

- **Assessment Leaders:** Assessment Leaders are typically program coordinators, directors of undergraduate/graduate study, directors of academic affairs, or associate deans. They can see only the Programs to which they are assigned.
  - **Edit access:** Assessment leaders have edit access to their own programs.
  - **Read-only access:** Read-only access is given to assessment leaders so they can view the assessment plans of all locations in their disciplinary community (e.g., the leader for Biology at Erie can see the plans for Biology at other locations) and to University administrators so that they may view the plans of all programs within their purview.

- **Email-Only:** These users cannot access the full range of functions in the AMS. They can complete tasks emailed to them from the AMS. Links within the emails allow them to complete these tasks and apply them to the AMS. A typical Email-Only user is a faculty member who is asked to describe an assessment conducted in their course (Assessment Method) but does not have broader responsibility for assessment reporting.

Much of this manual will not apply to Email-Only users. Email-Only users will find the sections Complete Tasks Assigned to You and Appendix A: Guide for Email-Only Users the most helpful.

NOTE: Email-Only users must first be added to the AMS by OPAIR staff before you can assign them tasks. If you need to add an Email-Only user, please email your Assessment Liaison (opens in new window) and provide the name, program name, campus, and credential (i.e., associates, baccalaureate, etc.) of the user.

NOTE: Email-Only users will not see the same interface that Assessment Leaders see. They will only see options directly relevant to their assigned task.
About This Manual

NOTE: This manual was written and tested in a Windows operating system using Google Chrome’s browser. A user’s experience may vary depending on their operating system and browser. We recommend disabling your pop-up blocker for this website in your browser. See this article about disabling pop-up blockers (opens in new window). The Nuventive AMS support the latest versions of Chrome, Firefox, Microsoft Edge, and Safari. It does not support Internet Explorer. OPAIR recommends that users use Chrome or Firefox.

How This Manual Works

This manual is set up to guide users through the process of entering and submitting annual program assessment reports. From accessing the AMS, to editing curriculum maps, this manual demonstrates how to use the Nuventive Improve interface to successfully submit your program assessment reports.

This manual assumes you have submitted a complete set of Program Learning Objectives (PLOs) and a curriculum map for those PLOs to the Office of Planning, Assessment, and Institutional Research (OPAIR), as required by the University and that these have subsequently been entered in the AMS for you. If you have submitted these two items but do not see them, or have not submitted these items, please contact your Assessment Liaison (opens in new window) or call (814) 863-8721 to get set up.

Programs that go through a specialized accreditation process, including associated learning outcomes assessment requirements, are required to provide the Office of Planning, Assessment, and Institutional Research (OPAIR) with a copy of their most recent accreditation self-study in lieu of participation in Penn State’s assessment process. Contact your Assessment Liaison (opens in new window) if you’re not sure if this applies to you.
Important Information and AMS Best Practices

Important Information before You Begin

Throughout the manual, particularly critical information will be highlighted with the word “Important”. What follows are important information and best practices that help make this process as easy as possible. The list below identifies important points to keep in mind as you go through these processes.

- It is imperative that you do not delete or edit any PLO names or descriptions for your program as PLOs are structured retroactively. This means that if you edit a PLO that was used for the past five years, the past five year’s records will reflect the new PLO and erase the old one. If you need to adjust your PLOs, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

- The AMS does not automatically save your work. Click the Save button in the top right corner of any editing screen frequently.

- Items marked with an asterisk (*) are required fields. You cannot save or submit without completing these fields. Click the blue circles with question marks to the right of a field for more detailed information about what that field requires.

- In the Document Repository, use the breadcrumbs at the top of the page to navigate back, rather than the Back button on your browser. The Back button takes you to the first page you loaded.

- We strongly discourage using sequential numbers when you name your PLOs, as this could create confusion if you need to rearrange them or if you add/archive PLOs.

- The Nuventive AMS interface updates nightly hourly, so you might not see changes reflected immediately. It’s a best practice to check the Home Screen often to make sure it displays your changes. If your changes still aren’t reflected, contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

- You still must submit your program for review even if you are not submitting results this cycle. The system will give you the opportunity to indicate the reason that you do not have results to submit for the current cycle.

- You must assign PLOs and Assessment Methods for the coming year even if you are not submitting results this cycle.

- Make sure you disengage pop-up blockers in your browser in order to download reports. See this website for instructions to turn off pop-up blockers (opens in new window) if you’re not sure that you’ve done this.

AMS Best Practices

- Review your program’s General Information.

- Archive your PLOs when they are no longer relevant. DO NOT DELETE OR EDIT the PLO names or descriptions. If you need to edit a PLO, contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.
• Create a workable naming convention for your document files and folders and share it with users who have access to your program in the AMS.

• Contact your liaison if you are unsure at any point during this process.

• Because the curriculum mapping function of the AMS does not accommodate multiple courses to meet one requirement (e.g., students may take MATH 110 or MATH 140), OPAIR encourages users to define sets of Restricted Electives in a document to be uploaded and kept in the AMS Document Repository for reference.
Getting Started

Log In/Access AMS Nuventive Improve
1. Visit the OPAIR website (opens in new window) to access the interface.
2. Click the Click here to log in to the AMS button on the right side of the home page. Use your Penn State Access ID credentials to log in.
3. Click the Launch button in the center of the screen.

Navigating the Home Screen
The Nuventive AMS Home Screen is designed to show you at-a-glance what parts of the process you still need to complete for a selected program in a given reporting year. Keep in mind that you are reporting results from the previous year and plans for the coming year.

Important: The Nuventive AMS interface updates nightly hourly, so you might not see changes reflected immediately. It’s a best practice to check the Home Screen often to make sure it displays your changes. If your changes still aren’t reflected, contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

The Home Screen updates its references annually on the first business day of January to focus on the coming year’s assessment report (i.e., on December 5, 2020 it will reflect the status of your 2019-20 assessment efforts and plans for 2020-21, and on January 5, 2021 it will reflect the status of your 2020-21 assessment efforts, and your plans for 2021-22).

On the home screen, a red X indicates an unfinished part of your annual reporting requirement. A green checkmark indicates your program assessment complies with that University requirement.

The Program field at the top shows which program is displayed on the dashboard below. Each time you log in to the AMS, this field automatically selects the last program you worked on the last time you were logged in. Click your cursor anywhere in this field to display a drop-down menu of programs to which you have access and click a program to select it. If you don’t see a program to which you think you should have access, contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.
The Side Panel

The side panel on the right side of your screen gives you access to a variety of resources, including the LOA Handbook and the AMS Training Site. This allows you to use the AMS side-by-side with either the handbook or the training site.

1. Click the LOA Handbook panel on the right side of your screen after you log in. This provides in-depth learning outcomes assessment explanations and definitions, as well as the option to simultaneously view the AMS and the handbook side-by-side. Look at specific segments or download the full version on this page. Once you click the handbook, you may need to scroll down to see its contents.
2. Click the **AMS Training Site**, below the LOA Handbook, to access training materials and learn more about the AMS.

3. Click these options to change how much of the side panel you wish to see. By default, when you log in you will always see the third option from the right selected.

**Program - Training Exemplar**

Use the **Program – Training Exemplar** to explore view-only access to the Nuventive Improve AMS interface and see what types of information are expected in the various fields. All Assessment Leaders should have access to the Training Exemplar Program.

To find the **Program – Training Exemplar** instance in the AMS, click anywhere in the program field at the top of the screen. Scroll through the drop-down menu that opens and select the **Program – Training Exemplar**. If you don’t see the Training Exemplar, contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

From this point you can click through the program and observe how completed assessments should look, however you cannot change anything about this program.
Using the AMS

General Information

**Important:** The first time you access a program in the AMS, please review your program’s General Information for accuracy. However, users cannot edit this information. Contact your Assessment Liaison (opens in new window) or OPAIR at (814) 863-8721 if the information here is incomplete or incorrect.

1. Navigate to the OPAIR website (opens in new window) and click the Click here to log in to the AMS button and log in with your PSU credentials, if necessary.
2. Click the Launch button in the center of the window.
3. Click the Program field at the top of your screen and select a program from the drop-down menu.
4. Click the hamburger icon (three lines) in the upper left-hand corner.
5. Click the Program tab from the drop-down menu.
6. Click the General Information subtab.

**NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.
Program Planning Summary

While the Home Screen indicates the status of tasks required for your annual assessment reporting, the Program Planning Summary provides a basic rundown for the program selected in the Program field. It shows your Program Learning Objectives (PLOs), and how many Assessment Methods, Assessment Results, and Action Plans Based on Findings you have for that program.

- For more detailed information about interacting with the Program Planning Summary, please see Navigate the Program Planning Summary below.

Find the Program Planning Summary

1. Click the Program field at the top of the window and select your program from the drop-down menu.

   ![Program field](image)

   Figure 5: The Program field.

   **NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
3. Click the Assessment tab from the menu panel that opens.
4. Click the Planning Summary subtab.

   ![Planning Summary subtab](image)

   Figure 6: The Planning Summary subtab.

This takes you to your selected Program Planning Summary.
Navigate the Program Planning Summary
Use this diagram to navigate the Planning Summary.

Figure 7: A diagram of the Planning Summary for a program in the AMS.

1. **Program Learning Objectives (PLOs):** This column shows your PLOs listed for this specific program. Click on a PLO to see it in more detail. This page will only show active PLOs and values for active assessment methods. A green checkmark indicates that you have successfully entered a PLO into the system and the table summarizes the information related to that PLO. However, the Summary table does not indicate whether you have completed the necessary tasks for your annual assessment. You should refer to your Home screen to determine any outstanding reporting items for the year.

   **Important:** It is imperative that you do not delete or edit any PLO names or descriptions for your program without carefully considering the consequences. The PLOs are structured retroactively. This means that if you edit a PLO that you used for the past five years, the past five year’s records will show the new PLO and erase the old one. If you need to edit or delete your PLOs, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

   **Assessment Methods:** This column shows how many active Assessment Methods there are for each PLO. Click on a value in this column to see more details about the Assessment Methods attached to this PLO.

2. **Assessment Results:** This column shows how many Assessment Results there are for each PLO. Click on a value in this column to see more details about Assessment Results attached to this PLO.

3. **Action Plan Based on Findings:** This column shows how many Action Plans Based on Findings there are for each PLO. Click on a value in this column to see more details about the Action Plan Based on Findings attached to this PLO.

4. **Help:** This icon displays navigational tips at the top of your current page. Click the X in the help box to exit this view.
5. **Instructions:** This icon displays instructions at the top of the page, if applicable. Instructions display automatically only if there are instructions in the system for a certain page. Not every page has instructions. Click the X in the instructions box to exit this view.

6. **Audit Log:** This icon shows a log of any edits or changes made to the current page. It shows when changes were made and who made them. Click Edit to see the Activity Details of what was changed. Click the X in the Audit Log box to exit this view.

**NOTE:** There is no audit log for the Program Planning Summary page.

7. **Filter:** This icon displays filter options available on certain pages to help you narrow your search. If you have filters applied to a page, this icon has a red highlight around it. Filters are user-specific. If multiple users have access to your program, each can set different filters to customize their views.

**NOTE:** There are no Filters for the program summary page.

To remove filters, click the Filters icon and click the Clear Filters button in any Filters Settings section to which filters are applied. You may need to scroll down to see all the instances in which settings are applied. Click the X in the upper right-hand corner of the Filters box to exit the filters view.
Working with Program Learning Objectives (PLOs)

The University requires that every academic program articulate Program Learning Objectives (PLOs). These should be reviewed as part of each annual assessment submission. PLOs are objectives for your program designed to specify the expected capabilities and knowledge students gain from engaging with that program.

Find Your PLOs

1. Click the Program field at the top of the window and select your program from the drop-down menu.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
3. Click the Assessment tab from the menu panel that opens.
4. Click the Plan subtab.

This takes you to your Plan page for your program’s PLOs.
Jump to instructions to:

- Archive a PLO
- Delete a PLO
- Add a PLO
- Edit a PLO
- Rearrange a PLO

Review Current PLOs

**Important:** Review your PLOs for accuracy. If you need to add PLOs, see Add a PLO or if you need to edit your PLOs, see Editing PLOs.

Archive and Delete PLOs

**Important:** We recommend that you DO NOT DELETE your PLOs and instead archive them if you no longer wish to use them. If you have PLOs used in previous years, deleting them will delete everything related to those PLOs (including methods and previous assessment findings) and they may not be recoverable. A good instance for using the delete function would be if someone on your team created a duplicate PLO for one you already have in your program. In this example you would delete the duplicate.

**Archive a PLO**

1. Navigate to the Plan subtab in the menu (Steps 1-6 under Find Your PLOs).
2. Click the Edit PLO icon to the right of the PLO you wish to archive.

![Figure 13: The Edit PLO icon.](image)
3. Click the **PLO Status** drop-down and select **Archived**.

![Image of the PLO Status field drop-down menu]

*Figure 14: The PLO Status field drop-down menu.*

4. *(Optional)* Click the **Archived Date** field to select a date. This attaches a date to the archived PLO to indicate when it was archived. OPAIR recommends completing this field for future reference, though it is not required.

   **NOTE:** Setting the Archived Date does not automatically change the PLO status.

5. Click the arrow to the right of the Save button and select **Save and Return** to save your PLO and return to the Plan page.

![Image of the Save and Return option]

*Figure 15: The Save and Return option.*

A green message box in the upper right-hand corner confirms that your changes were saved. You can see your archived PLO on the Plan page under the PLO description.
Delete a PLO

**Important:** DO NOT DELETE your PLOs and instead archive them if you no longer wish to use them. If you have PLOs used in previous years, deleting them will delete everything related to those PLOs (including previous assessment findings) and they may not be recoverable. A good instance for using the delete function would be if someone on your team created a duplicate PLO for one you already have in your program. In this example you would delete the duplicate.

7. Navigate to the Plan subtab in the menu (Steps 1-6 under Find Your PLOs).
8. Click the trashcan icon to the on the right-hand side of the PLO you wish to delete. A prompt appears asking you to confirm you want to delete that PLO.
9. Click OK to delete the selected PLO.

A green message box in the upper right-hand corner confirms your deletion. The deleted PLO no longer appears with your program, or in past yearly submissions if it was part of them.

Add a PLO

1. Navigate to the Plan subtab in the menu (Steps 1-6 under Find Your PLOs).
2. Click the green circle with a plus sign at the right side of the Program Learning Objectives (PLOs) displayed.

![Figure 16: An Archived PLO with its Archived Date.](image)

![Figure 17: The green circle with a plus sign to add a PLO.](image)
3. Enter information in the fields displayed. If you’re not sure what to enter, click the blue circles with question marks to see greater detail. An asterisk (*) indicates required fields.

**Important:** We strongly discourage using sequential numbers in your PLO names (e.g., PLO 1, PLO 2), as this could create confusion if you need to rearrange them or as new PLOs are added and old ones archived.

**NOTE:** If you do not select a status from the **Status** drop-down menu, the PLO defaults to active status. Active PLOs are those currently in effect for your program. Archived PLOs are PLOs that were once used but are no longer current.

![Image of the Nuventive Improvement Platform Premier Edition interface](image1.png)

*Figure 18: The blue help circles provide details about the fields.*

4. Please select the category that best fits your PLO. The options are: Application, Communication, Create, Critical Thinking, Cultural Competence, Ethics, Knowledge, Professional, Research, Teamwork, or Other.

5. To save your PLO, there are multiple options:

   - **Click the Save button** to save your PLO and remain on that page to make edits.

![Image of the Save button](image2.png)

*Figure 19: The Save button.*
• Click the arrow to the right of the Save button and select **Save and Return** to save your PLO and return to the Plan page.

![Image](https://via.placeholder.com/150)

*Figure 20: The Save and Return option.*

• Click the arrow to the right of the Save button and select **Save and Add New** to save your new PLO and add another.

![Image](https://via.placeholder.com/150)

*Figure 21: The Save and Add New option.*

6. If you did not choose the second option (Save and Return) and are ready to move forward, click the **Return** button.

Your PLO is added to the bottom of the list of PLOs on the Plan page.

**Edit PLOs**

**Important:** Archive PLOs you no longer wish to use rather than editing or deleting them. Editing PLOs used in previous assessment years changes those PLOs to the new (edited) version. To avoid this, we recommend archiving the PLO you wish to create and adding a new active PLO in its place. If you need help, contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

1. Navigate to the Plan subtab in the menu (Steps 1-6 in **Find Your PLOs**.
2. Click the **Edit PLO** icon to the right of the PLO to edit information for this PLO. Do not to forget to select an appropriate category for your PLO.
3. Click the down arrow next to the Save button and select **Save and Return** to return to the Plan screen.

![Figure 23: The Save and Return option.](image)

A green message box displays at the upper right-hand corner of the screen to confirm your changes were successfully saved.

**Rearrange PLOs**

**Important:** Make sure to clear all filters before rearranging your PLOs. You cannot arrange PLOs if you have active filters. The Filters icon has a red glow around it if you have filters applied.

![Figure 24: The Filters icon with a red glow around it, indicating active filters.](image)

1. Navigate to the **Plan** subtab in the menu (Steps 1-6 in **Find Your PLOs**).

2. Hover your cursor over the blue bullseye icon to the left of the PLO you wish to rearrange. When your cursor changes to a four-way arrow, click and drag the PLO to the desired place in the Plan.

   **NOTE:** If you cannot move the PLO, or you don’t see the four-way arrow, you may need to clear your filters first.

**Enter Assessment Methods**

Assessment Methods are the strategies, tools, and exercises used to measure student outcomes related to a PLO and are required as part of your annual submission.

**Find Your Assessment Methods**

1. Click the Program field at the top of the window and select your program from the drop-down menu.
NOTE: This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
3. Click the Assessment tab from the menu panel that opens.
4. Click the Planning Summary subtab.

5. From the Program Planning Summary table, click on the number in the Assessment Methods column that corresponds to the PLO. Each number corresponds to its own PLO in the Planning Summary and represents the number of active Assessment Methods for that PLO.

NOTE: You can also reach Assessment Methods through the Plan subtab.
This opens the corresponding PLO and brings you to any current Assessment Methods for that PLO.

Jump to instructions to:

- [Deactivate an Active Assessment Method](#)
- [Activate an Inactive Assessment Method](#)
- [Add an Assessment Method](#)
- [Edit an Assessment Method](#)
- [Delete an Assessment Method](#)
- [Relate a Document to an Assessment Method](#)

**Review Current Assessment Methods**

**Important:** Assessment Methods for 2019-20 cycle submitted to OPAIR in 2019 will be preloaded in the AMS. If you have Assessment Methods present in the AMS, review them for accuracy. If you need to edit your Assessment Methods, see [Edit an Assessment Method](#).

**Active and Inactive Assessment Methods**

Created Assessment Methods are activated or “active” by default. An active Assessment Method is one you’re currently using or plan to use in the future for your curriculum. An inactive Assessment Method is one that you no longer anticipate using (though you may reactivate it for use in future cycles).

**Deactivate an Active Assessment Method**

This section demonstrates how to deactivate an active Assessment Method in the AMS. You should deactivate an Assessment Method if you’re adding a new one to replace it or simply no longer using it.

**NOTE:** You must have an active Assessment Method in place to follow this procedure.
**Important:** Deactivate methods you no longer wish to use rather than deleting them. If you need help, contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

1. Navigate to your Assessment Methods in the Plan page (Steps 1-7 in Find Your Assessment Methods).
2. Click the **Edit Assessment Method** icon to the right of the Assessment Method you wish to edit.

![Figure 28: The Edit Assessment Method icon to the right of an Assessment Method.](image)

3. Deselect the **Active** checkbox to deactivate the Assessment Method.

![Figure 29: The Active checkbox.](image)

4. Click the down arrow next to the Save button and select **Save and Return** to return to the Plan screen.

![Figure 30: The Save and Return option.](image)

Your Program Planning Summary table will show one fewer Assessment Method for its PLO and it will not display on your Plan page.

**Activate an Inactive Assessment Method**

Under normal circumstances your inactive Assessment Method will not display with your PLOs active Assessment Methods. These instructions demonstrate how to locate and reactivate your inactive Assessment Method.

**NOTE:** You must have an inactive Assessment Method in place to follow this procedure.
1. Navigate to your Assessment Methods in the Plan page (Steps 1-7 in Find Your Assessment Methods).

2. Click the Filters icon in the upper left-hand corner of the screen.

3. Scroll to the bottom of the Filters to Assessment Method Filters and click the Show Inactive Assessment Methods toggle switch to set it to YES. Your inactive Assessment Method displays under its PLO in the Plan page.

4. Click the X in the upper right-hand corner of the Filters section to close it or scroll down to your PLO and inactive Assessment Method.

5. Click the Edit Assessment Method icon to the right of the inactive Assessment Method you wish to edit.
6. Select the **Active** checkbox to activate the Assessment Method.

![Figure 33: The Active checkbox.](image)

7. Click the down arrow next to the Save button and select **Save and Return** to return to the Plan screen.

![Figure 34: The Save and Return option.](image)

Your Assessment Method is active in your Plan and displays under your Assessment Methods.

**Important:** Be aware of any filters you have in place. You may need to clear them if things seem to be missing. To clear filters, click the Filters icon again then navigate to the Assessment Method Filters section and click the Clear Filters button.

---

**Add an Assessment Method**

1. Navigate to your Assessment Methods (Steps 1-7 in **Find Your Assessment Methods**).
2. Click the Add an Assessment Method icon (a green circle with a plus sign inside) to the right of the Assessment Methods section.

![Figure 35: The Add an Assessment Method icon to the right of the Assessment Methods for a PLO.](image)
3. Enter information in the fields relevant to your Assessment Method. Click the blue help circle with a question mark next to each field for help with that field. Required fields are indicated with an asterisk (*).

![Figure 36: The blue help circles.](image)

4. To save your Assessment Method you have several options:

- **Click the Save button** to save your Assessment Method and remain on that page to make edits.

![Figure 37: The Save button.](image)

- **Click the arrow to the right of the Save button** and select **Save and Return** to save your Assessment Method and return to the Plan page.

![Figure 38: The Save and Return option.](image)
• Click the arrow to the right of the Save button and select **Save and Add New** to save your new Assessment Method and add another.

![Figure 39: The Save and Add New option.](image)

5. If you did not choose the second option (Save and Return) and are ready to move forward, click the **Return** button to return to the Plan page.

A green message box displays in the upper right-hand corner to confirm your Assessment Method was successfully saved. Your new Assessment Method now displays in the information for the corresponding PLO on the Plan page, under Assessment Methods.

![Figure 40: An added Assessment Method in a PLO.](image)

**Edit an Assessment Method**

**Important:** Editing Assessment Methods changes how the method appears for each year in which it was used, not just the current year forward. Use Edit to add clarification/detail to an existing method. If you are using a different Assessment Method – even if it is similar to the old method – then make the old Assessment Method inactive and enter a new one.

1. Navigate to your Assessment Methods (Steps 1-7 in [Find Your Assessment Methods](#)).
2. Click the **Edit Assessment Method** icon to the right of the Assessment Method you wish to edit.

![Figure 41: The Edit Assessment Method icon to the right of an Assessment Method.](image)

3. Edit the information in the fields provided. Click the blue help circle with a question mark next to each field for help with that field.

![Figure 42: The blue help circles.](image)

4. Click the down arrow next to the Save button and select **Save and Return** to return to the Plan screen.

![Figure 43: The Save and Return option.](image)

A green message box displays in the upper right-hand corner to confirm your Assessment Method was successfully saved. Your updated Assessment Method now shows in the information for the corresponding PLO on the Plan page, under Assessment Methods.
Delete an Assessment Method

**Important:** We strongly recommend [deactivating Assessment Methods](#), rather than deleting them. If you must delete an Assessment Method, you must first [delete any Assessment Results](#) related to it before deleting it.

1. Navigate to your Assessment Methods (Steps 1-7 in [Find Your Assessment Methods](#)).
2. Click the **Delete Assessment Method** (trash can) icon to the right of the Assessment Method you wish to delete.

![Figure 44: The Delete Assessment Method icon to the right of an Assessment Method.](image)

3. A prompt displays asking you to confirm you want to delete the selected Assessment Method. Click **OK** to delete the Assessment Method.

A green message box displays to confirm your Assessment Method was deleted successfully.

**Relate a Document to an Assessment Method**

This section shows how to relate a document (i.e., add an attachment) from your Document Repository to your Assessment Method. This process assumes you have folders and files set up in your Program’s Document Repository.
See these instructions to complete these prerequisite steps:

- Add a Folder to the Document Repository
- Add File or URLs to the Document Repository

1. Navigate to your Assessment Methods (Steps 1-7 in Find Your Assessment Methods).
2. In the Assessment Method to which you wish to attach an item, click the Relate Document icon (a green circle with a wrench in the center) to the right of Related Documents.

![Figure 45: The Relate Document icon to the right of Related Documents.](image1)

3. Select the folder where the document you want to attach is in the Document Repository.

![Figure 46: The list of folders from the Document Repository.](image2)

4. Locate the file or item you wish to attach to the Assessment Method. You can click and drag the file to the Related Documents section to attach it. You can also hover your cursor over the file name and click the down arrow to the right of the file name. This opens a menu that lets you relate the document, preview the file, or download the file. A green message box confirms your document was attached or “related” successfully.
5. Click the **Complete** button in the upper right-hand corner of the screen to return to the Assessment Method.

Your file now appears in the **Related Documents** section of the Assessment Method.

To remove the file or item from the Assessment Method, click the **Un-relate Document** icon to the right of the related document. When prompted, click **OK** to confirm that you want to remove or “un-relate” the linked document. A green message box in the upper right-hand corner confirms the removal.
Enter Assessment Results

Assessment Results show the findings of the Assessment Methods and are used to evaluate your program’s success related to its learning goals.

Find Your Assessment Results

1. Click the Program field at the top of the window and select your program from the drop-down menu.

![Figure 49: The Program field.](image)

**NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
3. Click the **Assessment** tab from the menu panel that opens.
4. Click the **Results** subtab.

![Figure 50: The Results subtab.](image)

5. Click the arrows to the left of the PLO and Assessment Method to expand and see your Assessment Results, if they are present. A number over the blue bullseye next to the arrow indicates how many active Assessment Results are present.
Your Assessment Results display on the screen, each indicated by a small checkered flag. Each result shows the date the result was entered, the assessment year, the conclusion and a brief expandable summary.

Jump to instructions to:

- Add an Assessment Result
- Edit an Assessment Result
- Move an Assessment Result
- Delete an Assessment Result
- Relate a Document to an Assessment Result

Add an Assessment Result

1. Navigate to your Assessment Results (Steps 1-7 in Find Your Assessment Results).
2. Click the **Add Summary of Findings** icon (a green circle with a plus sign inside) to the right of the Assessment Method to which you want to add results.

![Figure 53: The Add Summary of Findings icon to the right of the Assessment Method to which you want to add results.](image)

3. Enter information in the fields provided. If you’re not sure what to enter, click the blue help circles with question marks icons for further information. You can also visit the “Program – Training Exemplar” to see an example of what type of information goes in these fields. An asterisk (*) indicates required fields.

4. Click the down arrow next to the Save button and select **Save and Return** to return to the Results screen.

![Figure 54: The Save and Return option.](image)

A green message box displays in the upper right-hand corner confirms your Assessment Results were successfully saved. Your updated Assessment Results now show in the Results page under the Assessment Method.
Edit an Assessment Result

1. Navigate to your Assessment Results (Steps 1-7 in Find Your Assessment Results).
2. Click the Edit Summary of Findings icon on the right side of the Assessment Result.
3. Edit the fields you wish to change.
4. Click the down arrow next to the Save button and select Save and Return to return to the Results screen.
A green message box displays in the upper right-hand corner to confirm your Assessment Results were successfully saved. Your updated Assessment Results now show in the Results page under the Assessment Method.

![Image](image-url)

**Figure 58: An edited Assessment Result for an Assessment Method.**

**Move an Assessment Result**

You may find it necessary to move an assessment result if you accidently post it under the wrong Program Learning Objective.

1. Navigate to your Assessment Results (Steps 1-7 in Find Your Assessment Results).
2. Click the **Edit Summary of Findings** icon on the right side of the Assessment Result.

![Image](image-url)

**Figure 59: The Edit Assessment Results icon to the right of an Assessment Result.**
3. Click the **Move Summary of Findings** button at the top of the screen.

![Figure 60: The Move Summary of Findings button.](image)

4. Click your cursor in the **Program Learning Objective (PLO) Name** field to open a drop-down menu.
5. Select the PLO to which you wish to move the Assessment Result.
6. Click the **Move Summary of Findings** button again.
7. Click the down arrow next to the Save button and select **Save and Return** to return to the Results screen.

![Figure 61: The Save and Return option.](image)

You can see your Assessment Result nested below the PLO you selected.

### Delete an Assessment Result

**Important:** You should only delete Assessment Results entered erroneously. Consider **moving** or **editing** the Assessment Result first.

1. Navigate to your Assessment Results (Steps 1-7 in **Find Your Assessment Results**).
2. Click the **Delete** (trashcan) icon on the right side of the Assessment Result you wish to delete.

![Figure 62: The Delete Summary of Findings icon to delete an Assessment Result.](image)

3. A prompt asks you to confirm that you want to delete the selected Assessment Result. Click **OK** to delete the Assessment Result.

A green message box displays in the upper right-hand corner to confirm your Assessment Result was successfully deleted.

**Add a Related Document to an Assessment Result**

This section shows how to relate a document (i.e., add an attachment) from your Document Repository to your Assessment Results. This process assumes you have folders and files set up in your Program’s Document Repository. See these instructions if you need to complete these prerequisite steps:

- [Add a Folder to the Document Repository](#)
- [Add File or URLs to the Document Repository](#)

1. Navigate to your Assessment Results (Steps 1-7 in **Find Your Assessment Results**).
2. Click the **Relate Document** icon (a green circle with the wrench inside) to the right of the Related Documents.

![Figure 63: The Relate Document icon to the right of the Related Documents for an Assessment Result.](image)
3. Select the folder where your document is located from the **Document Repository**.

![Image of Document Repository](image)

*Figure 64: A list of folders from the Document Repository.*

4. Locate the file or item you wish to attach to the Assessment Result. You can click and drag the file to the Related Documents section to attach it. A green message box displays in the upper right-hand corner to confirm your file was added.

You can also hover your cursor over the file name and click the down arrow to the right of the file name. This opens a menu that lets you relate the document, preview the file, or download the file.

![Image of Related Documents](image)

*Figure 65: The down arrow next to a file in the Document Repository.*

5. Click the **Complete** button in the upper right-hand corner of the screen to return to the Assessment Results.
Your file now appears in the Related Documents section of the Assessment Results.

Figure 66: A document added to an Assessment Result.

Click the **Un-relate Document** icon (the broken link icon) to the right of the document to remove the file or item from the Assessment Result.

Figure 67: The Un-relate Document icon to remove a document from an Assessment Result.
Enter Action Plans Based on Findings

The Action Plan Based on Findings is any necessary course of action you plan to take for your program based on your Assessment Results. You may not always have an action plan if students are meeting your goals.

Find Your Action Plan Based on Findings

1. Click the Program field at the top of the window and select your program from the drop-down menu.

   ![Figure 68: The Program field.](image)

   **NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
3. Click the Assessment tab from the menu panel that opens.
4. Click the Planning Summary subtab.

   ![Figure 69: The Planning Summary subtab.](image)

5. From the Program Planning Summary, click on the number in the Action Plan Based on Findings column that corresponds to the PLO. Each number corresponds to its own PLO in the Planning Summary and represents the number of active Action Plans Based on Findings for that PLO.
Figure 70: Action Plans Based on Findings in a Program Planning Summary table.

This opens the corresponding PLO and brings you to any Action Plans Based on Findings for that PLO, under Assessment Results.

Jump to instructions to:

- Add an Action Plan Based on Findings
- Edit an Action Plan Based on Findings
- Delete an Action Plan Based on Findings

Add Action Plan Based on Findings

1. Navigate to your Action Plan Based on Findings (Steps 1-7 in Find Your Action Plan Based on Findings).
2. Click the Add Action Plan Based on Findings icon (a green circle with a plus sign inside) to the right of Action Plan Based on Findings to add your Action Plan Based on Findings for your Assessment Results.

3. Enter information in the fields provided. If you’re not sure what to enter, click the blue circles with question marks icons to see greater detail. An asterisk (*) indicates required fields.
4. To save your Action Plans Based on Findings you have several options:
• Click the **Save** button to save your Action Plan Based on Findings and remain on that page to make edits.

![Image of Save button](image1.png)

*Figure 72: The Save option.*

• Click the arrow to the right of the Save button and select **Save and Return** to save your Action Plan Based on Findings and return to the Plan page.

![Image of Save and Return options](image2.png)

*Figure 73: The Save and Return option.*

• Click the arrow to the right of the Save button and select **Save and Add New** to save your new Action Plan Based on Findings and add another.

![Image of Save and Add New options](image3.png)

*Figure 74: The Save and Add New option.*

5. If you did not choose the second option (Save and Return) and are ready to move forward, click the **Return** button to return to your Plan’s page.

A green message box displays in the upper right-hand corner to confirm your Action Plan Based on Findings was successfully saved. Your new Action Plan Based on Findings now shows in the information for the corresponding PLO on the Plan page, under Assessment Results.
Edit Action Plan Based on Findings

1. Navigate to your Action Plan Based on Findings (Steps 1-7 in Find Your Action Plan Based on Findings).
2. Click the Edit Action Plan Based on Findings icon on the right-hand side of the Action Plan Based on Findings entry.
3. Edit the content in the fields you wish to change.
4. Click the down arrow next to the Save button and select Save and Return to return to the Plan screen.
A green message box displays in the upper right-hand corner to confirm your Action Plan Based on Findings was successfully saved. Your updated Action Plan Based on Findings now shows in the information for the corresponding PLO on the Plan page, under Assessment Results.

Delete an Action Plan Based on Findings

1. Navigate to your Action Plan Based on Findings (Steps 1-7 in Find Your Action Plan Based on Findings).
2. Click the Delete Action Plan Based on Findings icon (the trash can icon) on the right-hand side of the Action Plan Based on Findings entry.

3. A prompt displays to confirm your deletion. Click OK to delete that Action Plan Based on Findings.

A green message box displays in the upper right-hand corner to confirm your Action Plan Based on Findings was successfully deleted.
Identify/Enter PLOs and Assessment Methods for the Coming Year

**Important:** You must identify PLOs and enter Assessment Methods for the coming year, even if they will not change.

1. Click the Program field at the top of the window and select your program from the drop-down menu.

![Figure 80: The Program field.](image)

**NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

4. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
5. Click the **Assessment** tab from the menu panel.
6. Click the **Plan** subtab from the menu panel.

![Figure 81: The Plan subtab.](image)
7. Click the **Edit Program Learning Objective (PLO)** icon to the right of the PLO.

![Figure 82: The Edit Program Learning Objective (PLO) icon.](image)

8. Click the **Planned Assessment Cycle(s)** field to open a drop-down menu of assessment cycles in years.

**CAUTION:** Users are strongly discouraged from editing the **Program Learning Objective (PLO) Name** or **Program Learning Objective (PLO)** fields. Editing these fields used in previous assessment years changes those PLOs to the new (edited) version. If your PLO has changed, you should archive the old PLO and create a new PLO. If you are unsure of the best way to handle changes to your PLOs, please contact your **Assessment Liaison** (opens in new window).

![Figure 83: Planned Assessment Cycles for the coming year.](image)

9. Select a cycle year from the drop-down menu.
10. Click the down arrow next to the Save button and select **Save and Return** to return to the Plan screen.

![Figure 84: The Save and Return option.](image)
11. Your selected Planned Assessment Cycle now shows under your PLO.

![Figure 85: Added Assessment Cycles for the coming year.](image)

12. Repeat this process for each PLO in your Program.
Document Repository

Throughout this process you may need to link files to various areas. For example, you may want to link a rubric to your Assessment Methods. The Document Repository allows you to store files and link those files and URLs relevant to your assessment methods and results. This section shows how to find the Document Repository, create a folder, and add files and URLs to that folder. Once you’ve uploaded your file or linked to its URL, you can attach it to various points of the submission process.

**NOTE:** Documents must be saved in folders. Use an existing folder or create a folder in the Document Repository.

**NOTE:** When navigating the Document Repository, it may be helpful to use the breadcrumbs at the top of the screen rather than the Back button on your browser to move between folders.

---

**Find the Document Repository**

1. Click the Program field at the top of the window and select your program from the drop-down menu.

   ![Figure 87: The Program field.](image)

   **Figure 87: The Program field.**

   **NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three lines) in the upper left-hand corner. A menu panel opens.
3. Click the **Documents** tab to open the Document Repository.

![Image of Document Repository](image)

*Figure 88: The Documents tab.*

You will see any folders related to your program here.

Jump to instructions to:

- Add a Folder to the Document Repository
- Add a File from Your Computer
- Add a URL to the Document Repository

### Add a Folder to the Document Repository

When you first open the Document Repository you will have the **General** folder present by default. This folder is a good place to store items like course lists for the restricted electives used in your Curriculum Map. Programs that received assessment feedback from OPAIR in 2019 will also have a **Feedback Archive** folder.

**Important:** All documents and URLs must be saved in a folder. Use one of the existing folders or create an appropriate one. Since most programs will use the same documents for multiple assessments (e.g., a rubric), OPAIR recommends that you make folders based on subject area rather than year. So, for example, a communications rubric may be stored in your “Rubric” folder and linked to assessments across multiple years.

1. Navigate to the Document Repository (Steps 1-5 in **Find the Document Repository**).

2. Click the **Add Folder** icon in the upper right-hand corner. A new window opens.
3. Enter a name for the folder in the **Name** field.
4. Click the **Save** button in the lower right-hand corner of the window.

Your folder appears alphabetically in the list of folders. You can now use that folder to save, add, and view files.
Add Files and URLs to the Document Repository

**Add a File from Your Computer**

1. Navigate to the Document Repository (Steps 1-5 from Find the Document Repository).
2. Click the folder to which you want to add a document.
3. Click the Add File icon in the upper right-hand corner. A new window opens.
4. Click the Choose Files button on the left-hand side of the Add Documents window to select a file from your computer.
5. Click the Save button in the lower right-hand corner of the window.

Your selected file now appears in the list within the folder in alphabetical order. You can now attach it to your Assessment Methods, and Assessment Results.

**Add a URL to the Document Repository**

If the document you wish to reference is on a webpage, you can add the URL to the Document Repository.

**NOTE:** Because of the temporal nature of URLs, OPAIR recommends downloading relevant documents to your computer and then uploading them into the Document Repository rather than linking to a URL in order to ensure continued access to that document over time.

1. Navigate to the Document Repository (Steps 1-5 from Find the Document Repository).
2. Click the folder to which you’d like to add a document.
3. Click the Add File icon in the upper right-hand corner. A new window opens.
4. Enter a Name for the file, and the URL, in their respective fields.
5. Click the Save button in the lower right-hand corner of the window.

The URL now appears in the list within the folder in alphabetical order. You can now attach it to Assessment Methods, and Assessment Results.
Tasks in the AMS

If you have the appropriate permissions, you can delegate or assign tasks to other AMS users (Assessment Leaders or Email-Only users) to complete. This section shows how to assign tasks in the AMS and complete them if they are assigned to you. If you need someone added to the AMS so that you can assign a task to them, contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

Find Tasks Assigned to You

1. Click the Program field at the top of the window and select your program from the drop-down menu.

![Figure 89: The Program field.](image)

**NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
3. Click the My Assignments tab from the menu panel.

![Figure 90: The My Assignments tab.](image)

The My Assignments page shows any tasks to which you’ve been assigned in the AMS for this Program.
Complete Tasks Assigned to You

If you are assigned the Email Only role, open your assignments from the emails your assigner sends to you. There will be a link that redirects you to a webpage where you can complete your assignment. If you cannot find your assignment email, check your Spam or Junk folders in your email.

**Important:** If you are an Email Only user, we recommend notifying your assigner when you complete your task. No other notifications or emails are sent via the AMS.

4. Navigate to your My Assignment page (Steps 1-5 in Find Tasks Assigned to You).
5. Click the **Go to assignment** link for the Assignment you wish to complete.

6. Enter information required in the fields for the assignment. In some circumstances you may be able to attach a document to your assignment or add Action Plans Based on Findings.
7. Click the **Save** button in the upper right-hand corner of the screen.
8. A prompt displays asking if you want to complete your assignment. Click **Complete Assignment** to complete the assignment. Click **Keep Editing** if you are still working on your assignment.

**NOTE:** Once you’ve clicked the **Complete Assignment** button, you cannot go back and edit the assignment. Reach out to your Assessment Leader or your **Assessment Liaison** (opens in new window) to have this information edited.
Once you click Complete Assignment, a green message box displays in the upper right-hand corner to confirm your assignment is marked complete.

**Important:** No automated notifications regarding the completion of this task are sent out via the AMS. We recommend emailing your assigner to let them know you completed your assignment.

### Assign Tasks

**NOTE:** You must have the appropriate permissions to assign a task. If you do not see these options, you may not have the required permission. Contact your Assessment Liaison (opens in new window) if you’re unsure.

**NOTE:** Email-only users must first be added to the AMS by OPAIR staff before you can assign them tasks. If you need to add an Email-only user, please email your Assessment Liaison (opens in new window) and provide the name, program name, campus, and credential (i.e., associates, baccalaureate, etc.) of the user.

**NOTE:** Email-only users will not see the same interface that you see. They will only see options directly relevant to their assigned task.

**NOTE:** You cannot assign tasks for Assessment Results. You can only assign tasks, like the reporting of assessment results, for Assessment Methods and Action Plans. The AMS will allow you to assign a task at the PLO level, but OPAIR does not recommend this.

### Assign Tasks for Reporting Findings by Assessment Method

**NOTE:** You must have the appropriate permissions to assign a task. If you do not see these options, you may not have the required permission. Contact your Assessment Liaison (opens in new window) if you’re unsure.

1. Click the Program field at the top of the window and select your program from the drop-down menu.
**NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
3. Click the Assessment tab from the menu panel.
4. Click the Plan subtab.

![Figure 95: The Plan subtab.](image)

5. At the bottom of the relevant Assessment Method, click the Manage Assignment icon (the green circle with a wrench inside) to the right of Assignment. You may need to click the arrow to the left of the PLO to see the Assignment option.

**Important:** OPAIR Recommends that you do not use the Assignment for the PLO (the assignment option farthest to the left). This is used to provide findings for the whole outcome as a whole rather than providing them individually by Assessment Method. The preferred approach is to report findings individually for each method.
6. Enter and edit the fields and options displayed in the PLO Assignment screen. An asterisk (*) indicates required fields. The **Subject** and **Notes/Instructions** fields auto-populate with information from your PLO. You can edit the content in those fields to give your Assignee more information about what you’d like them to do.

**Important:** We recommend that you edit the default **Subject** and supplement the default text in **Notes/Instructions** field with instructions that make it very clear what you are asking the assignee to do. For example, “Please report the findings from We recommend selecting the boxes for **Email Assignment to Assignee** and **Send CC to Person Assigning** (you). These options send out emails to the Assignee and you respectively to alert you to this assignment. We also recommend emailing your assignee to let them know to expect something from you via the AMS. If you do not select the Email Assignment to Assignee and your assignee is an Email-Only user, they will have no way of knowing that they’ve been assigned a task. Even Assessment Leaders may not notice the assignment unless they are actively checking for it when they log in.
7. Click the down arrow next to the Save button and select **Save and Return** to return to the Plan screen.

A green message box displays in the upper right-hand corner to confirm your assignment was created and, if selected, the email(s) sent out. The Assignee’s name appears with the entered due date below the PLO Assignment, at the bottom of the Assessment Method.

**NOTE:** Check Spam or Junk folders for the mailbox if you selected to receive an email for the assignment and there is trouble locating the email.
Assign Tasks for Action Plans

NOTE: You must have the appropriate permissions to assign a task. If you do not see these options, you may not have the required permission. Contact your Assessment Liaison (opens in new window) if you’re unsure.

1. Click the Program field at the top of the window and select your program from the drop-down menu.

NOTE: This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.

3. Click the Assessment tab from the menu panel.
4. Click the **Results** subtab.

![Figure 101: The Results subtab.](image)

5. At the bottom of the relevant Action Plan, click the **Manage Assignment** icon (the green circle with a wrench inside) to the right of **Assignment**. You may need to click the arrow to the left of the PLO to see the Assignment option.

![Figure 102. The Manage Assignment icon for an Action Plan.](image)

6. Enter and edit the fields and options displayed in the PLO Assignment screen. An asterisk (*) indicates required fields. The **Subject** and **Notes/Instructions** fields auto-populate with information from your PLO. You can edit the content in those fields to give your Assignee more information about what you’d like them to do.

**Important:** We recommend that you edit the default **Subject** and supplement the default text in **Notes/Instructions** field with instructions that make it very clear what you are asking the assignee to do. For example, “Please report the findings from We recommend selecting the boxes for **Email Assignment to Assignee** and **Send CC to Person Assigning** (you). These options send out emails to the Assignee and you respectively to alert you to this assignment. We also recommend emailing your assignee to let them know to expect something from you via the AMS. If you do not select the Email Assignment to Assignee and your assignee is an Email-Only user, they will have no way of knowing that they’ve been assigned a task. Even Assessment Leaders may not notice the assignment unless they are actively checking for it when they log in.
7. Click the down arrow next to the Save button and select **Save and Return** to return to the Results screen.

A green message box displays in the upper right-hand corner to confirm your assignment was created and, if selected, the email(s) sent out. The Assignee’s name appears with the entered due date below the PLO Assignment, at the bottom of the Assessment Method.

**NOTE:** Check Spam or Junk folders for the mailbox if you selected to receive an email for the assignment and there is trouble locating the email.
Curriculum Mapping

A curriculum map shows how a program’s courses align with the PLOs. Curriculum maps can be used to identify opportunities in an academic program for collecting evidence of student learning and achievement. They can also identify PLOs that are not receiving adequate coverage via the curriculum. At their core they describe the alignment between the courses and experiences all students must complete in the program’s curriculum and PLOs.

In the AMS, curriculum maps are based on individual active courses from Penn State’s University Bulletins. Courses that are not currently active in the Bulletin cannot be used in the curriculum map.

Where students may select from a selection of courses to meet a requirement, a “Restricted Electives” column(s) can be added to your curriculum map, but the system does not currently allow for these to be defined within the map. Programs can have up to 11 sets of elective groups in the map. If you need more, contact your Assessment Liaison (opens in new window), or the OPAIR office, (814) 863-8721, for assistance.

**Important:** OPAIR encourages users to define sets of Restricted Electives in a document kept in the AMS Document Repository “General” folder for reference.

AMS Nuventive’s Mapping tab allows you to view your program’s curriculum map, save a copy, edit course proficiency levels, and rearrange courses along the top. If you need to add a course to your map, contact your Assessment Liaison (opens in new window), or the OPAIR office, (814) 863-8721, for assistance.

**Find Curriculum Mapping**

1. Click the Program field at the top of the window and select your program from the drop-down menu.

   ![Figure 106. The Program field.](image)

   **NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
3. Click the **Mapping** tab from the menu panel.

![Image of the Mapping tab](image_url)

*Figure 107. The Mapping tab.*

This shows the curriculum map for the program you selected in the Program field. Save or print a copy of the curriculum map for your program in the Reports tab (see Generating Reports.)

**Navigating the Curriculum Map**

Use the key below to interact with your program’s Curriculum Map in the AMS. By default, courses are listed in alphabetical order, but programs can re-order them to their preference.

![Image of the Curriculum Map interface](image_url)

*Figure 108: A diagram of the Curriculum Map in the AMS interface.*

1. Where a course and a PLO intersect, programs should indicate the level of achievement at which faculty expect students to perform in that class with respect to that PLO. Click the cell where the course and PLO intersect and select a number to indicate the level. The number will go from grey to black when selected. Select multiple
levels in a single cell, as needed (e.g., a student is both introduced to and allowed to practice a PLO in the same course). Clicking on the numbers or boxes will also unselect boxes.

a. **Introduced (1)** means the students in that course are expected to gain an introduction to the concepts or skills associated with the corresponding PLO.

b. **Practiced (2)** means the students in that course are expected to gain practical skills relating to the concept’s skills associated with the corresponding PLO.

c. **Mastered (3)** means the students in that course are expected to demonstrate mastery of the concepts or skills associated with the corresponding PLO.

2. (Optional) Click the **Course Mapping Order** button to click-and-drag courses in the sequential order of your choice. See **Rearrange Course Mapping Order** for more in-depth instructions.

   **NOTE:** Once you rearrange your course mapping order there is no reset option to set the order to its default setting. You would have to manually reset the courses in alphabetical order to return them to the default setting.

3. Click **Save** to save the Curriculum Map as you have it.
4. Click the lower scroll bar to see more courses within your program’s Curriculum Map.

### Add and Delete Courses from Your Program’s Curriculum Map

At this time, users cannot add or delete courses from a Curriculum Map. If you need to add or delete a course, please contact your [Assessment Liaison](opens in new window) or the OPAIR office, (814) 863-8721, for assistance.

### Rearrange Course Mapping Order

When completing a curriculum map, it is best to place courses into the table in the basic order in which students tend to take them.

**NOTE:** Once you rearrange your course mapping order, there is no reset option to return the order to its default setting. You would have to manually reset the courses to return them to the default setting.

1. Navigate to your program’s Curriculum Map (Steps 1-5 in **Find Curriculum Mapping**).
2. Click the **Course Mapping Order** button in the upper right-hand corner.
3. Hover your cursor over the hamburger icon to the left of the Course ID you want to move until your cursor turns into a four-way arrow.

![Figure 109: The hamburger icon for the Course ID.](image)
4. Click and drag the course to the order in which you want it. A green message box displays in the upper right-hand corner to confirm successful reordering of your courses.

<table>
<thead>
<tr>
<th>Course ID</th>
<th>Course Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSYCH 109N</td>
<td>The Psychology of Artistic Creativity</td>
</tr>
<tr>
<td>PSYCH 105</td>
<td>Psychology as a Science and Profession</td>
</tr>
<tr>
<td>PSYCH 144N</td>
<td>Climate Change: Individual Beliefs and Attitudes</td>
</tr>
<tr>
<td>PSYCH 120N</td>
<td>Knowing Right from Wrong</td>
</tr>
<tr>
<td>PSYCH 169N</td>
<td>What it means to be human</td>
</tr>
<tr>
<td>PSYCH 171N</td>
<td>Mental Health and the Mind</td>
</tr>
</tbody>
</table>

*Figure 110. A course being dragged to another position in the curriculum map.*

5. Click the **Return** button in the upper right-hand corner when you’re finished rearranging courses to go back to the Curriculum Map.

6. Click the **Save** button to save your progress.
Annual Submission

Before you complete your annual submission, you need to ensure the following list is complete:

- Enter Assessment Results, and Action Plan(s) for the previous year, if necessary.
- Indicate which PLOs you will be assessing, and related assessment methods for the coming year.

This process lets OPAIR know your annual report is ready for review. You can check the level of completion of your submission on the Home screen.

**Important:** Your report is not considered final until you go through the submission process. You still must submit your program for review even if you are not submitting results this cycle. The submission screen will allow you to provide a reason that you have no results.

These instructions show you how to submit your report, request an extension, or submit null results.

1. Click the Program field at the top of the window and select your program from the drop-down menu.

![Program field](image)

*Figure 111. The Program field.*

**NOTE:** This drop-down menu only displays programs to which you are assigned. If you don't see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
3. Click the **Assessment** tab from the menu panel.
4. Click the **Submission** subtab from the Assessment sub-menu.

![Figure 112. The Submission subtab.](image)

5. Click the **Add** icon (plus sign in a circle) in the upper right corner or in the center, to add your submission.

![Figure 113. The Add icon for a submission.](image)

6. Click your cursor in the **Submission Year** field and select a cycle year. Note that the Submission Year is the year for which you are reporting results (e.g., if you are submitting in June 2020, the Submission Year would be 2019 – 2020.)
7. Enter information in the fields. Click the arrow to the left of a section to expand or collapse the section. An asterisk (*) indicates a required field. *Additional information about the various submission fields is located in the Additional Annual Submission Details section of this document.*

**Important:** If you are requesting an extension for your report submission, indicate that by selecting a due date for your submission. If you are not requesting an extension, select No. Leaving this box empty will be interpreted as no extension request. Programs requesting an extension should reach out to their Assessment Liaison (opens in new window) to discuss their need for the extension and plans to meet the extended deadline.

**Important:** If you are submitting no results for this cycle you must indicate that by selecting a reason. If you select Other, you must select an explanation in the next question in this section.
8. Select **Yes** for the last question under the **Plan Submittal** section to indicate you are ready to submit your annual report for review.

9. Click the **Save** button in the upper right-hand corner to complete the submission process.

A green message box displays in the upper right-hand corner to confirm you’ve successfully submitted your report. You can see your submitted report in the submission screen.

Click the **Edit** icon (pencil icon) to the right of the submission to edit it.

Click the **Delete** icon (trashcan icon) to the right of the submission to delete it.
Generating Reports

Assessment Leaders can pull reports in a variety of formats to meet your needs. These formats include, pdfs, zip files, and hyperlinks to associated documents.

**Important:** Only other Assessment Leaders with AMS access will be able to open the hyperlinks generated in the reports. If you want to share these reports with non-users, then OPAIR recommends that you use the **Open Report >Download as Zip** option (Figure 116). The zip folder includes the report and any documents related to the Program’s Assessment Methods or Assessment Results.

![Download as Zip option](image1)

*Figure 118: The option to download a report as a zip file.*

Find Reports

1. Click the Program field at the top of the window and select your program from the drop-down menu.

![Program field](image2)

*Figure 119. The Program field.*

**NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your [Assessment Liaison](opens in new window) (opens in new window) or call the OPA office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.

![Menu panel](image3)
3. Click the **Reports** tab from the menu panel that opens.

![Image of Reports tab](image)

*Figure 120. The Reports tab.*

You can now view and save different reports for your Program.

Jump to instructions to:

- [View a Report](#)
- [Save a Report as a Zip File](#)
- [Save a Report to the Document Repository](#)

**Types of Reports in the AMS**

- **Assessment Report**: This report shows the PLOs for your selected program, along with any information contained in the Assessment Plan. The report is displayed in a narrative layout with your program’s General Information displayed at the top and may include any Mapping for the PLOs you wish to display.

- **Assessment Report (4-column)**: This report shows the PLOs for your selected program, along with any Assessment Methods, Assessment Results, and Action Plan Based on Findings related to those PLOs. The report is displayed in a four-column layout with your program’s General Information displayed at the top of the report.

- **Curriculum Mapping**: This report shows the PLOs of your selected program and how each selected Course is related to those PLOs using Curriculum Mapping.

**NOTE**: You can only run the Curriculum Mapping report for one program at a time.

**Filtering Reports in the AMS**

**Important**: The best way to get the most from your reports is through using the Filters and Options sections when you create a report. The Filters and Options sections allow you to show one or multiple Planned Assessment Years, Active or Archived PLOs, among other options. When you click on the link to a Report on the Reports page it takes you to a form. This form allows you to enter information and choose your filters and options for that report.
View a Report
You can create any of the reports listed above and view them.

1. Navigate to the Reports page (Steps 1-5 in Find Reports).
2. Click the link for the report you want on the Reports page.
3. Enter information in the fields and select options for your report.
4. (Optional) In the Filter section, click the PLO Status field and select Active. This removes Archived PLOs from your generated report.

![Figure 121. The PLO Status field.](image)

5. Click the Open Report button in the upper right corner to view it.

**NOTE:** If you do not see your Report, you may need to allow pop-ups for this site and repeat this process. See this website for instructions to turn off pop-up blockers if you’re not sure.

Save a Report
You have two options to save a report in the AMS; you can save it as a zip file, or you can save it to the Document Repository in the AMS.

*Save a Report as a Zip File*

1. Navigate to the Reports page (Steps 1-5 in Find Reports).
2. Click the link for the report you want on the Reports page.
3. Enter information in the fields and select options for your report.
4. Click the down arrow to the right of the Open Report button and click Download as Zip from the drop-down menu.
5. Click the **Return** button in the upper right-hand corner to return to the Reports screen.

Your report is saved as a zip file along with any documents you related to your Program’s Assessment Methods or Assessment Results. Find the zip file in your Downloads folder on your computer.

**Save a Report to the Document Repository**

1. Navigate to the Reports page (Steps 1-5 in Find Reports).
2. Click the link for the report you want on the Reports page.
3. Enter information in the fields and select options for your report.
4. Click the down arrow to the right of the Open Report button and select **Save to Document Repository** from the drop-down menu.

5. Click the **Return** button in the upper right-hand corner to return to the Reports screen.

Your report is saved to the **Document Repository** in the AMS.
Feedback
Once you submit your program results for an Assessment Cycle, OPAIR reviews your submission and provides feedback on it. The purpose of this feedback is to guide you regarding your submission and recommend any opportunities to strengthen your assessment approach. Your 2019 feedback can be found in the “Feedback Archive” folder in your Document Repository. Beginning with the 2020 cycle, your feedback can be found as described below. If you need older feedback, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

Find Your Feedback
1. Click the Program field at the top of the window and select your program from the drop-down menu.

![Figure 124. The Program field.](image)

**NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
3. Click the Feedback tab from the menu panel that opens.

![Figure 125: The Feedback tab.](image)
Any feedback for the selected program displays in Assessment Cycles, or years. If you need help with your feedback, contact your Assessment Liaison (opens in new window) or call the OPAIR office, (814) 863-8721, for assistance.

Figure 126: Feedback in the Feedback page.
Recent AMS Handbook Updates
Additional Annual Submission Details

The Annual Submission page is broken into three sections: 1) Contact for this Reporting Year, 2) Assessment Impact, and 3) Plan Submittal. Required fields are designated with an asterisk (*). You can open each section by clicking on the arrow to the left of the section title.

1. In the Contact for this Reporting Year please enter the primary report contact name, their email, and phone number. This should be the person who can answer questions about the program and its assessment.

2. Under Assessment Impact, you should indicate if you have recently modified an assignment, a rubric, a teaching approach or some other aspect of the curriculum in response to prior assessment results. This might reflect your current or a previous action plan or it may not. If you indicate yes, then:
   a. select the option that best categorizes the MOST significant modification that you made,
   b. select the option that best categorizes the nature of the impact of that change, and
   c. briefly describe the action and its impact.

Important: Note that the yellow bar indicating completion of the section will not fill if you skip these questions, but that is okay if they are not relevant in your context.

3. Under Plan Submittal, you should respond to the questions that are relevant to your submission. For example, if you are requesting an extension to the reporting deadline due to extenuating circumstances or if you are not reporting assessment results this year, please select the appropriate option from the drop-down list, otherwise leave these fields blank. All submitters should confirm that you have:
   a. reviewed their program’s General Information,
   b. reviewed your PLOs,
   c. reviewed your curriculum map, and that
   d. your assessment materials are ready to be reviewed.
The Annual Submission page also provides you with the opportunity to provide feedback to help OPAIR support your assessment efforts and improve the assessment process. Please take this opportunity to provide feedback to us.

Find a Personnel List for Your Program

1. Click the Program field at the top of the window and select your program from the drop-down menu.

![Figure 128. The Program field.](image)

**NOTE:** This drop-down menu only displays programs to which you are assigned. If you don’t see a program you think you should be assigned to, please contact your Assessment Liaison (opens in new window) or call the OPA office, (814) 863-8721, for assistance.

2. Click the hamburger icon (three horizontal lines) in the upper left-hand corner. A menu panel opens.
3. Click the Program tab from the menu panel.
4. Click on the Personnel tab under the Program menu.

![Figure 129. The Personnel tab.](image)

This shows a list of people who have access to your program in the AMS. curriculum map for the program you selected in the Program field. Save or print a copy of the curriculum map for your program in the Reports tab (see **Generating Reports**.)
Matching Any or All Filters

The option to “Match any or all filters” comes into play when you are filtering on multiple fields. “Any” will return results that match at least one of your filters, while “All” will only return results that match all of your filters. For example, if you filtered by reporting period “2018-19” and by “Active” outcomes only, Any would return outcomes and results that have either the 2018-2019 for the reporting period OR an Active outcome. All would return only those outcomes at are Active AND have a report year of 2018-2019.
AMS Resources

For resources and information about the assessment process at Penn State, please visit the OPAIR Website (opens in new window).

Each college and campus is assigned an Assessment Liaison to support your assessment process. If you need help with the AMS interface or anything assessment related, reach out to your Liaison and they will be happy to assist you. Visit the Assessment Liaison webpage (opens in new window) to find out who your liaison is.
Appendix A: Guide for Email-Only Users

The Email-Only Role

If you are an Email-Only user, you cannot access the full range of functions in the AMS. As an Email-Only user, you can complete tasks emailed to you from the AMS. This may require entering assessment results, action plans, completing items, or relating (uploading/attaching) a document. Links within the emails allow you to complete these tasks and apply them to the relevant program in the AMS. You also won’t see the same interface that Assessment Leaders see. As an Email-Only user, you will only see options directly relevant to your assigned task.

This appendix is intended to show you how to complete tasks and interact with the Email-Only user interface. If you need help, please contact your Assessment Liaison (opens in new window).

Throughout this index, particularly critical information will be highlighted with the word “Important”. What follows are important information and best practices that help make this process as easy as possible.

**NOTE:** As an Email-Only user, you must first be added to the AMS by OPAIR staff before Assessment Leaders can assign you tasks. If you cannot access the AMS links in your email, reach out to your Assessment Leader. They must contact their Assessment Liaison (opens in new window) and add you as an Email-Only user. They must provide your:

- Name
- Program name and level (e.g., A.S., B.A., B.S., M.S., PhD., undergraduate/graduate certificate)
- Campus
Assignments/Tasks in the AMS

When an Assessment Leader has assigned you a task you will receive an email.

Important: If you are expecting an email in this regard and don’t see it in your Inbox, check your Spam and Junk folders.

This email includes relevant program information, such as a Program Learning Objective (PLO), an Assessment Method, and a Performance Target (if entered). It also includes a due date for completion, and the name of the Assessment Leader who created this task for you. If the Assessment Leader added additional information relevant to your task, you will see it in this email, under Notes/Instructions.

As an Email-Only user, you can complete any of the tasks below, if your Assessment Leader assigns them to you in the AMS.

- Enter a Summary of Findings (Assessment Results) for a PLO
- Relate (upload/attach) supporting documents
- Complete an Action Plan
- Mark items (i.e., an Action Plan) completed

Access Your Assignment

1. Click the link in the email to access your assignments page. The assignment related to the email in which you clicked the link is highlighted on the webpage. You will see this assignment’s status, due date, and information here along with a link that lets you access the assignment.

2. Click the Go to assignment link, at the bottom of the highlighted assignment. A new browser window opens in the AMS and displays your assignment.

Figure 132. The Go to assignment link in the assignments page.
Completing Assignments
There are four types of tasks that Assessment Leaders can assign to Email-Only users.

- Submit Assessment Results
- Submit Assessment Results and an Action Plan
- Relate (Upload/Attach) a Document
- Mark an Item (i.e., and Action Plan) Complete

This section demonstrates how to complete these assignments.

Complete an Assignment with Multiple Tasks
Assessment Leaders may assign you more than one task per assignment. For example, an Assessment Leader may require both Assessment Results and an Action Plan be completed together within one assignment. Another example may be completing an Assessment Result and attaching a rubric.

Important: If you are assigned multiple tasks, do not click the Mark as Complete/Complete Assignment buttons until all tasks are completed. You cannot go back and edit your entries/submission after you’ve clicked either button.

Assignment: Submit Assessment Results
This process shows how to complete the task of submitting Assessment Results (findings) for a program’s PLO.

1. Navigate to your assignment (Steps 1-2 in Access Your Assignment).
2. Enter information in the fields displayed on this page. An asterisk (*) indicates a required field. Relevant information about field requirements displays when you click your cursor in the field.

   ![Figure 133. Fields for entering Assessment Results.]

3. (Optional) Relate (upload/attach) any documents requested by your Assessment Leader for your Assessment Results (see Assignment: Relate (Upload/Attach) a Document).
4. Review your entries for accuracy and completion.
5. Click the Save button in the upper right-hand corner. A prompt opens asking you to confirm that your assignment is completed.
   a. (Optional) Click the Keep Editing button to complete additional tasks, such as Relate Documents or complete Action Plans.
6. If you have completed all tasks within your assignment, click the Complete Assignment button in the prompt.

Important: At this point all revisions are final for your assignment. You cannot return and edit the assignment once you click the Complete Assignment button.
A green box in the upper right-hand corner indicates your completed assignment.

**Important:** It is a best practice to send an email to your assigner to communicate completion. No notification emails are sent from the AMS alerting your assigner that the assignment is complete.

**Assignment: Submit Assessment Results and an Action Plan**
Some assignments may require you to enter both Assessment Results and an Action Plan for your Program’s PLO. This process shows you how to complete this type of assignment and relate (upload/attach) a document, if needed.

1. Navigate to your assignment (Steps 1-2 of [Access Your Assignment](#)).
2. Enter Assessment Results information in the fields displayed on this page. An asterisk (*) indicates a required field. Relevant information about field requirements displays when you click your cursor in the field.
3. Click the Add Action Plan Based on Findings (green circle with a plus) icon to the right side of the **Action Plan Based on Findings** bar at the bottom of the window.

![Figure 134. The Add Action Plan Based on Findings icon.](image)

4. Enter Action Plan information in the fields on this page. An asterisk (*) indicates a required field. Relevant information about field requirements displays when you click your cursor in the field.
5. To save your work, there are multiple options:
• Click the **Save** button to save your PLO and remain on that page to make edits.

![Figure 135. The Save button.](image)

• Click the arrow to the right of the Save button and select **Save and Return** to save your PLO and return to the Plan page.

![Figure 136. The Save and Return option.](image)

• Click the arrow to the right of the Save button and select **Save and Add New** to save your new PLO and add another.

![Figure 137. The Save and Add New option.](image)

6. If you did not choose the second option (Save and Return) and are ready to move forward, click the **Return** button. Your Action Plan information displays below the Action Plan Based on Findings bar. Use the icons to the right of the Action Plan to edit or delete it.
7. (Optional) Relate (upload/attach) any documents requested by your Assessment Leader for your Assessment Results or Action Plan (see Assignment: Relate (Upload/Attach) a Document).

8. Review your entries for accuracy and completion.

9. Click the Save button in the upper right-hand corner. A prompt opens asking you to confirm that your assignment is completed.

10. (Optional) Click the Keep Editing button to complete additional tasks, such as Relate Documents, or add more Action Plans.

11. If you have completed all tasks within your assignment, click the Complete Assignment button in the prompt.

**Important:** At this point all revisions are final for your assignment. You cannot return to make changes once you click the Complete Assignment button.

A green box in the upper right-hand corner indicates you submitted your assignment.

**Important:** It is a best practice to send an email to your assigner to communicate completion. No notification emails are sent from the AMS alerting your assigner that your assignment is complete.

### Assignment: Relate (Upload/Attach) a Document

Some assignments may require you to attach a document. You must first upload the document to the Document Repository before attaching it. This process shows how to complete this type of assignment by relating (uploading) and then attaching a document.

1. Navigate to your assignment (Steps 1-2 of Access Your Assignment). Your screen displays the PLO, Assessment Method and a Related Documents bar for your assignment.
2. Click the Relate Document (green circle with a wrench) icon on the right side of the Related Documents bar.
3. Click the Upload new documents (green circle with a plus) icon, in the right corner of the Document Repository. A new window opens.

![Image of Document Repository]

*Figure 140. The Upload new documents icon.*

4. Click the **Places documents into** field. A drop-down menu opens.
5. Select a folder from the drop-down menu to which you want to upload the document.
6. Click the **Files** field to browse files on your computer.

![Image of Files field]

*Figure 141. The Files field.*

7. Select the file or item you wish to attach to the assignment and click the **Open** button. Your file displays below the Files field.
8. (Optional) Add a description for the document in the **Description** field for the file.
9. (Optional) Repeat Steps 1-8 to add another document.
10. Click the **Save and Relate** button in the upper right-hand corner of the window.

![Image of Save and Relate button]

*Figure 142. The Save and Relate button.*

11. Your chosen document displays under the Related Documents section, and in the folder you selected in Step 5. A green box in the upper right-hand corner indicates your document was added to the Related Documents section.
12. (Optional) Click the downward triangle in a box icon to the right of the document and click Un-relate Document to remove the document from the Related Documents section.

![Figure 143. The downward triangle and Un-relate Document option.](image)

13. Click the **Complete** button in the upper right-hand corner of the window.
14. Review the information and make any necessary changes.
15. (Optional) Click the Un-relate Document (broken link) icon to the right of the file to remove the document from the assignment.

![Figure 144. The Un-relate Document icon.](image)

16. Click the **Mark as Completed** button in the upper right-hand corner of the window.

    **Important:** Once you click the **Mark as Completed** button, you cannot return to the assignment to make changes.

A green box in the upper right-hand corner indicates that your assignment is now complete.

**Important:** It is a best practice to send an email to your assigner to communicate completion. No notification emails are sent from the AMS alerting your assigner that your assignment is complete.

### Assignment: Complete an Assessment
Assessment Leaders may require you to report completed items within the AMS. You can do this with a simple click of a button. These instructions show how to complete this type of assignment.

1. Navigate to your assignment (Steps 1-2 of **Access Your Assignment**). This screen shows the completed PLO, Assessment Methods, Assessment Results, Action Plans, and any Related Documents.

    **Important:** Reach out to your Assessment Leader if any information is inaccurate.
2. Click the **Mark as Completed** button in the upper right-hand corner of the window.

   **Important:** If you have multiple tasks for one assignment, first make sure they are all complete. Once you click the **Mark as Completed** button, you cannot return to the assignment to make changes.

   A green box in the upper right-hand corner indicates the action was completed.

   **Important:** It is a best practice to send an email to your assigner to communicate completion. No notification emails are sent from the AMS alerting your assigner that your assignment is complete.