

QuickStart Guide: How to Enter Data in an Annual Assessment Plan


 Tip: Hover your mouse over the call-out icons embedded in this document for additional explanation of the steps outlined below.



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Your Home Page

When you log in to Planning & Self Study by Watermark, you will see a page that looks like this, with dashboards for each Organization- such as a program, co-curricular or administrative unit- for which you have been assigned as a Lead contributor to enter assessment and planning data. Each dashboard includes links that take you directly to areas to enter specific content, such as assessment plans and mission statement. You may see multiple such dashboards if you have been assigned as a Lead contributor for multiple Organizations at your institution. If you do not see one or more Organizations that you expect to see on your home page, please contact a Planning & Self-Study administrator at your institution for clarification.

My Leadership
View and access the course(s), program(s), or organization(s) you lead. You will receive guided prompts and tasks for effective leadership. Navigate to their profile(s) to access more insights about its progress, success, and improvement.

Demo Program
Program - Demo User

ENTER PROGRAM

PROJECTS IN PROGRESS

Demo Academic Assessment Plan 2020-2021
1 organization included | 3 outcomes being assessed

Outcome Progress and Results

Not Started
 In Progress
 Met
 Not Met

PROFILE PROGRESS

Mission: [View Mission](#)

Outcomes: 3

Outcomes Mapped: 3/3

Curriculum Map: [Edit Map](#)

Accessing an Assessment Plan

Planning & Self-Study can be used to track and manage annual outcomes assessment data (measures, findings, results, actions, etc.) in an assessment Plan. If one of your Organizations is included in an annual Plan, you will see that Plan listed within the [Projects In Progress](#) area of your Organization.

PROJECTS IN PROGRESS

Demo Academic Assessment Plan 2020-2021

1 organization included | 3 outcomes being assessed

Outcome Progress and Results

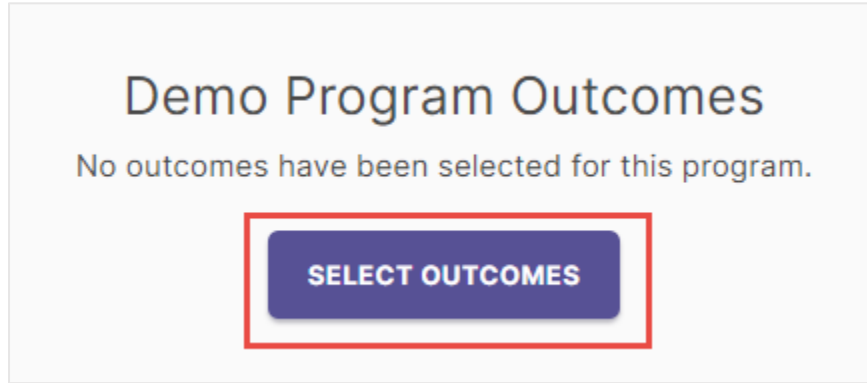
Not Started
 In Progress
 Met
 Not Met

You may see multiple Plans if there is more than one assessment cycle that you are required to enter data into. To work on a Plan, click on its title.

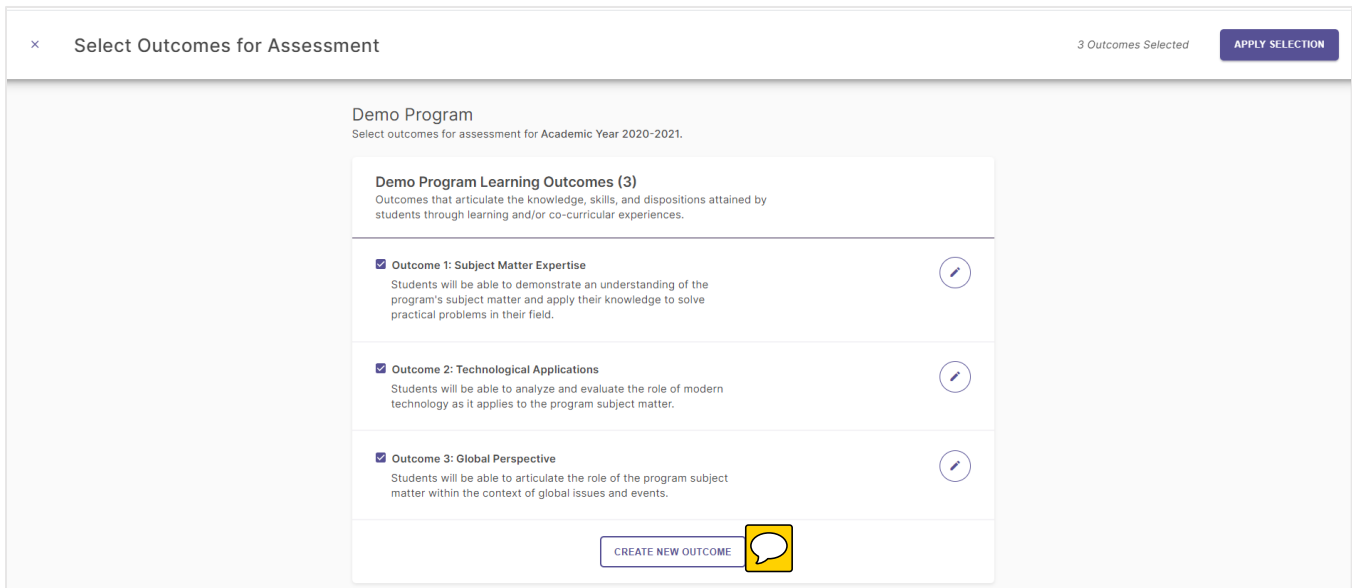
Select Outcomes for Assessment

Add Outcomes to a Plan

When you open a Plan for the first time, you must select which Outcomes your Organization will assess that year. Start by clicking the [Select Outcomes](#) button on this page.



The following page shows a list of all your Organization’s Outcomes.

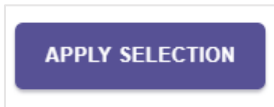


From this page, you can edit your existing Outcomes by clicking the pen icon to the right of that Outcome, and you can also create additional Outcomes by clicking the [Create New Outcome](#) button at the bottom of this list. For more information about creating and editing Outcomes, please review [the previous guide](#).

To select the Outcomes that your Organization will assess and report on for this Plan, first check the boxes the left of each Outcome title that you want to include.

<input checked="" type="checkbox"/>	Outcome 1: Subject Matter Expertise Students will be able to demonstrate an understanding of the program's subject matter and apply their knowledge to solve practical problems in their field.
<input checked="" type="checkbox"/>	Outcome 2: Technological Applications Students will be able to analyze and evaluate the role of modern technology as it applies to the program subject matter.
<input checked="" type="checkbox"/>	Outcome 3: Global Perspective Students will be able to articulate the role of the program subject matter within the context of global issues and events.

Then, click the [Apply Selection](#) button in the upper right-hand corner of the page.

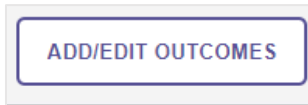


On the following page, you will see your selected Outcomes, and can start entering Measures for each Outcomes. If your selected Outcomes had Measures added to them in prior Plans, those Measure will automatically be added to those Outcomes for this Plan.

A screenshot of a web application interface for an assessment plan. The header shows "Demo Academic Assessment Plan 2020-2021" with a "REVIEW AND SUBMIT" button. Below the header, there are buttons for "ADD/EDIT OUTCOMES" and "ACTIONS". The main content area is titled "Demo Program Learning Outcomes" and lists three outcomes: "Outcome 1: Subject Matter Expertise", "Outcome 2: Technological Applications", and "Outcome 3: Global Perspective". Each outcome card shows "0 Measures" and "0 Actions" and a "Not Started" status with a dropdown arrow.

Remove Outcomes from a Plan

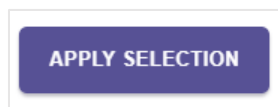
If you need to remove an Outcome from a Plan, first click the [Add/Edit Outcomes](#) button in the upper right-hand corner of the page. Please note that you can only remove an Outcome from a Plan if that Outcome does not have any Measures associated with it; if that Outcome has Measures, you must first remove those Measure from that Outcome before you can remove that Outcome from a Plan.



This will take you back to the Outcome selection page. Deselect Outcomes from this list by clicking a checked box to the left of an Outcome title, which removes the checkmark.

<input checked="" type="checkbox"/>	Outcome 1: Subject Matter Expertise Students will be able to demonstrate an understanding of the program's subject matter and apply their knowledge to solve practical problems in their field.	
<input checked="" type="checkbox"/>	Outcome 2: Technological Applications Students will be able to analyze and evaluate the role of modern technology as it applies to the program subject matter.	
<input type="checkbox"/>	Outcome 3: Global Perspective Students will be able to articulate the role of the program subject matter within the context of global issues and events.	

Then, click the [Apply Selection](#) button in the upper right-hand corner of the page.



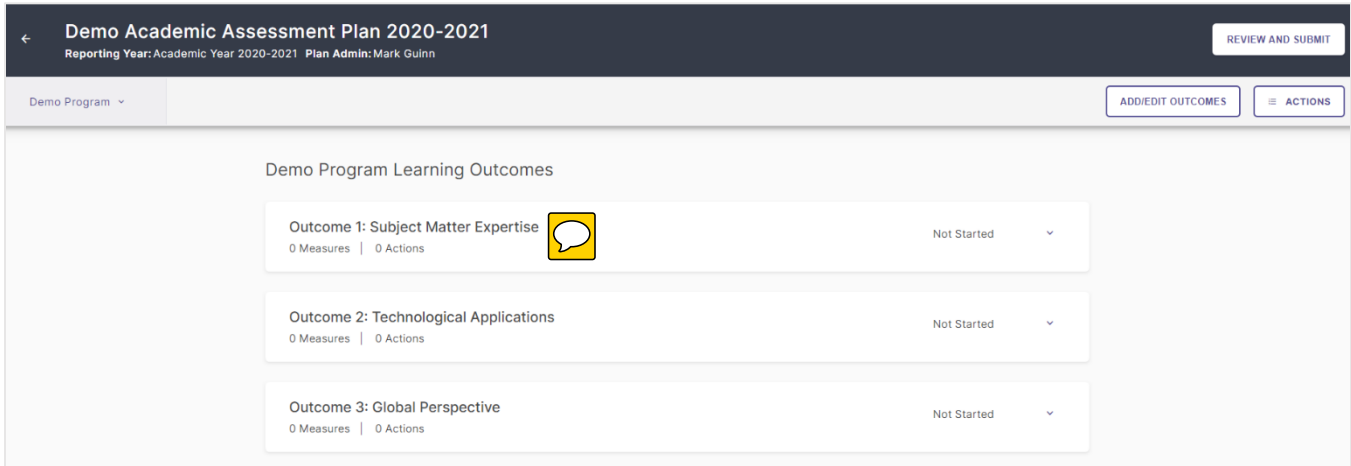
You will be returned to your Plan page which will no longer include the removed Outcome.

The screenshot shows the 'Demo Academic Assessment Plan 2020-2021' interface. At the top, there is a navigation bar with a back arrow, the title 'Demo Academic Assessment Plan 2020-2021', and a 'REPORTING YEAR: Academic Year 2020-2021 | PLAN ADMIN: Mark Guinn' section. A 'REVIEW AND SUBMIT' button is in the top right. Below the navigation bar, there is a 'Demo Program' dropdown menu, an 'ADD/EDIT OUTCOMES' button, and an 'ACTIONS' button. The main content area is titled 'Demo Program Learning Outcomes' and contains two outcome cards. The first card is for 'Outcome 1: Subject Matter Expertise' with '0 Measures | 0 Actions' and a 'Not Started' status. The second card is for 'Outcome 2: Technological Applications' with '0 Measures | 0 Actions' and a 'Not Started' status. Outcome 3 has been removed.

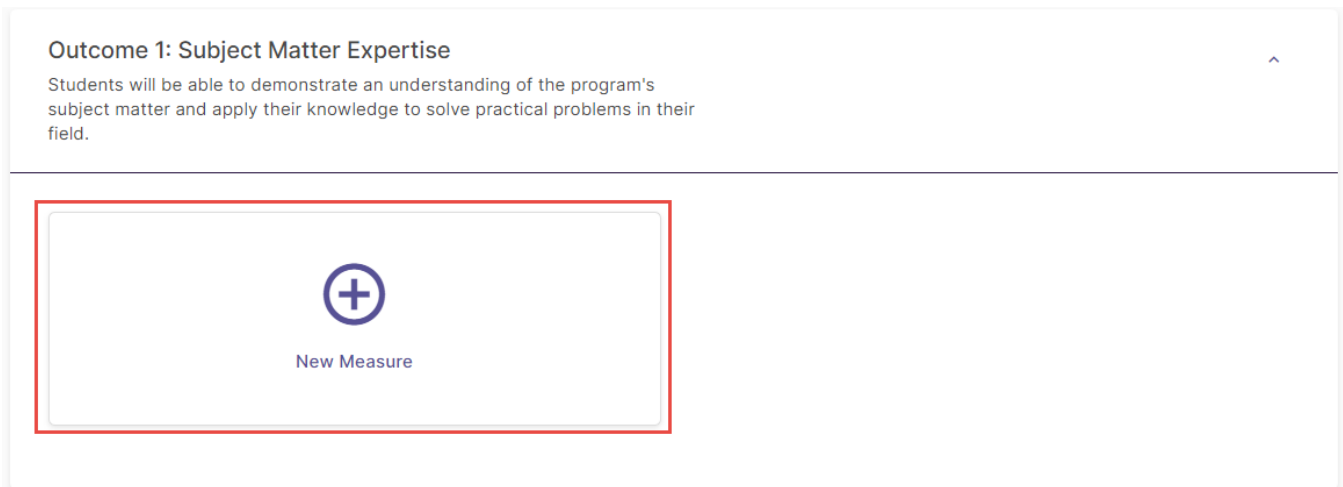
Add/Edit Measures

Add Measures to an Outcome

Once you have selected the Outcomes your Organization will assess in a Plan, the next step is to enter the Measures used to assess each Outcome. On your Plan page, you will see your selected Outcomes.




To add a Measure to an Outcome, first click on that Outcome displayed in the screen-shot above, which will expand it to reveal a **New Measure** button. Click that button to add a new Measure.




On the following page, you will see a form with various fields to enter data for your Measure:

Fields marked with * are required.

Definition Details of the measure activity

Method 


Select Measure Method

Outcome 


Outcome 1: Subject Matter Expertise

Program

Demo Program

Course* 

Select a course for this measure

This is a non-course based measure 


[Can't find a course? Add course to program's curriculum](#)

Title*

Enter Measure Title

Results Collection

Align this measure to rubric results from another integrated system. If your results aren't being collected in an integrated system, simply skip this step.

ALIGN RUBRIC 



Target


Enter target or criteria of success for this measure

For example, 80% of the students will achieve a score of 3 or above.

Description

Briefly describe the measure activity

Attachments  Attach up to 5 files.

Method: Use this dropdown menu to select whether your Measure is Direct or Indirect. There are also values for subcategories within these types.

Course (required, only available to Program-type Organizations): If a Measure is collected from a Course in your Program curriculum, use this field to identify that Course. Click on the dropdown menu to search the curriculum for a Course to select. If you do not see a Course you expect to see in this list, you can click the [Add course to program’s curriculum](#) link to add more Courses to the Program curriculum. For more information about updating Program curriculum, please review [this guide](#).

If a Measure is not collected from a particular Course (for example, if your Measure is a survey that goes out to all students, regardless of course enrollment), check the box next to [This is a non-course based measure](#) instead of selecting a Course.

Title (required): Enter the title or name of the measure.

Results Collection / Align Results: If your institution utilizes a data integration between Planning and Self-Study and either an LMS or another Watermark product, such as Aqua or Via, you can align a Measure to an assignment collected from that system to automatically populate assessment results from that system into Planning and Self-Study. Please review the following documentation for more information about our integration options:


[Aligning Rubrics from Aqua by Watermark](#)


[Aligning Rubric Results from Canvas](#)

[Managing the Blackboard Integration](#)

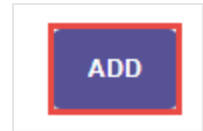
[Managing the D2L Integration](#)

Target: Enter the target or criteria of success for the measure, e.g. “80% of the student will achieve a score of 3 or above.”

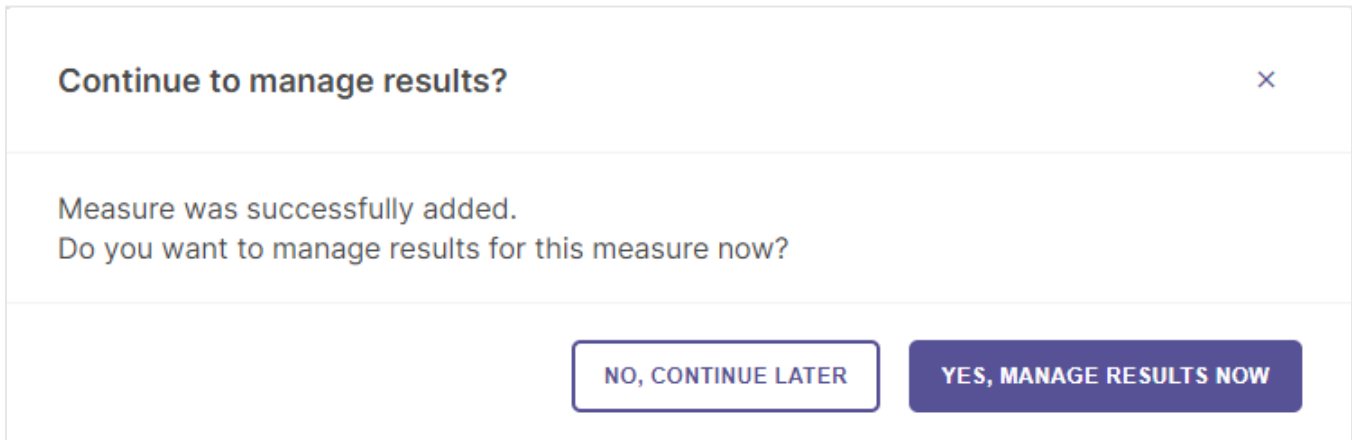
Description: Enter a brief description of the measure activity. 

 **Attachments / Attach Description Documents:** Upload up to 5 files that provide more details about the measure activity.

Please note that you can always return to this page to edit any part of your Measure later. Once you are done entering information for your Measure, click the [Add](#) button in the upper right-hand corner of the page to save your changes.

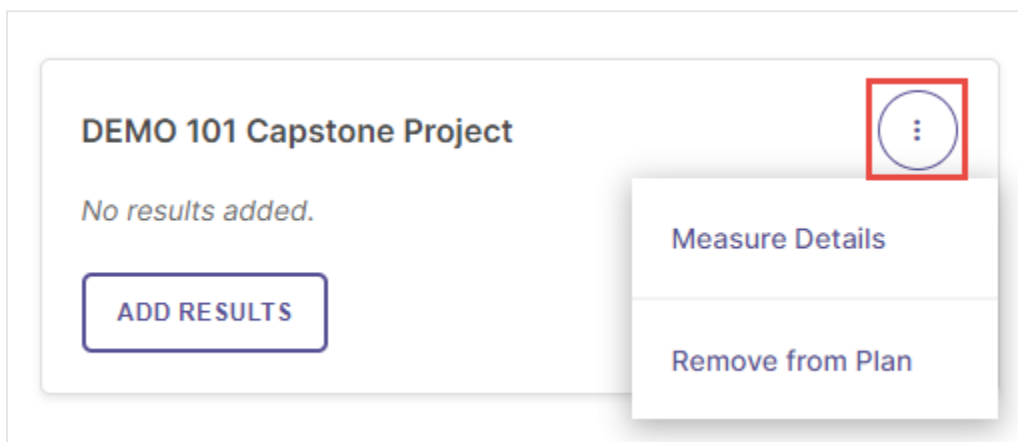


A message will appear asking whether you are ready to enter the results of the Measure you just entered. Click [No, Continue Later](#) to return to your Plan page where you can enter more Measures for your Outcomes, or click [Yes, Manage Results Now](#) to go to where you can enter your assessment results and findings, a process detailed on [page 11](#) of this guide.



Edit or Remove a Measure

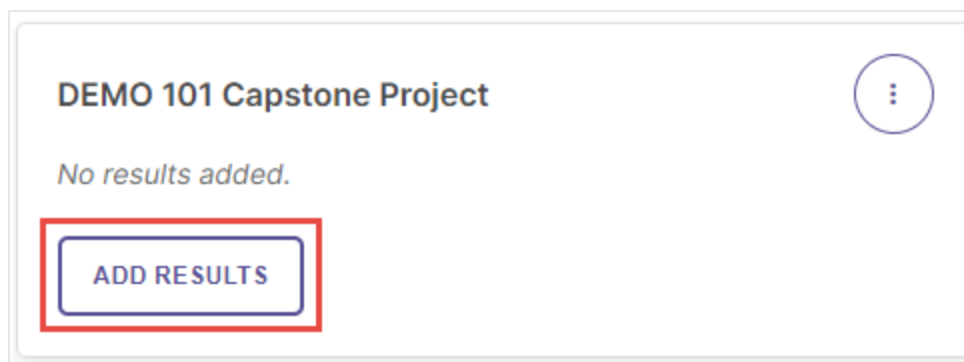
From your Plan page, you can make changes to or remove a Measure by first clicking the menu button to the right of the Measure Title. A menu will open the options, [Measure Details](#), which will return you to the measure editing page to make changes to your Measure, and [Remove from Plan](#), which allows you to remove a Measure from your Plan.



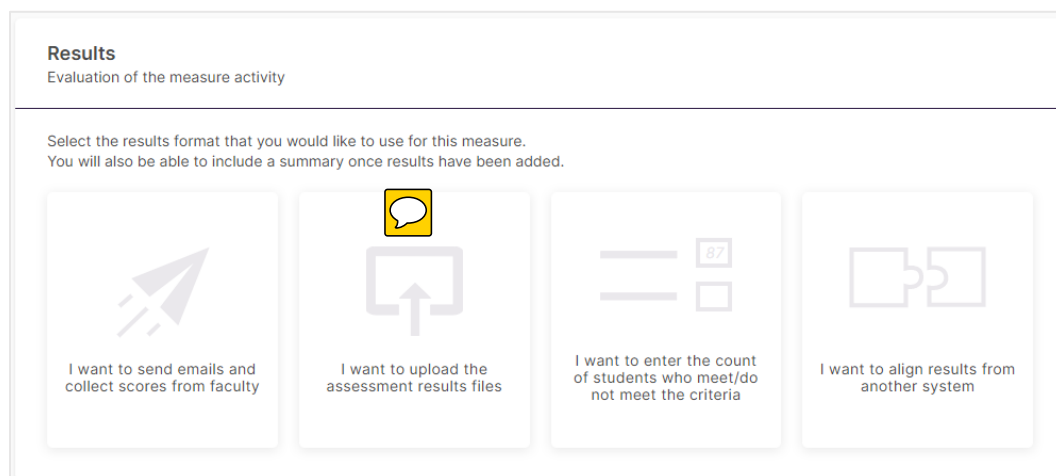
Add/Edit Results


Add Results


Once you have added assessment Measures to your Plan, the next step is to enter the Results of those Measures. To begin, click the **Add Results** button for a Measure for which you have results to enter.





You will be taken to a page where you are asked to **select** the results format you would like to use to document evidence of your assessment results, described below. Please note that you may not see all of the following options, based on the type of Outcome assessed, and details associated with the Measure.



 **I want to send emails and collect scores from faculty:** This option is only available for Measures associated with Courses, and requires a lot of administrative setup to utilize, but will send emails to faculty teaching course sections asking them to enter their students' scores for a Measure.

 **I want to upload the assessment results files:** If your assessment Results are documented in a file you have saved to your computer, you can use this option to upload that file as evidence.

 **I want to enter the count of students who meet/do not meet the criteria:** This option allows you to enter the counts of students who met or did not meet your criteria for outcome achievement, and those results will display as a data graphic.

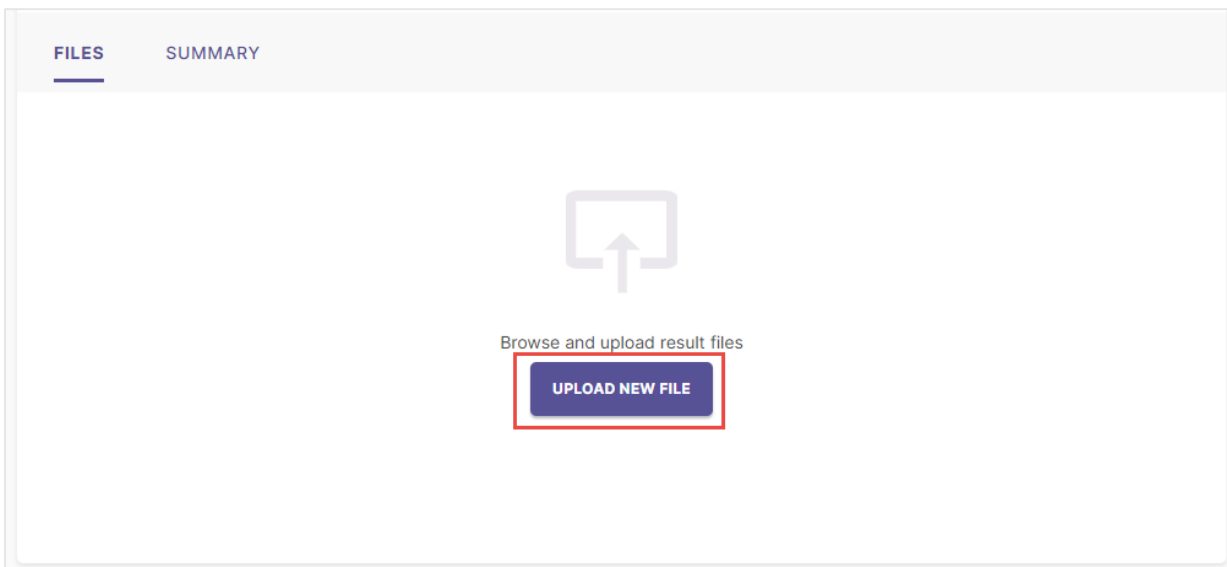
 **I want to align results from another system:** If your assessment Results are collected from your LMS or either Via or Aqua by Watermark, this option populates the results from one of those systems into Planning and Self-Study. See Results Collection/ Align Results section from page 9 for more information on integration options.

Please note that you can always return to this page to edit any part of your Results later. Once you are done entering information for your Measure, click the [Save & Close](#) button in the upper right-hand corner of the page to save your changes.

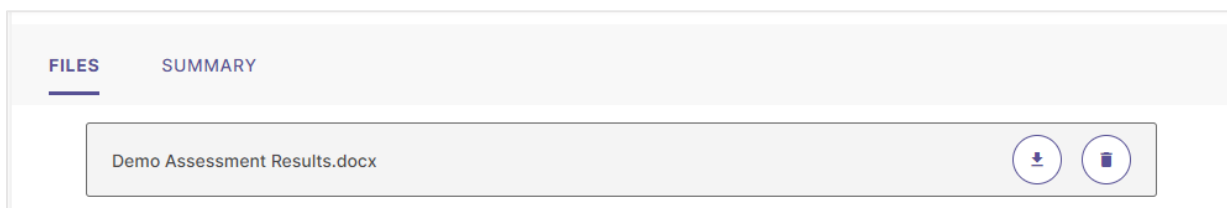
SAVE & CLOSE

Upload Assessment Results Files

If you choose the Results format option, [I want to upload the assessment results files](#), next click the Upload New File button to search your computer for a document detailing your assessment Results. You may upload multiple files to this area.



After you upload a file, you will see buttons to the right of its title to download or remove it.



You will also also need to click the Summary tab to type additional information about your Results.

FILES **SUMMARY**

Summary


Summarize the results of the measure activity



Enter Count of Students who Meet / Do Not Meet Criteria

If you choose the Results format option, I want to enter the count of students who meet/do not meet the criteria, next enter the number of students for each achievement category. Please note that these categories may be titled differently, based on your institution’s setup of Planning and Self-Study. Click View Results when you have entered your student counts.

Enter met/not met counts
 Select the level of detail for met/not met counts:*

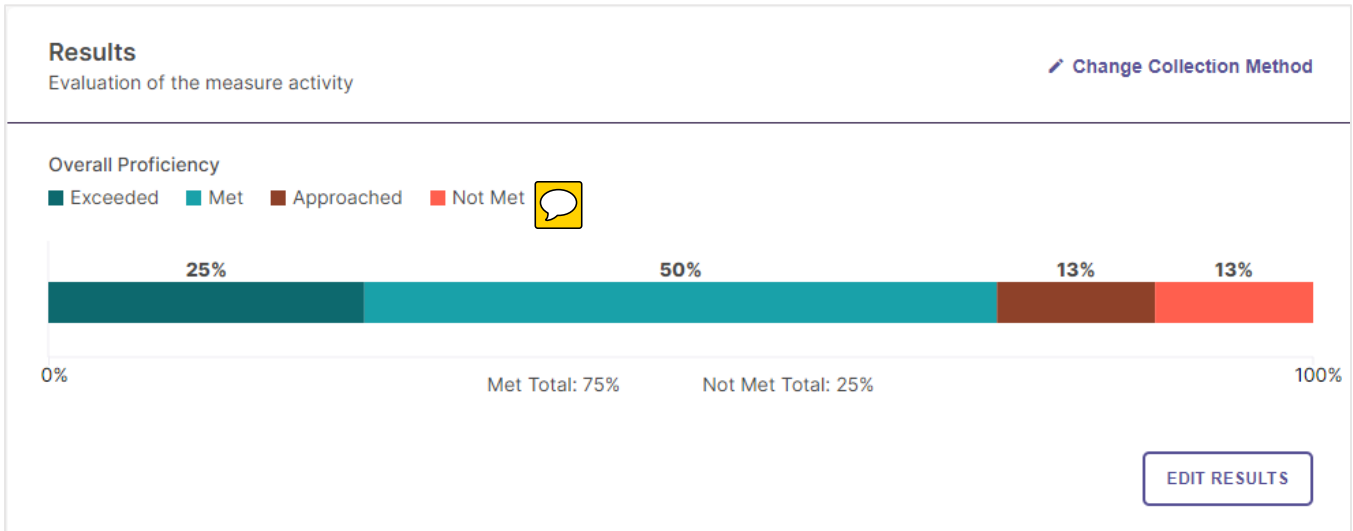
Overall counts for this measure activity.
 If you do not have values for some of the categories, you can leave them blank. 

Exceeded	Met	Approached	Not Met
<input type="text" value="10"/>	<input type="text" value="20"/>	<input type="text" value="5"/>	<input type="text" value="5"/>
Met Total: 30		Not Met Total: 10	

Counts for each section
 Enter counts for individual course sections, based on the term they occurred in.

VIEW RESULTS

Your student performance data will now display as a data graphic. You may edit these Results by clicking [Edit Results](#).



You have the option to enter student counts broken down by course section – if your Measure is associated with a Course that has Course Sections offered during your Plan year – by selecting [Counts](#) for each section and clicking [Enter Counts](#), and Planning and Self-Study will automatically aggregate totals across all Course Sections.

[Counts for each section](#)
Enter counts for individual course sections, based on the term they occurred in. [ENTER COUNTS](#)

Even if you select the [I want to enter the count of students who meet/do not meet the criteria](#) Results format option, you may still upload documentation and enter a summary of assessment Results. To do so, first click the carrot icon to the right of [Include results files and a summary of results \(optional\)](#)

Include result files and a summary of results (optional)

This will expand options to both upload a file and enter a summary, identical to the steps described on [page 12](#) of this guide.

[FILES](#) [SUMMARY](#)

Browse and upload result files

[UPLOAD NEW FILE](#)

Remove and Change Results

To remove Results and change the selected Results format, click [Change Collection Method](#).

Results
Evaluation of the measure activity

[Change Collection Method](#)

This will open a pop-up window to confirm your decision. Click [Yes, Delete Results](#) to proceed and delete your Results, which will allow you to select a new Results format.

Delete existing results? ×

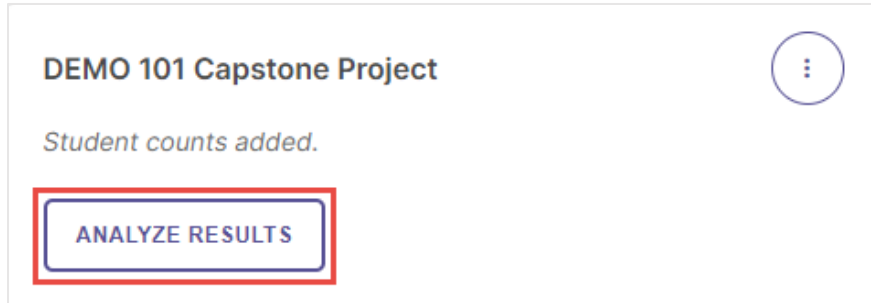
Changing the format will delete all existing results & result settings for this measure. Are you sure you want to continue?

[NO, KEEP EXISTING FORMAT](#) [YES, DELETE RESULTS](#)

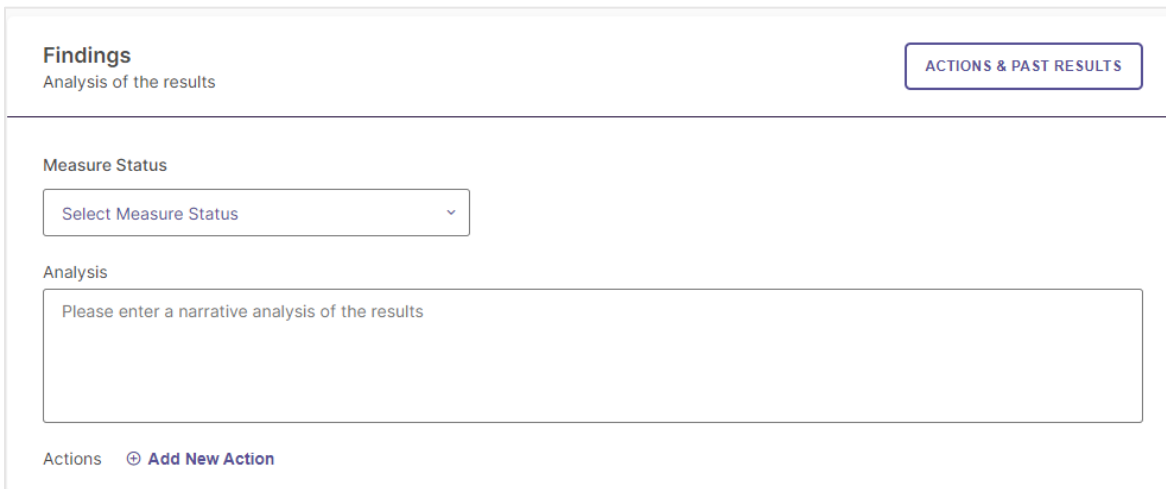
Analyze Results

Add Findings

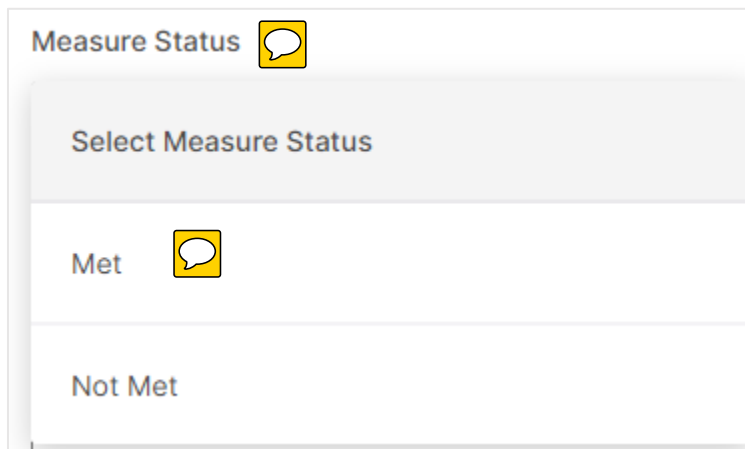
Once you have documented the Results for a Measure, the next step is to document the Findings, or analysis. From the Plan page, you can click [Analyze Results](#) to open the page for that Measure.



Once you are on that page, scroll down to the [Findings](#) category.



The first option in this category is to document the [Measure Status](#) for this Measure. Use the dropdown menu to select whether the criteria for this Measure was [Met](#) or [Not Met](#), based on the Results.





You may also enter a more detailed Analysis in the following text field.

Analysis



Please enter a narrative analysis of the results


View Actions and Past Results


If the same Measure was used in previous assessment Plans, you can view Actions and Results for previous iterations of that Measure to more effectively analyze how the Results for the most recent iteration fit in to a longitudinal understanding of the Measure. To begin, click the **Actions & Past Results** button in the Findings section.

Findings
Analysis of the results

ACTIONS & PAST RESULTS

This will open a panel on the right-hand side of your screen. Click the  and  icons to toggle between viewing historic Actions and Results associated with your Measure.

 **Actions** ×


 Sort By Most Recent ▼


Collaborate with another department / unit / program

Status
Complete ▼

Plan
Demo Academic Assessment Plan 2019-2020

Description
Plan an event to share effective teaching strategies with faculty from other Programs in this Department.

 **Past Results** ×

 **Demo Academic Assessment Plan 2019-2020**

Academic Year 2019-2020

Status: **MET**

Target: *None*

Overall Proficiency

- Exceeded
- Met
- Approached
- Not Met

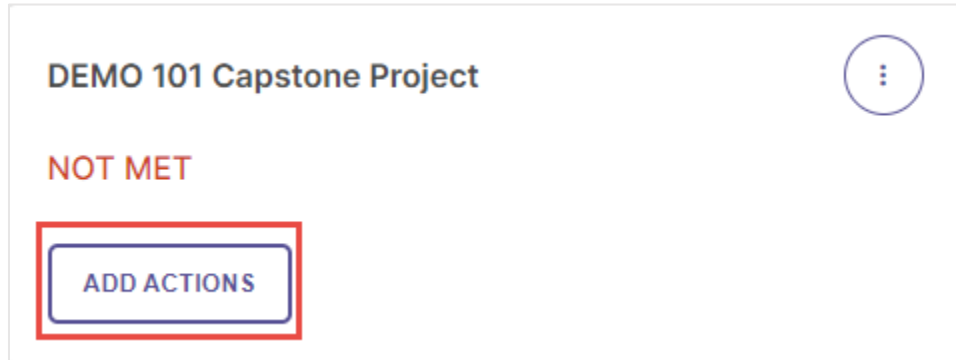
19% 63% 13% 6%

0% 100%

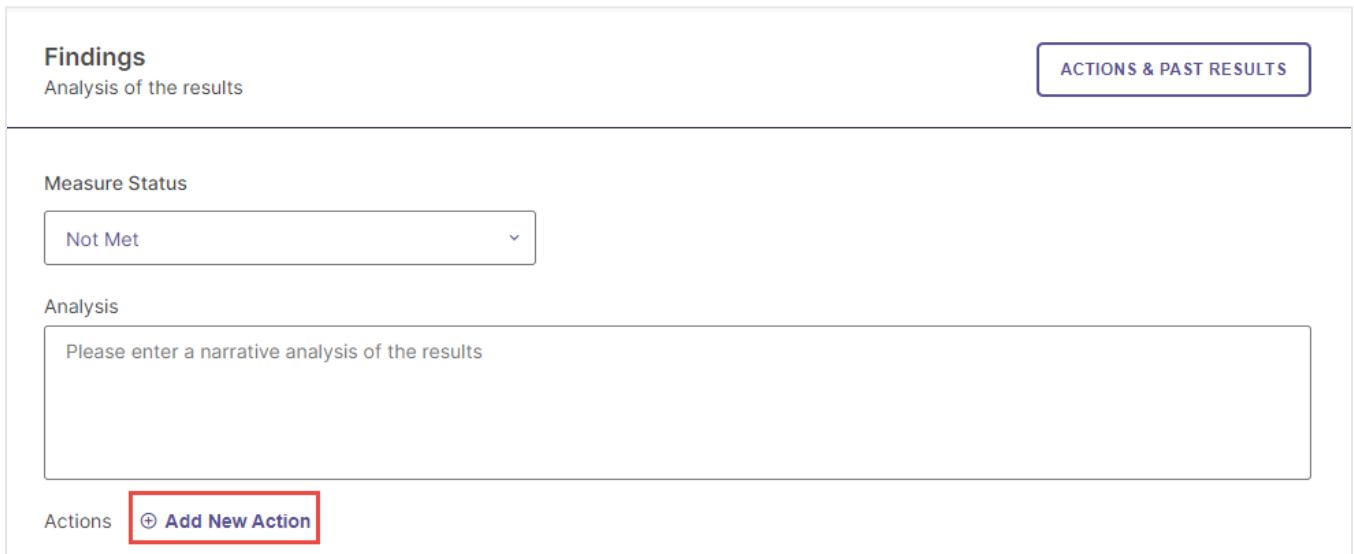
Add/Edit Actions

Add Actions

Once you have documented Results and Findings for a Measure, the next step is to document follow-up actions. From the Plan page, you can click [Add Actions](#) to open the page for that Measure.



Once you are on that page, scroll down to the [Findings](#) category and click [Add New Action](#).

A screenshot of the "Findings" section in an assessment plan. The section title "Findings" is in bold, with the subtitle "Analysis of the results" below it. In the top right corner, there is a button labeled "ACTIONS & PAST RESULTS". Below the title, there is a "Measure Status" dropdown menu currently set to "Not Met". Underneath is an "Analysis" section with a large text area containing the placeholder text "Please enter a narrative analysis of the results". At the bottom left, there is an "Actions" section with a button labeled "Add New Action" that has a plus sign icon and is highlighted with a red rectangular border.

This will open the Actions panel on the right-hand side of the page. Next, select the type of action you want to document from the list of options.

Once you select an Action Type, enter more details for that Action on the following form and click **Create Action**.

Action Type
Revise Curriculum
[Change Action Type](#)

Action Description*

Add new first-year course to introduce this outcome to students earlier in curriculum.

Recommended Due Date
mm/dd/yyyy

CANCEL
CREATE ACTION

Actions > Add Action ×

Add Action

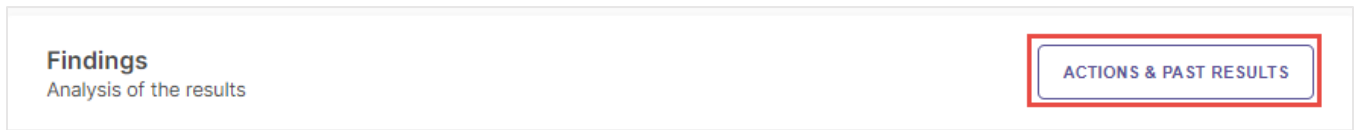
Select the type of action you recommend.

- Revise Curriculum
- Restructure Outcome Statement
- Revise Measurement / Assessment
- Gather Additional Data
- Revise Benchmark / Target
- Implement New Program Or Services
- Community Partnership
- Modify Position / Personnel
- Modify Policies / Procedures
- Adopt Or Expand Technologies
- Additional Training
- Collaborate With Another Department / Unit / Program
- Modify Physical Environment

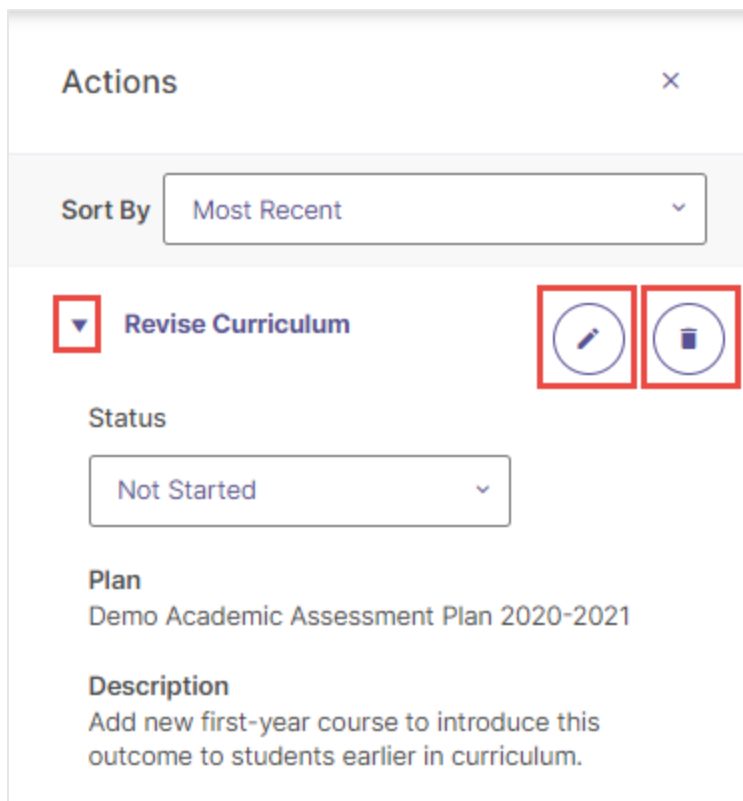
Repeat these steps to enter additional Actions. There is no limit to the number of Actions that can be added to a Measure. For information on how to update an Action's status, please refer the guide, [Centralized Tracking of Actions](#).

Edit and Delete Actions

To edit or delete Actions, first open your Action panel by clicking [Actions & Past Results](#) in the Findings section.



From the Action panel, expand an Action by clicking the arrow next to it. With the Action expanded, you can edit it by clicking the pen icon, or delete by clicking the trash icon.



Analyze Outcome

Once you have documented all Measures, Results, and follow-up Actions for an Outcome, the next step is to analyze overall achievement of that Outcome. To begin, click the [Analyze Outcome](#) button from the Plan page.

Outcome 1: Subject Matter Expertise ^

Students will be able to demonstrate an understanding of the program's subject matter and apply their knowledge to solve practical problems in their field.

DEMO 101 Capstone Project ⋮

NOT MET

Action: [Revise Curriculum](#)

[View Results](#)

DEMO 301 Capstone Project ⋮

MET

Action: [Maintain Assessment Strategy](#)

[View Results](#)

Student Post-Graduation Self Assessment Survey ⋮

MET

Action: [Modify Position / Personnel](#)

[View Results](#)

+

New Measure

[ANALYZE OUTCOME](#)

In the following form, use the [Outcome Status](#) dropdown menu to select whether the Outcome was [Met](#) or [Not Met](#). You may also enter more details in the [Outcome Analysis](#) text field. Finally, you can document Actions that are related to the Outcome but which are not related to a specific Measure by clicking [Add New Action](#) beneath General Actions.

Outcome Analysis 💬

Provide analysis of the outcome and its combined measure(s).

Outcome Status

Met ▼

General Outcome Actions

⊕ ADD NEW ACTION