ePIE Workbook

Documenting the Planning for Institutional Effectiveness (PIE) Process at Mt. San Antonio College

http://tracdat.mtsac.edu/tracdat

Fall 2008
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Introduction

This workbook is a step-by-step guide on the different functions of ePIE (using the TracDat software). ePIE is the assessment management tool designed to meet the assessment and planning needs at Mt. San Antonio College. ePIE allows for department/division and institution-wide viewing of assessment plans and uniform reporting across departments. Each unit is responsible for entering and maintaining their PIE plans and assessment results in TracDat.

Please contact the Information Technology Help Desk at ext. 4357 if you have questions about this manual or if you need ePIE assistance.

Please contact Joan Sholars at ext. 4610 if you have questions about how to develop Student Learning Outcomes (SLO) or Administrative Unit Objectives (AUO.)

Please contact the Instruction Office if you have questions about the Planning for Institutional Effectiveness (PIE) process.

Uses of ePIE (TracDat)

ePIE (TracDat) can be used to manage and document the following institutional effectiveness activities at Mt. SAC:

- Document Student Learning Outcomes and results
- Document Administrative Unit Objectives and results
- Manage AUOs/SLOs/Strategic Actions
- Complete the PIE process electronically
- Link department goals and SLO/AUO activities to the College goals
- Access to PIE-related reports
- Document Program Review and plan for improvement
Getting Started: ePIE (TracDat) Summary of Screens

Departments are responsible for developing their PIE plans and inputting them in ePIE. The table below was developed to show where each component of the PIE plan fits in ePIE.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Screen</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Summary</td>
<td>Displays an overview of the data for a particular assessment unit.</td>
</tr>
<tr>
<td></td>
<td>Calendar</td>
<td>Provides a calendar to enter data.</td>
</tr>
<tr>
<td></td>
<td>Profile</td>
<td>Provides a summary of your user account information as it is known in TracDat.</td>
</tr>
<tr>
<td>Assessment Unit</td>
<td>General</td>
<td>Enter the department/unit’s Mission statement. Enter the unit’s previous year’s accomplishments and tie them to college goals. Enter both the External and Internal Conditions that influence the department/unit goal-setting process. Departments and units should support the conditions with quantifiable data.</td>
</tr>
<tr>
<td></td>
<td>Goals</td>
<td>Enter the department/unit goals to be addressed through the SLOs/AUOs process and also goals that will not be assessed through the SLOs/AUOs process. Each of these goals can be tied back to a college goal and a team goal.</td>
</tr>
<tr>
<td></td>
<td>Personnel</td>
<td>This screen documents the staff with access to view and or edit a department/unit’s PIE form.</td>
</tr>
<tr>
<td></td>
<td>Courses</td>
<td>Use this screen to view those Courses which are associated with the assessment unit.</td>
</tr>
<tr>
<td>Plan</td>
<td>SLO/AUO/SA</td>
<td>Use this screen to add new Program Level SLO/AUO/SA and/or view the existing SLO/AUO/SA of your Assessment Unit.</td>
</tr>
<tr>
<td></td>
<td>Means of Assessment</td>
<td>Use this screen to define the means you will use to assess the selected SLO/AUO. You may add as many different Assessment Methods as you wish.</td>
</tr>
<tr>
<td></td>
<td>Related Courses</td>
<td>Use this screen to relate which courses or activities are associated to the SLO/AUO/SA. This is where the SLO/AUO/SA is related to the college goals and the department / unit’s goals.</td>
</tr>
<tr>
<td></td>
<td>Tasks</td>
<td>Use this screen to identify those Tasks that must be accomplished in order to achieve the SLO/AUO/SA. When you enter a Task, you can then assign that Task to a person. That person will receive an email notifying them they have been assigned the Task.</td>
</tr>
<tr>
<td></td>
<td>Related Goals</td>
<td>Use this screen to relate an SLO/AUO/SA to those Goals which it supports. The Goals of all appropriate Units are shown. To select a Goal, click the box to the left of the Goal.</td>
</tr>
</tbody>
</table>
## Getting Started: ePIE (TracDat) Summary of Screens
*(continued…)*

<table>
<thead>
<tr>
<th>Course Assessment Plan</th>
<th>SLO/AUO/SA</th>
<th>Use this screen to add new <strong>Course Level</strong> SLO/AUO/SA and/or view the existing SLO/AUO/SA for the unit.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Means of Assessment</td>
<td></td>
<td>Use this screen to enter the Means of Assessment for the course SLO.</td>
</tr>
<tr>
<td>Related Assessment Unit SLO/AUO/SA</td>
<td></td>
<td>Use this screen to state whether a program level outcome/objective/strategic action is related to this particular course SLO. (Optional)</td>
</tr>
<tr>
<td>Related Goals</td>
<td></td>
<td>Use this screen to relate a <strong>Course Level</strong> SLO/AUO/SA to those goals which it supports. The college goals, team goals and unit goals are shown. To select a goal, click the box to the left of the goal.</td>
</tr>
<tr>
<td>Summary of Data</td>
<td>By SLO/AUO/SA</td>
<td>Use this screen to add the summary of data and the use of results for <strong>Program Level</strong> SLO/AUO/SA results.</td>
</tr>
<tr>
<td></td>
<td>By Course</td>
<td>Use this screen to add the summary of data and use of results for <strong>Course Level</strong> SLOs.</td>
</tr>
<tr>
<td>Reports</td>
<td>Reports List Assessment Unit Course</td>
<td>This screen displays a list of all the available reports defined within ePIE for the department/unit. The best reports to run are: 1. Assessment Plan 2. Assessment Report</td>
</tr>
<tr>
<td>Documents</td>
<td>Document Repository</td>
<td>Use this screen to create document folders to store department/unit documents that are used in the PIE process. Reports provided by IT to support programs internal conditions are in the “Reports for &lt;current year&gt; PIE” folder.</td>
</tr>
<tr>
<td></td>
<td>Related Documents</td>
<td>This screen displays a list of all documents that have been related (associated with a particular Outcome and/or Means of Assessment) within ePIE.</td>
</tr>
</tbody>
</table>
ePIE (TracDat) Login & Logout

Logging in to ePIE:

1. Using a web browser, go to: http://tracdat.mtsac.edu/tracdat
2. Enter your User Name
3. Enter your Password
4. Click Login
5. To logout click Logout located in the upper right hand of all screens

Contact the IT Help Desk at ext. 4357 if you need a User Name or Password.
HOME Tab – Summary Screen

Select the unit for which the PIE is being developed from the drop down menu. The Home tab is a dashboard view of a Unit. It shows a snapshot of the unit’s plan, assessment information, goals and assignments. Clicking on any colored number (often purple), will either take you to another area with more specific information or pop-up a descriptive window.

Select Unit

Click the number for additional information
Worksheet

Previous Year Accomplishments

Identity accomplishments from the previous year and the college goal they relate to.

**College Goals**

1. The college will secure funding that supports exemplary programs and services.
2. The college will prepare students for success through the development and support of exemplary programs and services.
3. The college will improve career/vocational training opportunities to help students maintain professional currency and achieve individual goals.
4. The college will improve the quality of its partnerships with business and industry, the community, and other educational institutions.
5. The college will utilize and support appropriate technology to enhance educational programs and services.
6. The college will provide opportunities for increased diversity and equity for all across campus.
7. The college will increase access for students by strengthening recruitment opportunities for full participation in college programs and services.
8. The college will encourage and support participation in professional development to strengthen programs and services.
9. The college will provide facilities and infrastructure that support exemplary programs and consider the health and safety of the campus community.
10. The college will ensure that basic skills development is a major focus and an adequately funded activity.
11. The college will improve effectiveness and consistency of dialogue between and among departments, committees, teams, and employee groups across the campus.

<table>
<thead>
<tr>
<th>College Goal #</th>
<th>Previous Year Accomplishment(s)</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
Worksheet
Internal/External Conditions Data Analysis

Identify those external conditions that have influenced the department/unit goal-setting process:

*Note: External conditions include disciplinary or regulatory changes, changes in technology or legislative changes, accreditation recommendations, enrollment issues, etc.*

Identify those internal conditions that have influenced the department/unit goal-setting process:

*Note: Internal conditions include results of previous SLOs/AUOs assessment, IT data, changes in technology, changes in budget, staffing, resources, enrollment issues, facilities issues, etc.*
Worksheet
Data Analysis

Departments and units should support the conditions above with quantifiable data, conduct appropriate analyses, and make supportable conclusions. For your use, standardized IT data reports will be provided in ePIE on the Document tab. You may also report on your own internally-generated data like budget reports or advisory council minutes.

Example:

<table>
<thead>
<tr>
<th>Parameter being examined</th>
<th>Data source(s) used / Findings or Trends / Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student retention</td>
<td>Annual College Retention Study</td>
</tr>
<tr>
<td></td>
<td>- Student retention rate for class X is below other classes in the department</td>
</tr>
<tr>
<td></td>
<td>- Retention rates for several classes in Y department are lower than those in other departments</td>
</tr>
<tr>
<td></td>
<td>- Need to examine methods to improve retention in class X.</td>
</tr>
<tr>
<td></td>
<td>- Develop ways to improve retention in department Y.</td>
</tr>
</tbody>
</table>
ASSESSMENT UNIT Tab – General Screen

Click on the Assessment Unit Tab and the General Screen and enter the following information:

Mission Statement: The department or unit should have a statement that defines their broad purposes.

Goal / Accomplishment: Select the college goal and enter the previous year’s accomplishments that are tied to that goal.

External Conditions: Identify those external conditions that have influenced the department or unit goal setting process. They may include accreditation, economic trends, technological shifts or legislative changes.

Internal Conditions: Identify those internal conditions that have influenced the Department or Unit goal-setting process. They may include, curriculum, staffing, SLO and AUO efforts, IT data reports or budget changes.

Parameter, Data Source / Findings / Impact: Departments and Units should support Internal and External Conditions with quantifiable data, conduct appropriate analyses and make supportable conclusions. For your use, standardized IT data reports are provided on the Documents Tab for each Program or Unit. You may also report on your own internally-generated data.

From the drop down menu, choose the Type of Parameter Being Examined. In the Data Source / Findings / Impact field, report specific data reviewed and trends identified via this analysis.
Worksheet

Department Goals

Department goals allow the area to focus its priorities. Prompted in part by college goals (page 8) and team goals, they guide area planning and assessment. Goals are not required to change every year. They can be either short or long term.

Team Goals

AS-1. Ensure that Facilities staff has the necessary leadership, direction, supplies and equipment to perform effectively.

AS-2. Ensure that Facilities Planning and Management Department appropriately increases staffing levels to address the growth of College facilities and maintainable grounds.

AS-3. Increase effectiveness and consistency of communication between Facilities units, construction management design and inspection teams and the Campus Community.

AS-4. Increase the use of information technology to improve Facilities Planning & Mgmt Department effectiveness.

AS-5. Further develop and implement campuswide recycling and hazardous materials handling procedures.

AS-6. Expand overall professional and organizational development in the Facilities Planning and Management Department.

AS-7. Develop and fund a staffing plan that meets the needs of the College.

AS-8. Implement a new enterprise application system.


AS-10. Provide state-of-the-art facilities and equipment.


AS-12. Maintain customer satisfaction with services offered by the Technical Services Department; increase patron and user satisfaction; upgrade and replace existing technical subsystems; expand spaces and staffing for Performing Arts; make campus community aware of services; continue staff education/training for the Performing Arts facility; transition to a Campus Center Box Office for all campus ticketing needs.

Please do not list outcomes statements here. When appropriate, identify the connection of your goals to the college goals (page 8) and team goals.

<table>
<thead>
<tr>
<th>College Goal #</th>
<th>Team Goal #</th>
<th>Department Goal</th>
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</tbody>
</table>
**ASSESSMENT UNIT Tab – Goals Screen**

**Department Goals:** Prompted in part by college goals and team goals and generated by faculty and staff, they guide area planning and assessment. Goals are not required to change every year and can be either short- or long-term.

From the Assessment Unit Tab, Goals Screen - to add a new goal:

1. Click the yellow **Add New Goal** button.

2. A new screen will appear that contains a field for typing in the new goal.

3. Leave the **Active** box checked if this is a current department goal. If checked a “Y” will appear on the previous screen indicated that the goal is active, if unchecked, an “N” will appear.

4. Identify the connection of the department goal to college goals and team goals.

5. Scroll down the screen to view additional college and team goals of necessary.

6. Always click the yellow **Save Changes** button when done.
Worksheet

Program Level SLOs/AUOs/SAs

**Student Learning Outcomes (SLOs):** A means of evaluating student learning. They are created and assessed by the faculty, department, or academic program. They inform planning and lead to goals of improved learning. SLOs are expressed in statements of what students will be able to think, know, do, or feel because of a given educational experience. SLOs should be tied to unit goals.

**Administrative Unit Objectives (AUOs):** A means of evaluating the services provided by administrative units. They are created and assessed by the staff and managers of the unit. They inform planning and lead to goals of improved support services. AUOs are expressed as statements of what clients experience, receive or understand as a result of a given service. AUOs should be tied to unit goals.

<table>
<thead>
<tr>
<th>Department Goal #</th>
<th>Intended Outcome / Objective</th>
<th>Means of Assessment / Criteria for Success</th>
<th>Summary of Data</th>
<th>Use of Results</th>
</tr>
</thead>
<tbody>
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**Strategic Actions**

**Strategic Actions (SAs):** are the steps that an Academic Program or Administrative Unit may take in order to achieve their goals. SAs may also support the implementation of SLOs and AUOs. SAs are expressed as statements of what academic programs or administrative units will do to achieve their stated goals.

<table>
<thead>
<tr>
<th>Department Goal #</th>
<th>Strategic Actions</th>
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</tbody>
</table>
The Plan Tab is where **Program Level** Student Learning Outcomes, Administrative Unit Objectives and Strategic Actions are entered.

To enter a new SLO/AUO/SA, click on the yellow **Add New SLO/AUO/SA** button:

1. **SLO/AUO/SA Name**: Type in an abbreviated name.
2. **SLO/AUO/SA**: Type in the full objective/outcome or strategic action.
3. **Type(s)**: Select the type – AUO, SLO or SA.
4. **Status**: Select the status of the outcome or strategic action.
5. **Start Date**: Type date outcome became effective.
6. **End Date**: Type date outcome has been completed or becomes inactive.
7. In the next four boxes list the resources required to achieve this SLO, AUO or SA.
8. Always click the yellow **Save Changes** button when done.
**Worksheet**

**Program Level SLOs/AUOs**

The **Means of Assessment** is the method of determining whether the learning or performance outcome has been achieved. It is the systematic collection of data and information focused on student learning, and other outcomes and objectives. The assessment of student learning outcomes is integral to the SLO process. It is a department-controlled task that represents what students can do at the end of a particular program or course that they couldn’t do at the beginning.

The Means of Assessment should meet the following criteria:

- identify specific means of assessment (survey, test, etc.) for the outcome
- indicate consideration of previous data, if available
- establish minimum score for success at achieving outcome
- give number (%), fraction, actual number) of students or clients who are expected to meet the minimum score
- establish the minimum sub-score in given area(s) of interest *(optional)*
- specify when actual assessment occurs and by whom it is administered
- identify evaluator(s)
- specify evaluation process

<table>
<thead>
<tr>
<th>Unit Goal #</th>
<th>Intended Outcome / Objective</th>
<th>Means of Assessment / Criteria for Success</th>
<th>Summary of Data</th>
<th>Use of Results</th>
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**ePIE (TracDat Version 4)**

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Fall 2008
PLAN Tab – Means of Assessment Screen

To enter a new **Means of Assessment**, select the SLO or AUO name from the drop down menu. At the bottom of the screen, click the yellow **Add New Assessment Method** button.

1. **Assessment Method Category**: Select the assessment tool from the drop down menu.
2. **Assessment Method**: Type in-detailed the method of assessment.
3. **Criterion**: Type in the criteria for success.
4. **Schedule**: Type in when the assessment occurs and who is administering it.
5. **Active**: Check this box if this means of assessment is currently being used.
6. Always click the yellow **Save Changes** button when done.
Worksheet

Related Goals

Aligns program level SLOs/AUOs/SAs to the college goals, team goals (page 12), and department goals.

College Goals

1. The college will secure funding that supports exemplary programs and services.
2. The college will prepare students for success through the development and support of exemplary programs and services.
3. The college will improve career/vocational training opportunities to help students maintain professional currency and achieve individual goals.
4. The college will improve the quality of its partnerships with business and industry, the community, and other educational institutions.
5. The college will utilize and support appropriate technology to enhance educational programs and services.
6. The college will provide opportunities for increased diversity and equity for all across campus.
7. The college will increase access for students by strengthening recruitment opportunities for full participation in college programs and services.
8. The college will encourage and support participation in professional development to strengthen programs and services.
9. The college will provide facilities and infrastructure that support exemplary programs and consider the health and safety of the campus community.
10. The college will ensure that basic skills development is a major focus and an adequately funded activity.
11. The college will improve effectiveness and consistence of dialogue between and among departments, committees, teams, and employee groups across campus.

<table>
<thead>
<tr>
<th>College Goal #</th>
<th>Team Goal #</th>
<th>Department Goal</th>
<th>Program SLO/AUO/SA</th>
</tr>
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</table>
PLAN Tab – Related Goals Screen

The Related Goals screen aligns program level SLOs/AUOs/SAs to the college goals, team goals, and department goals.

From the Plan Tab, Related Goals Screen – to relate a program level SLO/AUO/SA:

1. Select the program level SLO/AUO/SA from the drop down menu.

2. Click the boxes next to each college goal, team goal and/or department goal this SLO/AUO/SA is related to.

3. Use the scroll bar to move down the screen and see additional college, team or department goals.

4. Always click the yellow Save Changes button when done.
Course Level SLOs

Designing SLOs for courses requires the participation of all departmental faculty. Ideally, the design begins with a series of conversations, usually in small groups. Faculty refer to the learning goals for students and identify knowledge and performance values in the discipline as a way to begin the process. These conversations should consider both affective and cognitive learning domains. The course SLO should meet the following criteria:

- ☐ indicate course level assessment
- ☐ aligns with the department goals
- ☐ be reasonable given the ability of the students
- ☐ state what students will know, do, think, or feel
- ☐ is measurable (can be observed or tested)
- ☐ is central to the course

<table>
<thead>
<tr>
<th>Course Name</th>
<th>Intended Outcome</th>
<th>Means of Assessment / Criteria for Success</th>
<th>Summary of Data</th>
<th>Use of Results</th>
</tr>
</thead>
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</table>
The Course Assessment Plan Tab is where Course Level SLOs are entered.

To enter a new course level SLO, click on the yellow Add New SLO/AUO/SA button:

1. **SLO/AUO/SA Name**: Type in an abbreviated name.
2. **SLO/AUO/SA**: Type in the full outcome.
3. **Type(s)**: Select the SLO type.
4. **Status**: Select the status of the outcome.
5. **Start Date**: Type date outcome became effective.
6. **End Date**: Type date outcome has been completed or becomes inactive.
7. In the next four boxes list the resources required to achieve this SLO.
8. Always click the yellow Save Changes button when done.
Worksheet

Course Level SLOs

The Means of Assessment is the method of determining whether the learning or performance outcome has been achieved. It is the systematic collection of data and information focused on student learning. The assessment of student learning outcomes is integral to the SLO process. It is a department-controlled task that represents what students can do at the end of a particular program or course that they couldn't do at the beginning.

The Means of Assessment should meet the following criteria:

Means of Assessment:
- identify specific assessment method category (course-embedded assessment, test, portfolio, standardized test, survey etc.) for the outcome
- details the assessment method used to measure the outcome

Criteria for Success:
- establishes minimum expected score for success at achieving outcome
- quantifies (%, fraction or actual number) of students who are expected to meet the minimum score
- indicates consideration of alternate data (previous SLO assessment effort(s), external reports), if available (optional)
- establish the minimum score for any subcategories within the outcome, if applicable

Schedule
- specifies the time frame in which outcome will be assessed
- specifies who will administer the assessment

Evaluation
- identifies evaluator(s)
- specifies evaluation process
- attach relevant document(s), if applicable

<table>
<thead>
<tr>
<th>Course Name</th>
<th>Intended Outcome</th>
<th>Means of Assessment / Criteria for Success</th>
<th>Summary of Data</th>
<th>Use of Results</th>
</tr>
</thead>
</table>
COURSE ASSESSMENT PLAN Tab – Means of Assessment Screen

To enter a new course level **Means of Assessment**, select from the drop down menu the course name and then the SLOA name. At the bottom of the screen, click the yellow **Add New Assessment Method** button.

1. **Assessment Method Category**: Select the assessment tool from the drop down menu.
2. **Assessment Method**: Type in-detail the method of assessment.
3. **Criterion**: Type in the criteria for success.
4. **Schedule** Type in when the assessment occurs and who is administering it
5. **Active**: Check this box if this means of assessment is currently being used.
6. Always click the yellow **Save Changes** button when done.
Notes...
COURSE ASSESSMENT PLAN Tab – Related Goals Screen

The **Related Goals** screen aligns course level SLOs to the college goals, team goals, and department goals.

From the Course Assessment Plan Tab, Related Goals Screen – to relate a course level SLO:

1. Select the course level SLO from the drop down menu.
2. Select the SLO name from the drop down menu.
3. Click the boxes next to each college goal, team goal and department goal this SLO is related to.
4. Scroll down the page if necessary to see all possible goals.
5. Always click the yellow **Save Changes** button when done.
Worksheet

Program Level SLOs/AUOs

The Summary of Data is completed after the assessment has been conducted. Refer to the assessment plan and examine the actual student performance or client behavior with what you had expected. How do they compare?

<table>
<thead>
<tr>
<th>Goal #</th>
<th>Intended Outcome / Objective</th>
<th>Means of Assessment / Criteria for Success</th>
<th>Summary of Data</th>
<th>Use of Results</th>
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Course Level SLOs

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SUMMARY OF DATA Tab – By SLO/AUO/SA Screen or By Course Screen

From the Summary of Data Tab - to enter a Summary of Data:

1. Select the By SLO/AUO/SA screen if you are adding a Summary of Data for the assessment of an SLO/AUO at the Program Level.

2. Select the By Course screen if you are adding a Summary of Data for the assessment of an SLO at the Course Level.

3. Click the yellow Add Summary of Data button.

4. When the new screen appears, click on select for which SLO/AUO/SA the Summary of Data applies to.

5. Select the Assessment Method that appears in the internal screen.
Notes…
6. **Summary of Data**: Type in the summary of data from the assessment.

7. **Summary of Data Date**: Type in the date the summary was entered.

8. **Summary of Data Type**: If the data met or exceeded the criterion select **Criterion Met**; if the data did not meet the criterion select **Criterion Not Met**.

9. **Summary of Data Status**: If this summary of data is complete select **Closed**; if it is not complete select **Open** from the drop down menu.

10. **Summary of Data Status Update Date**: If an update is done this date will automatically default.

11. **Notes**: Type in any anecdotal information or leave blank.

12. Always click the **Save Changes** button when you are done.
# Worksheet

## Program Level SLOs/AUOs

The **Use of Results** is the process of closing the loop. Determine ways to use the data and make applicable revisions to the curriculum, departmental processes and the outcomes/objectives.

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## Course Level SLOs

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Fall 2008
SUMMARY OF DATA Tab – By SLO/AUO/SA Screen or By Course Screen (...continued)

From the Summary of Data tab - to add the Use of Results:

1. Click on the **Use of Results** mini-tab.
2. Click on **add Action**.
3. Type in the Use of Results / Action.
4. Always click the yellow **Save Changes** button when you are done.
SUMMARY OF DATA Tab – By SLO/AUO/SA Screen or By Course Screen (…continued)

If there are documents related to an AUO/SLO/SA such as test examples, Excel files with data results, meeting minutes, etc. they can be uploaded to ePIE and associated with a particular outcome, objective or action.

From the Summary of Data tab, By SLO/AUO/SA screen or By Course screen - to upload and relate a document:

1. Click on the Related Documents mini-tab.

2. Click Relate Document and a menu with three choices will appear.

3. Select:
   - New Document to browse your hard drive and upload a new document
   - Document from Repository to choose a document from the Documents tab.
   - Previously Related Document to see documents that have already been related to this outcome, objective or action.
REPORTS Tab

1. Click on the Reports tab.

2. Note the two different screen choices:
   a. Assessment Unit – runs reports at the Assessment Unit level – AKA data entered on the Plan tab.
   b. Course – runs reports at the Course level – AKA data entered on the Course Assessment Plan tab.

3. Click Run to begin generating the report.
4. Select the parameters to filter data for the report.

5. Click the **Execute Report** button to generate the report.

6. The report will open in a new window.