UNIVERSITY OF SOUTH ALABAMA
WATERMARK
PLANNING AND SELF-STUDY GUIDE

FOR NON-ACADEMIC UNITS

The University of South Alabama is transitioning to Watermark's new assessment management platform, *Planning, and Self-Study* (P&SS). There are some differences between the two platforms, but the University's assessment framework remains the same:

- Specify measures and criteria/targets
- Collect and analyze results
- Identify action and follow-up

Nuventive and P&SS Comparison	
Nuventive	**P&SS**
Academic programs focus on student learning outcomes. Student support service units use student learning and operational outcomes.	P&SS uses the terms "learning outcome" and "successful outcome." Programs and units can establish both types of statements if they choose. Academic programs can use success outcomes to monitor other indicators of student success (e.g., graduation, placement, etc.), while non-academic/student support services use success outcomes.
Measures are entered or copied over manually every year.	Once entered, measures carry over from year to year. Modifications to information are allowed.
Results for all measures are summarized together in text format.	Results for each measure are summarized individually in text format or uploaded in various file formats.
Each program or unit has a document repository.	Each program or unit has a document repository.

Frequently Used Icons

The checkmark icon is used to save your information.

The X icon cancels any action taken; your entered information will not be saved.

The pencil icon is used to edit content.

The three dots icon is used to display more options.

The download icon is used to download documents and reports.

The expand/collapse icon is used to expand and collapse content.

The + icon is used to add more details.

Important Reminders

- Chrome and Firefox are P&SS's recommended browsers for P&SS.

- When you are done entering details in any area of P&SS, make sure to use the check mark and save and close buttons to save your information throughout P&SS.

- If you are having issues logging in to P&SS or accessing your Department/unit dashboard, please do not hesitate to email assessment@southalabama.edu

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Planning & Self-Study Log-in Process

Watermark's P&SS can be accessed through single sign-on.

To log in to Planning & Self-Study:

1. Navigate to the Faculty A/Z Applications.

2. Select 'W' at the top of the page and Watermark: Planning & Self-Study will appear.

Home Page Navigation

When you log into P&SS, you will see your **Home** page, which:

- Displays each academic Department that has you as a lead contributor.

- May contain multiple dashboards if you are associated with more than one department.

- Provides easy access to specific content, such as assessment and action plan data.

Each dashboard includes:
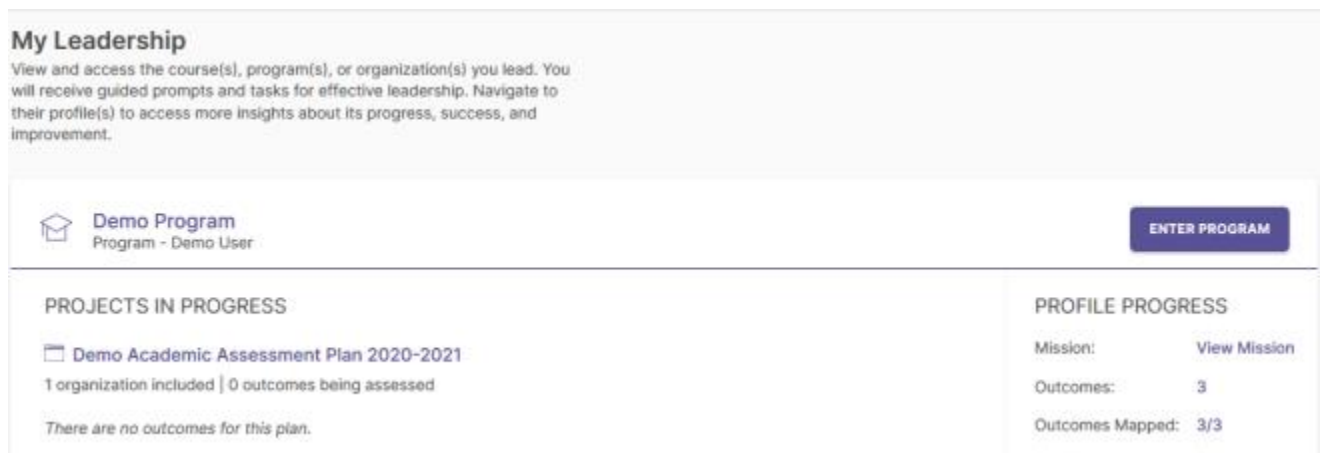
1. Department name(s) and names of leads (individuals with permission to enter information)

2. Assessment and action plans in progress are noted as **Projects in Progress.**

3. Once you have entered the outcome and results information, a dashboard will be generated to display the status of the outcomes for that particular plan.

4. Profile Progress functions as a dashboard within P&SS, offering direct links to specific areas. As more information is entered, the dashboard will change to reflect the updates.

   - Mission

   - Outcomes (the Department's current number of outcomes is shown)

5. Click the **Enter Department** to review and update information.

Department Dashboard
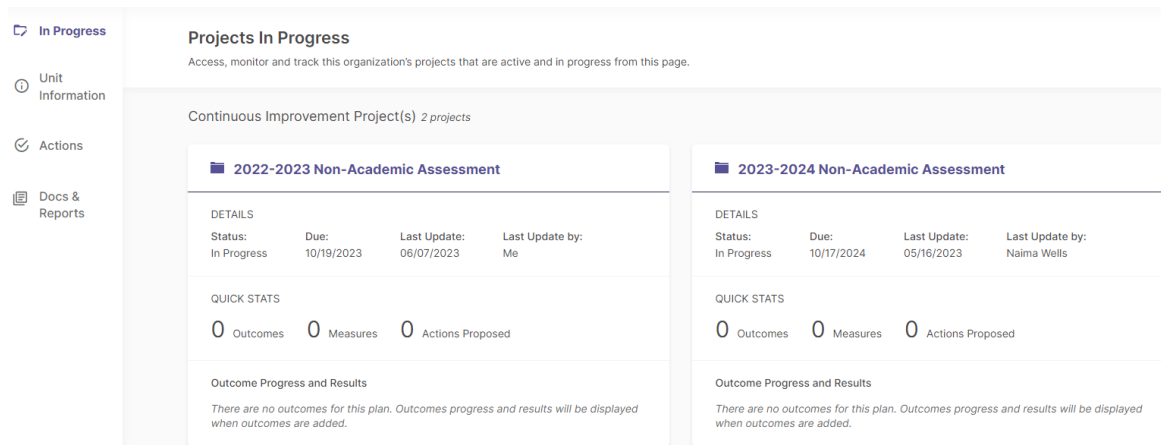
After clicking **ENTER PEPARTMENT,** you will see the Department Dashboard, which includes five tabs:

1. **In Progress:** Access, monitor, and track assessment and action plans that are active and in progress.

2. **Department Information:** Communicate the purpose and design of your department by creating and editing a mission statement and outcomes.

3. **Actions:** Track status and report on the progress of all actions identified in the Department's assessment and action plan.

4. **Docs & Reports:** Access reports and add documents to track your continuous improvements and organizational activity.

Department Information Tab: Mission Statement

From the Department Dashboard, click Department Information to enter a mission statement.

Add Mission
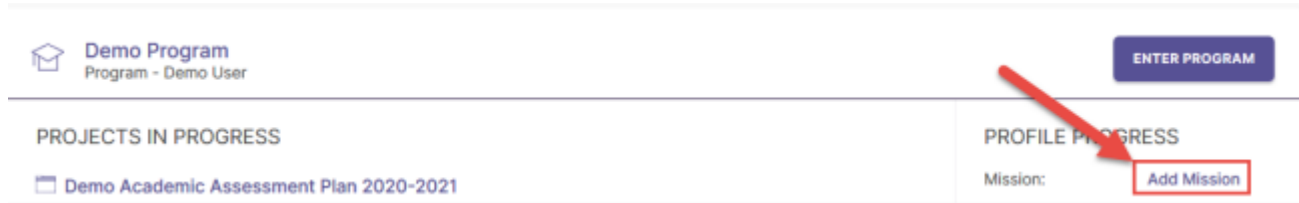
1. Use the **Add Mission** button to open the mission statement dialog box
2. Please input the mission statement for the Department. There is a character limit of 1000.
3. Click the **checkmark** icon to save. **Your information will not be saved if you do not click the icon.**
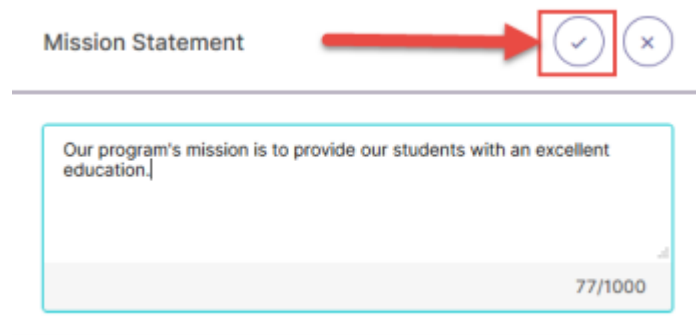
4. Alternatively, you can click the **x** icon to cancel; your entered information will not be saved.

Editing Mission Statement

Editing is used for minor changes to your current mission statement, such as typos or word changes that do not change the intent of the mission statement. The system does not retain a history of edits. To edit a mission statement, click on the options icon (represented by three dots) and choose the **Edit** option.
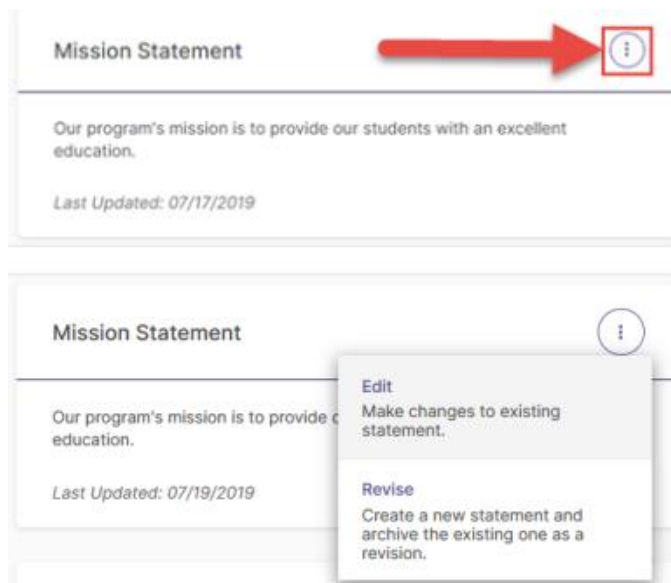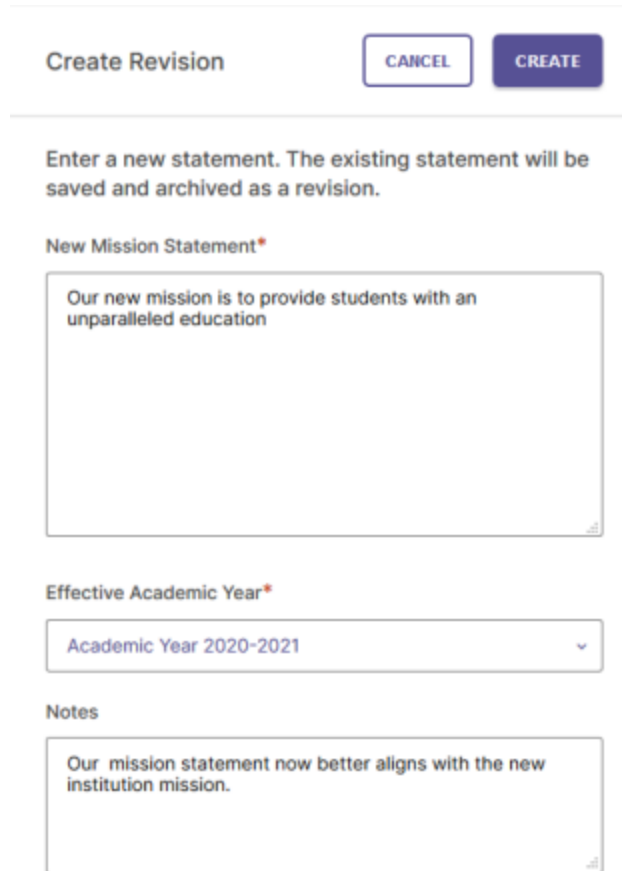
1. When you select **Edit**, a text box will appear.

2. Remember to save changes by clicking on the checkmark. As mentioned, there is no autosave feature. If you press the x button, any changes will not be saved.

Revising Mission Statement

Revise is used to replace an existing mission statement. If you revise an existing mission statement, older versions will be archived for reference; therefore, a history of your Department's mission statement is maintained.

When you select the Revise option, a panel will open on the right side of your screen to enter information about the new mission statement.

1. The first area is the **New Mission Statement** text box, where you will enter the new mission statement.

2. Use the **Effective Academic Year** drop-down menus to select the year when your new mission statement goes into effect.

3. The last text box is optional and may be used for notes to provide additional context about the revised mission statement.

4. When complete, select the **Create** button to save or click **Cancel** to undo your changes and delete any content you entered

Department Information Tab: Outcomes

P&SS designates two types of outcomes:

Learning outcomes articulate knowledge, skills, and dispositions obtained by students through learning/co-curricular activities.

Success outcomes articulate other indicators of student success that are not directly tied to mastery of learning outcomes.

Each academic department's student success outcomes have been transferred to P&SS.
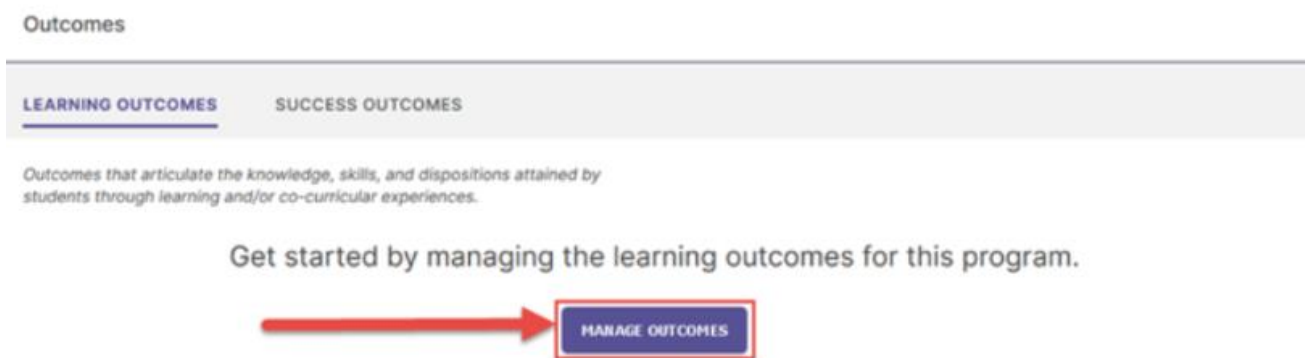
1. On the Department Information tab, scroll down to the **Outcomes** section.

2. Click on either the Learning Outcomes or Success Outcomes tab, depending on the outcome type you want to view. Administration units will more than likely utilize Success Outcomes for objectives. You will see the Department's existing success outcomes in the Learning Outcomes tab.

3. Click the **Manage Outcomes** button to create, order, edit, or archive outcomes.

Managing Outcomes Page

On the **Manage Outcomes** page, you will find the Department outcomes listed. From this page, you will be able to:

1. Reorder existing outcomes. Use the **Up and Down Arrows** to the right of the outcome title to rearrange the order of the department's outcomes.

2. Create a new outcome (see details on the next page).

3. Use the more options icon to edit, revise, archive, or delete an outcome.

Creating a New Outcome

After clicking **Create New Outcome,** the following pop-up window will appear.

1. **Outcome Title:** Provide a concise descriptor for the outcome with no more than seventy (70) characters. For example: If the outcome is "Community Connections: Students will establish meaningful connections to engage with their campus community" the title may be "Community Connections."

2. **Outcome Description:** Enter the entire outcome statement. Although the system has this as optional, you **MUST** include the entire outcome statement.

3. Click on **Create** to save your new outcome.

> **Important:** When you are done entering details for the outcome, be sure to click **Save & Close** in the top right-hand corner, or all information will be lost.

Editing, Revising, Archiving, or Deleting an Outcome

To adjust one or more outcomes listed, use the more **options icon** ⓘ to the right of the outcome you want to modify. You will see four options – Edit, Revise, Archive, and Delete. **Note,** if any data are previously entered for an outcome, you will **NOT** see the delete option.

Edit an Outcome
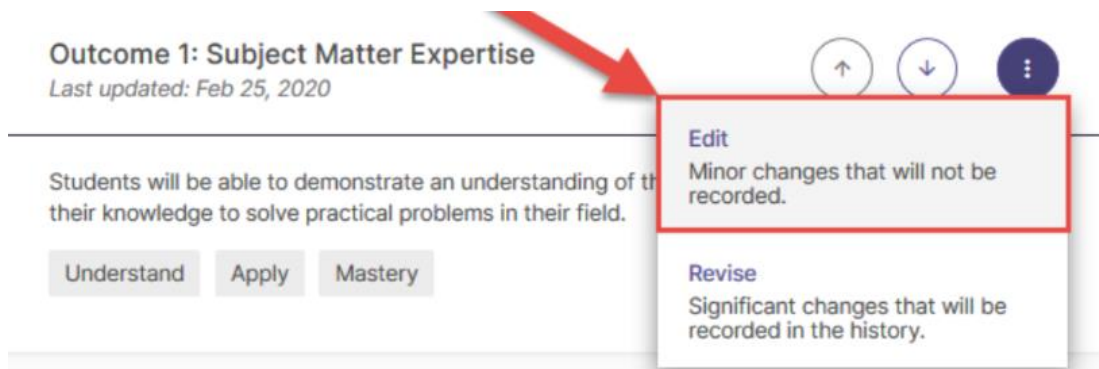
1. Select the **Effective Academic Year** that the revised outcome would be operational.

2. Enter the revised **Outcome Title.**

3. Enter the revised **Outcome Description.**

4. Select or enter the revised tag, if applicable.

5. Click on 'Update' to save the revised version. If you select cancel, all of the work entered will not save.

Revise an Outcome

The **Revise** option is used to make more significant changes. Those changes are recorded in the history of the outcome. When you select the Revise option, the system will open the following side panel to create your revision.

1. Select the **Effective Academic Year** that the revised outcome would be operational.

2. Enter the revised **Outcome Title.**

3. Enter the revised **Outcome Description (this is the full wording of the outcome).**

4. Select or enter the revised tag (if any).

5. The **Notes** section is optional but will allow you to document any additional context regarding the revised outcome.

6. When complete, click on **Create Revision** to save.

Revise Outcome
Outcome 1: Subject Matter Expertise

CANCEL   **CREATE REVISION**

Make significant changes to the outcome to document continuous improvement. You will still be able to use your previous data.

Effective Academic Year*

Academic Year 2019-2020

Outcome Title*

Outcome 1: Subject Matter Expertise

Outcome Description

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.

Tags

Understand ⊗   Apply ⊗   Mastery ⊗   3/5

Enter Tag

Tags allow you to track outcomes across organizations using Bloom's Taxonomy or your own institutional labels. You can add up to 5 tags.

Notes

Archive an Outcome

Use **Archive** to retire an outcome. This will permanently remove the outcome from the outcome set and will no longer be included in future assessments and action plans. However, prior data associated with that outcome will be preserved. Note when you select **Archive**, a pop-up window will prompt you to document reasons for archiving the outcome. Click **Archive** or **Cancel** to go back to the **Manage Outcomes** page.
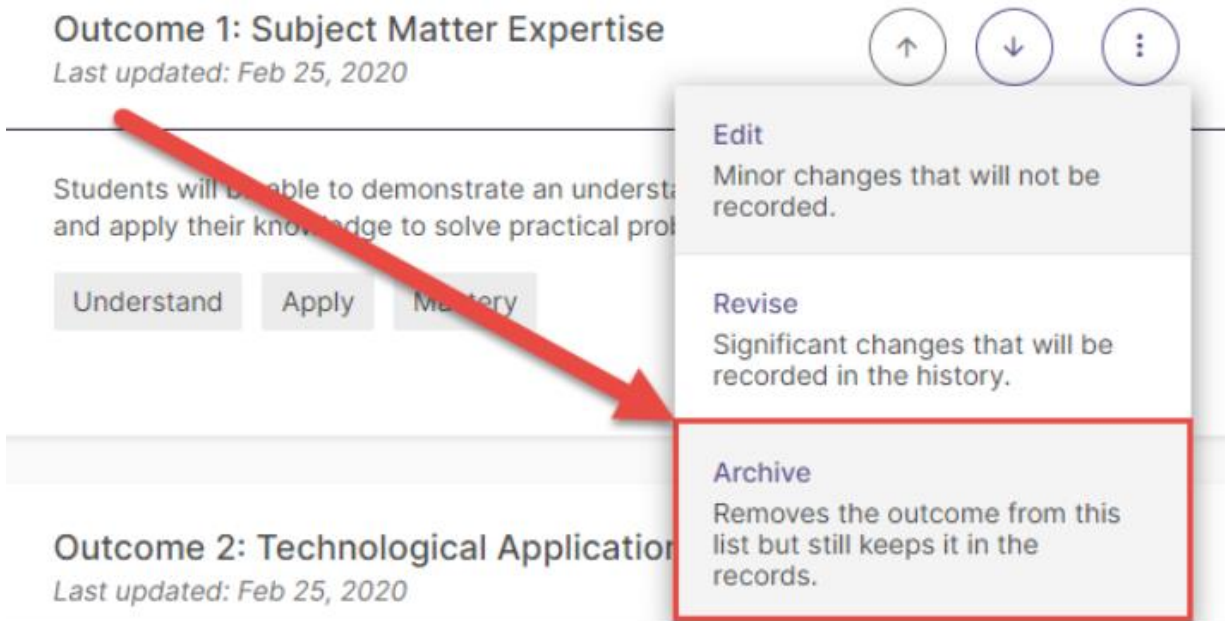
Delete an Outcome

Delete permanently removes the outcome from the system. If any data has been previously entered for an outcome, you will NOT see this option.

Create/Update an Outcome Map

If your organization has entered outcomes in Planning & Self-Study, you can map those outcomes to outcomes created by organizations above yours in your institutional hierarchy, to demonstrate alignment across different levels at an institution. For example, this function allows you to map the outcomes of your program or department to the University of South Alabama's Strategic Plan priorities.

Navigation from the Home Page

1. To begin, first locate your program dashboard from your home page and click Enter Program on the right to navigate to your organization profile.

2. From the organization profile, click the Program Information tab in the navigation toolbar.

3. From the Information tab, scroll down to your Outcomes area, and click the Edit Outcome Map button to the right.
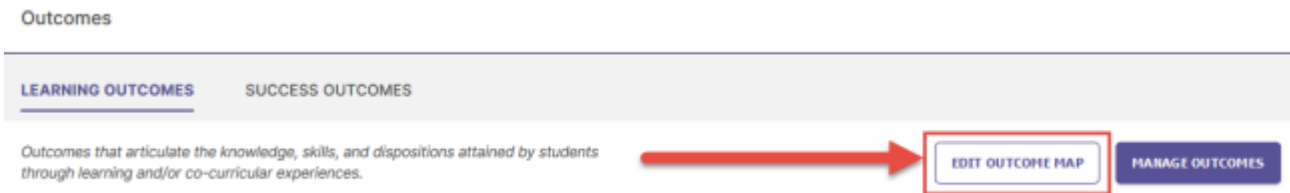
4. You will be taken to the outcomes mapping matrix for that organization.

5. Your organization's outcome set is located on the left-hand side of this matrix, listing the outcomes within it from top to bottom. If you need to edit your outcome set, click the icon of the pencil at the top of this list.

6. Across the top of the matrix from left to right are the organizations of your institution's hierarchy in which your organization is nested. The left-most organization is the institution-wide level of your hierarchy, where your institution-wide outcomes will be documented.

7. To align one of an organization's outcomes to the outcomes created in one of the organizations listed across the top of this matrix, click on the cell where that outcome intersects with an organization.

Important: Please note that if you close this page before clicking Create or Update, any changes you made will not be saved.

Entering Information for the Department's Assessment and Action Plan

The following section shows how to enter information for the department's assessment and action plan.

1. From the **Home** page, select the current assessment and action plan under **Projects in Progress** (e.g., 2020-21 Assessment and Action Plan). On the next screen, click the **Select Outcomes** button to indicate which outcomes your department is assessing.
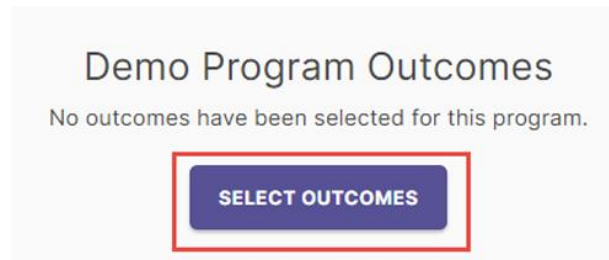
Selecting Outcomes for the Assessment and Action Plan
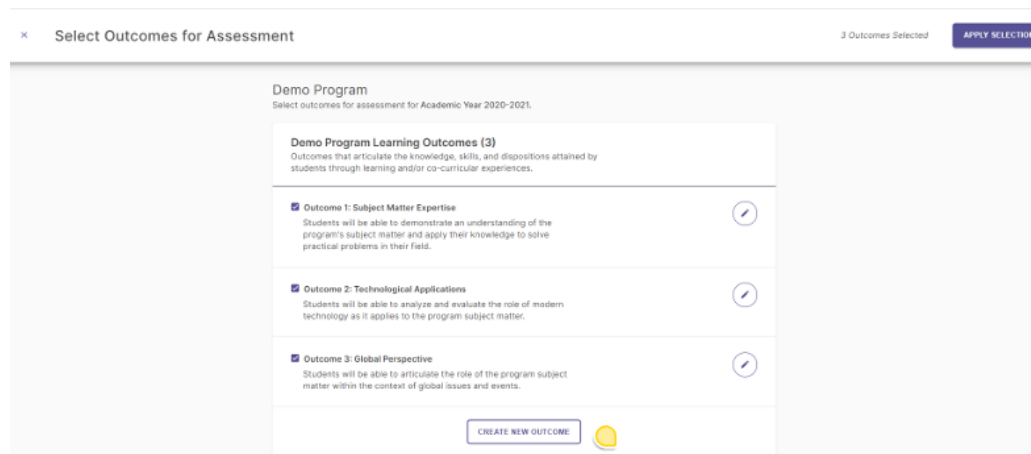
2. Use the checkbox to select the outcome(s) to be assessed for the assessment and action plan in progress.

3. Click **Apply Selection** in the top right corner to add the selected outcomes to the assessment and action plan. This process keeps your assessment plan clean each year - with only the outcomes to be assessed added to your plan.

4. Use "**X**" to cancel the outcome selection. After clicking **Apply Selection**, the selected outcomes will appear on the next screen, where you can add measures.

Adding Measures for Learning/Success Outcomes

Learning outcomes are examined using two or more measures, at least one of which is direct (e.g., student papers, projects, exams, and performances). Students demonstrate their learning through these direct measures often embedded in the course. Indirect measures supplement the information gathered through direct measures. An indirect measure may ask students or alumni to share their perceptions of their gains in knowledge and skills and/or experiences in the Department. Indirect measures can also include other indicators about the Department, such as retention and graduation rates, and graduate school or employment placement.

Leads are also able to enter success outcomes. Examples of direct measures for success outcomes may include average time, counts, money raised, number of applications, project, and total time. Instances of indirect measures used to gauge successful outcomes encompass student perspectives obtained through focus groups, interviews, and surveys.

Administrative programs/units' existing operational outcomes/objectives are listed under the Success Outcomes tab.

In P&SS, each measure, as well as the results and analysis for it, are entered separately.

1. Click on the outcome to add a measure to an outcome.

2. Click **+ New Measure** to open the **Add Measure** window. Continue to the next page to add details of the measured activity.

Adding Details of the Measure Activity

1. In the **Add Measure** window, select the **Measure Method** from the drop-down menu. The list contains commonly used types of direct measures and by indirect measures. If you do not see a type that matches your measure, select either **Other - Direct** or **Other - Indirect**.

2. Using the drop-down, identify the **course** in which the assessment will take place. Only one course can be selected. **IMPORTANT:** If you are assessing more than one course with this measure, you will need to add another measure for the additional course(s). Results for each course will be entered and analyzed separately. Note, if you cannot find the course, click the "Add course to Department's curriculum.

3. Enter a title for the Measure.

4. Then enter the target/criterion of the measure. For example, 95% of applications are completed and processed by the semester deadline.

5. Historical records might be entered and submitted through the attachment document option. This will allow leads to submit appropriate artifacts.

6. When you are finished with adding measure details, please select ADD located at the top of the page to save your work.

Adding Results

It is now the moment to record your assessment findings, analyses, and subsequent measures. Once you have added a measure, the system will prompt you to decide whether you want to manage the results for that measure. At this stage, you have the option to either input the results or defer it for later.

Use the following steps to return to the results section later.

Select the current assessment and action plan under **Projects in Progress** (e.g., 2022-23 Academic Year), which will take you to the list of the departments' outcomes.

1. From the selected outcomes list, click on the expand button to see the measures.

2. To add results, click **Add Results**

3. After clicking on **Add Results** at the top of the page, you will see details of the measure.

4. Use the pencil icon to edit the details of the measured activity if necessary.

Option 1: Upload Assessment Results Files

After clicking in the "I want to upload the assessment results files" tile, **results** can be documented for the measure by

1. Uploading one or more results files such as an Excel spreadsheet, Word document, or pdf file. This option may also be used to add student artifacts. Make sure student names have been redacted.

2. Entering results in the Summary text box.

3. Click "**Change Collection Method"** to return to the **Results** options page to select a different method.

Analyzing the Results of a Measure

Now that you have entered the results, it is time to document the faculty's analysis in the Findings section.

1. First, select the **Measure Status**. Click on the drop-down and select **Met** or **Not Met to indicate whether the target/criterion was achieved**.

2. In the text box, provide the **Analysis** or interpretation of the results.

3. You may create a specific measure-related action by clicking **Add New Action**. **Note** actions can be added for any measure, as well as for the Department-level outcome.

4. The **Past Findings** button can view and refer to past results, findings, and actions associated with the measure. Note if you just added a new measure, there will not be any past findings associated with that measure.

5. Click **Save & Close** in the top right corner after you document the results and findings for the measure.

These steps may be repeated for subsequent measures used to assess the outcome. Results and analysis of each measure should be completed before moving on to the next section, Analyzing the Outcome.

Analyzing the Outcome

1. After entering results and analysis for each measure, click **Analyze Outcome** to provide an outcome-level analysis.

2. **Outcome Analysis:** provide qualitative analysis of the outcome and its combined measures.

3. Click on the **checkmark** icon to save.

4. Using the drop-down for **Outcome Status**, select MET or NOT MET. **Important:** until the status is selected, your assessment and action plan will remain as **IN PROGRESS**.

5. Click **Add New Action** to add an action for the Department-level outcome.

Adding Actions

The assessment process fosters action. Based on the analysis and interpretation of results, the following questions should be considered:

- What actions, if any, should the department take to improve student learning, department operations, and/or the assessment process?

Focus on one or two action items each year and decide when the action will be implemented and who will be responsible for follow-up. After implementing the action, reassess the outcome to determine the effectiveness of the action. Certain action items may be long-term, with results reported in subsequent years.

1. Select the type of action based on the findings. If you cannot find the type of action from the list, select **Other** and describe the action type.

2. After selecting the action type, add the **Action Description** (required), where you will describe the action in detail.

3. Identify the **Recommended Due Date** for the action.

4. Click **Create Action**.

Tracking Actions

1. To track all actions from the **Actions** dashboard, return to the **Home** page and click **Enter Department.** From the **Department dashboard,** click on the **ACTIONS** tab.

2. The dashboard will show the complete list of actions, their due dates, assessment period, and status.

3. Update the status by clicking on the action's hyperlink. This will open a new window to change the status of the action.

Changing Action Status

1. Using the drop-down, select either **In-Progress** or **Complete**.

2. Click **Add Update** if the action is in progress.

3. Click **Done** if the action is complete.

Reviewing and Submitting the Assessment and Action Plan

1. To review and submit your assessment and action plan, click on the **Review and Submit** button in the top right-hand corner of the screen. This will prompt you to a new screen where you can review the information entered for each outcome included in the current year's plan.

Submitting the Assessment and Action Plan

1. Once reviewed, select **Submit**. Until this happens, the plan will remain in progress.

2. You can continue to edit in the outcomes workspace by clicking **Edit**. Once submitted, you can still edit this report until the administrator permanently closes it.

3. You can download a copy of your report in PDF format by clicking **Download as PDF**.

Requesting Feedback

1. After you click submit, you can leave a comment about your assessment and action plan on the right-side panel. If you would like to receive feedback, leave a comment and mention (@Assessment Working Team) in the comments section. You can also use the comments section to mention and notify other team members of your submission.

2. When done, click **Save Comment** to notify us of your submission and request feedback.

3. Click Done to go back to your home page.

Questions/Training

If you have questions or need assistance in navigating Planning & Self-Study, please do not hesitate to contact the Assessment Working Team at assessment@southalabama.edu.

We are also available to schedule one-to-one or group training sessions upon request. The training may include a one-hour session providing a full overview of the P&SS or a session focused on topics of interest.

Thanks to you and the faculty for your efforts to support and improve our academic offerings and the student experience.