

ASSESSMENT PLANNING

SETUP & OUTCOMES

- [Organizational Hierarchy](#): Confirm all data collecting units are represented
- [Associate Users](#): Confirm users have view/edit privileges to appropriate units
- [Nomenclature](#): Establish and confirm nomenclature of outcome types
- [Add Outcomes](#): Articulate outcomes for all units. Determine if outcomes will be entered in bulk by UA or if units will be responsible for entry
- [Outcome Mapping](#): Establish parent/child relationships for outcomes

ASSESSMENT PERIODS & PLAN DATA ENTRY

- Create Assessment Period(s): Establish current assessment period for data collection
- Configure Plan [Forms](#): Confirm all Assessment Forms
- Align Organizations to Plan: **Note** only one plan per organization
- [Plan Data Entry](#): Establish pilot program & enter historical data on plan

FEEDBACK

- Feedback Forms: Configure forms with the Assessment Plan Feedback [Context](#)

TRAIN & PREPARE CONTRIBUTORS

- Establish user roles and confirm privileges
- Prepare training guides/materials to support users
- Train users on Outcome Entry as necessary
- Train users on Plan Data Entry using pilot program as lead example
- Train users on providing Feedback

REPORTS

- Monitor data collection with [Assessment Planning Reports](#)

For more information, go to our [Assessment Planning Quick Guides](#) found on our [Tk20 Help Desk](#)