

# NON-ACADEMIC PROGRAMS TASKSTREAM USER MANUAL

Office of Institutional Effectiveness,  
Research, and Planning



**Lincoln  
University**  
LEARN. LIBERATE. LEAD.

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## Introduction

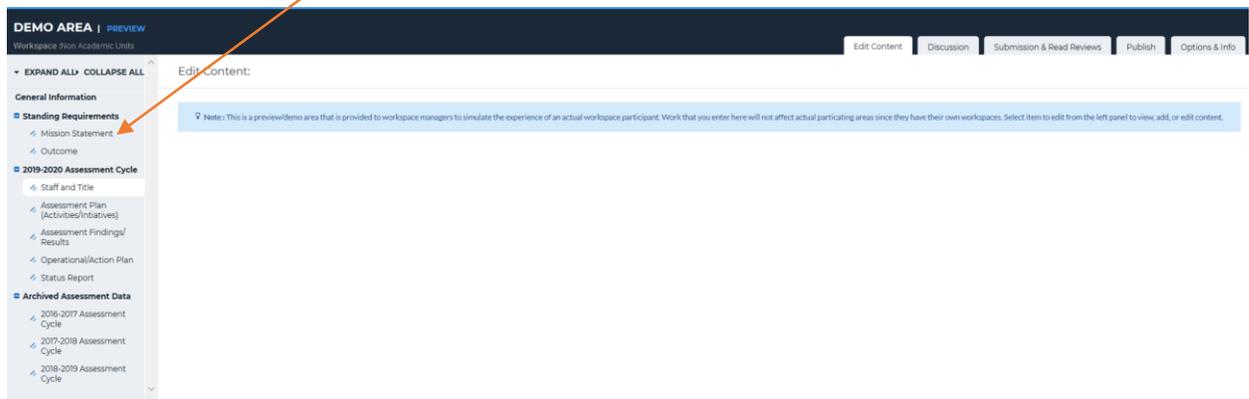
Taskstream by Watermark will be utilized for assessment reporting starting with the 2019-2020 academic year. Log in access and other resources for Assessment Reporting may be found here: [Taskstream Resources](#) . If you have any questions, please contact the Office of Institutional Effectiveness, Research, and Planning at 484-365-7842 or [oierp@lincoln.edu](mailto:oierp@lincoln.edu) .

## Non-Academic Programs Process

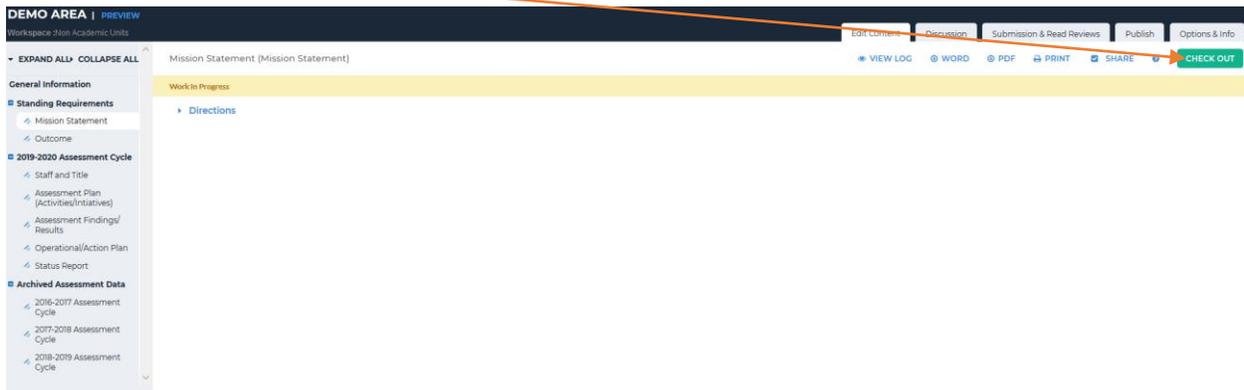
**NOTE:** Example office/unit of “Laughter Therapy Office” will be utilized for this User Manual

### Mission Statement - Non-Academic Programs

1. Log into your Taskstream Account
2. Click on the appropriate office/unit
3. Click on the **Mission Statement** (left side column menu)

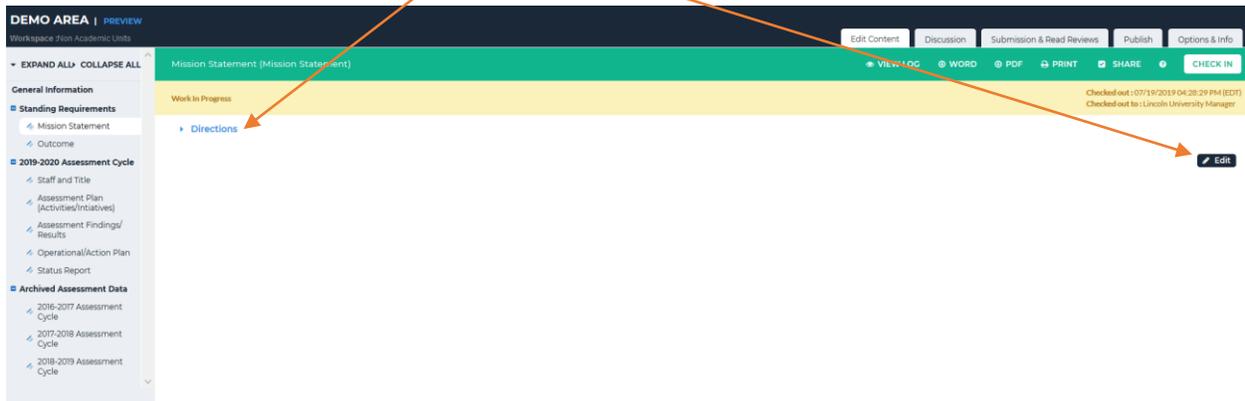


4. Click **Check Out**

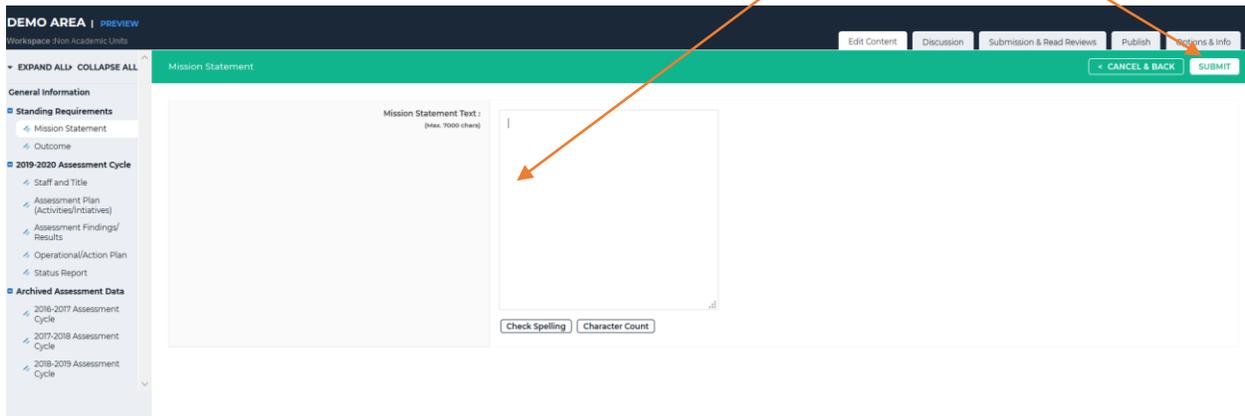


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## 5. To view directions, click **Directions**; Click **Edit**



## Type or copy/paste the mission statement into the dialog box; click **Submit**



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6. Click on the appropriate checkboxes to update the mission statement for the appropriate cycle; NOTE: Do not **Apply Changes** to previously submitted Assessment Cycles
7. If you are making changes for the current cycle, select **Apply Changes**

taskstream  
by watermark

HOME SHARED RESOURCES LOCATOR MESSAGES RESOURCE TOOLS ANALYTICS

DEMO AREA | PREVIEW

Workspace Academic Program Assessment and Planning Workspace

EXPAND ALL COLLAPSE ALL

General Information

- Standing Requirements
  - Mission Statement
  - Program Goals
  - Program Student Learning Outcomes
  - Curriculum Map
- 2019-2020 Assessment Cycle
  - PSLO History
  - Assessment Plan
  - Assessment Findings (Results)
  - Operational Plan (Using Assessment Results for Program Improvement)
  - Status Report
- Archived Assessment Data
  - 2016-2017 Assessment Cycle
  - 2017-2018 Assessment Cycle
  - 2018-2019 Assessment Cycle

Update Options

Important! Would you like to update other areas with these changes? The changes you just made to your Mission Statement will NOT be reflected in other areas unless you update them now.

This Mission Statement is associated with the requirements listed below.

NO UPDATES REQUIRED APPLY CHANGES

Check all areas to update (if any):

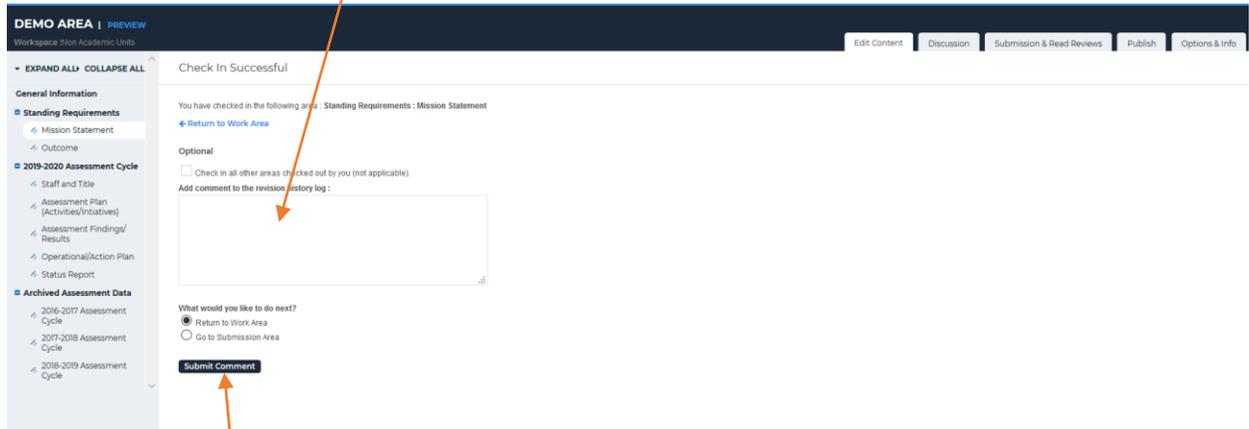
- Academic Program Work space Template (Academic Program Assessment and Planning Workspace)
  - 2019-2020 Assessment Cycle: Assessment Plan  
Last modified 06/10/2019 02:37:03 PM
  - 2019-2020 Assessment Cycle: Operational Plan (Using Assessment Results for Program Improvement)  
Last modified 06/10/2019 02:37:03 PM

NO UPDATES REQUIRED APPLY CHANGES

8. Your Mission Statement should now be visible in the workspace.
9. If revisions are needed, click **Edit** and repeat process from step 5
10. If Mission Statement is correct, click **Check In**.

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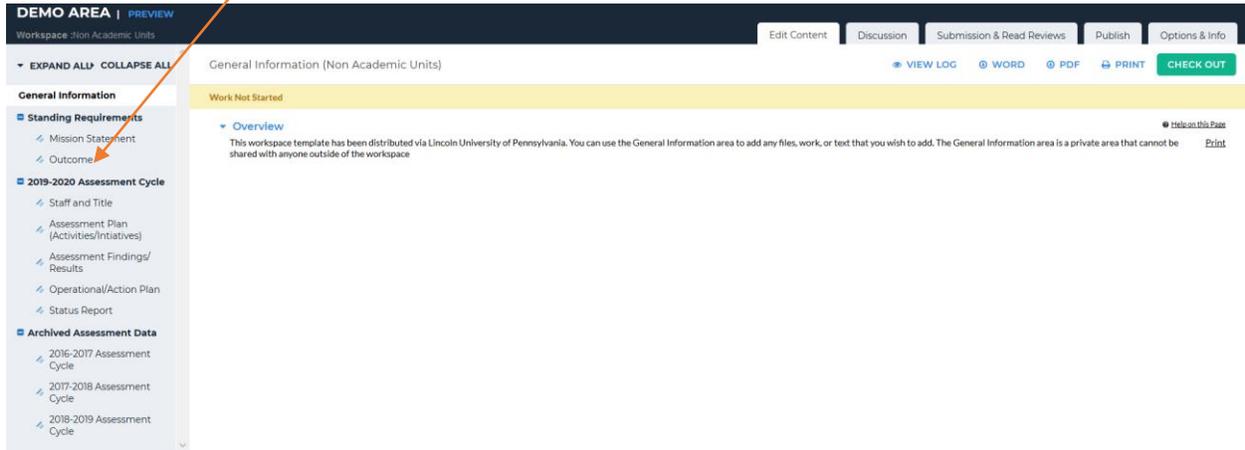
## 11. Submit comment to revision history log to track updates to the Assessment report



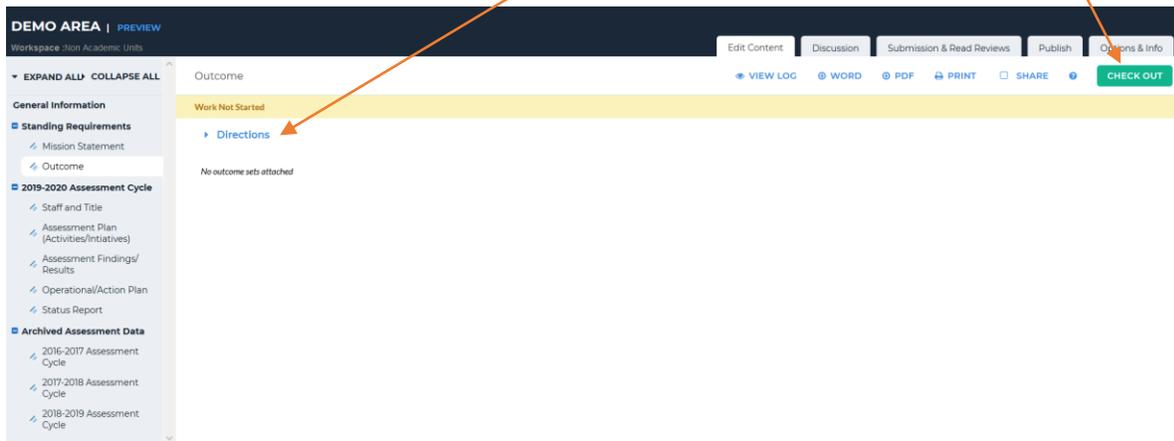
## 12. Click **Submit Comment**

## Outcome – Non-Academic Programs

1. Log into your Taskstream Account
2. Click on the appropriate office/unit
3. Click on **Outcome** (Left side menu)



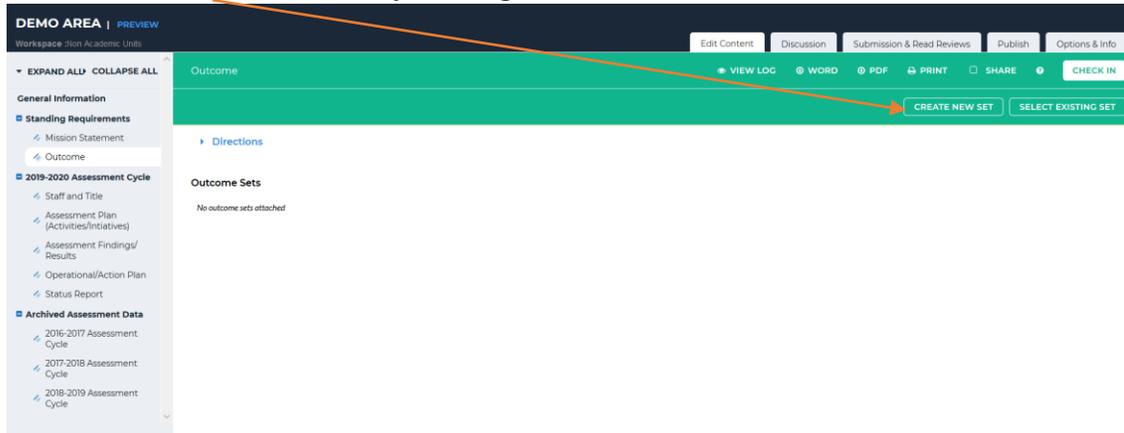
4. To view the Directions, click on **Directions**; to add/edit the Outcomes, click **Check Out**



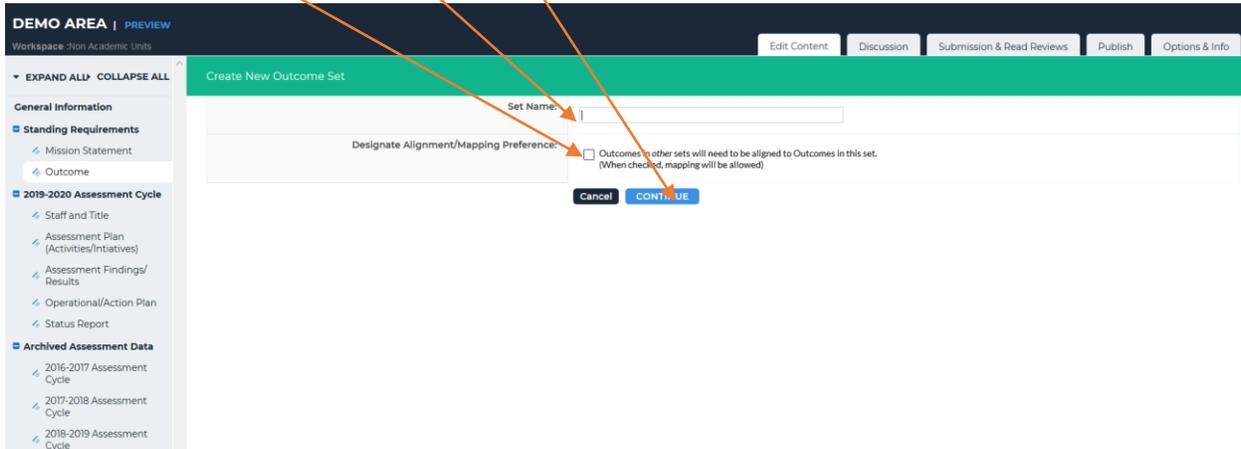
5. Offices/Units will identify alignment to the Lincoln University Strategic Theme(s);  
NOTE: In most cases, offices will align to one or more outcomes in the Strategic Plan; you will have the option to identify alignment with specific objective(s) of the Strategic theme(s)

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6. Click **Create New Set** to identify this alignment

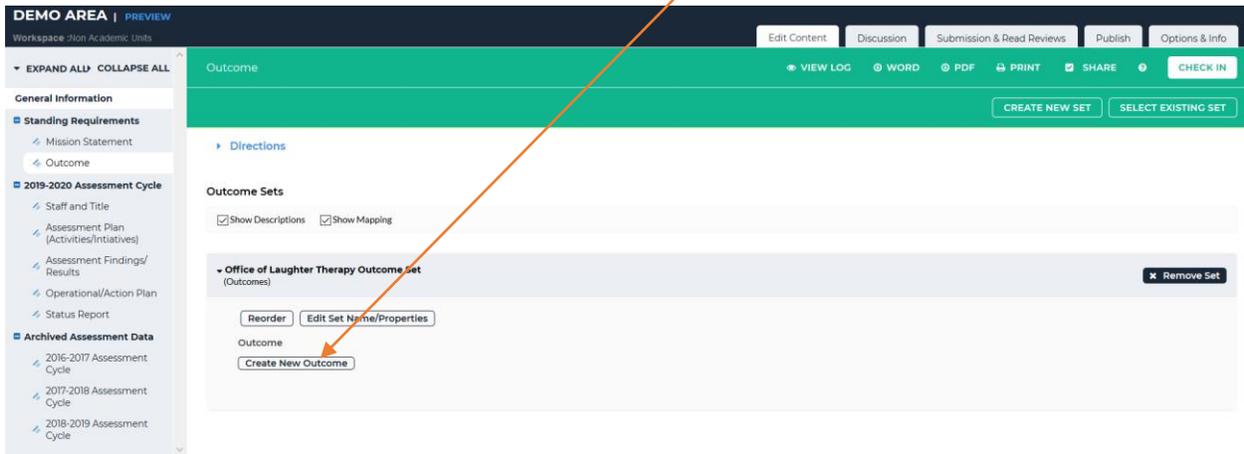


7. Type in the name of the Outcome set, using the format: [unit/office] Outcomes (e.g. Laughter Therapy Office Outcomes); if other units in your office align similarly to the strategic plan, click the check box; then click **Continue**

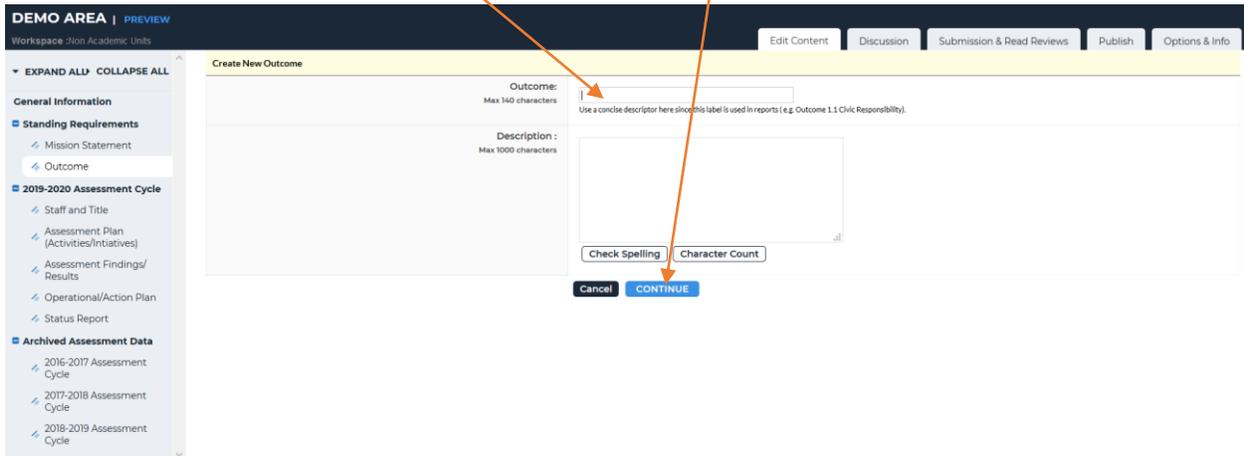


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8. To identify the strategic themes, click **Create New Outcome**



9. To the Outcome dialog box, type the Theme number and title (e.g. Theme One: Build a Culture that Supports Student Success); then click **Continue**

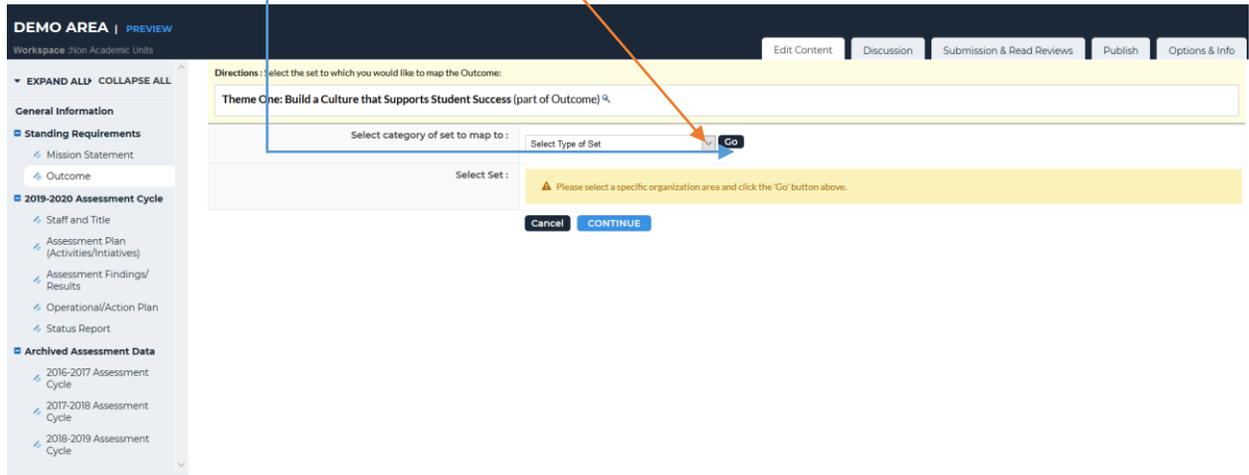


10. Then click **Add Mapping**

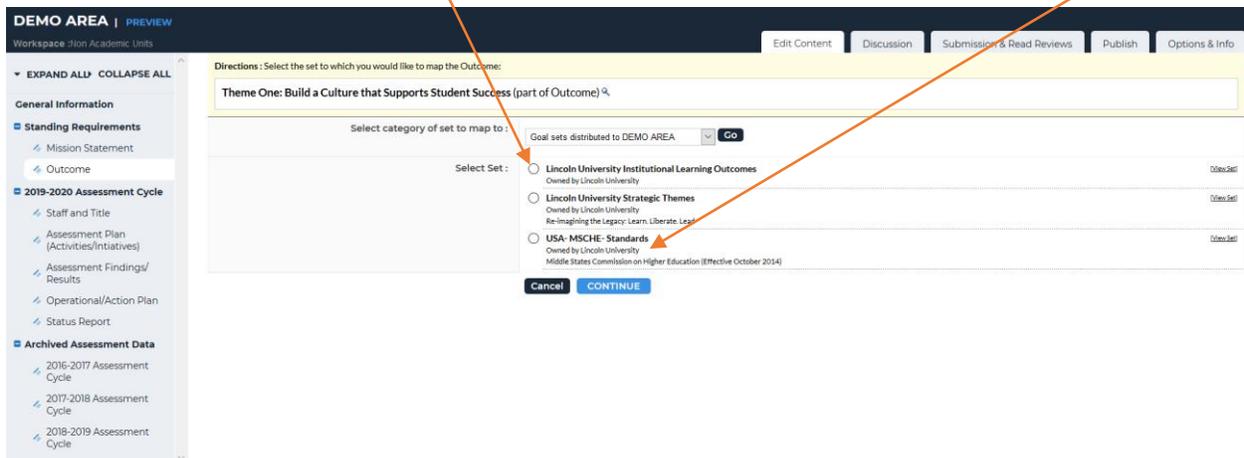


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11. Using the dropdown menu (click on this arrow), select **Goal sets distributed to this workspace**; then click **Go**

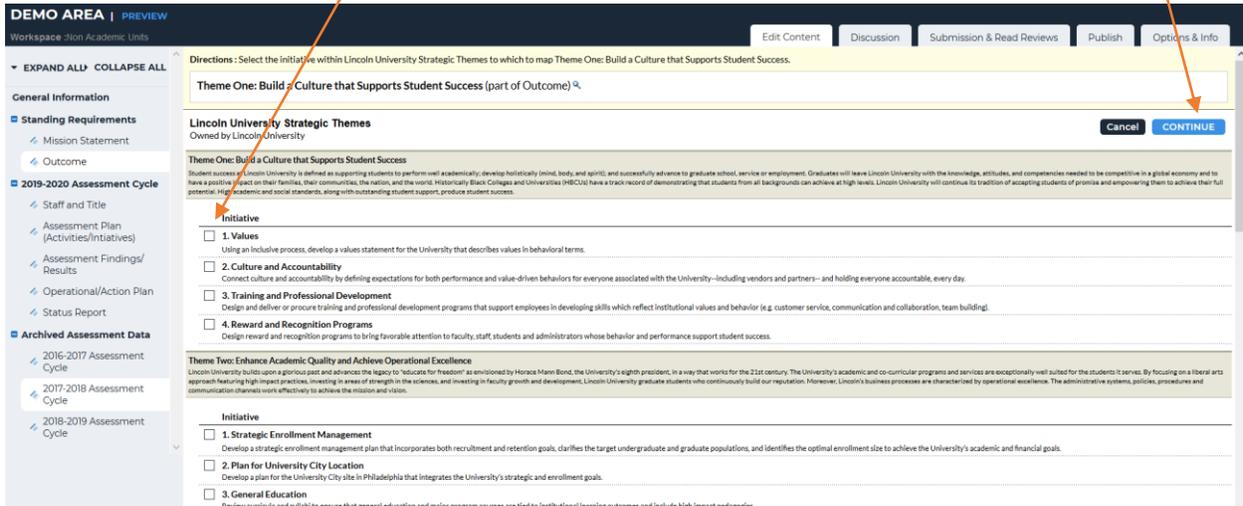


12. Now select the radio button for the Lincoln University Strategic Themes; then select **Continue**

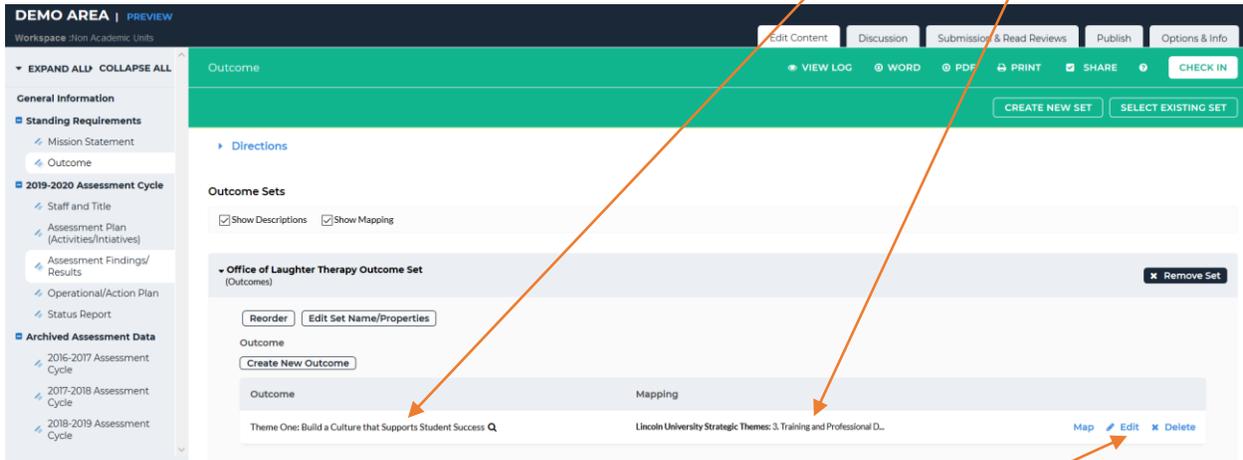


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13. Click the checkboxes for the Strategic Objectives that align with your office; click **Continue**



14. The workspace should now show alignment of the Strategic Theme and Strategic Objective.

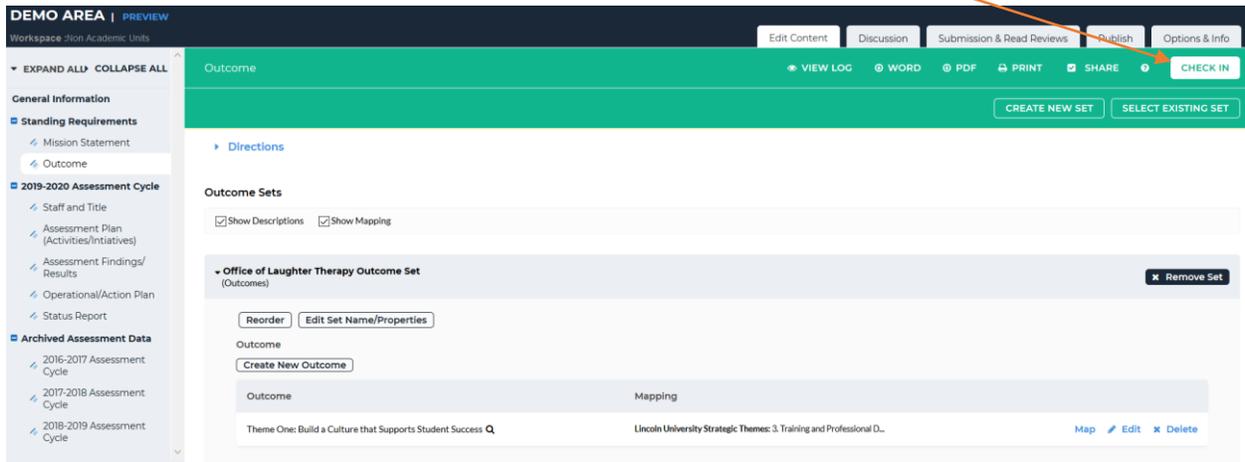


15. If you need to revise/change the information for this outcome, select **Edit**

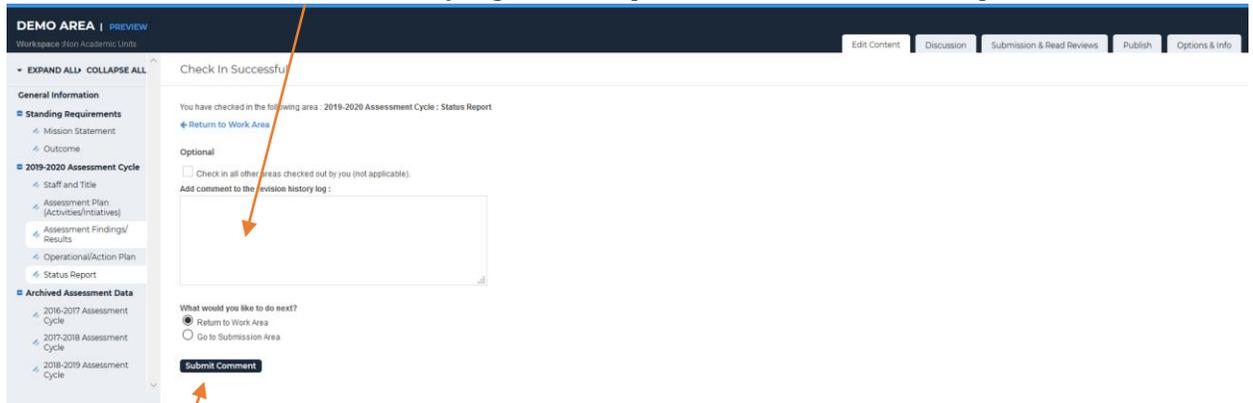
16. If you align to additional Strategic themes, click add new outcome and continue from step 8

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17. When you are finished selecting Strategic Objectives, click **Check In**



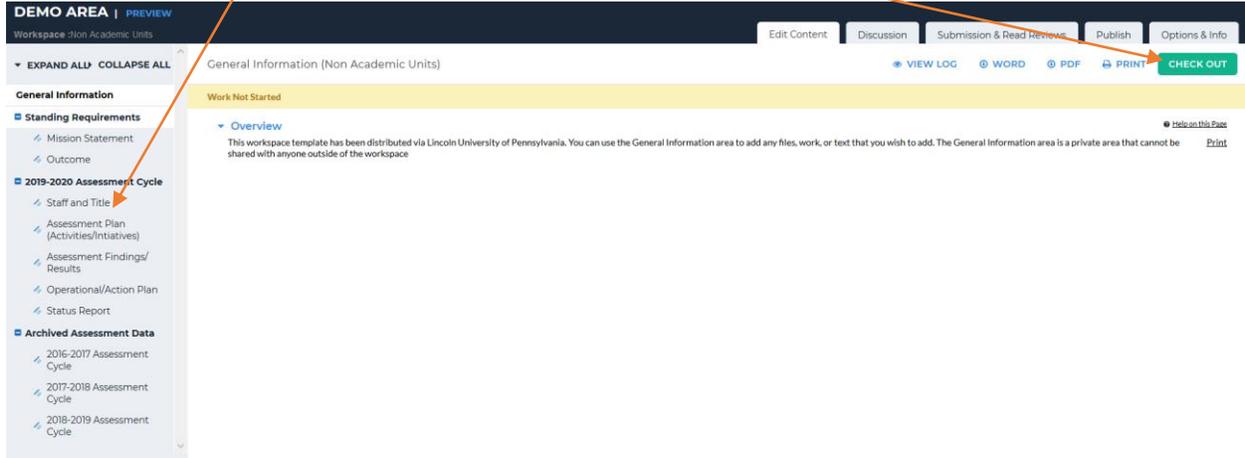
18. Submit comment to revision history log to track updates to the Assessment report



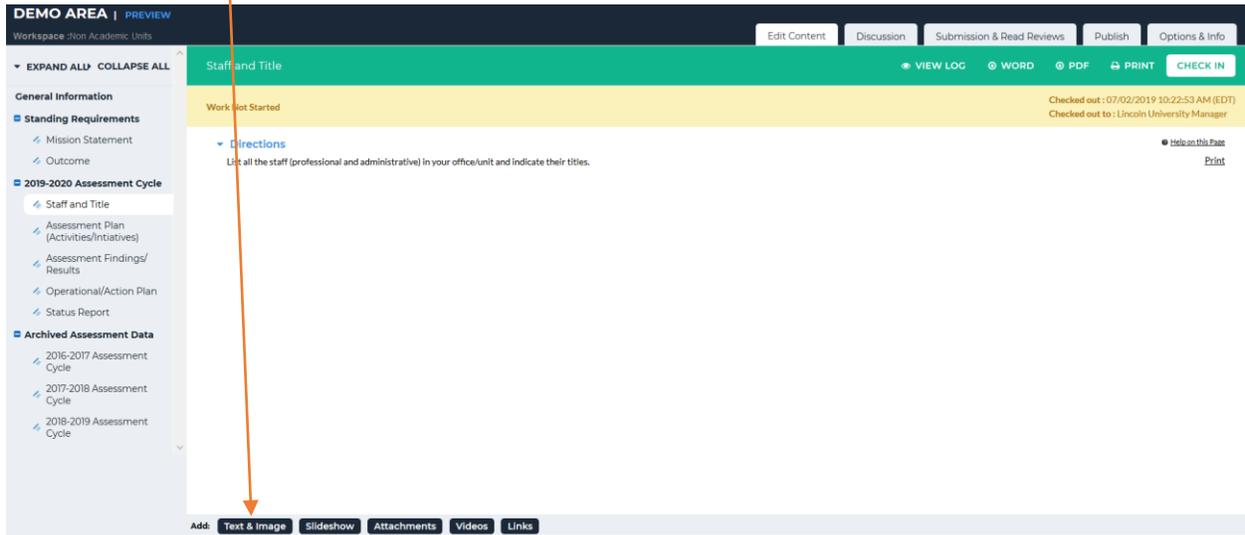
19. Click **Submit Comment**

## Staff and Title - Non-Academic Programs

1. Log into your Taskstream Account
2. Click on the appropriate office/unit
3. Click on **Staff and Title** (Left side menu); click **Check Out**



4. Click on **Text & Image**, (or other option as appropriate)



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5. In this text box, type or copy/paste the names of staff and their title; then click **Save and Return**

The screenshot shows the 'Add/Edit Text and Image for Staff and Title' form. At the top, there are buttons for 'Cancel', 'Check Spelling', 'SAVE DRAFT', and 'SAVE AND RETURN'. Below these is a rich text editor with a menu bar (Edit, Format, Insert, View, Table, Tools) and a toolbar with various icons for text formatting and alignment. The main area is a large empty text box for entering staff names and titles. At the bottom, there are 'Cancel', 'Check Spelling', 'SAVE DRAFT', and 'SAVE AND RETURN' buttons. Two orange arrows point from the text above to the 'SAVE AND RETURN' button and the text input area.

6. The staff names and titles should now be visible in the workspace; If edits are needed, click **Edit** and follow process from step 4

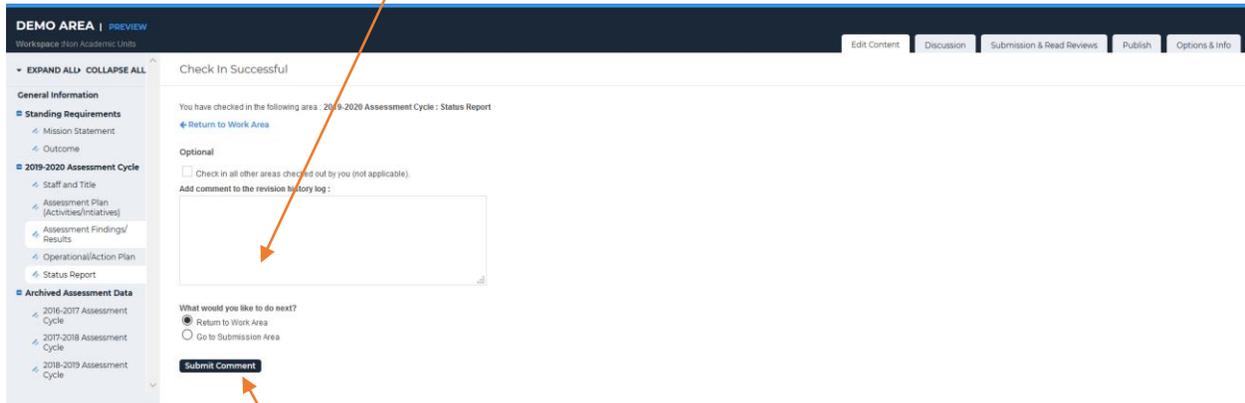
The screenshot shows the 'DEMO AREA | PREVIEW' workspace. The left sidebar contains a navigation menu with sections like 'General Information', 'Standing Requirements', '2019-2020 Assessment Cycle', and 'Archived Assessment Data'. The main workspace area is titled 'Staff and Title' and shows a 'Text and Image Section' containing the following text:  
Jasmine Jones, Director  
Joshua Brown, Associate Director  
Jonquil Zee, Counselor  
At the bottom right of this section, there are 'Edit' and 'Delete Section' buttons. An orange arrow points from the text above to the 'Edit' button.

7. When all information is correct, click **Check In**

This screenshot is identical to the previous one, showing the workspace with the staff list. However, an orange arrow points from the text above to the 'CHECK IN' button in the top right corner of the workspace header.

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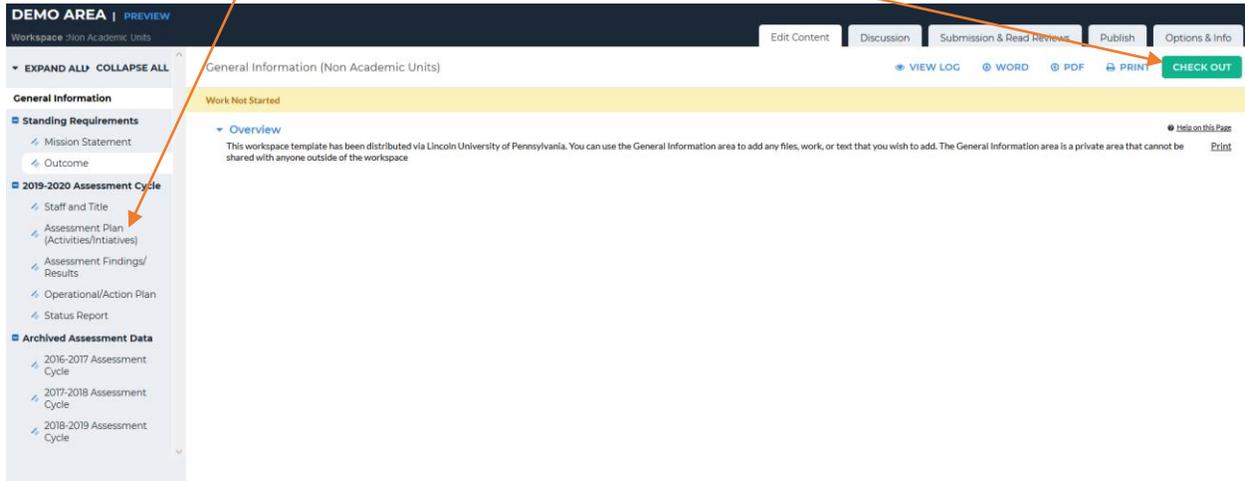
## 9. Submit comment to revision history log to track updates to the Assessment report



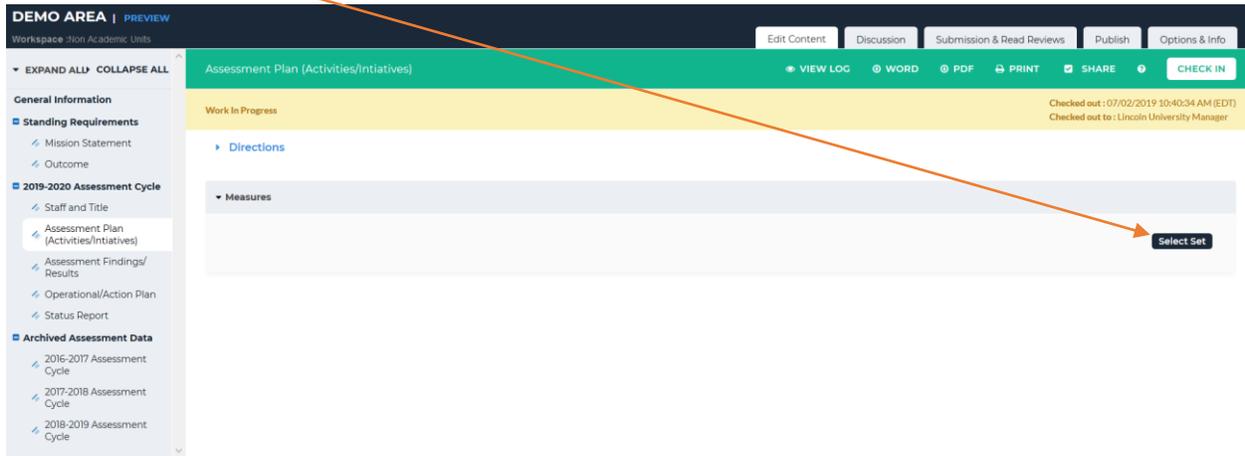
## 10. Click **Submit Comment**

## Assessment Plan – Non-Academic Programs

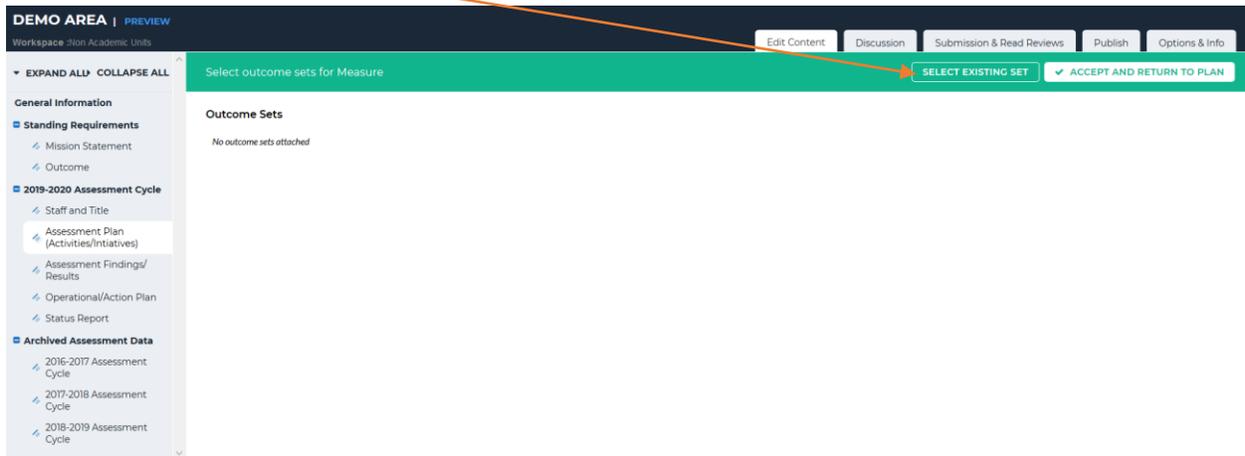
1. Log into your Taskstream Account
2. Click on the appropriate office/unit
3. Click **Assessment Plan** (Left side menu); click **Check Out**



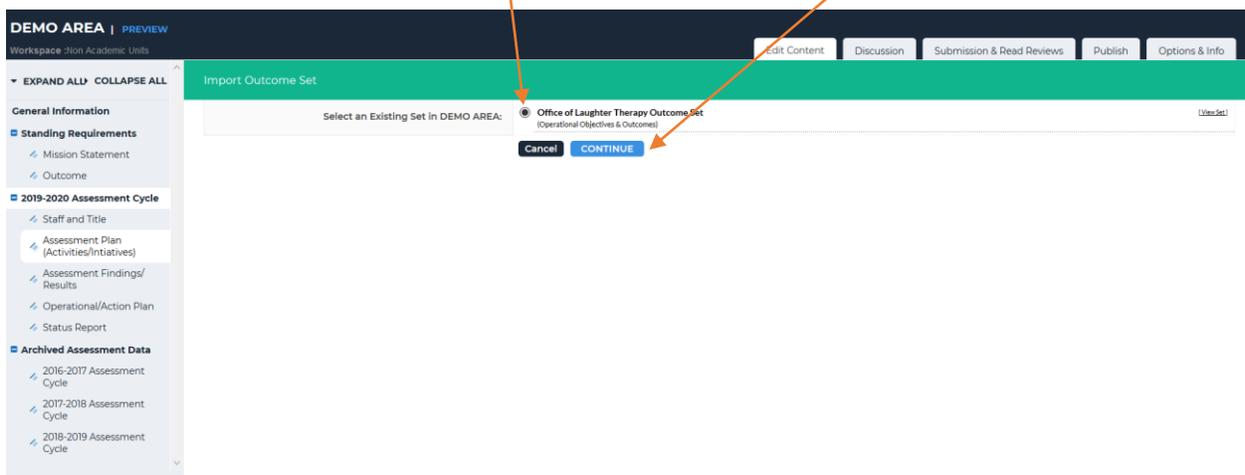
4. Click **Select Set**



## 5. Click on **Select Existing Set**

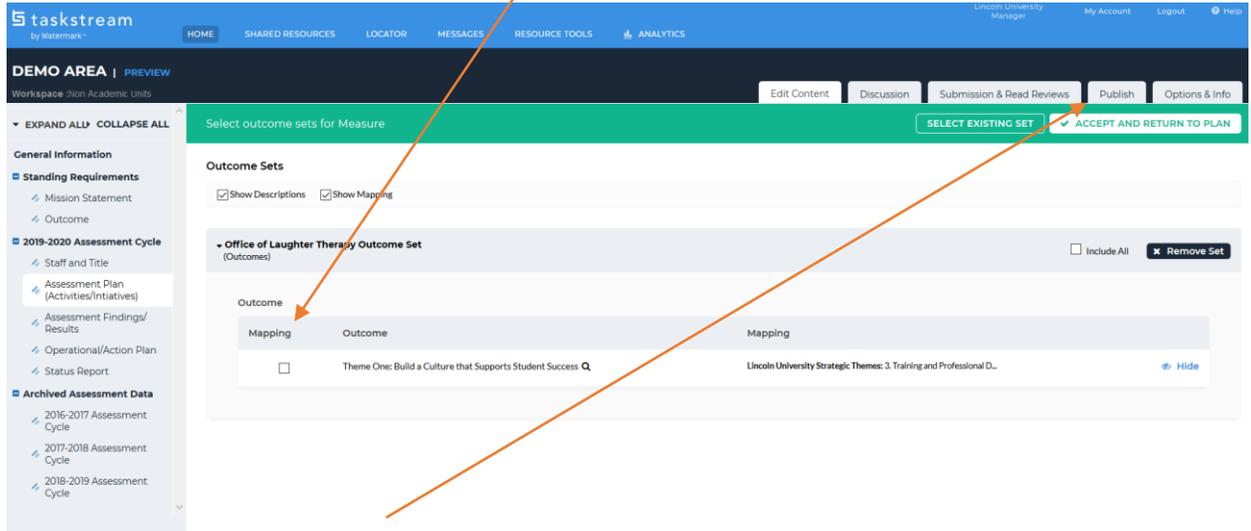


## 6. Click the radio button for your office's outcome set; click **Continue**

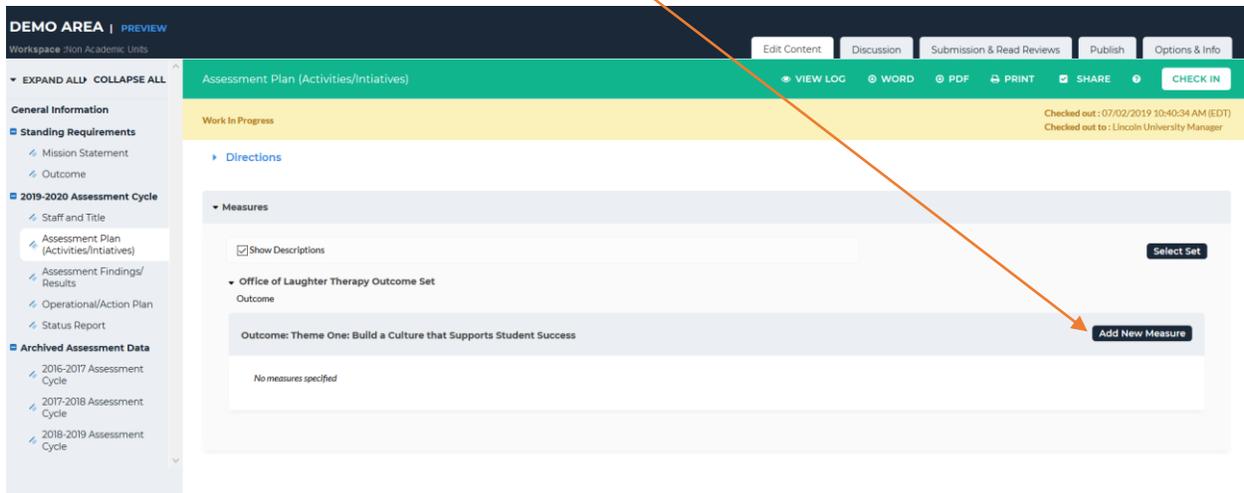


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7. Click the checkbox for the appropriate Strategic Objective that your assessment plan aligns with



8. Click **Accept and Return to Plan**
9. To add the specific initiatives, click **Add New Measure**



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10. To each of the appropriate boxes, click and insert content for: Measure Title, Details/Descriptions, Implementation Plan and Key/Responsible Personnel

DEMO AREA | PREVIEW  
Workspace 250n Academic Units

Measure Information for:  
Outcome: Theme One: Build a Culture that Supports Student Success

For the Details/Description, describe the specific initiatives/strategies that will take place. For each initiative, identify the assessment measure. For example, what data will you be collecting to determine the impact of this/these activities? Think of direct and indirect assessment methods (surveys, focus groups, program evaluations, attendance sheets, interviews, etc.) The Implementation Plan should identify activities that occur in the Fall and those that occur in the Spring Term. Once this measure is added, then you may add supporting attachments and links in the next step from the main assessment plan screen.

\* Required Fields

Cancel IMPORT MEASURE

\* Measure Title:

Details/Description:

Implementation Plan (timeline):

Key/Responsible Personnel:

Check Spelling Cancel APPLY CHANGES

11. Click **Apply Changes**

12. The information entered should now be visible in the workspace; To add attachments and links, click **Add/Edit Attachments and Links**

DEMO AREA | PREVIEW  
Workspace 250n Academic Units

Assessment Plan (Activities/Initiatives)

VIEW LOG WORD PDF PRINT SHARE CHECK IN

Work in Progress

Checked out: 07/02/2019 10:40:34 AM (EDT)  
Checked out to: Lincoln University Manager

Directions

Measures

Show Descriptions

Select Set

Office of Laughter Therapy Outcome Set

Outcome: Theme One: Build a Culture that Supports Student Success

Add New Measure

Measure: laughter Therapy fundamentals

Edit Remove

Details/Description: Launch a campaign to inform the university community regarding Laughter therapy

Implementation Plan (timeline): Fall 2019: Post flyers, host informational sessions

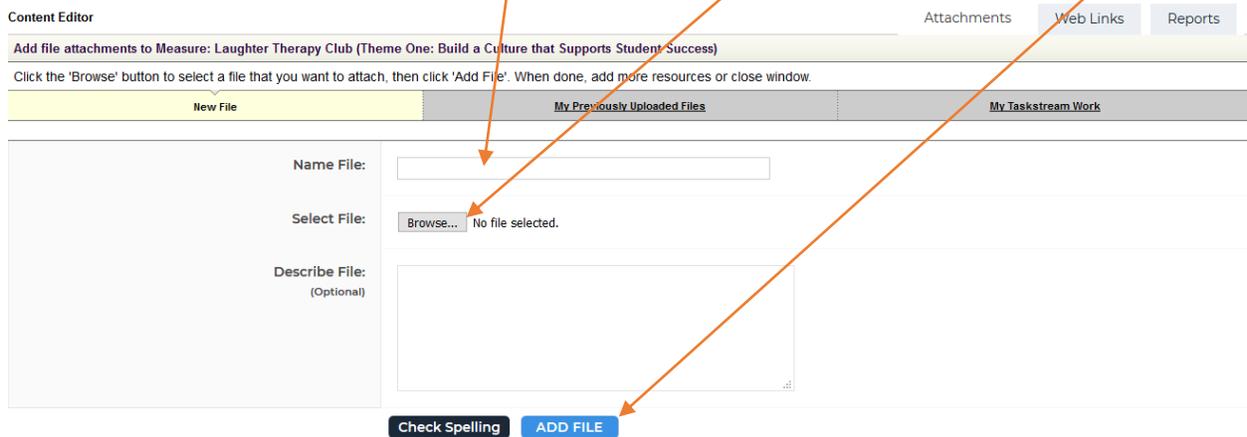
Key/Responsible Personnel: Joshua Brown, Associate Director  
Jonquil Zen, counselor

Supporting Attachments:

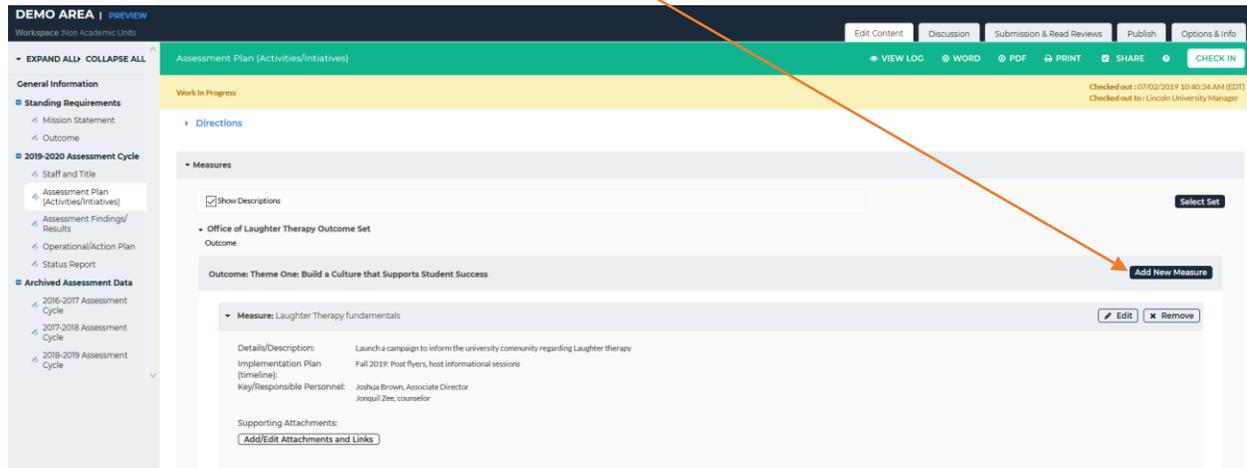
Add/Edit Attachments and Links

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13. To name the file, insert text in **Name File** box; click **Browse** to select the file; click **Add File**



14. To add a new measure, click **Add New Measure** for the appropriate Objective; repeat process from step 9



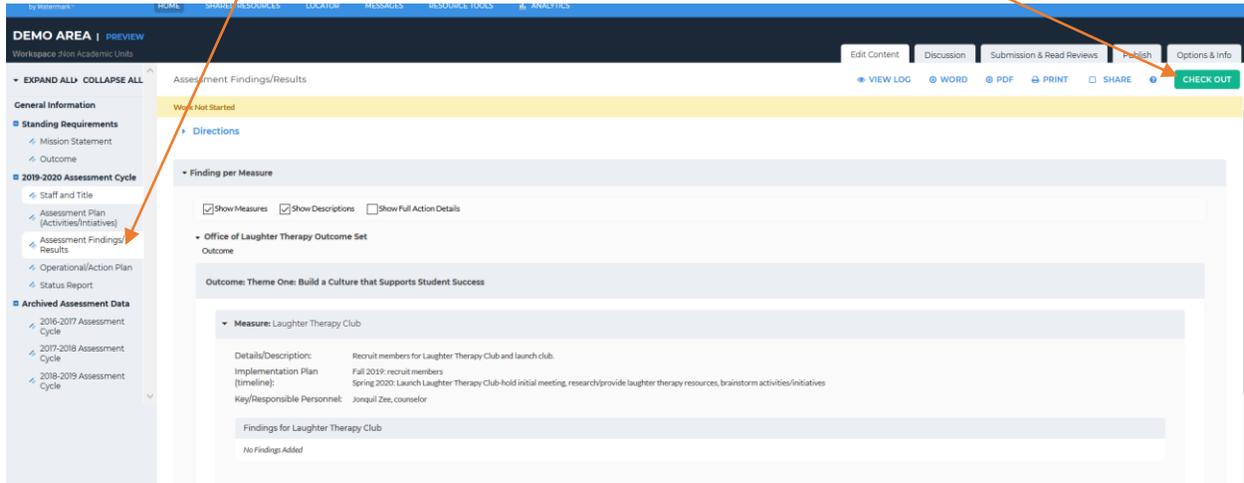
15. When finished adding all the assessment measures for this assessment cycle, click **Check In**

16. Add comment to the revision history log by clicking in this box; then click **Submit Comment**

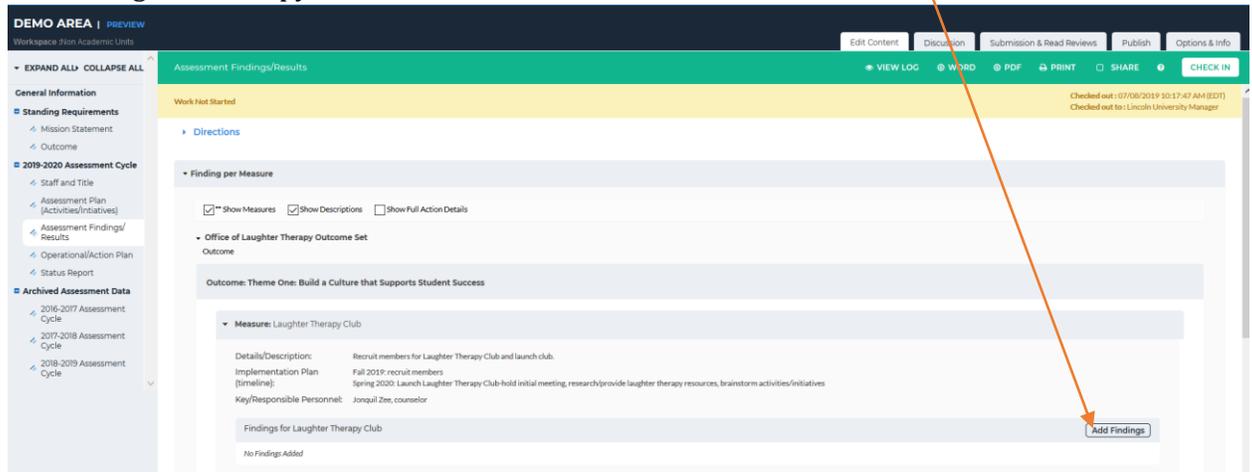


## Assessment Findings/Results – Non-Academic Programs

1. Log into your Taskstream Account
2. Click on the appropriate office/unit
3. Click on **Assessment Findings/Results** (Left side menu); click **Check Out**



4. Assessment findings can be added per measure and/or by “Overall Recommendations” and “Overall Reflection”
5. To add findings for a specific measure in the Assessment plan, click on **Add Findings**(associated with the specific measure); For example, these steps will add findings to the Laughter Therapy Club Measure



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- Complete the sections by clicking the appropriate text box and adding content for Summary of Findings, Recommendations and Reflections/notes (optional)

DEMO AREA | PREVIEW  
Workspace 2000 Academic Units

Findings for Laughter Therapy Club  
Outcome: Theme One: Build a Culture that Supports Student Success

Please enter the findings for this assessment measure (Major Metric). Include information regarding the progress that your office/unit has made toward achieving this objective.

\*Required Fields

\* Summary of Findings:

Recommendations:

Reflections/Notes:

Assessment Findings:  Moving Away  Approaching  Exceeded

Cancel Check Spelling SUBMIT

- Click on the appropriate radio button to indicate if these findings are: “Moving Away, Approaching or Exceeded” expectations
- When finished adding content, click **Submit**
- The information should now be visible in the workspace

DEMO AREA | PREVIEW  
Workspace 2000 Academic Units

Assessment Findings/Results

VIEW LOG WORD PDF PRINT SHARE CHECK IN

Outcome: Theme One: Build a Culture that Supports Student Success

Measure: Laughter Therapy Club

Details/Description: Recruit members for Laughter Therapy Club and launch club.  
Implementation Plan (Timeline): Fall 2019: recruit members  
Spring 2020: Launch Laughter Therapy Club-hold initial meeting, research/provide laughter therapy resources, brainstorm activities/initiatives  
Key/Responsible Personnel: Jonquai Zee, counselor

Findings for Laughter Therapy Club

Summary of Findings: Fall 2019: Institutional members submitted email information indicating interest in joining the Laughter Therapy club. Members included 20 students and 20 employees.  
Spring 2019: Laughter Therapy club held 3 meetings. An initial introductory meeting and 2 planning meetings.

Results: Assessment Findings: Approaching

Recommendations: Continue recruitment efforts and build membership.  
Finalize initial plans for the club activities.

Reflections/Notes: Those who attended initial meetings were enthused regarding the club. There were some comments that some students and employees may be confused or misinformed regarding the purpose of the club.

Substantiating Evidence:  
Add/Edit Attachments and Links

- To upload Attachments and insert links, click **Add/Edit Attachments and Links**

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## 11. Insert name of file; use **Browse** to select file; click **Add File**

Content Editor Attachments Web Links Reports

Add file attachments to Findings for Laughter Therapy Club (Theme One: Build a Culture that Supports Student Success)

Click the 'Browse' button to select a file that you want to attach, then click 'Add File'. When done, add more resources or close window.

New File My Previously Uploaded Files My Taskstream Work

Name File:

Select File:  No file selected.

Describe File: (Optional)

## 12. To add findings to each measure, repeat the process from step 5;

## 13. To add comments for Overall Recommendations, click **Edit**

DEMO AREA | PREVIEW

Workspace 2108 Academic Units

Assessment Findings/Results

Work in Progress

Directions

Finding per Measure

Overall Recommendations

No text specified

Overall Reflection

No text specified

## 14. In the text box, submit the overall Recommendations; then click **Submit**

DEMO AREA | PREVIEW

Workspace 2108 Academic Units

Directions: Please enter overall recommendations based on your findings.

Text:

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15. To add comments for Overall Reflections, click **Edit**

The screenshot shows the 'Assessment Findings/Results' page in a 'Work in Progress' state. The left sidebar contains a navigation menu with sections like 'General Information', 'Standing Requirements', '2019-2020 Assessment Cycle', and 'Archived Assessment Data'. The main content area has a 'Directions' section and two 'Overall Recommendations' entries, each with an 'Edit' button. An orange arrow points from the text above to the 'Edit' button of the second 'Overall Reflection' entry.

16. In the text box, submit the overall Reflections; then click **Submit**

The screenshot shows the 'Directions' section with a text input area labeled 'Text:'. Below the text area are three buttons: 'Cancel', 'Check Spelling', and 'Submit'. An orange arrow points from the text above to the 'Submit' button.

17. When finished adding findings, click **Check In**

The screenshot shows the 'Assessment Findings/Results' page with a detailed view of a finding for 'Laughter Therapy Club'. The finding includes details, implementation plan, key personnel, and a summary of findings. At the top right of the main content area, there is a 'CHECK IN' button. An orange arrow points from the text above to this 'CHECK IN' button.

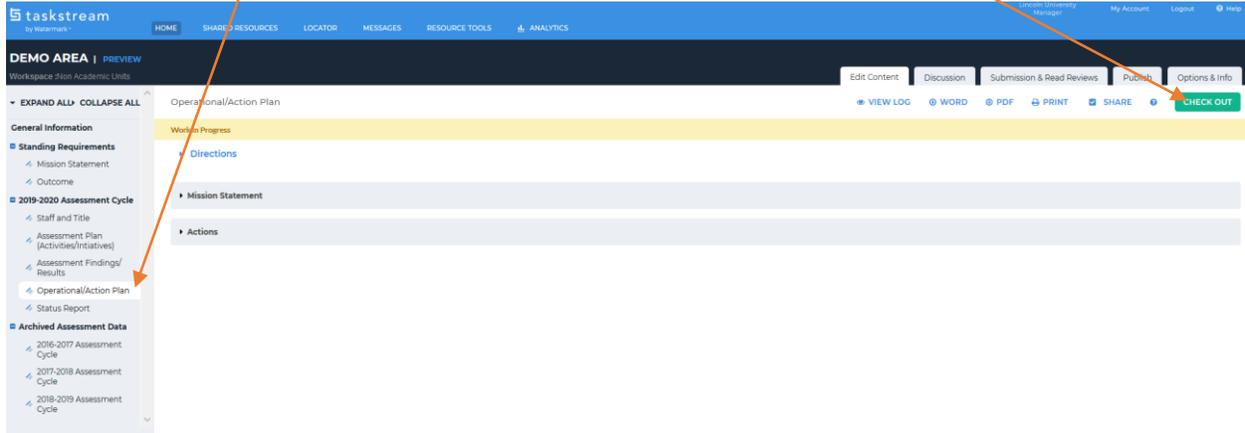
## 18. Submit comment to revision history log to track updates to the Assessment report

The screenshot displays the Taskstream interface. At the top, there is a dark blue header with 'DEMO AREA | PREVIEW' on the left and navigation buttons for 'Edit Content', 'Discussion', 'Submission & Read Reviews', 'Publish', and 'Options & Info' on the right. Below the header, a sidebar on the left contains a tree view of assessment components. The main content area shows a 'Check In Successful' message. Below this message, there is a text input field labeled 'Add comment to the revision history log:' with a small 'x' icon in the bottom right corner. Below the input field, there are radio buttons for 'Return to Work Area' (selected) and 'Go to Submission Area'. At the bottom of the main content area, there is a 'Submit Comment' button. Two orange arrows point to the 'Submit Comment' button and the text input field.

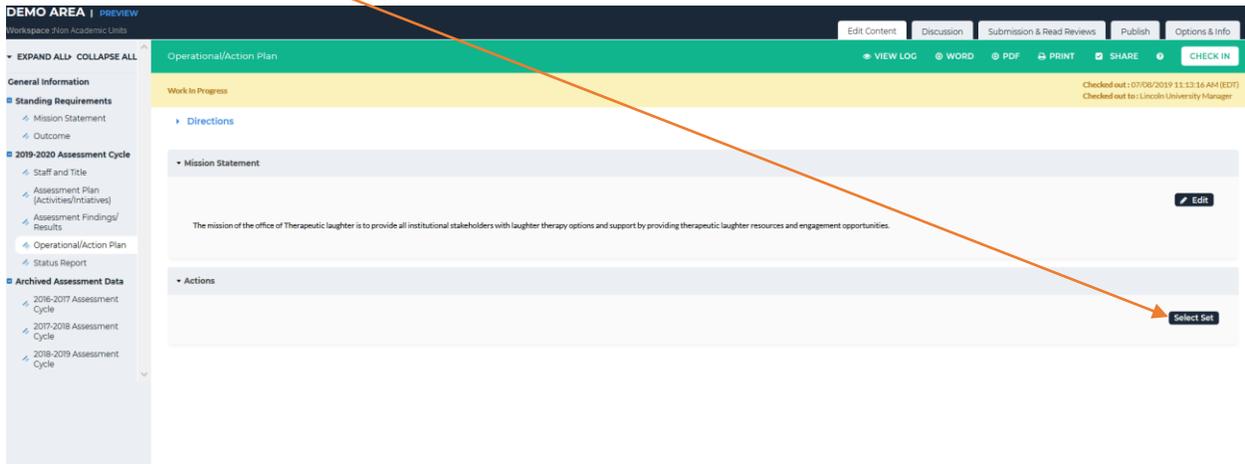
## 19. Click **Submit Comment**

## Operational/Action Plan – Non-Academic Programs

1. Log into your Taskstream Account
2. Click on the appropriate office/unit
3. Click on **Operational/Action Plan** (Left side menu); then click on **Check Out**

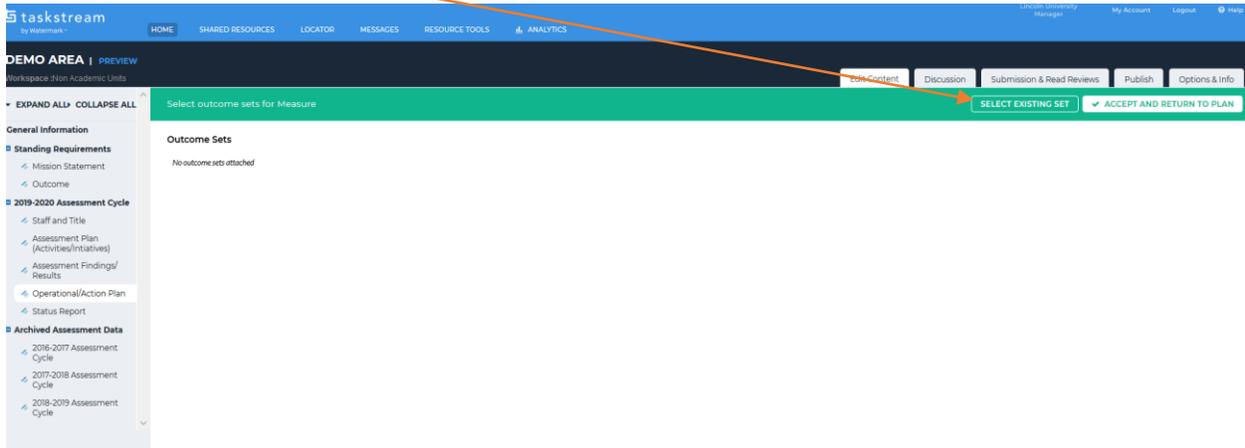


4. Click **Select Set**

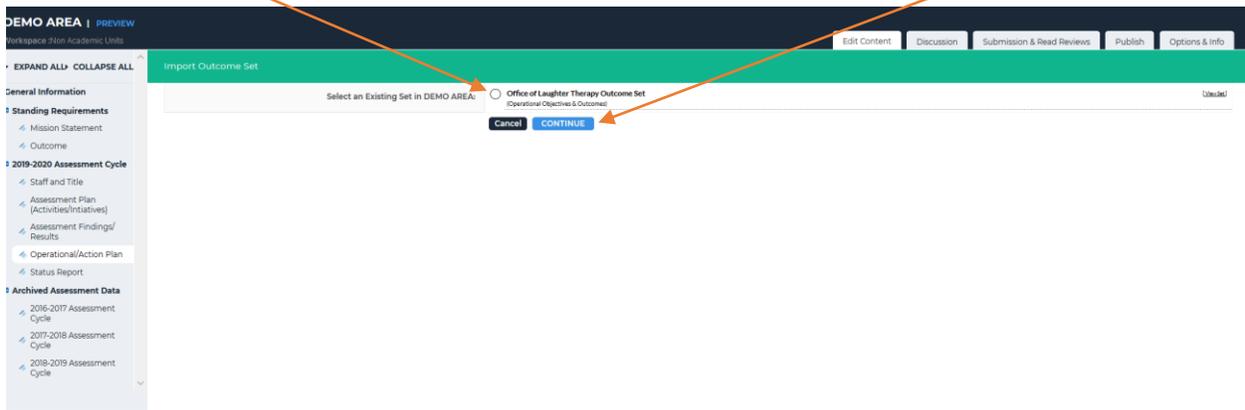


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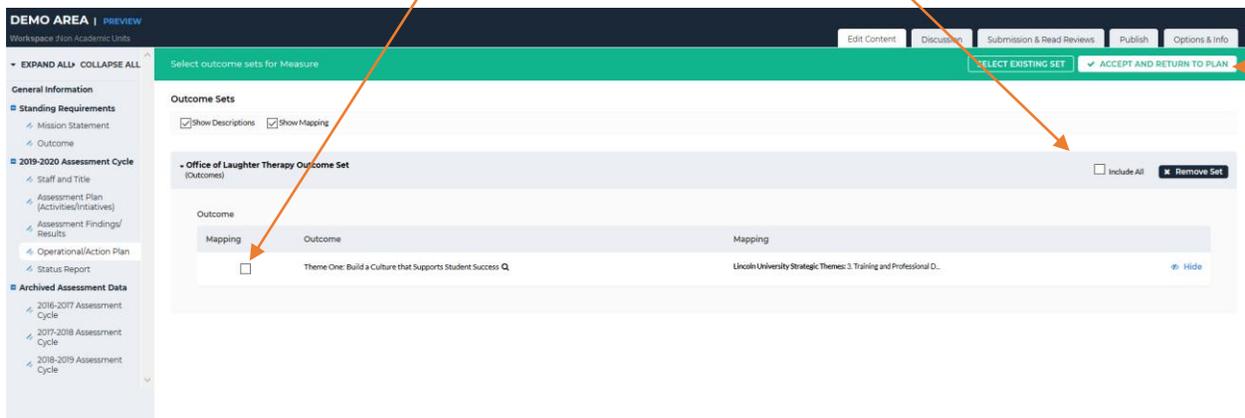
## 5. Click Select Existing Set



## 6. Use the radio button to select your unit's outcome set, then click Continue

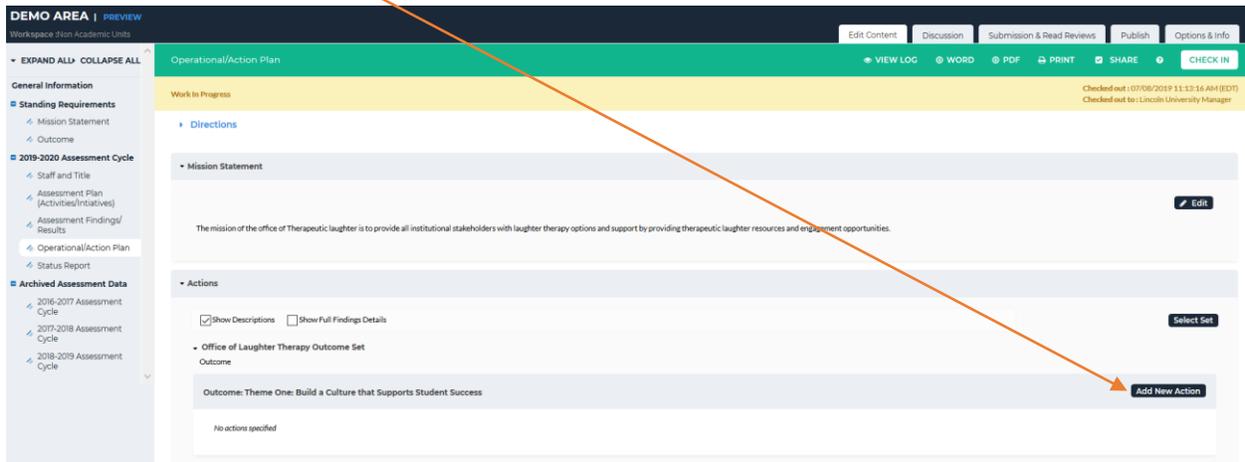


## 7. Select the appropriate checkbox for the measure(s) or select **Include all**, as appropriate

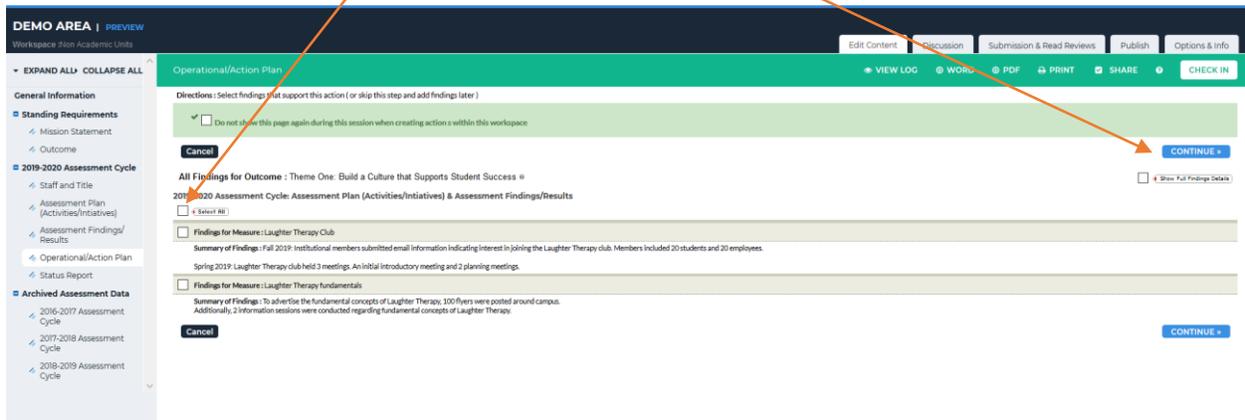


## 8. Click Accept and Return to Plan

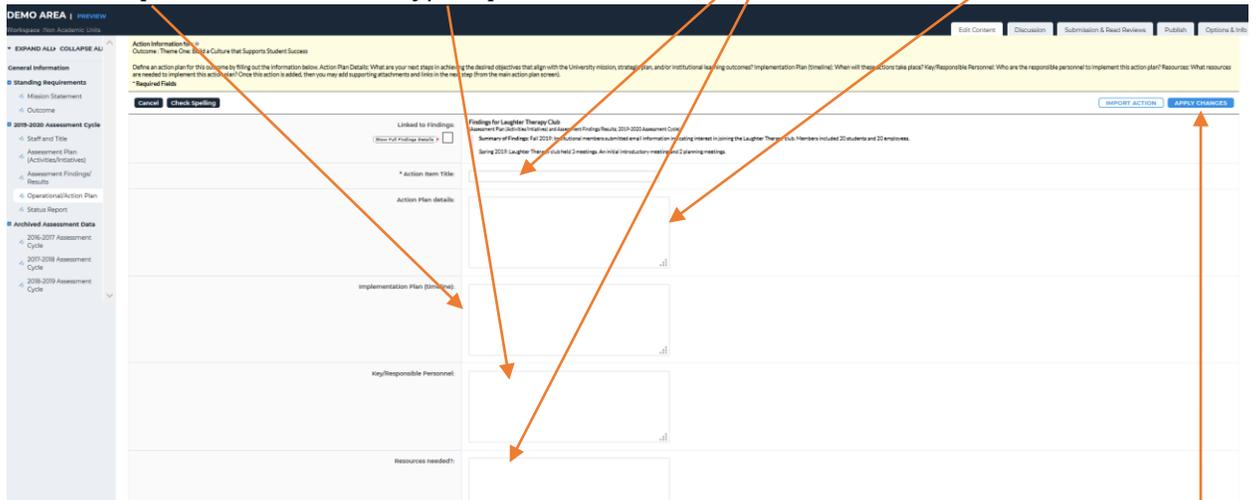
## 9. Click Add New Action



## 10. For each of the Assessment measures/findings, operational/action plans can be submitted by clicking the appropriate checkbox and then click **Continue**



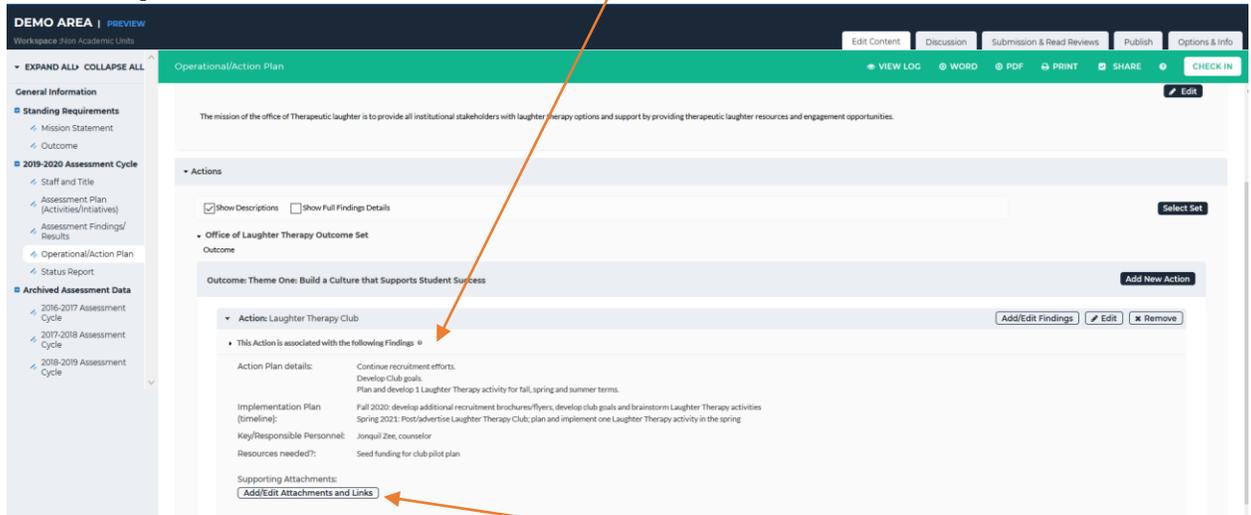
## 11. Click in the appropriate textbox and entering information for Action Item Title, Action Plan Details, Implementation Plan, Key/Responsible Personnel and Resources Needed.



## 12. When complete, click **Apply Changes**

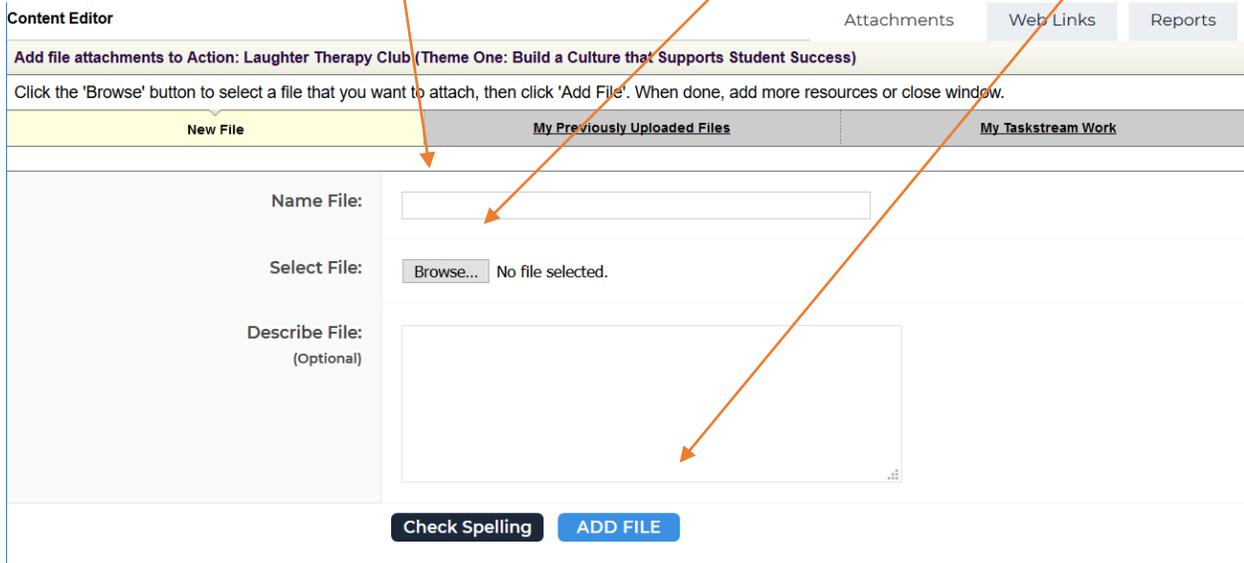
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13. The workspace should now contain the Action information



14. To add attachments and links, click **Add/Edit Attachments and Links**

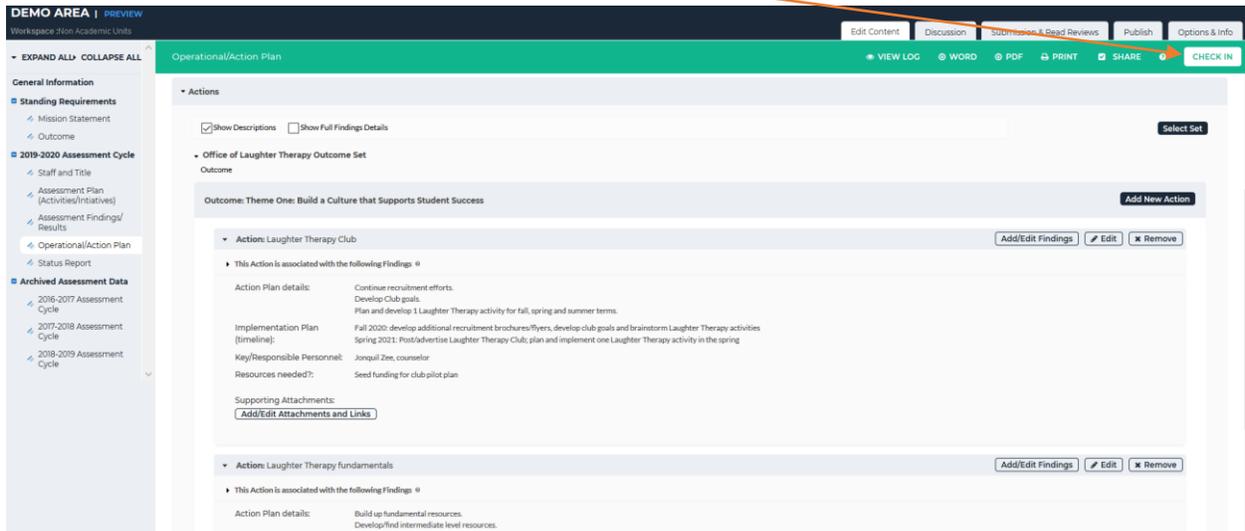
15. Click in the Name File box to add name of file; click **Browse** to select a file; then click **Add File**



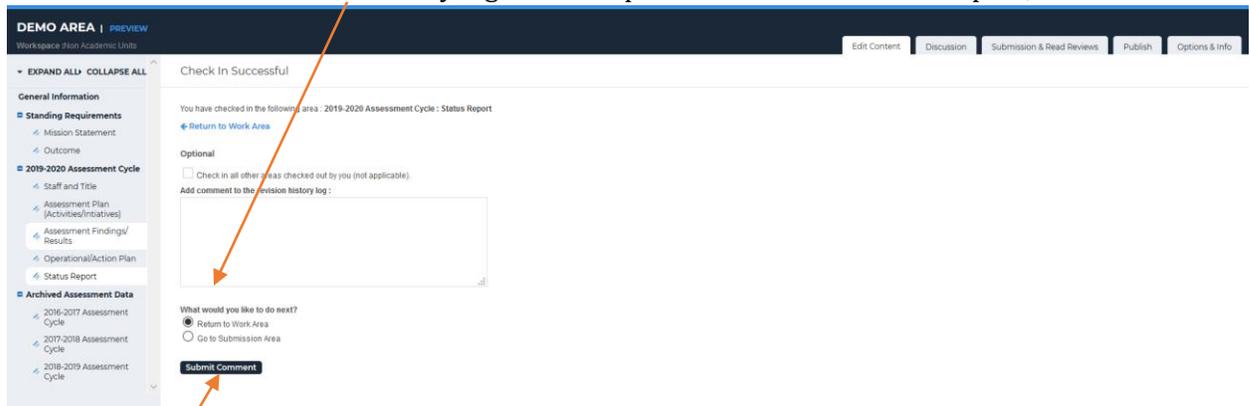
16. To add actions to other measures, repeat the process from step 7

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## 17. When finished adding actions, click **Check In**



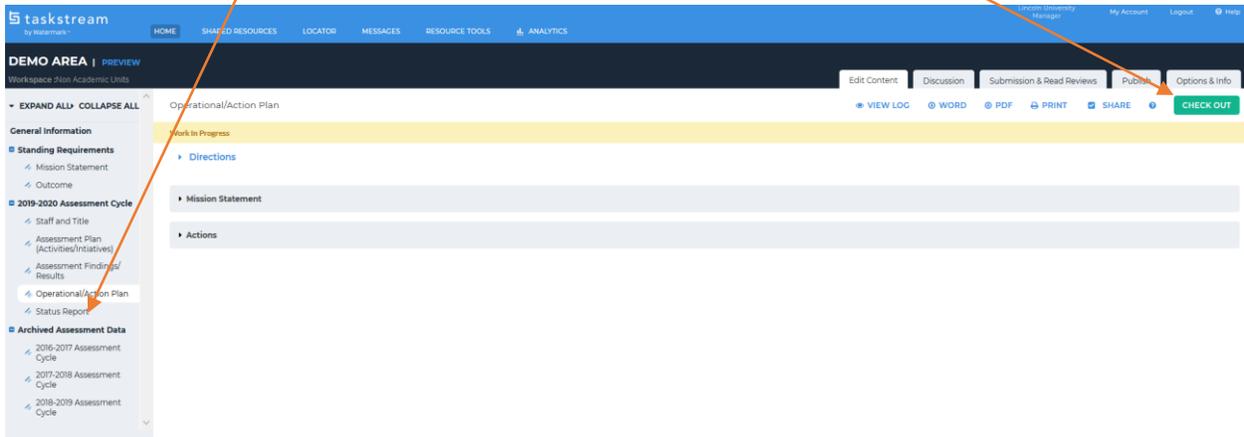
## Submit comment to revision history log to track updates to the Assessment report;



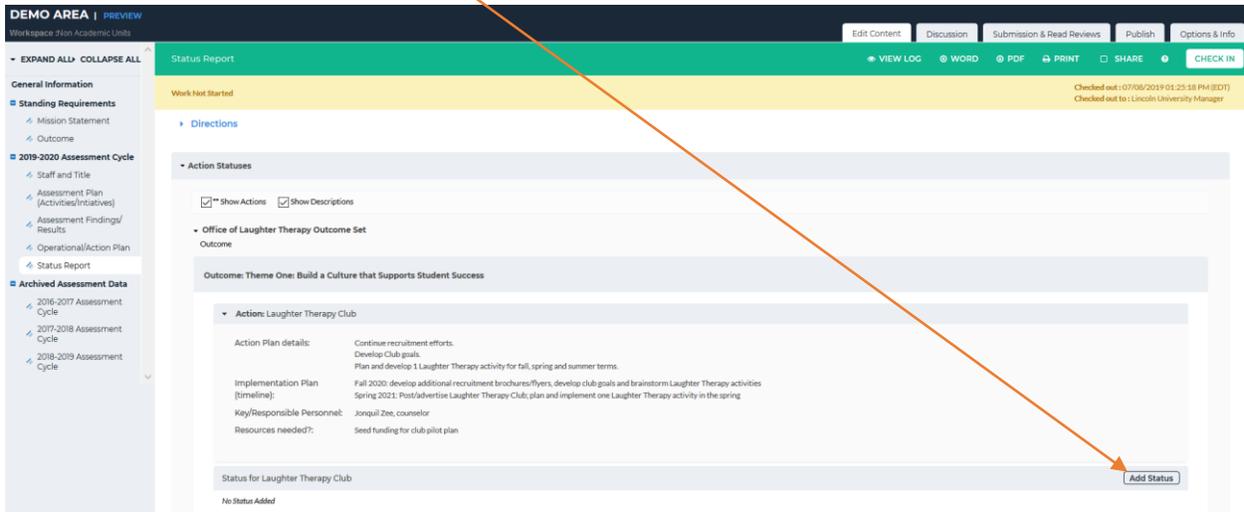
## 18. Click **Submit Comment**

## Status Report – Non-Academic Programs

1. Log into your account and click on the unit/office
2. Click **Status Report** (Left side menu); click **Check Out**

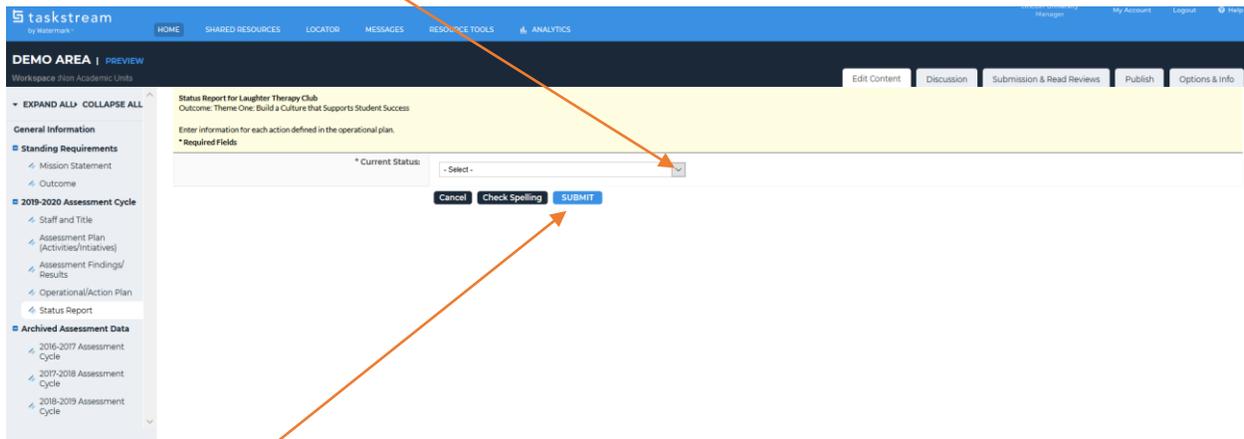


3. For an action plan, click **Add Status**

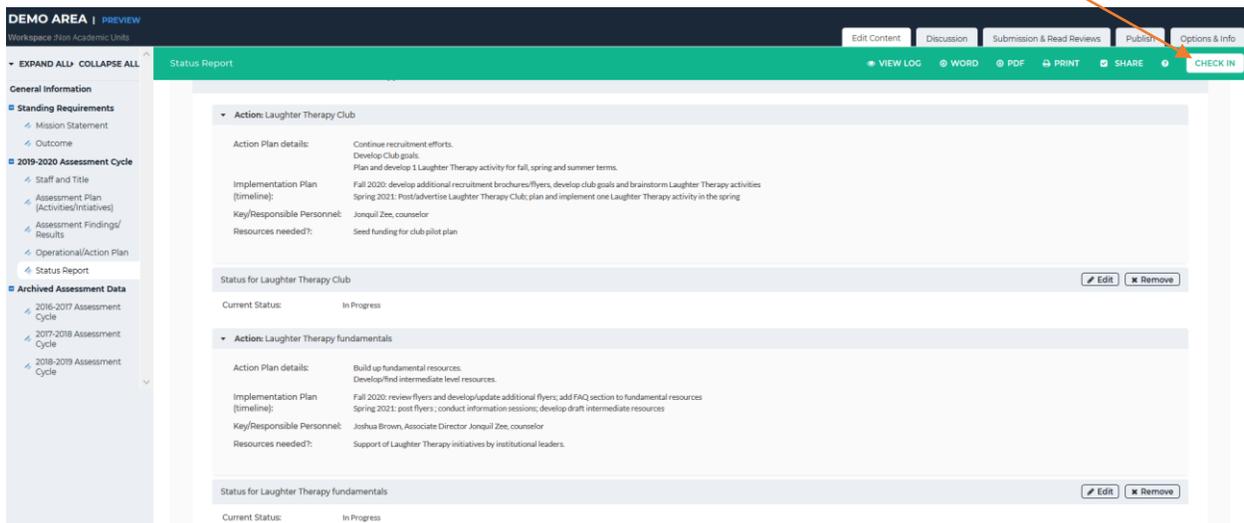


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- Click on the arrow to view the drop down menu; choices include: Not Started, In Progress, Completed, Not Implemented; select the appropriate choice



- Click **Submit**
- Continue adding status for each action plan (steps 3-5); when finished, click **Check In**



- Add comment to the revision history log by clicking in this box; then click **Submit Comment**

