Understanding the System for Assessment Management (SAM)

***Please note: These directions may become obsolete in the future. Please contact assessment@usf.edu for any inquiry.

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What are the roles in SAM?

- There are three roles in SAM that a faculty or staff members may request
  - Viewer = this role can only view assessments for which they were given access
  - Contributor = Most users are this role. They submit, edit, and receive emails about comments from the reviews
  - Supervisor = similar to contributor but is excluded from emails about comments from reviews

- To be assigned a specific role, after a faculty or staff member requests access for the SAM system, please send an email to assessment@usf.edu
  - Access requests default to a contributor role
What You See

- After logging on, you will see a list of assessments assigned under your account (i.e. program list page)
- There are ten columns total to the list

Review Columns

- The last four columns addresses the different stages of your assessment in SAM
- Status Column
  - Shows the last action conducted on assessment
  - *Not Started* = no information has been added to the system for the current cycle
  - *Edited* = the assessment is being worked on but not yet submitted
  - *Submitted* = the assessment has been submitted by the department
- **Reviewed** = IE has reviewed the assessment
- **Reopened** = a reviewed assessment has been viewed by the department but there has been no edits made

➢ **IE Review Status Column**
- Shows where an assessment is in the review process for the current cycle
- Status will change depending on plan or report cycle
- **Not Reviewed** = plan or report has not yet been reviewed
- **In Review** = plan or report is in the process of review
- **Not Approved** = a review was completed and needs revisions
- **Approved** = a review was completed and a program’s plan or report met BOG and SACS standards

➢ **Last Review Column**
- Shows the latest review.
- If you are in the reporting cycle and a report has not been submitted, the latest review shows the rating of the plan.
Tools Column

- This column provides the tools to assess, edit, and download program assessments
- First Icon: View assessment plan or report
- Second Icon: Edit assessment plan or report
What Are Cycles of Assessments?

- The SAM software goes through two cycles, planning and reporting. The cycle tells the user which parts of the assessment are due and reviewed.

- **Planning Cycle**: Assessment information for the Objective/Learning Outcome, Method of Assessment, and Performance Targets sections are due and open for submission. Only these three sections are available to view.

- **Reporting Cycle**: Assessment information for the Assessment Results and Use of Assessment Results sections are due and open for submission. All sections of an assessment are available to edit by contributors.
Steps to Submit Your Plans or Reports

**Step 1:** On the program list page, click on the second icon (pencil) in the tools column to edit a program’s assessments

- You will see a box for a mission statement, curriculum map, and list of Goals and Learning Outcomes
- There is a bar above the Mission statement that shows:
  - The assessment type of cycle
  - Assessment Period
  - Overall review status (if reviewed)
- There are two buttons on the right hand side of each of the goals and learning outcomes
  - *Edit:* opens up a new window to input information for each component of an assessment
  - *Delete:* remove the goal or outcome and all related information

**Step 2:** Click on the assessment period edit button for a drop down menu. Here, you are able to determine if your assessment is for one year or over a course of three years. You must click save to confirm your decision. If you chose a
three year period and after the three years, you will need to confirm your next assessment again.

**Step 3:** To upload your curriculum map, click on the edit button at the top right of the curriculum map box. Two more buttons will appear.

- **Choose File:** select a file ending in .bmp, .gif, .png, .jpeg, .doc, .xls, .xlsx, .pdf
- **Upload File:** Upload selected file to SAM. Once uploaded, the document will become a link that when clicked will download the uploaded file.

**Step 4:** Click the edit button on the learning outcome you wish to edit. You will see text boxes for learning outcomes, method of assessment, and performance targets. Assessment results and use of assessment results will only show during reporting cycles.
Step 5: Input your assessment information into the correct text box
- There is an edit bar containing common tools for text editing
- *Important:* If you are copying and pasting from a word document, you will need to press the “strip format” button or your text will be lost or formatted improperly

Step 6: After all information has been entered, click the save button in the bottom right corner
- Every time you save an assessment, you will return to the list of goals and learning outcomes

Step 7: Repeat step 4-6 for the next learning outcomes.

Step 8: After saving all completed information for each learning outcome, scroll down to the bottom of the goal and learning outcome list page and find the “submit assessment” button.

Step 9: Click the button and you will return to the program list page. You have now submitted your assessment!
- You are unable to edit your assessment once it has been submitted.
- You must wait for the assessment to be reviewed.
- You are able to message Institutional Effectiveness to open the assessment if needed.
Steps to View Your Assessment Review

Before you start, you can check the latest overall rating immediately on the program list page in the “last review” column. To view comments and rating for each component of the assessment, follow the steps below.

Step 1: On the program list page, click on the second icon in the last column
- After the assessment has been reviewed, the lowest rating within a learning outcome assessment will appear in the far top right of each learning outcome.

Step 2: Click the edit button on the learning outcome you wish to open
- The ratings for each component (e.g. performance targets) of an assessment will appear in the top right corner of each text box.

Step 3: Scroll down to find the “Plan Review Comments” or “Report Review Comments”
- These comments will help you understand if any component is needs correction

Step 4: To correct your assessment, follow the review comments and repeat Step 2-7 in the “Steps to Submit Your Assessment” section with the corrected information