Welcome to the 2024-2025 reporting year!

Your program/unit may fall into one of two situations:

1. You are starting fresh. You fall into this group if:
   a. You are a brand-new program/unit, and this is your first time reporting in Nuventive; or
   b. You scrapped your old plan entirely and none of your existing outcomes in are relevant anymore.

If this is you, follow these instructions. Exit this guide.

2. You are not starting from scratch – whether
   a. Nothing changed (i.e., the outcomes, methods, targets listed in Nuventive are what you will report on for 2024-2025)
   b. Some elements (e.g., outcomes, methods, and/or success criteria/targets changed)

If this is you, stay in this guide. It will walk you through exactly what to do.

If you are not starting from scratch, you may fall into one or more of these scenarios:

- Scenario 1: Outcome changed (even slightly)
- Scenario 2: Outcome, method, and success criteria (targets) same
- Scenario 3: Method(s) changed (even though the outcome stayed the same)
- Scenario 4: Success Criterion (target) changed (This also applies to situations where your target in the first year was set to "baseline" and now you are reporting data for subsequent years)

This guide is structured in 2 parts:
1. **Quick reference (Page 2):** a summary table and tips to help you quickly determine what to do based on your situation
2. **Detailed instructions (Starts on page 3).** Step-by-step instructions to walk you through each case.

Quick Reference

Outcome Changed	Method Changed	Target (Success criteria) Changed	What to do
Yes			Archive old outcome and create a new one and add methods (see page 3)
No	No	No	Enter new results (see page 8)
No	Yes		Archive old method, add a new one, report using the new version (see page 12)
No	No	Yes	Same as method changed: archive the method with the old target, add new method with the new target, and report accordingly (see page 16 first then go to 12)

Tips:

- **Always archive** when in doubt about changes.
- **Never edit** existing outcomes or methods as the change affects historical reporting.
- **Do not delete** previous reporting years—this permanently removes your data.
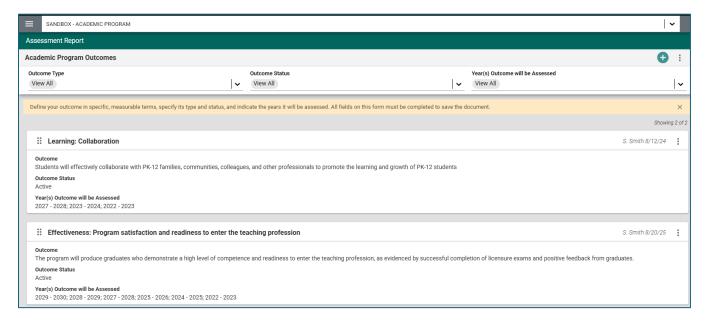- If you're unsure, reach out to the assessment folks.

Scenario 1: Your Outcome Has Changed (Even Slightly)

If your outcome changed in any way (big or small), you MUST archive it first. If you modify an outcome even slightly, the change will retroactively appear in past reports, making it look like those reports were based on the updated outcome.
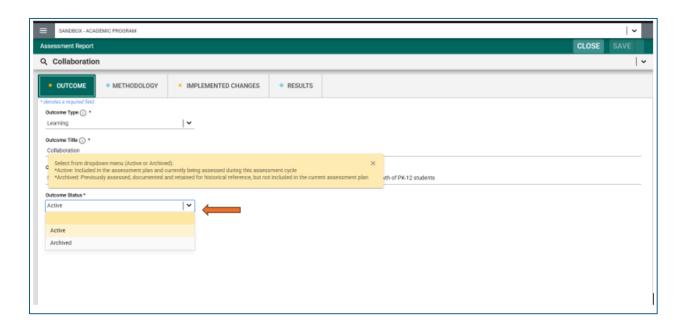
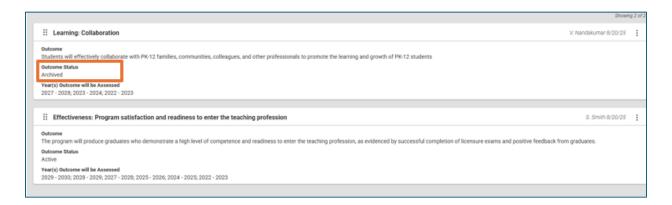**To archive the old outcome,** start from the "Assessment Report" area:

Next, double click on the outcome you want to archive from the outcomes listed (the page will look like the image below)

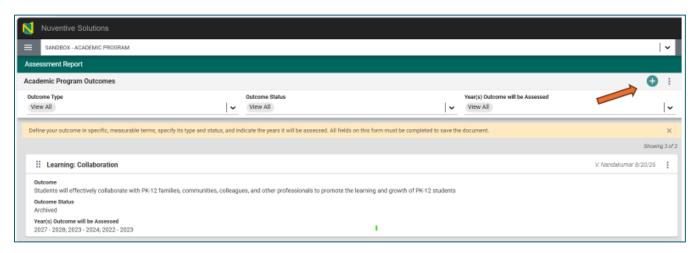Click on the 'Outcome Status' and change it to **Archived.**

After changing the status, click on **Save** in the top right corner of the page and then click on **Close**. When you click on close, it will take you to the main page with the list of outcomes for your program. There, you will notice the status of the outcome you changed listed as **Archived.**
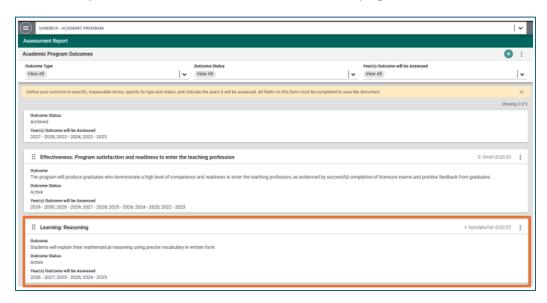
Now, you can add/record your revised outcome. Follow these steps:

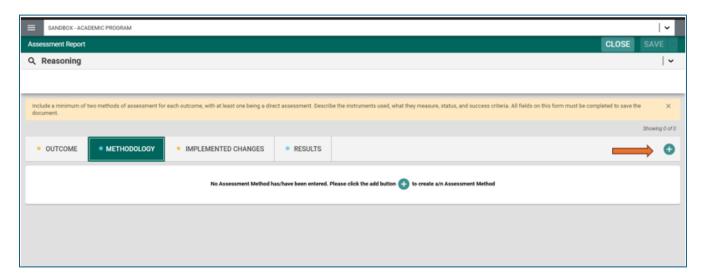1. Click on the green plus (+) sign to enter your new outcome.

Fill out the outcome details in its entirety and click on **save** at the top right corner of the page and then click on **close**. Once you click on close it will take you back to the main outcomes page where you can locate your new outcome at the bottom of the page.

2. Once you locate your new outcome, double click on it and then proceed to the METHODOLOGY tab at the top of the page.
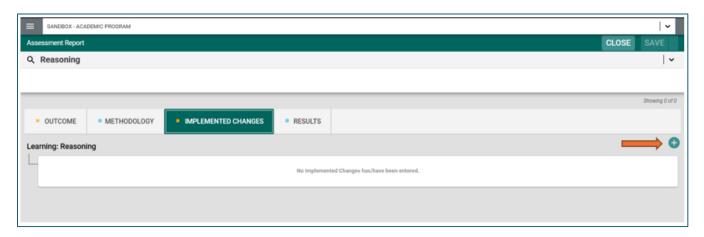
Next, begin creating your methods. To do this, click on the green (+) sign to enter your new method.

3. After saving your methods, proceed to the IMPLEMENTED CHANGES tab at the top of the page to begin your reporting on the outcome.
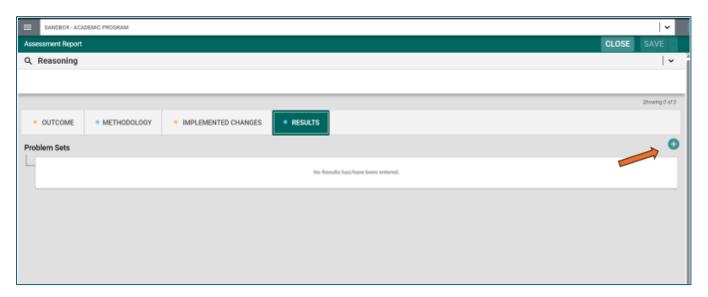

To do this, click on the green plus (+) sign:

Follow the instructions for "Follow up on Previous Initiatives". Read the guiding questions closely to understand what you are being asked to do. Do not leave this section blank. If you leave this area blank, you can generate a report.

Next, select the correct reporting year (2024-2025). This is essential. If you don't select the correct year, your results will not appear in the report for that year.

Next, navigate to the RESULTS area. Click the green plus (+) sign for your method.
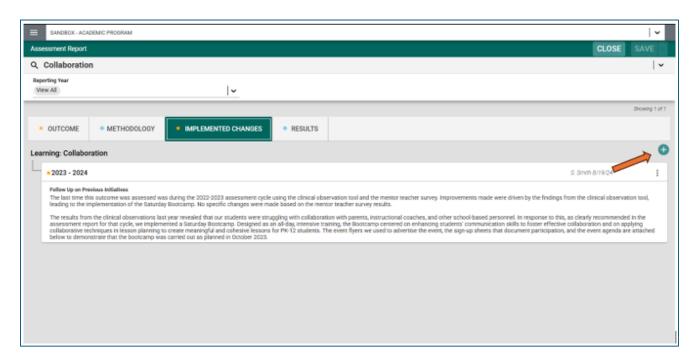

Once you are inside the method area, select the correct reporting year (2024-2025) and follow the prompts to complete this section. Once done, click on **save** at the top right corner of the page and then click on **close**.

Repeat this process for all methods (if you have more than one).

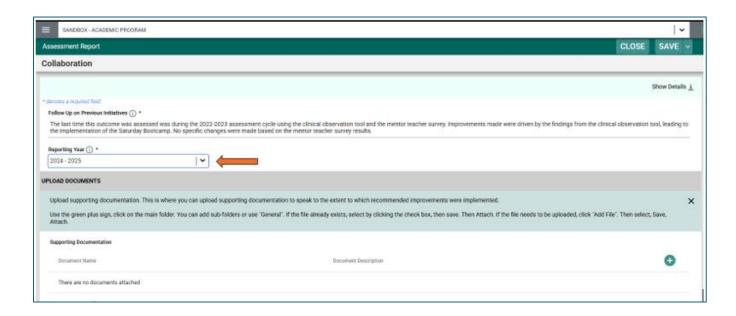**Scenario 2: Your Outcome, Methods and Success Criteria Stayed the Same**

If nothing has changed – the outcome, methods, and success criteria all remain the same – you are ready to begin reporting. Follow these steps:

1. Double click on the outcome for which you wish to report results and proceed to the IMPLEMENTED CHANGES area.
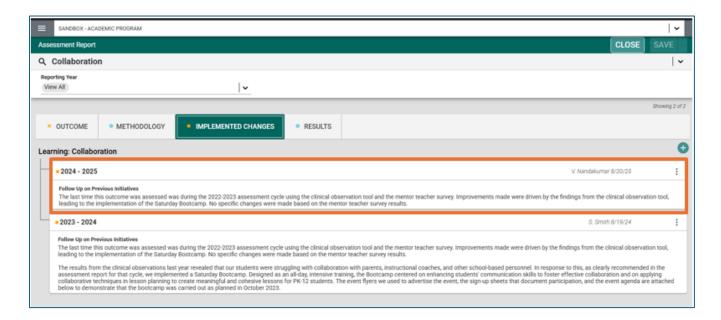

Follow the instructions for "Follow up on Previous Initiatives". Read the guiding questions closely to understand what you are being asked to do. Do not leave this section blank. If you leave this area blank, you can't generate a report.

Next, select the correct reporting year (2024-2025). This is essential. If you don't select the correct year, your results will not appear in the report for that year.

After saving your IMPLEMENTED CHANGES, hit close (top right corner) and you will see the implemented changes for 2024-2025 appear at the top.
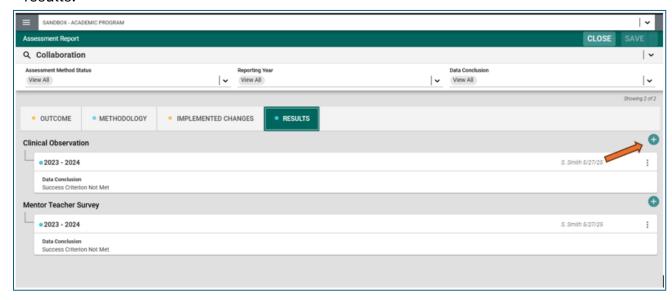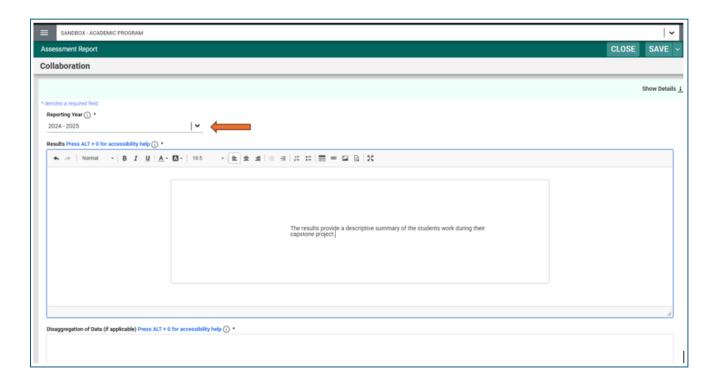

2. Next, navigate to the RESULTS area.

   The first thing you will see on this page are the previous years' results tied to each method. DO NOT DELETE THEM. Once removed, they can't be recovered, and this will result in lost reports.

   Preserve the results from past years, and create new entries for new results.
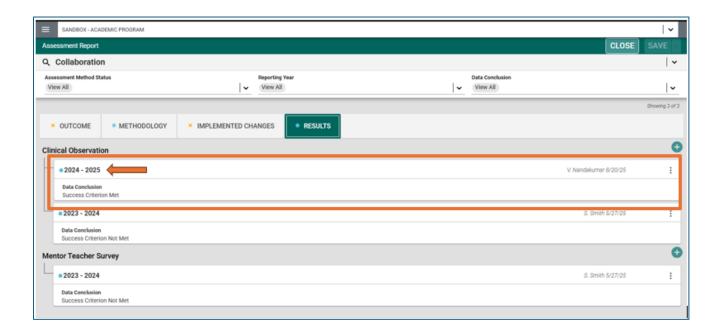
3. Find the method you wish to report results on and click the green plus (+) sign to report your results.

Once you are inside the method area, select the correct reporting year and follow the prompts to complete this section. Once done, click on **save** at the top right corner of the page and then click on **close**.
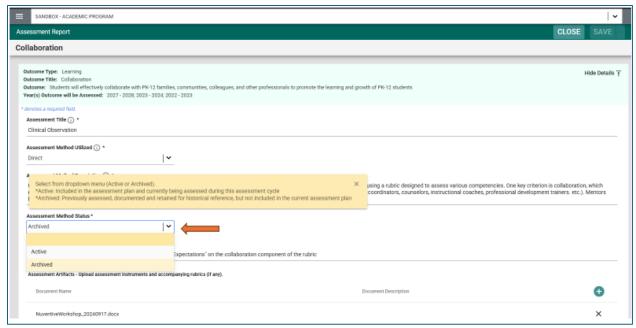

After saving your RESULTS, you will see the results for the new reporting year appear at the top.

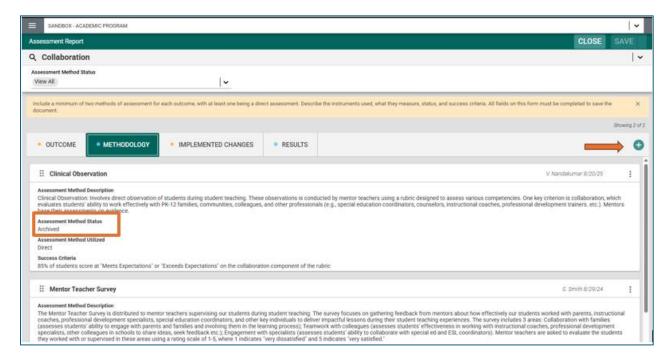Repeat this process for all methods (if you have more than one).

Scenario 3: Your Outcome Stayed the Same but Method(s) Changed

1. Archive your old method. Double click on the outcome for which you wish to archive your method. Next, navigate to the METHODS tab. Double click on the method and scroll down to the 'Assessment Method Status'. Change the status to **Archived,** click on **save** and **close**.
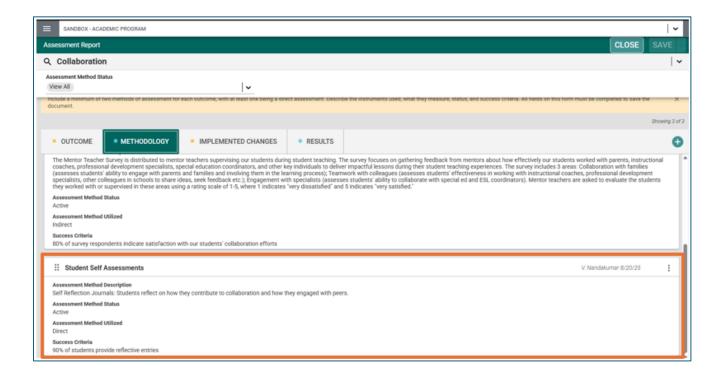

On the main METHODS tab, you will notice that your existing method indicates **archived.**

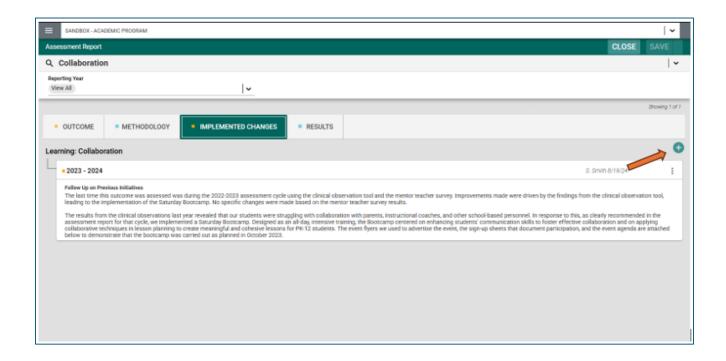2. Next, click the green (+) sign and add your new method.

Once you have created your new method, you will see it at the bottom of the page on the METHODS tab.

Repeat this process if you have more than one method to archive and/or add a new one.
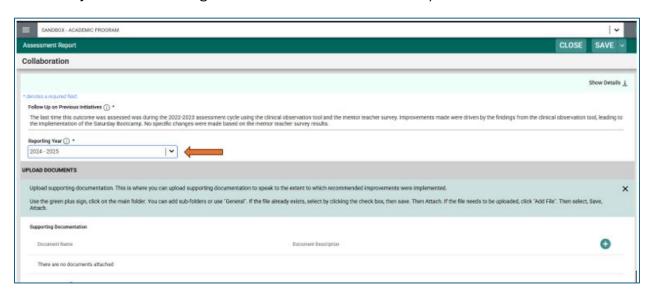
Once your outcome and its methods are ready for you to report on them, proceed to the IMPLEMENTED CHANGES area at the top of the page to start reporting on your outcome.

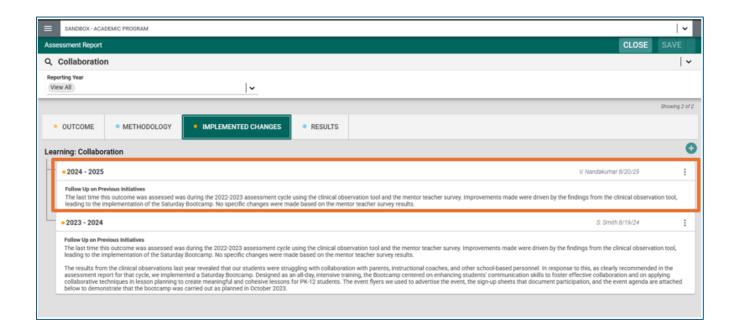Next, click on the green plus (+) sign.

Follow the instructions for "Follow up on Previous Initiatives". Read the guiding questions closely to understand what you are being asked to do. Do not leave this section blank. If you leave this area blank, you can generate a report.

Next, select the correct reporting year. This is essential. If you don't select the correct year, your results will not appear in the report for that year. (The reporting year refers to the academic year for which you are submitting data and results on an outcome).
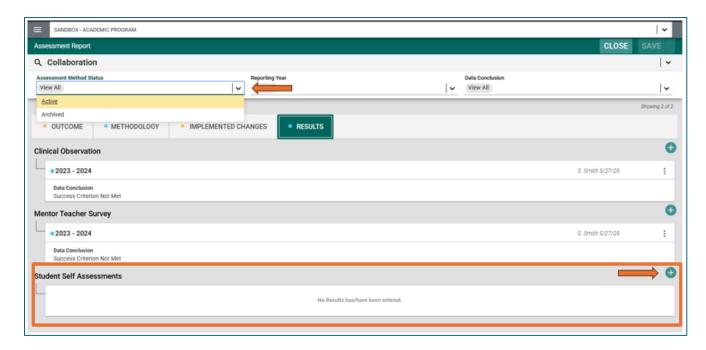

After saving your IMPLEMENTED CHANGES, hit close (top right corner) and you will see the implemented changes for the reporting year appear at the top.

3. Next, proceed to the RESULTS tab at the top of the page.

==When you reach the RESULTS area, you may see results from previous years. DO NOT DELETE THEM. Once removed, they can't be recovered, and this will result in lost reports.==

Helpful tip: If you click on the filter **'Assessment Method Status'** and select the option **'Active'**, this allows you view and report on only <u>active methods</u>.

Next, locate the new method you created (appears at the bottom of the page) and click the plus sign (+) to enter your results.

Continue reporting results for all other methods associated with your outcome – whether they are newly added or already existing.

Scenario 4: Your Method Stayed the Same but Target (Success criteria) Changed

In Nuventive, the target (success criteria) is part of the method description; it is not stored as a separate field. So, when a target changes, you are technically changing the description of the method. Because of that:

- Archive the method for which the target changed (follow the instructions for scenario 3 above)
- Create new method (with the updated target, even if the method itself stays the same) (again, follow the instructions for scenario 3 above)

!!! if you don't follow this approach and instead edit the target directly within the existing method, it will override historical targets and alter past reports – making your prior data misleading or inaccurate. Always archive and create a new method to preserve accuracy.

This approach also applies when your target in the first year was set to "baseline". Once that baseline is established, you are no longer evaluating performance against it. That shift requires updating the method. Archive the method with the original baseline and create a new one with the updated target.