Adding and Updating Annual Plans in SPIMS

Step 1: Sign on to SPIMS through this link or from SPIMS Home Page

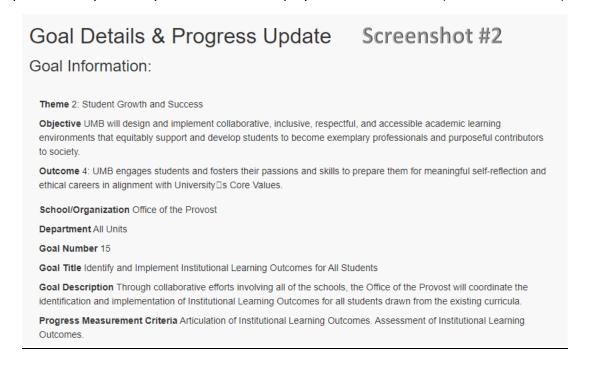
<u>Step 2</u>: Landing page for SPIMS is the "Goals" page. Click on "Goals" on SPIMS Tool Bar if already logged in.

<u>Step 3</u>: Goals page will display only those Goals in units and subunits assigned to you. Goals ready for Annual Plans to be added will appear under the heading "Click on Goal Title to view details and update progress" (*see Screenshot #1*). Goals with risks still needing to be defined (if any) will appear in a separate table below this.

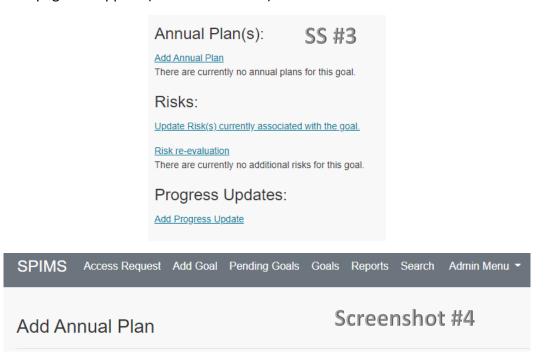
<u>Note</u>: Goals must be approved (Status = Approved) and reviewed (Reviewed? = Y) before adding an Annual Plan. Goals appearing in the Pending Goals page are not available to have Annual Plans added.



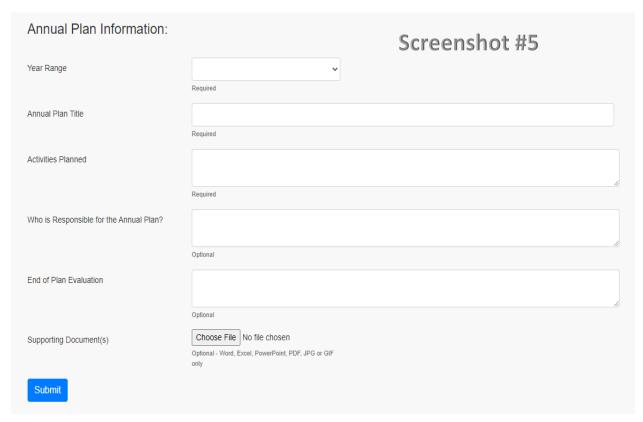
<u>Step 4</u>: Click on Goal Title to display goal details. Selected Goal will appear in edit format, except that data previously entered will be displayed in a fixed format (see screenshot #2).



<u>Step 5</u>: Further down in the Goal detail, click on Add Annual Plan (see Screenshot #3). The Add Annual Plan page will appear (see Screenshot #4).



<u>Step 6</u>: Entry form for Annual Plan Information has 3 required and 2 optional fields and the option to attach a Supporting Document (see Screenshot #5). Enter desired information.



Annual Plan Information

Year Range – Select Fiscal Year range for Annual Plan from dates listed - Required

<u>Note</u>: The initial Annual Plan range for the 2022 – 2026 Strategic Plan is 2022 – 2023. Be careful when selecting the fiscal year range, as any available range can be selected.

Annual Plan Title (50 characters maximum) - Required

Activities Planned (1000 characters maximum) - Required

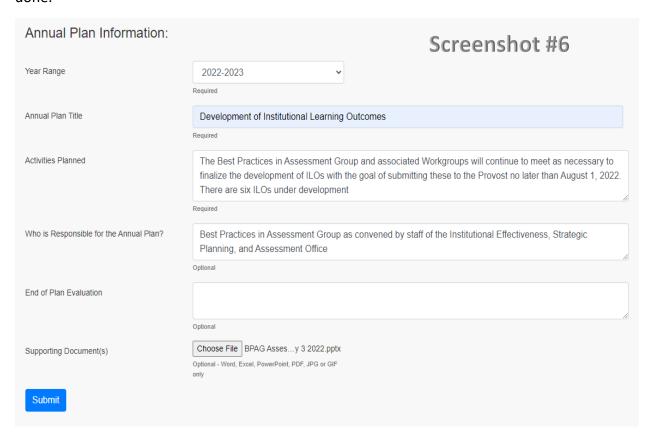
Who is Responsible for the Annual Plan? (200 characters maximum) - Optional

End of Plan Evaluation (4000 characters maximum) – Optional

<u>Note</u>: End of Plan Evaluation field will be used during the plan year to document actual activities conducted and can serve as the basis for the bi-annual strategic plan progress update. This field should be left blank when the annual plan is first created, unless there is initial activity already completed that could be documented.

Supporting Document – Attach one file of the following type only: Word, Excel, PowerPoint, PDF, JPG or GIF – Optional

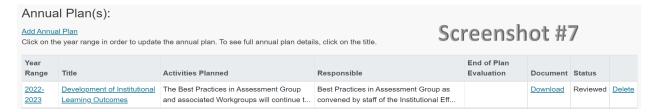
<u>Step 7</u>: An example of a completed Annual Plan is shown in Screenshot #6. Click <u>Submit</u> when done.



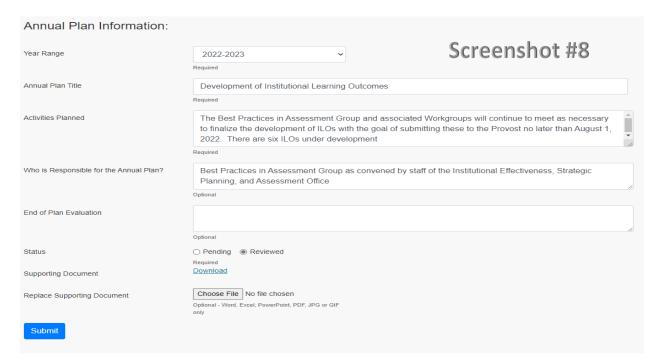
<u>Step 8</u>: Goal detail will now show summary details of completed Annual Plan (*see Screenshot #7*). To view full annual plan details in a printable format, click on the plan Title. To view the attached document, click <u>Download</u>.

<u>Annual Plan Review</u>: Annual plans created by a Contributor will have a status designation of "Pending" and an email notification is sent to the Administrator notifying them that an Annual Plan is available for review. Once reviewed, the Administrator should change the status to "Reviewed" using the radio button. Annual plans created by an Administrator will have a status designation of "Reviewed".

<u>Note</u>: Completed plans will have the option to <u>Delete</u>. This should only be done if a plan is accidentally created. Otherwise, the update option can be used to change any content and substitute a different file attachment. At some point during or after the Annual Plan year the ability to delete plans from that year will be suspended to preserve strategic plan documentation.



<u>Updating an Existing Annual Plan</u>: Click on the Year Range to update the Annual Plan. The plan will be displayed in an interactive format (*see Screenshot #8*). The existing file attachment can be viewed by clicking <u>Download</u>, and a different file attachment can be substituted if desired. Click <u>Submit</u> when done.



Adding an Additional Annual Plan to the Same Goal (optional): Click Add Annual Plan to add another Annual Plan for the same Goal and follow Steps 6 and 7. You will have the option to create a new plan from scratch or to start with an existing plan and modify the contents (see Screenshot #9). Once additional plans are created, they will be displayed in order by time of creation with other existing plans (see Screenshot #10). Plans can also be created for future year ranges. If plans for future time periods are created, they will be displayed in order by time period (see Screenshot #11).



Add Annua	al Plan(s): al Plan e year range in order to update		Screenshot #10				
Year Range	Title	Activities Planned	Responsible	End of Plan Evaluation	Document	Status	
2022- 2023	Submission of Institutional Learning Outcomes	The Best Practices in Assessment Group and associated Workgroups will finalize a	Best Practices in Assessment Group as convened by staff of the Institutional Eff	Target Date August 1, 2022	Download	Pending	Delete
<u>2022-</u> <u>2023</u>	Assessment of Institutional Learning Outcomes	The Best Practices in Assessment Group and associated Workgroups will develop th	Best Practices in Assessment Group as convened by staff of the Institutional Eff	Target Date December 31, 2022	Download	Pending	Delete
2022- 2023	Evaluation of Institutional Learning Outcomes	The Best Practices in Assessment Group and associated Workgroups evaluate the su	Best Practices in Assessment Group as convened by staff of the Institutional Eff	Target Date July 31, 2023	Download	Pending	Delete

Add Annua	Il Plan(s): Il <u>Plan</u> e year range in order to update t		creenshot #11				
Year Range	Title	Activities Planned	Responsible	End of Plan Evaluation	Document	Status	
2022- 2023	Development of Institutional Learning Outcomes	The Best Practices in Assessment Group and associated Workgroups will continue t	Best Practices in Assessment Group as convened by staff of the Institutional Eff		Download	Reviewed	<u>Delete</u>
<u>2023-</u> <u>2024</u>	Development of Institutional Learning Outcomes	ILOs were not finalized by June 30, 2023. The Best Practices in Assessment Grou	Best Practices in Assessment Group as convened by staff of the Institutional Eff		Download	Pending	<u>Delete</u>

SPIMS Guidance – Adding an Annual Plan Version 1.4 May 20, 2022