
CHECKLIST: UPDATING & ARCHIVING OLD RECOMMENDATIONS in TracDat

Program Level

Summer (July): Update and Archive Old Recommendations

Prior to entering new recommendations for the new fiscal year, please update and archive old recommendations at the close of the implementation year by doing the following:

- 1. Recommendation Status:** Update the final Status of each recommendation
- 2. Completion Date**
- 3. Annual Evaluation Date:** Add the date that the recommendation is evaluated
- 4. Annual Evaluation:** Evaluate the impact of the recommendation being funded. Evaluation should answer the following questions:
 - Was it funded?
 - Was it implemented (partially or fully)?
 - What were you able to do as a result of the funding or implementation?
 - What outcomes can you measure as a result of implementation? Were the Expected Outcomes achieved?
 - What should be done differently to ensure institutional effectiveness (*optional*)?
- 5. Archive Old Recommendations**
- 6. Delete Old Recommendations** (*Optional*)

CHECKLIST: PLANNING & ENTERING NEW RECOMMENDATIONS in TracDat

Program Level

Fall (September – December): Enter New Recommendations

Please complete the following fields when entering each new recommendation:

- 1. Add Recommendation:** Add new (+) or copy recommendation from the previous year.
- 2. Recommendation Name:** Name each recommendation using the naming convention: [Unit-Abbrev] [Program-Abbrev] [Fiscal-Year] "Rec" [Unique Number] (e.g., BSS HDEV 2017-18 Rec 1)
- 3. Recommendation:** Please limit the description of the goal to one to two sentences; more detail can be provided in **Rationale & Expected Outcome**
- 4. Recommendation Status:** Select a status. Begin with Not Started.
- 5. Implementation Timeline:** Select the appropriate *Fiscal Year* (e.g., 2017-18)
- 6. Input/Last Revised Date:** Today's date; revise this date when changes are made. Leave Completion Date blank.
- 7. Origin of Recommendation:** Select the source of your Recommendation (Program Review, Emerging Need, Other). Reference appropriate Program Review sections where applicable once you have saved Recommendation.
- 8. Expense Category:** Select an expense category that most closely relates to your Recommendation. Select 'Other' if the Recommendation needs no funding.
- 9. Program Rank:** Select priority number for the Recommendation within the given expense category
- 10. Rationale & Expected Outcome:** Briefly describe the rationale for your request; sketch out an evaluation plan
- 11. Anticipated Cost:** Use whole numbers (integers) only. Enter '0' if no cost is involved.
- 12. Primary SI Supporting Recommendation:**
- 13. Any Impact on other Programs, Areas or Units?** Mark **Yes** if recommendation has impact on other programs, areas or units.
- 14. List impacted areas and describe potential impact:** If 'Yes' was selected in previous prompt, list all programs that would be potentially impacted by the recommendation and briefly describe potential impact.
- 15. Code Req, Mandate, Health & Safety; Tech Need:** Describe any implications for your Recommendation related to these (optional)
- 16. Funding Status/Funding Type:** was Set Funding Status to Proposed or N/A. Indicate Funding Type.
- 17. Save Recommendation**
- 18. Link Recommendation to Program Review Component** (if **Origin of Recommendation** is Program Review): see Training Manual for Instructions, pgs. 5-6