Outcomes Annual Checklist

When a new academic year approaches, use this checklist to ensure your Outcomes site and your users are ready for data collection. If you have any questions, please reach out to your Campus Labs Consultant or contact Support at Support@CampusLabs.com or (716) 270-0000.

- [ ] **1. Verify Primary/Additional Contact(s) and Data Manager(s)**
  These roles are essential to the ongoing maintenance of Outcomes. If there has been any change to your official contacts list, please notify your Campus Labs Consultant.

- [ ] **2. Check Core Data (manual uploads only)**
  If you are doing manual uploads to Core Data, review the frequency of uploads with your Data Manager. If you are interested in automating these uploads, reach out to your Campus Labs consultant for more information.

- [ ] **3. Initialize the new time period in Outcomes**

- [ ] **4. Make changes to your organizational chart**
  The best time to make changes to your organizational chart is at the beginning of a new time period. Changes may include adding units, relocating or hiding units, and non-identifier changes, for example.

- [ ] **5. Sync Core Data changes in Outcomes**
  When new units, courses, or sections are added to Core Data, you must apply the updates in Outcomes to see these additions in your site. We recommend doing this on an ongoing basis throughout the year.

  > → Best practice tip: To apply updates, set a calendar reminder that aligns with your Core Data upload schedule.

- [ ] **6. Review templates for outcomes, assessments, and results**

☐ 7. Prepare outcomes statements for the new academic year

You can copy outcomes from one year to the next with the bulk copy feature.
Add new outcomes statements and connections, if applicable.

☐ 8. Review email notification settings

You may choose to have the Outcomes system notify users when an outcome is assigned to them, and you may also set reminder dates.

> → Best practice tip: If you use notifications, work with your IT department to whitelist these emails.

☐ 9. Set permissions for new users

☐ 10. Train new users

Update and re-share any user guides or resources, and/or hold training sessions or office hours for new users. Read our recommendations for end-user training.

> → Best practice tip: Consider differentiating your resources by audience (e.g., a guide for program coordinators, a guide for faculty).