STRATEGIES

Strategies User Guide

All Users

Cognia Improvement Platform

Overview

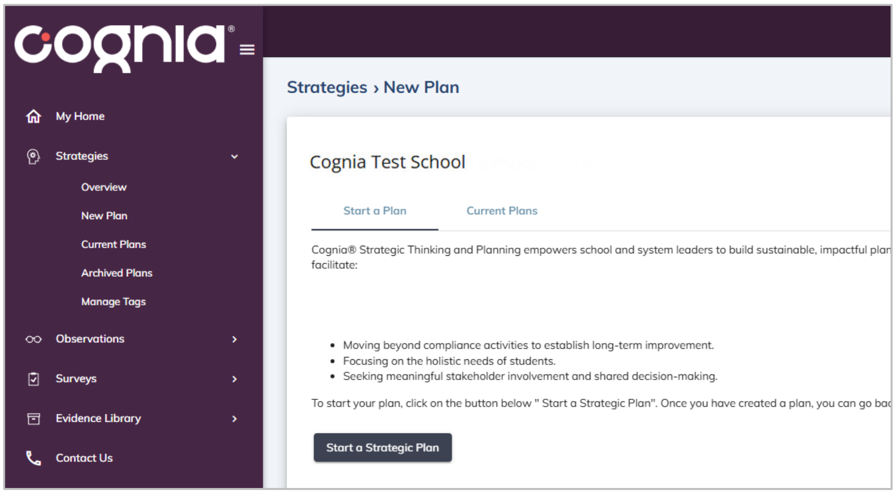
The Strategies tool is part of the Cognia® Improvement Platform. For assistance logging in and accessing the Improvement Platform, please refer to that guide.

This guide provides instructions for users who are creating School Improvement Plans.

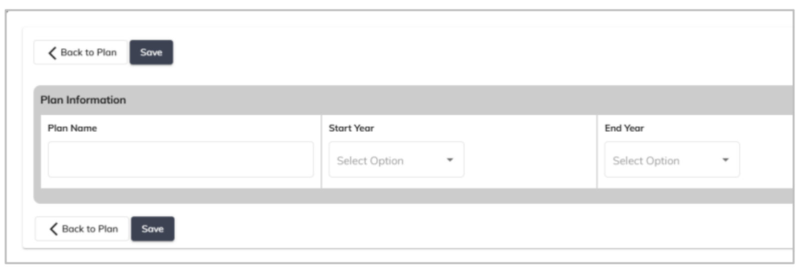
Starting a New Plan

Follow these steps to start a new School Improvement Plan.

1. Select the **Strategies** menu from the left-side navigation, and then click **New Plan**. This opens the New Plan page (or if you have access to multiple institutions, first click the institution to open).
2. From the **Start a Plan** tab, click the **Start a Strategic Plan** button. This opens a new plan box.



3. Enter a **Plan Name**.
4. Select a **Start Year** from the drop-down.
5. Select an **End Year** from the drop-down.
6. Click the **Save** button. This creates your plan and adds it to your Current Plans page.
7. Click the **Back to Plan** button to continue. This opens the plan.



Completing a Plan

School Improvement Plans contain four phases that must be completed, each with their own set of sections (subphases) and items that must also be completed.

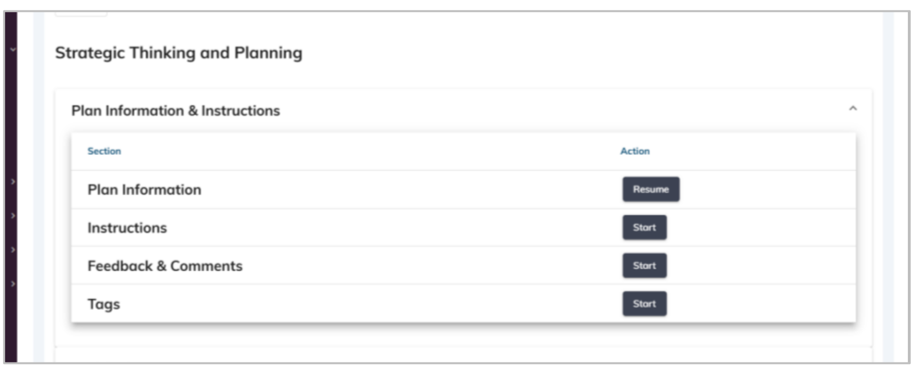
- **Envisioning**
- **Planning**
- **Implementing**
- **Evaluating**

Important: A phase must be marked as complete before the next phase becomes available in the plan.

Plan Information & Instructions

The Plan Information & Instructions contains four sections. These sections do not get marked as complete but can be reviewed by clicking the **Resume** or **Start** button to the far right.

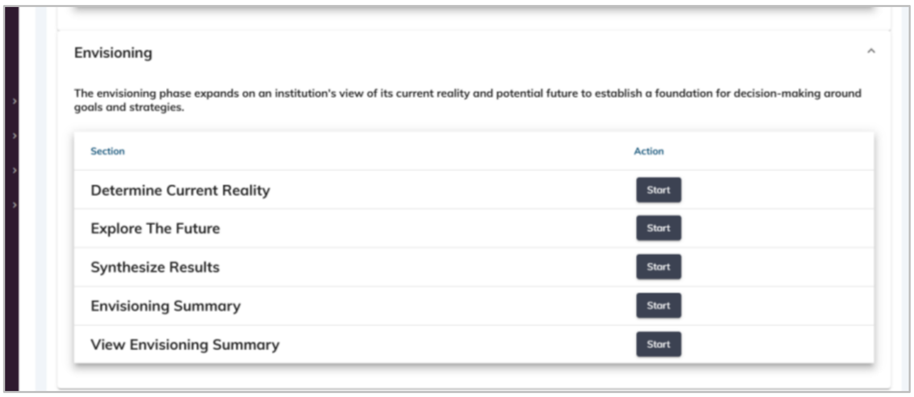
- **Plan Information:** This section shows the Plan Name, Start Year, and End Year. Edits can be made if necessary.
- **Instructions:** This section provides instructions for how to complete the plan.
- **Feedback & Comments:** This section is for providing and reviewing any feedback.
- **Tags:** This section displays all tags that have been created in the tool.



Envisioning Phase

The Envisioning phase contains five sections that must be completed.

- **Determine Current Reality**
- **Explore The Future**
- **Synthesize Results**
- **Envisioning Summary**
- **View Envisioning Summary**



Follow these steps to complete the Envisioning phase.

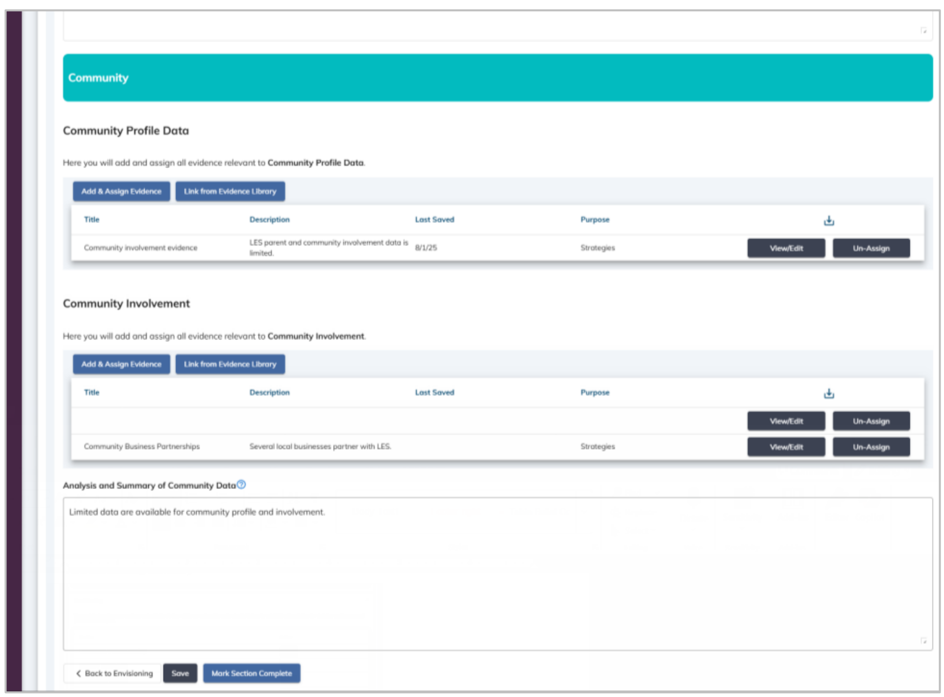
Determine Current Reality

1. From the plan, click the **Start** button to the far right of **Determine Current Reality**.

   a. For every topic (**Learner**, **Institution**, **Community**), assign evidence to each of the items by adding new evidence or by selecting from the evidence library.

   b. At the end of each topic, enter a summary of the analysis completed in the **Analysis and Summary** field.

   c. When the section is complete, click the **Mark Section Complete** button. This updates the section to show it Marked as Completed and returns you to the plan. (If you missed any required field, the field will be highlighted with a red border.)



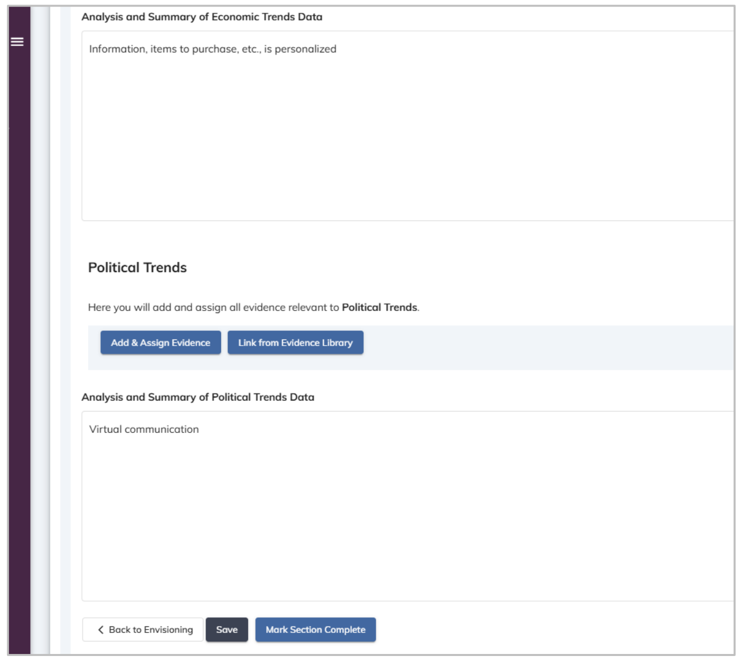
Explore The Future

2. From the plan, click the **Start** button to the far right of **Explore The Future**.

a. For every topic (**Social Trends**, **Technological Trends**, **Economic Trends**, **Political Trends**), assign evidence to each of the items by adding new evidence or by selecting from the evidence library.

b. At the end of each topic, enter a summary of the analysis completed in the **Analysis and Summary** field.

c. When the section is complete, click the **Mark Section Complete** button. This updates the section to show it Marked as Completed and returns you to the plan. (If you missed any required field, the field will be highlighted with a red border.)



Synthesize Results

3. From the plan, click the **Start** button to the far right of **Synthesize Results**.

a. Enter a statement in the **Institution's Vision** field.

b. Enter a statement in the **Institution's Mission** field.

c. Enter beliefs in the **Institution's Beliefs** field.

d. Add a strategic theme by clicking the **Add Theme** button.

   i. Select a **Priority** number from the drop-down.

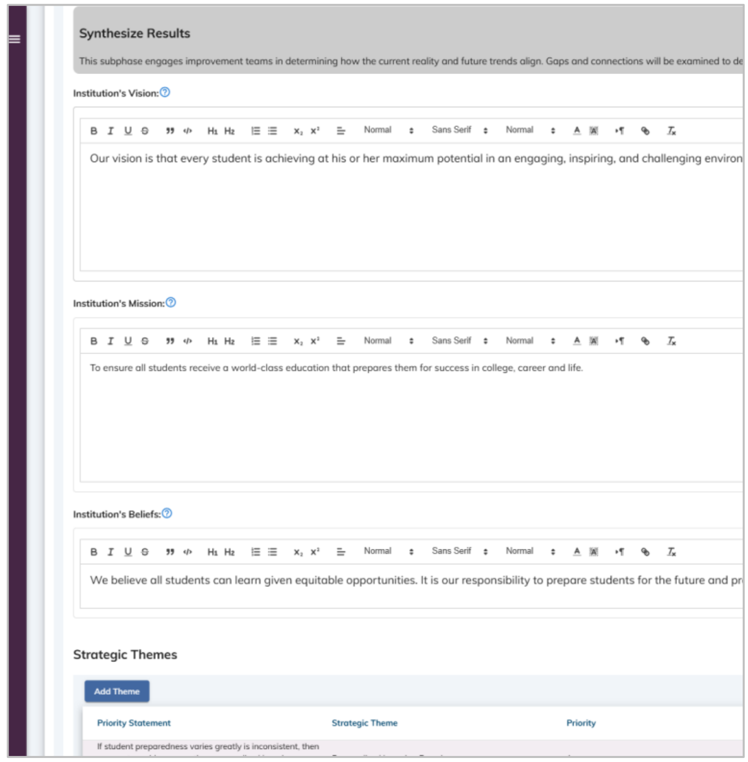
   ii. Enter a **Priority Statement**.

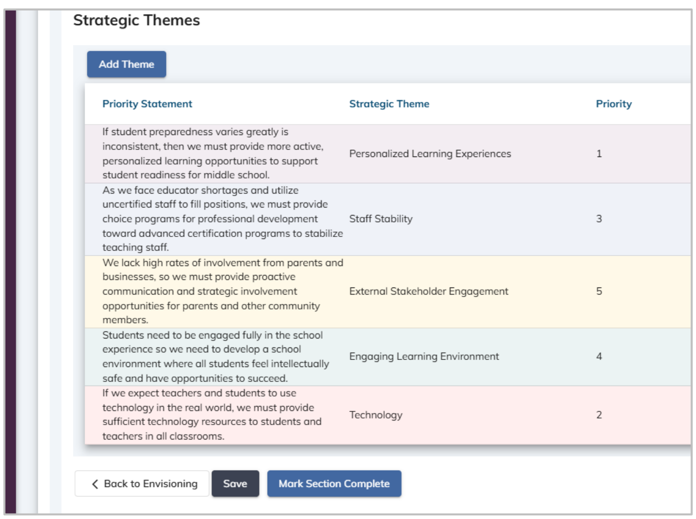
   iii. Enter the major area of focus in the **Strategic Theme** field.

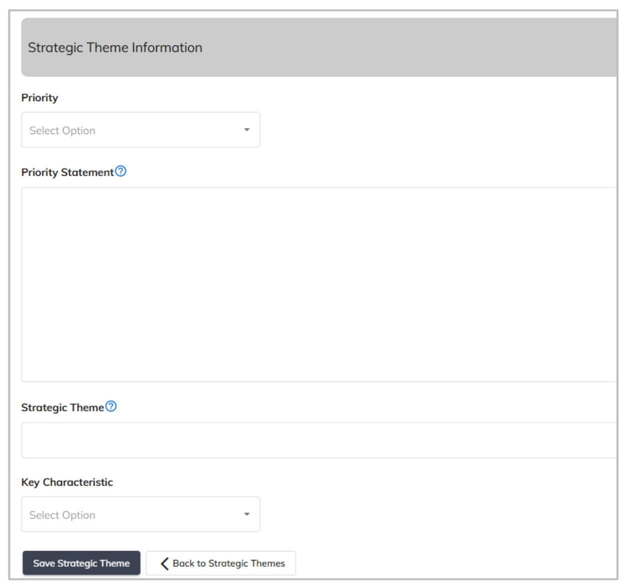
   iv. Select a **Key Characteristic** from the drop-down.

   v. Click the **Save Strategic Theme** button. This adds the theme to your plan.

e. When the section is complete, click the **Mark Section Complete** button. This updates the section to show it Marked as Completed and returns you to the plan. (If you missed any required field, the field will be highlighted with a red border.)

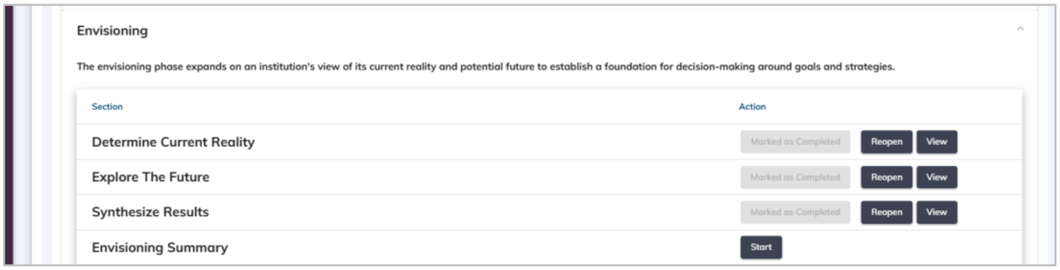






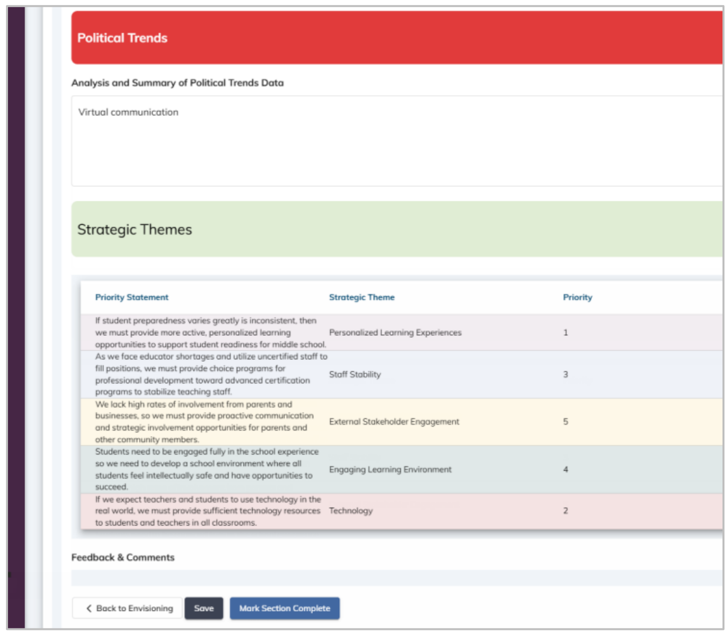
Envisioning Summary

4. From the plan, click the **Start** button to the right of **Envisioning Summary**.



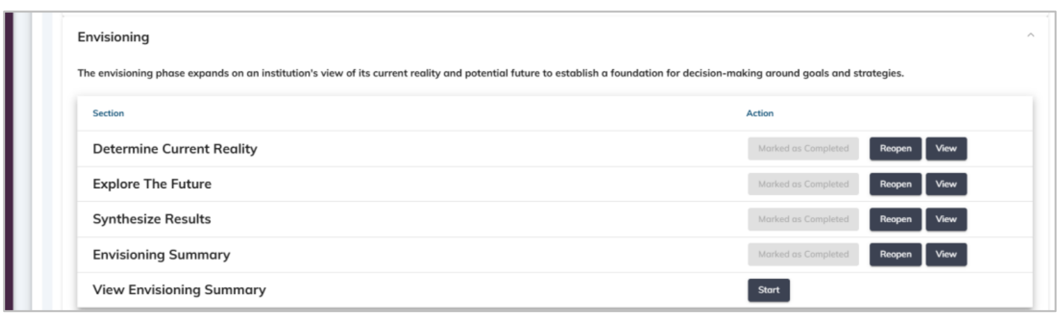
a. For every section (**Current Realit**y, **Exploring the Future**, and **Strategic Themes**), review the information that was entered and make any edits, if necessary.

b. When the section is complete, click the **Mark Section Complete** button. This updates the section to show it Marked as Completed and returns you to the plan.



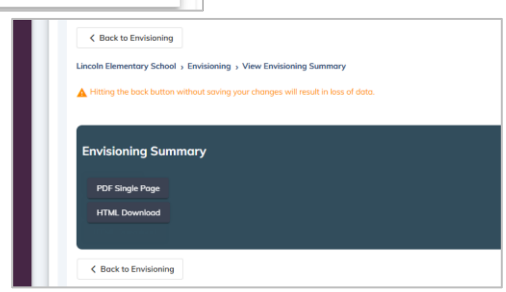
View Envisioning Summary

5. From the plan, click the **Start** button to the far right of **View Envisioning Summary**.

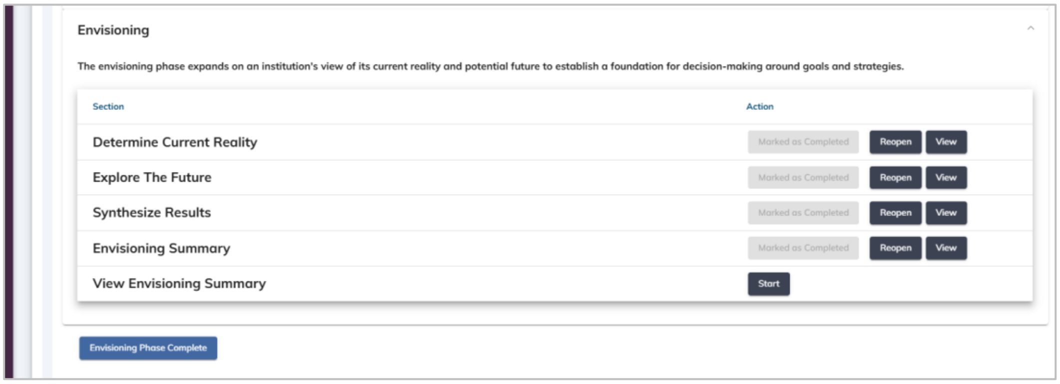


a. Click each output you want to download – **Single PDF Page** or **HTML Download**.

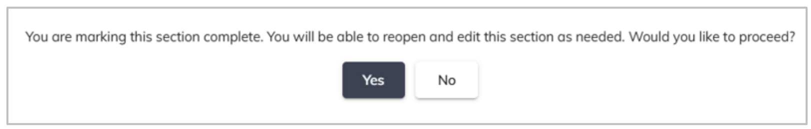
b. When you are done, click the **Back to Envisioning** button.



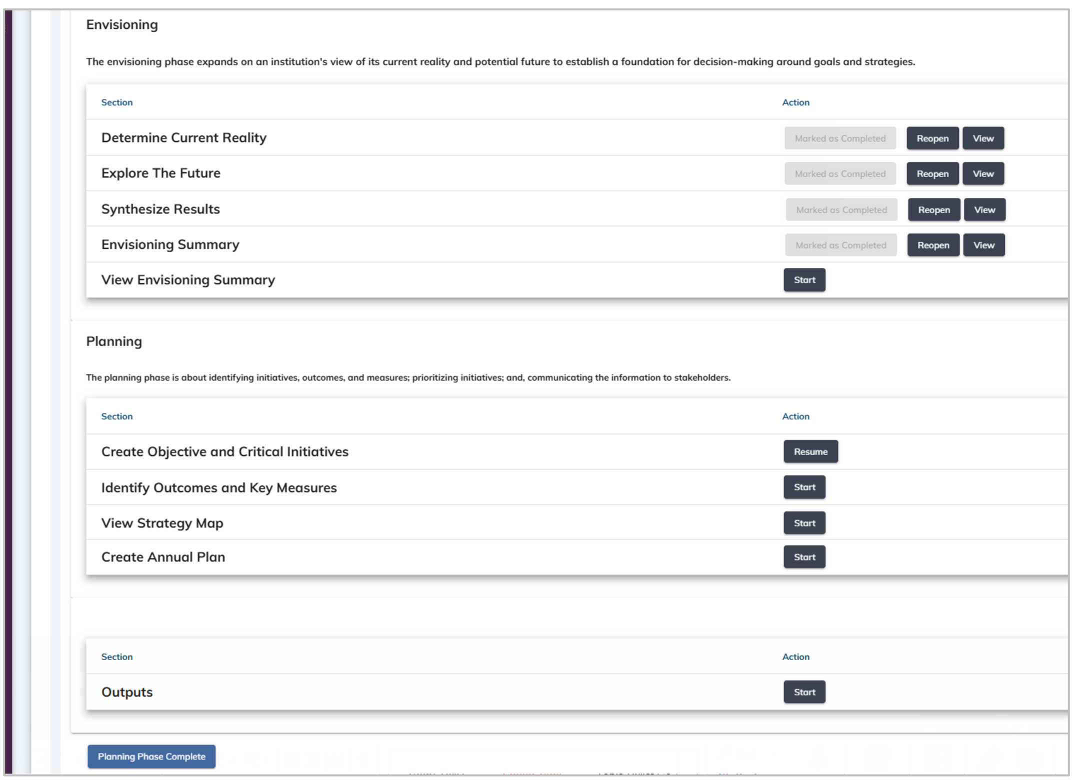
6. After the sections are complete, click the **Envisioning Phase Complete** button from the plan. This opens a confirmation box.



7. Click the **Yes** button to confirm. This makes the next phase available in the plan. (Edits can still be made.)



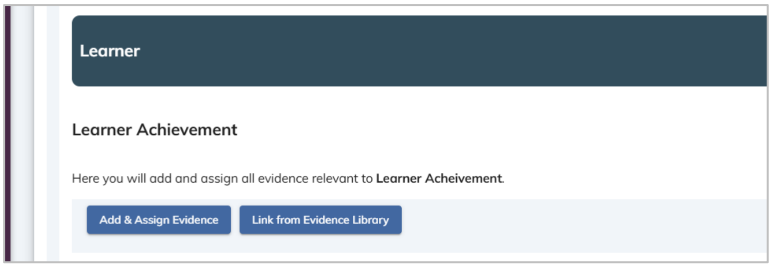
Note: Marking the Envisioning section completed makes the **Outputs** section available at the bottom of the plan. The Outputs section contains the PDFs that are available to be downloaded. Click the **Start** button to the far right of **Outputs** to generate and download a PDF.



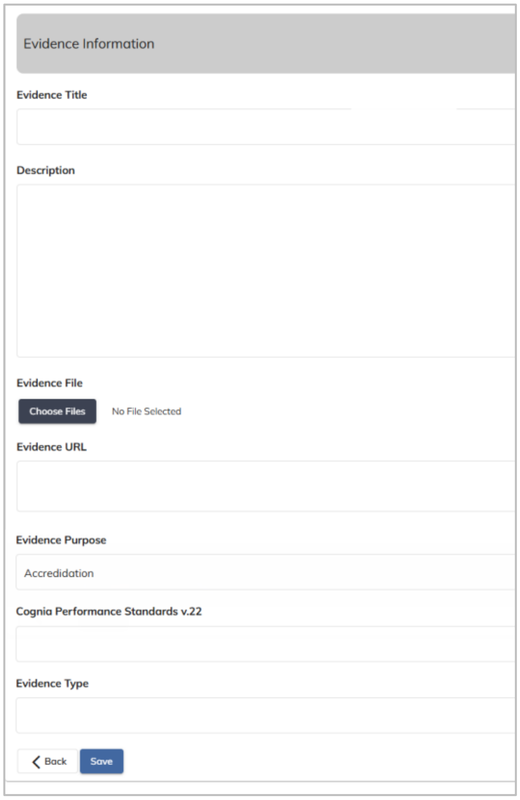
Adding New Evidence to an Item

Follow these steps to add new evidence to an item.

1. Under the item, click the **Add & Assign Evidence** button.



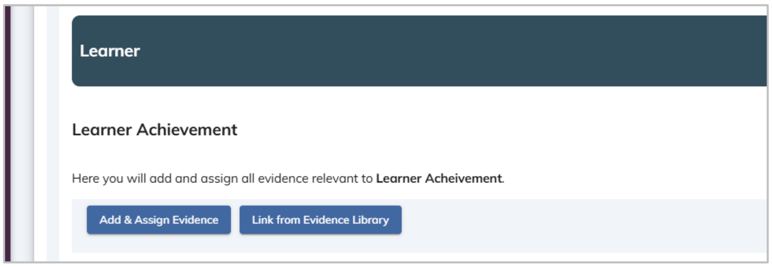
2. Enter an **Evidence Title**.
3. Enter a **Description** for the evidence record.
4. Selecting evidence:
   a. To add a file, click the **Choose Files** button and then select the file to add. (Only doc, excel, and PDF file types are allowed.)
   b. To add a URL, enter the URL in the **Evidence URL** field.
   c. Select one or more options from the **Evidence Purpose** drop-down. If you selected **Accreditation** or **Certification**:
   d. Select one or more options from the **Cognia Performance Standards V.22** drop-down.
   e. Select one or more options from the **Evidence Type** drop-down.
5. When you are done, click the **Save** button. This adds the evidence to the item and to the Evidence Library to be used in other areas of the platform.

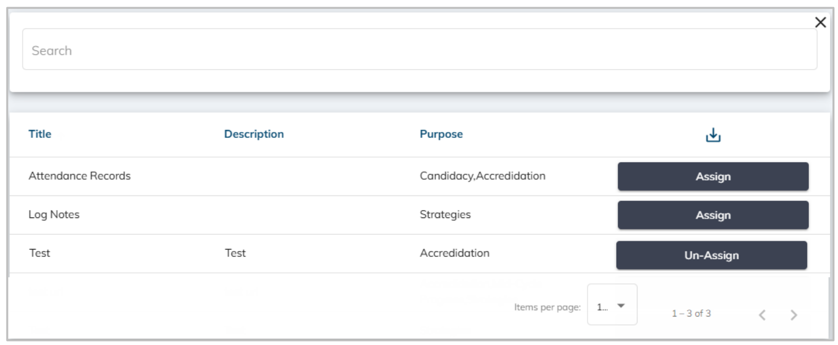


Adding Existing Evidence to an Item

Follow these steps to add existing evidence to an item in a plan.

1. Under the item, click the **Link from Evidence Library** button. This opens the list of evidence records that are available in the Evidence Library.





2. Find the evidence record you want to add. **Tip:** You can search the list, sort the list by clicking on a column header, export the list to Excel by clicking the Export icon, and navigate using the Items per page drop-down and page arrows.
3. Click the **Assign** button to the far right to add it to the item. (Click the **Un-Assign** button to remove any evidence assigned and no longer needed.)
4. When you are done, click the **X** button at the upper right of the list. This returns you to the item.

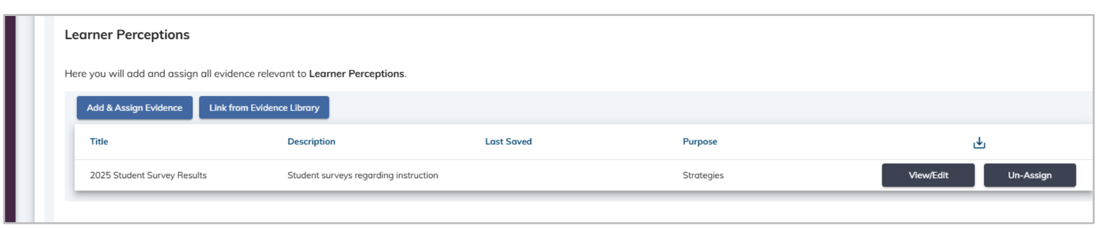
Removing Evidence from an Item

Removing evidence from an item in a plan does not remove the evidence from the Evidence Library or any other plans to which it is assigned.

Follow these steps to remove evidence from an item in a plan.

Note before proceeding: You will not be asked to confirm this action.

1. Under the item, find the evidence record you want to remove.
2. Click the **Un-Assign** button to the far right. This removes the evidence from the item.

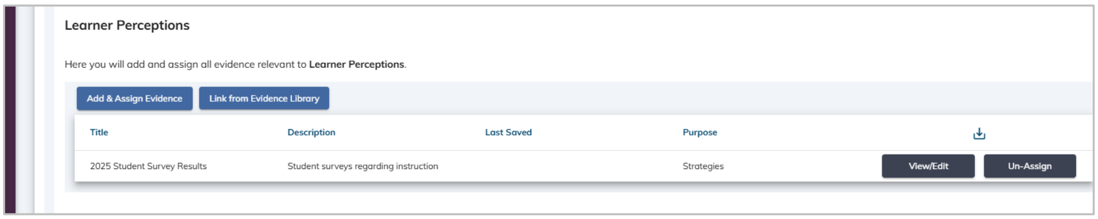


Viewing or Editing Evidence in an Item

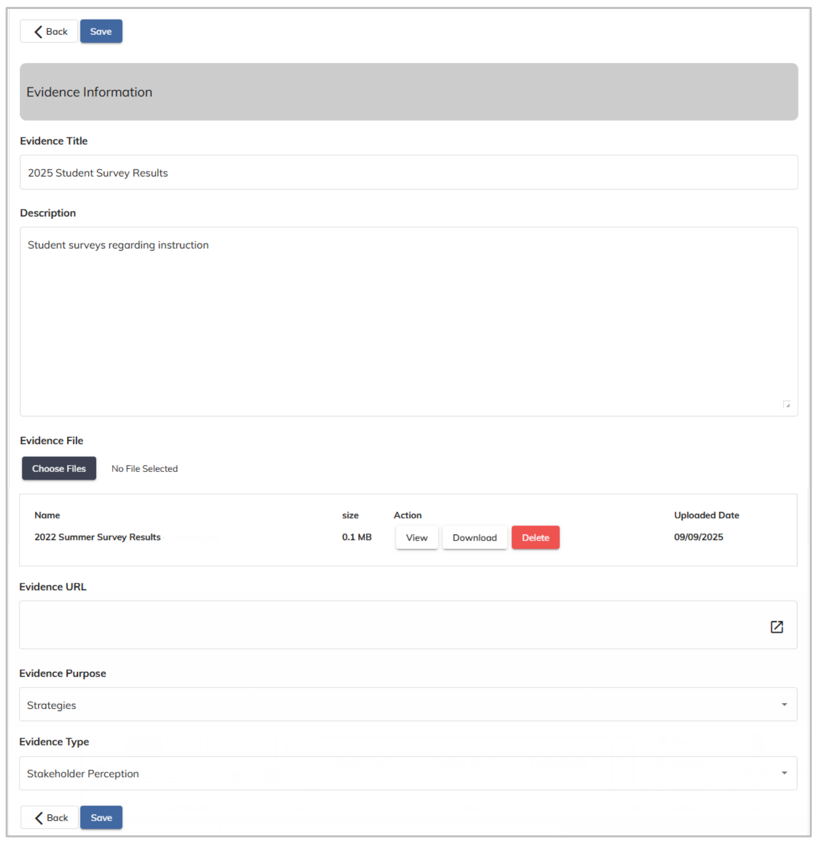
When evidence from an item is edited, it is automatically updated in the Evidence Library and in any other plans to which it is assigned.

Follow these steps to view or edit the evidence assigned to an item in a plan.

1. Under the item, find the evidence record you want to view or edit.
2. Click the **View/Edit** button to the far right. This opens the evidence record.



3. View or make any changes to the evidence record.
4. When you are done, click the **Save** button. This updates the evidence in the item and in the Evidence Library and returns you to the item. (Click the **Back** button to return without saving any changes.)



Planning Phase

Important: The Planning phase is not available until the Envisioning phase is marked complete.

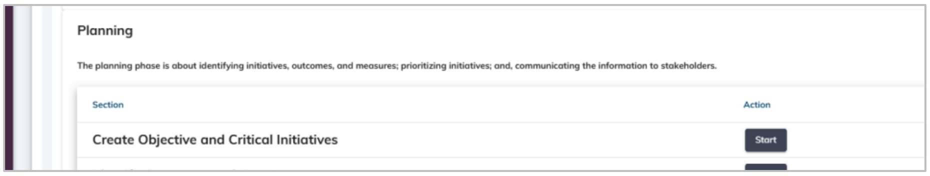
The Planning Phase contains four sections that must be completed.

- **Create Objective and Critical Initiatives**
- **Identify Outcomes and Key Measures**
- **View Strategy Map**
- **Create Annual Plan**

Follow these steps to complete the Planning phase.

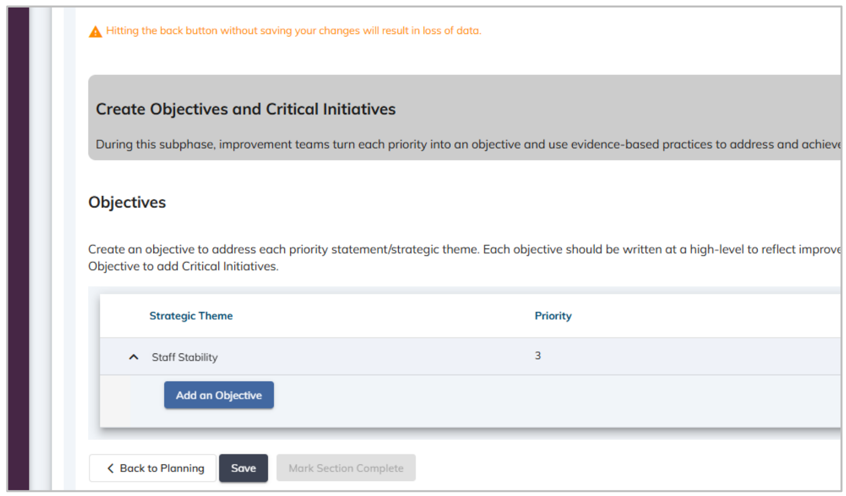
Create Objective and Critical Initiatives

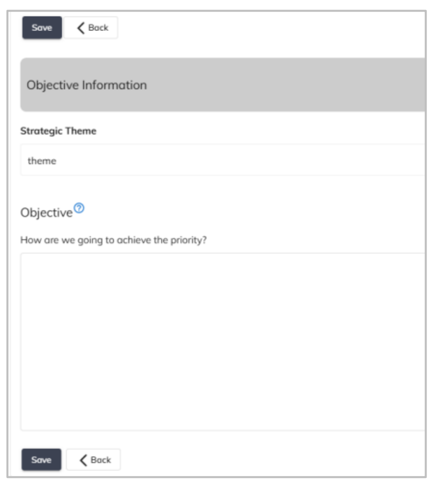
1. From the plan, click the **Start** button to the far right of **Create Objective and Critical Initiatives**.



You must add an objective and critical initiative to each strategic theme in the plan.

a. Click the theme to expand it.
b. Click the **Add an Objective** button.
c. Enter an **Objective**.
d. Click the **Save** button. This adds the objective to the theme and makes the option to add critical initiatives available.





e. Click the objective to expand it.

f. Click the **Add Critical Initiative** button.

g. Enter a **Critical Initiative**.

h. Select a **Critical Initiative Priority** number from the drop-down.

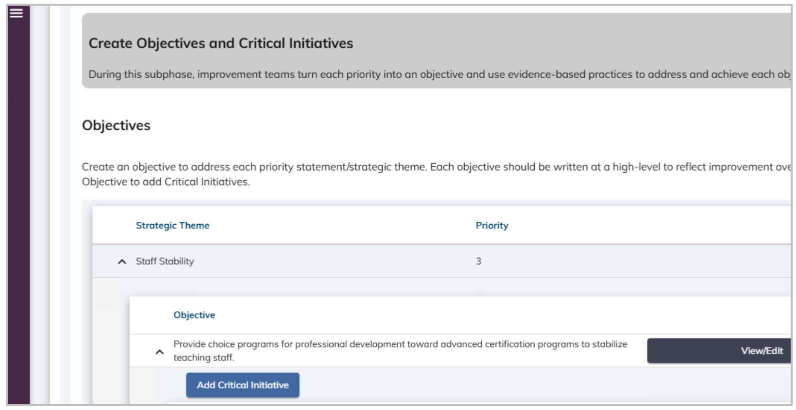
i. Click the **Start Date** and **End Date** calendars to select a window.

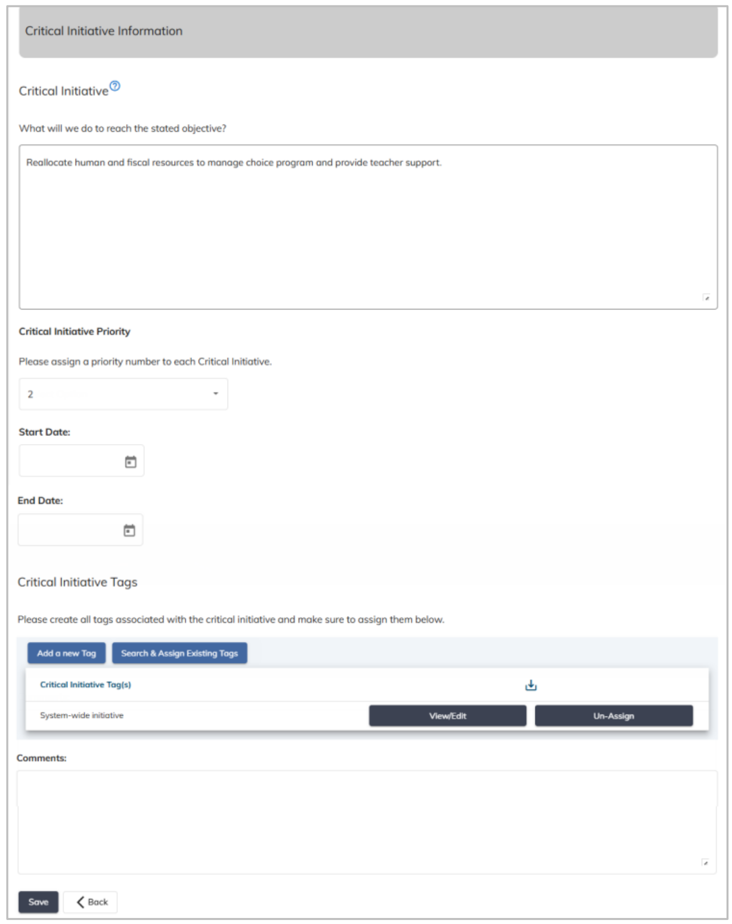
j. Assign **Tags** by adding a new tag or by selecting from the existing tags.

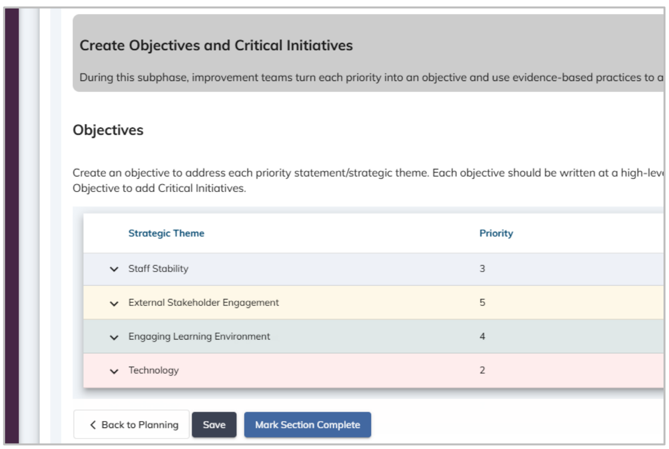
k. (Optional) Enter any final **Comments**.

l. When you are done, click the **Save** button.

m. When the section is complete, click the **Mark Section Complete** button. This updates the section to show it Marked as Completed and returns you to the plan.

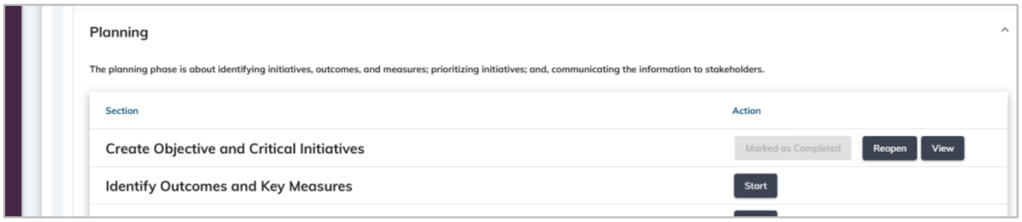






Identify Outcomes and Key Measures

2. From the plan, click the **Start** button to the far right of **Identify Outcomes and Key Measures**.



You must add intended outcomes and key measures to every critical initiative for each strategic theme in the plan.

a. Click the theme to expand it.

b. Click the critical initiative to expand it.

c. Click the **Add Intended Outcome** button.

d. Enter an **Intended Outcome** for the initiative.

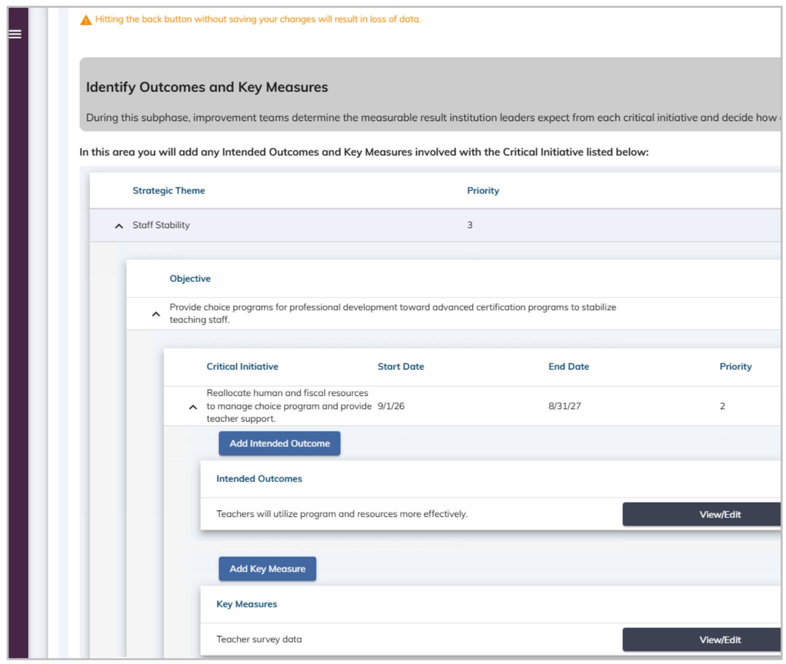
e. Click the **Save** button. This adds the intended outcome to the strategic theme.

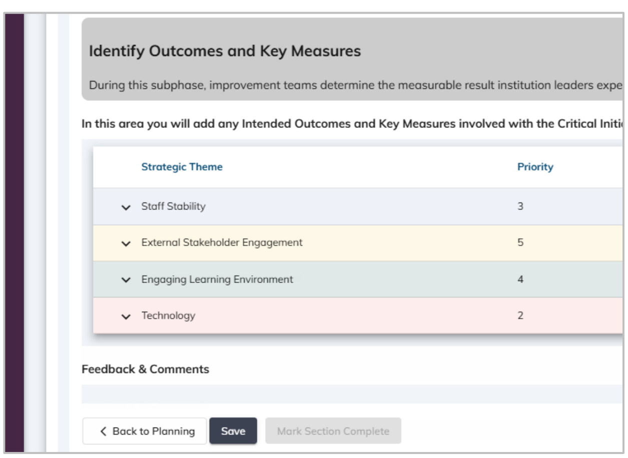
f. Click the **Add Key Measure** button.

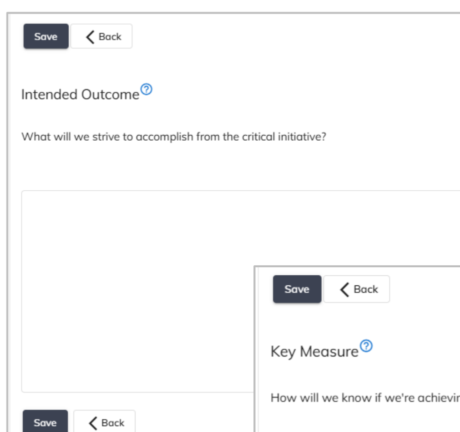
g. Enter a **Key Measure** for the intended outcome.

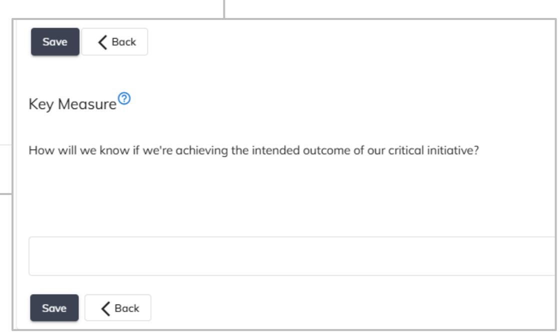
h. Click the **Save** button. This adds the key measure to the strategic theme.

i. When you are done, click the **Save** button. This updates the section and returns you to the plan. **Note:** For this section, the **Mark Section Complete** button is not currently required.







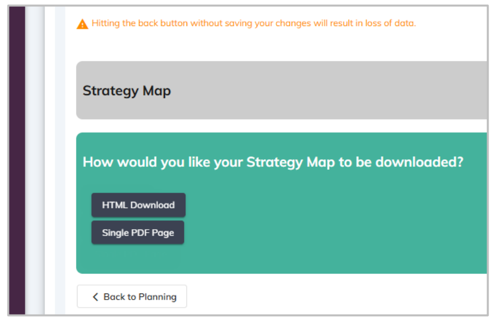


View Strategy Map

3. From the plan, click the **Start** button to the far right of **View Strategy Map**.

a. Click each output you want to download – **HTML Download** or **Single PDF Page**.

b. When you are done, click the **Back to Planning** button.



Create Annual Plan

4. From the plan, click the **Start** button to the far right of **Create Annual Plan**.

For each critical initiative, review the dates and make any necessary edits.

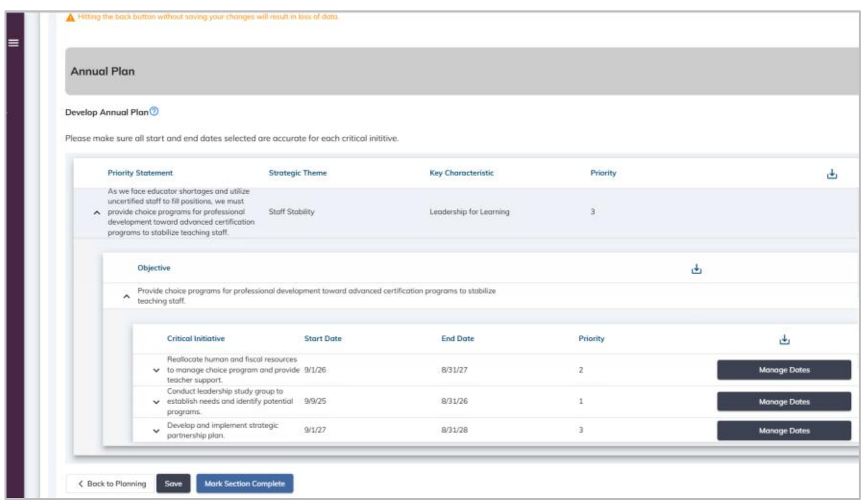
a. Click the theme to expand it.

b. Click the objective to expand it.

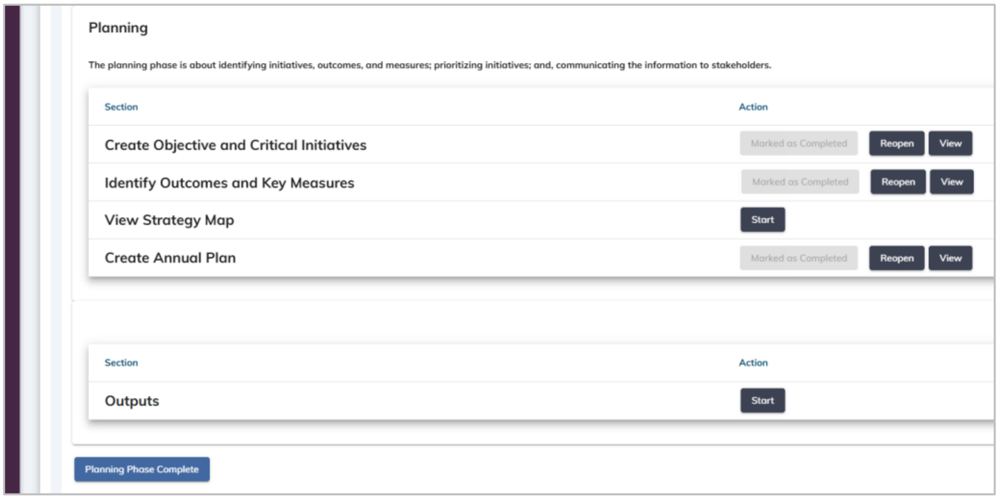
c. Find the critical initiative to expand it.

d. Click the **Manage Dates** button to the far right. This opens the initiative in edit mode. Make any necessary edits and click the **Save** button.

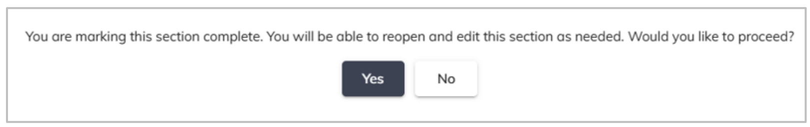
e. When you are done, click the **Mark Section Complete** button. This updates the section to show it Marked as Completed and returns you to the plan.



5. After the sections of the Planning phase are complete, click the **Planning Phase Complete** button. This opens a confirmation box.



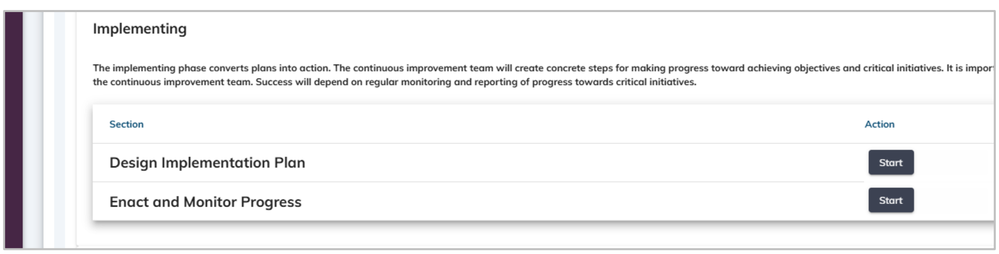
a. Click the **Yes** button to confirm. This makes the next phase available in the plan. (Edits can still be made.)



Implementing Phase

The Implementing phase contains two sections that must be completed.

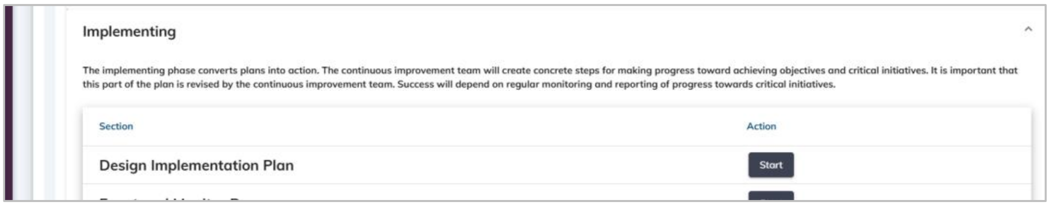
- **Design Implementation Plan**
- **Enact and Monitor Progress**



Follow these steps to complete the Implementing phase.

Design Implementation Plan

1. From the plan, click the **Start** button to the far right of **Design Implementation Plan**.



For each critical initiative, you must add any activities involved in the plan.

a. Click the theme to expand it.

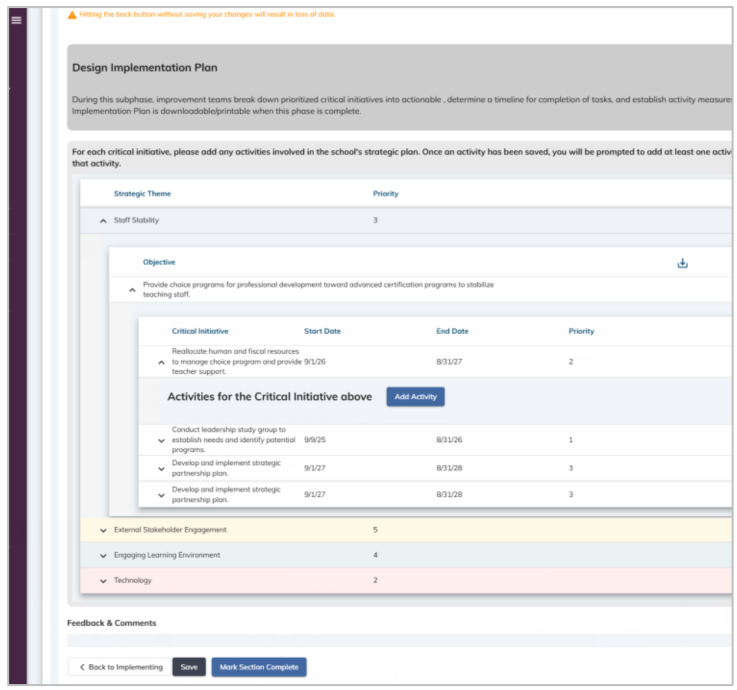
b. Click the objective to expand it.

c. Click the critical initiative to expand it.

d. Click the **Add Activity** button.

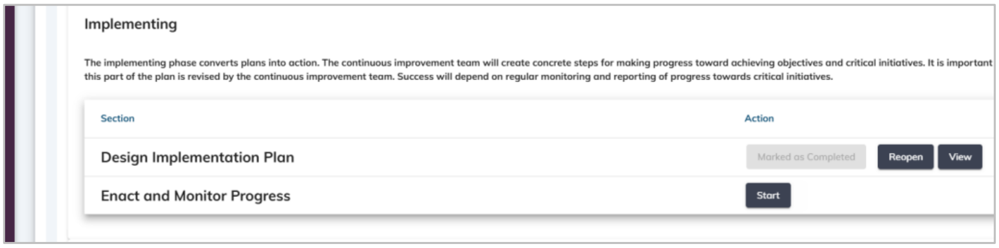
e. Complete the activity information fields and click the **Save** button.

f. When you are done, click the **Mark Section Complete** button. This updates the section to show Marked as Completed and returns you to the plan.



Enact and Monitor Progress

2. From the plan, click the **Start** button to the far right of **Enact and Monitor Progress**.



For each Critical Initiative, add tracking statuses as you continue to make progress.

a. Click the **Add Tracking Status** button.

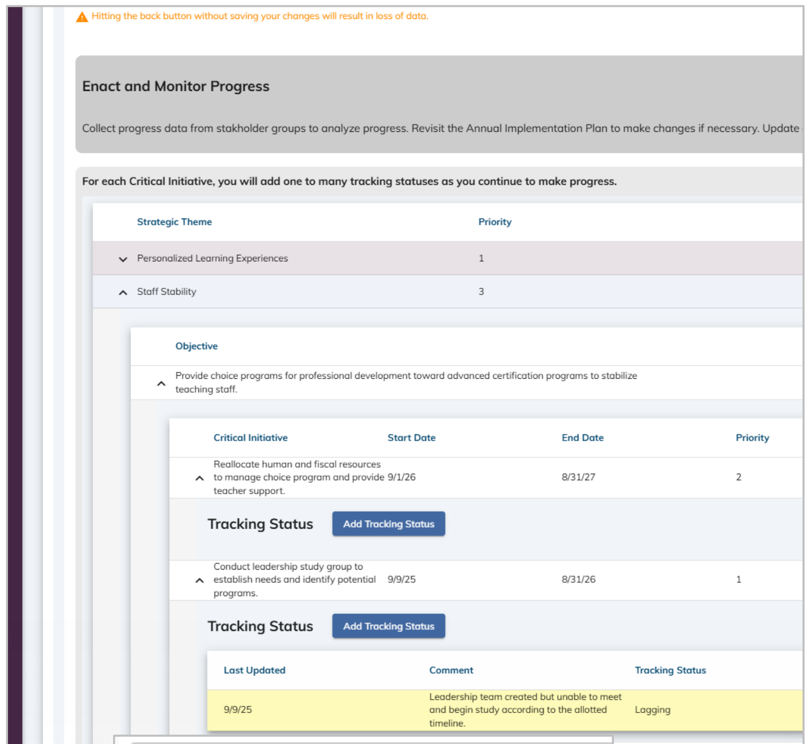
b. Select a status from the **Set Tracking Status** drop-down.

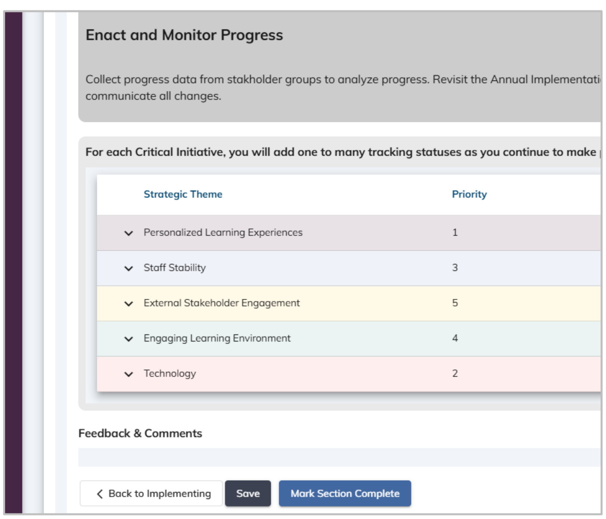
c. Enter a **Comment**.

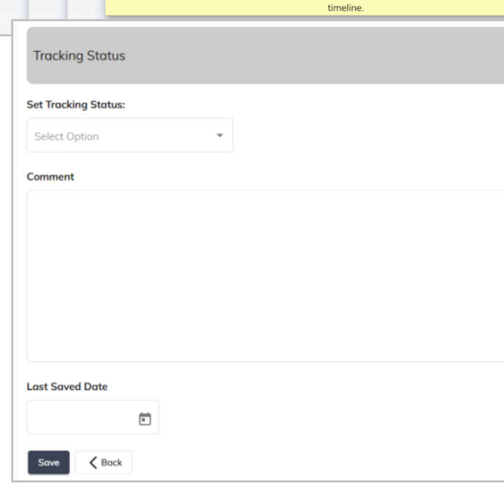
d. Click the **Last Saved Date** calendar to select the date the status notes were entered.

e. Click the **Save** button. This adds the status to the critical initiative.

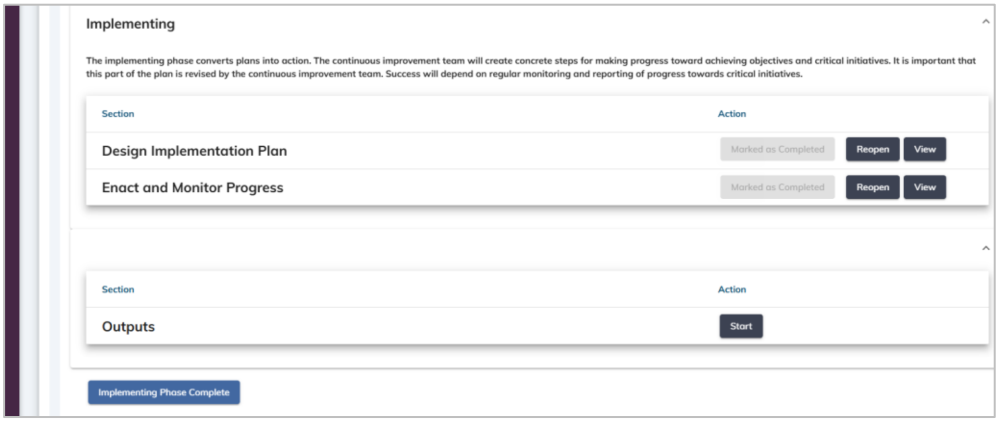
f. When you are done, click the **Mark Section Complete** button. This updates the section to show Marked as Completed and returns you to the plan.



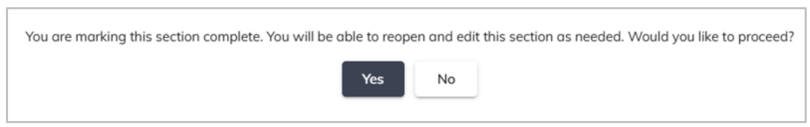




3. After the sections of the Implementing phase are complete, click the **Implementing Phase Complete** button. This opens a confirmation box.



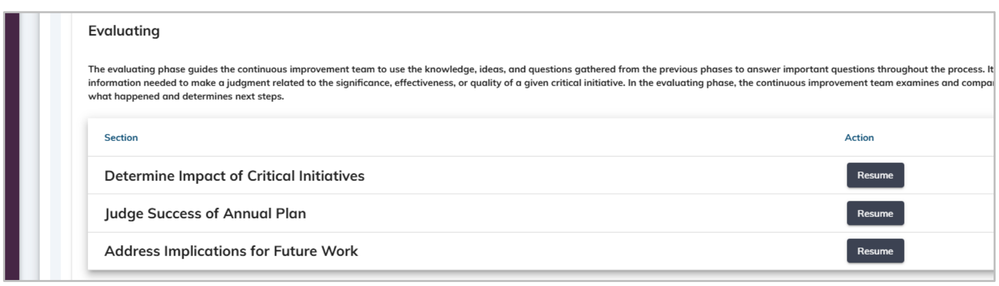
4. Click the **Yes** button to confirm. This makes the next phase available in the plan. (Edits can still be made.)



Evaluating Phase

The Evaluating phase contains three sections that must be completed.

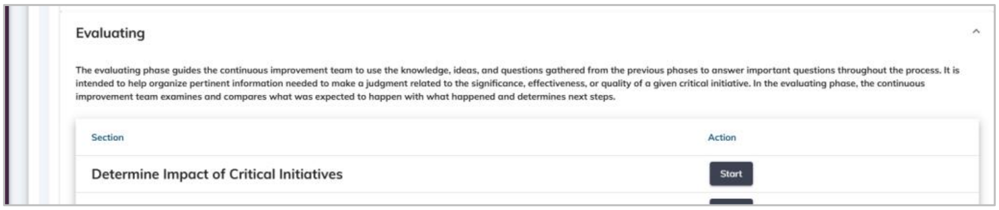
- **Determine Impact of Critical Initiatives**
- **Judge Success of Annual Plan**
- **Address Implications for Future Work**



Follow these steps to complete the Evaluating phase.

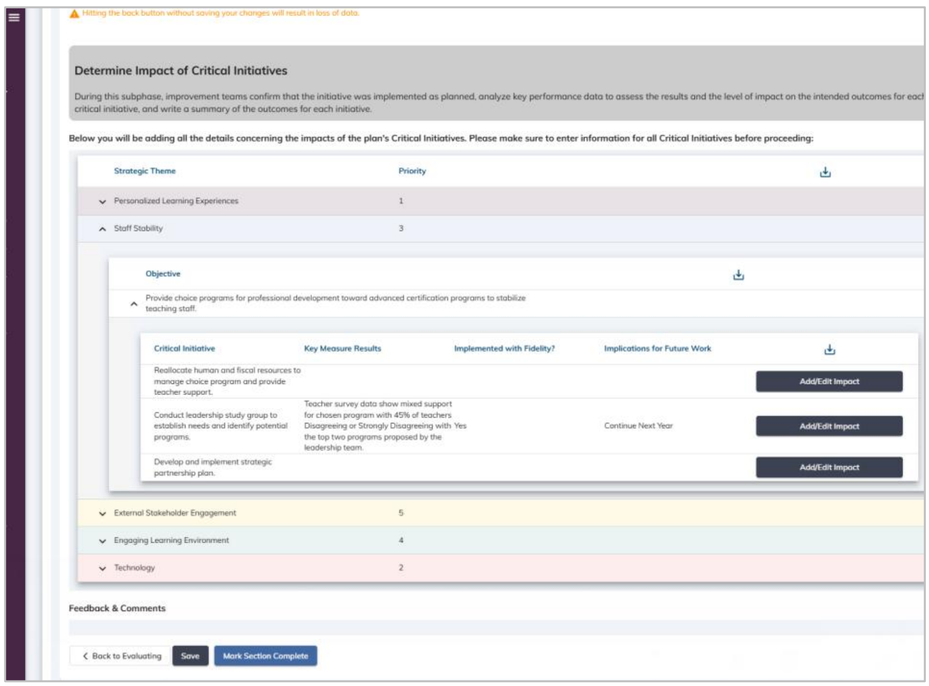
Determine Impact of Critical Initiatives

1. From the plan, click the **Start** button to the far right of **Determine Impact of Critical Initiatives**.



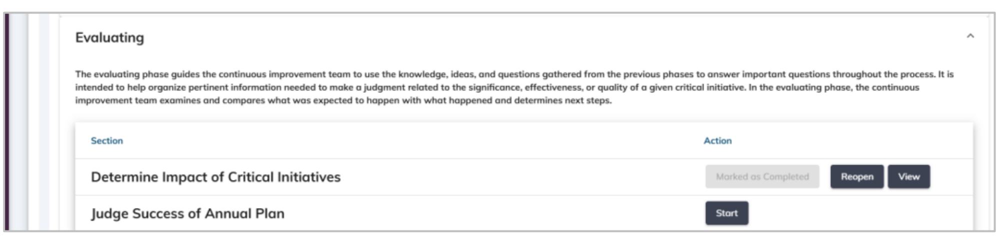
For each critical initiative, review the data and make any necessary edits to the dates.

a. Click the theme to expand it
b. Click the objective to expand it.
c. Find the initiative and click the **Add/Edit Impact** button to the far right. This opens the initiative in edit mode. Make any necessary edits.
d. When you are done, click the **Mark Section Complete** button. This updates the section to show Marked as Completed and returns you to the plan.



Judge Success of Annual Plan

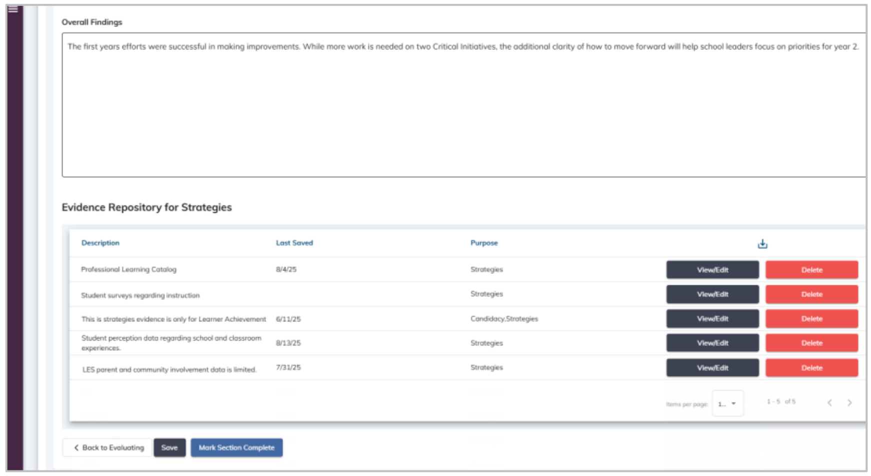
2. From the plan, click the **Start** button to the far right of **Judge Success of Annual Plan**.



a. Enter a response in each of the item fields.

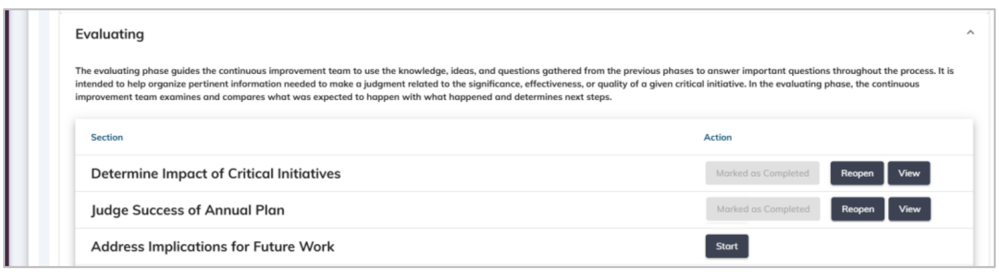
b. Review your **Evidence Repository** and make any necessary updates by editing or deleting the evidence from the item.

c. When you are done, click the **Mark Section Complete** button. This updates the section to show Marked as Completed and returns you to the plan. (If you missed any required field, the field will be highlighted with a red border.)



Address Implications for Future Work

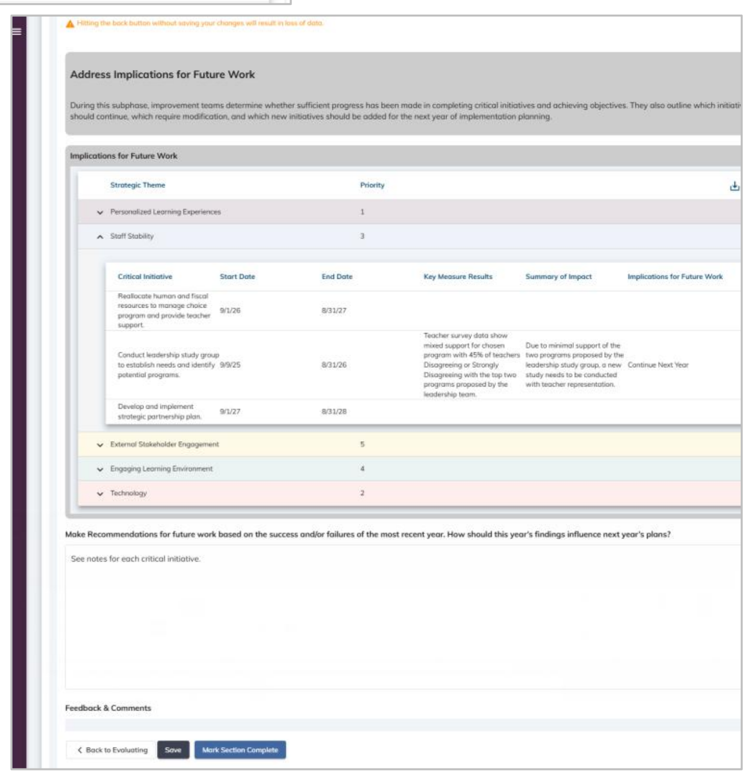
3. From the plan, click the **Start** button to the far right of **Address Implications for Future Work**.



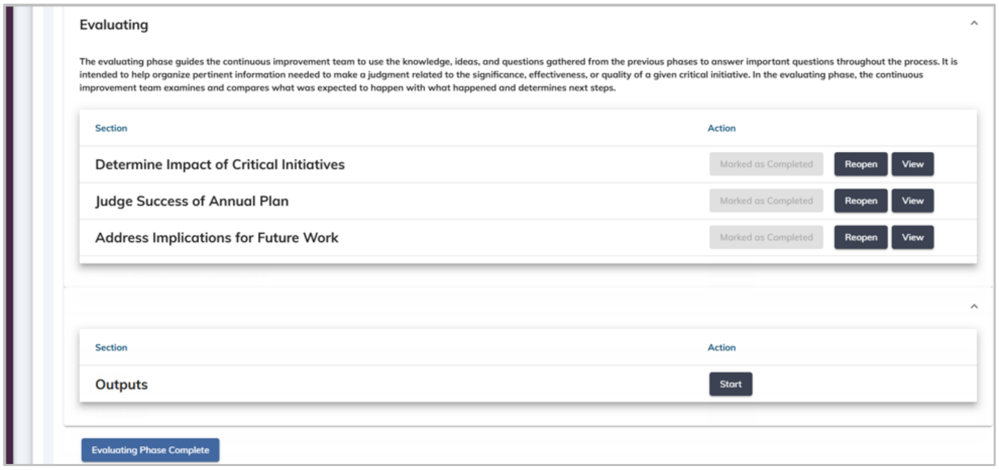
a. For each strategic theme, review the data by clicking the theme to expand it.

b. Enter any **Recommendations for future work**.

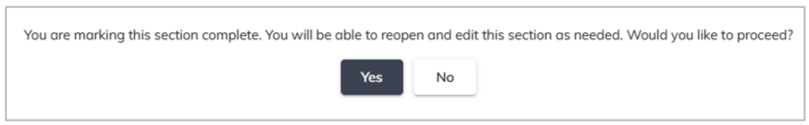
c. When you are done, click the **Mark Section Complete** button. This updates the section to show Marked as Completed and returns you to the plan.



4. After the sections of the Evaluating phase are complete, click the **Evaluating Phase Complete** button. This opens a confirmation box.



5. Click the **Yes** button to confirm. This makes the option to finalize the plan available.

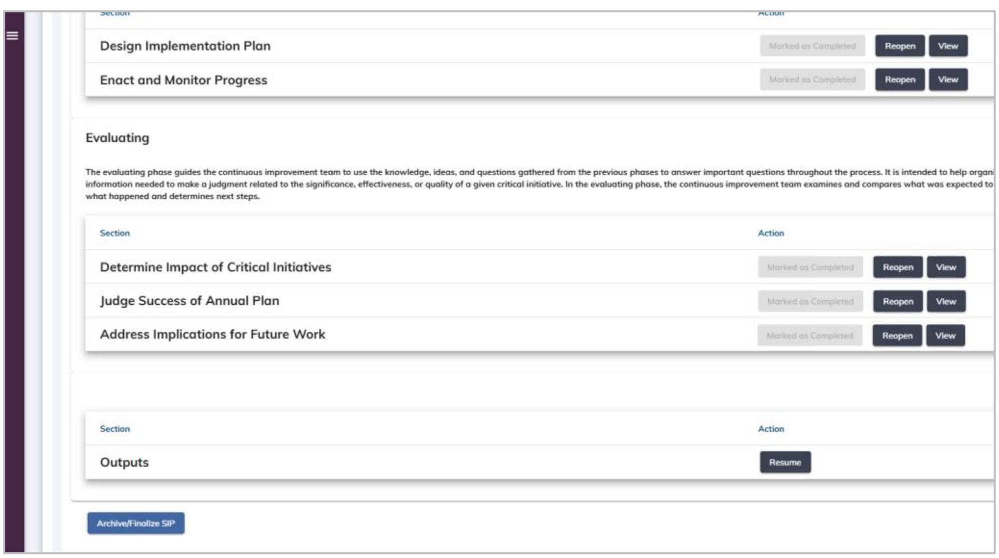


Finalizing

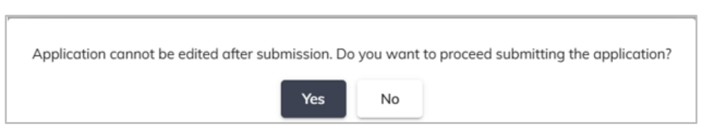
The school improvement plan can be finalized now or later. A plan should only be finalized once all phases and subphases are completed.

Follow these steps to finalize the plan now.

1. At the bottom of the plan, click the **Archive/Finalize SIP** button. This opens a confirmation box.



2. Click the **Yes** button to confirm. This updates the plan as final and moves it from the Current Plans page to the Archived Plans page.

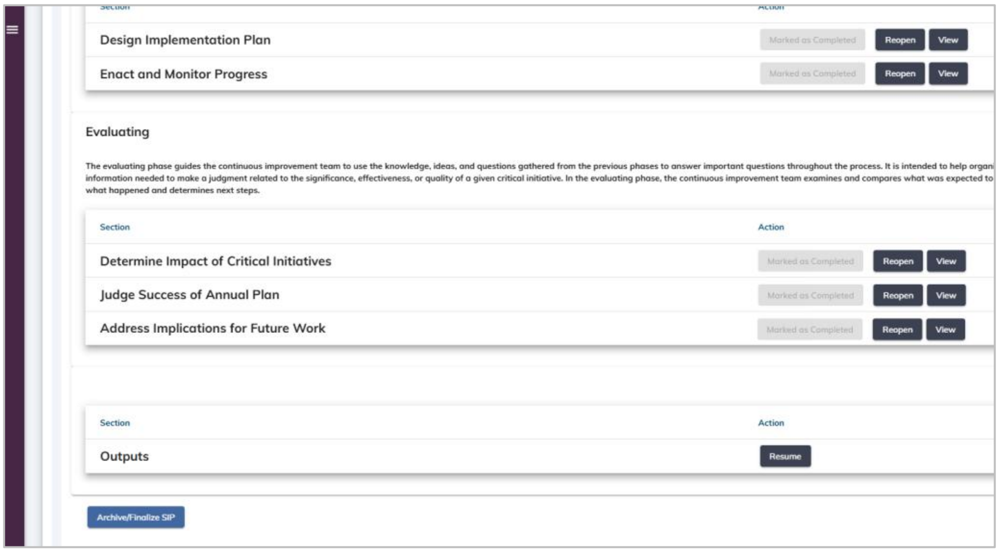


Finalizing a Plan

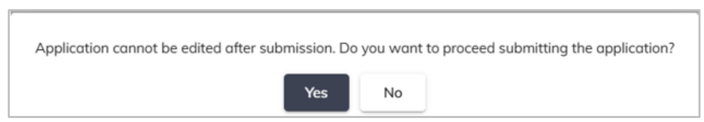
A school improvement plan should only be finalized once all phases and subphases in the plan are completed.

Follow these steps to finalize a completed plan.

1. At the bottom of the plan, click the **Archive/Finalize SIP** button. This opens a confirmation box.



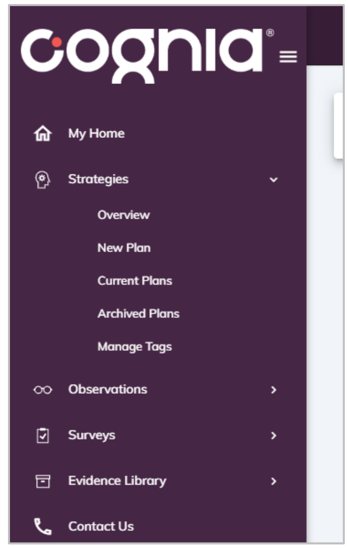
2. Click the **Yes** button to confirm. This updates the plan as final and moves it from the Current Plans page to the Archived Plans page.



Accessing Current Plans

The Current Plans page displays the School Improvement Plans created by users that are currently in progress.

Follow these steps to access the Current Plans page.

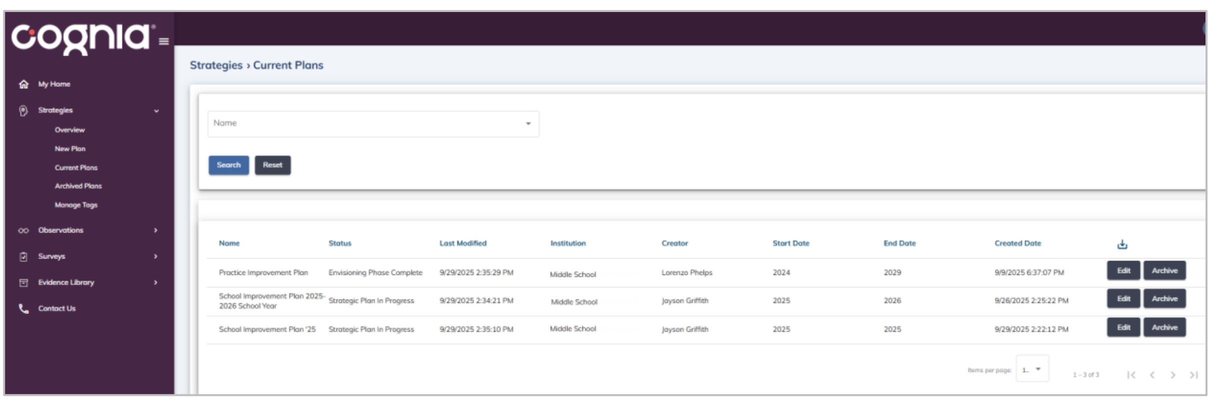


1. Select the **Strategies** menu from the left-side navigation, and then click **Current Plans**. This opens the Current Plans page (or if you have access to multiple institutions, first click the institution to open).

The Current Plans page displays a table with the plans currently in progress (not submitted). The following columns are displayed: **Name**, **Status**, date and time **Last Modified**, **Institution** (if you have access to multiple institutions, they are all included here), **Creator**, **Start Date**, **End Date**, and **Created Date**.

On the Current Plans page, you can:

- **Search** for a plan by name.
- Sort the table by clicking on the **column header**.
- Export the table to Excel by clicking the **Export** icon.
- Navigate the pages using the **Items per page** drop-down and page **arrows**.

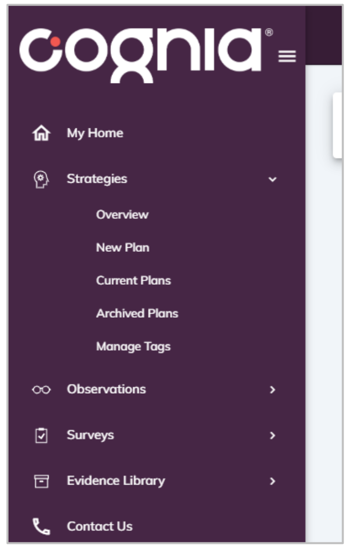


Accessing Archived Plans

The Archived Plans page displays the School Improvement Plans that have been finalized or archived by you or other users at the institution.

Follow these steps to access the Archived Plans page.

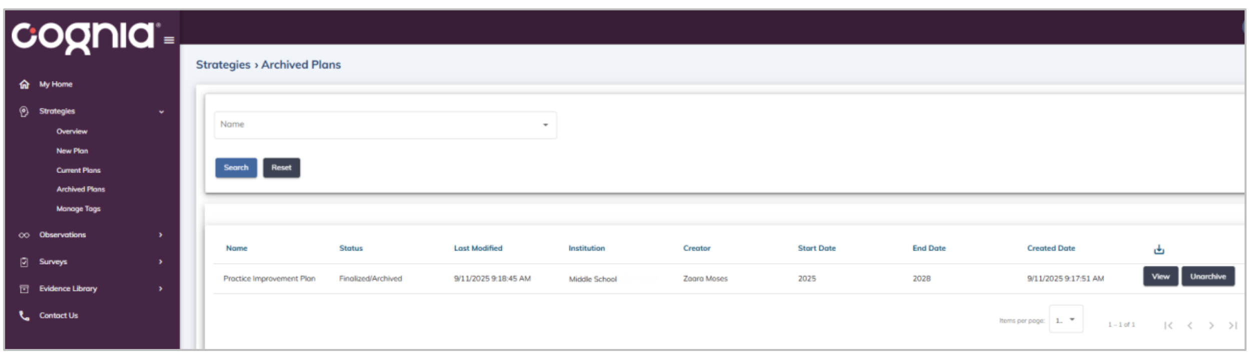
1. Select the **Strategies** menu from the left-side navigation, and then click **Archived Plans**. This opens the Archived Plans page (or if you have access to multiple institutions, first click the institution to open).



The Archived Plans page displays a table with the plans that are final or archived. The following columns are displayed: **Name**, **Status**, date and time **Last Modified**, **Institution** (if you have access to multiple institutions, they are all included here), **Creator**, **Start Date**, **End Date**, and **Created Date**.

On the Archived Plans page, you can:

- **Search** for a plan by name.
- Sort the table by clicking on the **column header**.
- Export the table to Excel by clicking the **Export** icon.
- View and unarchive plans.
- Navigate the pages using the **Items per page** drop-down and page **arrows**.



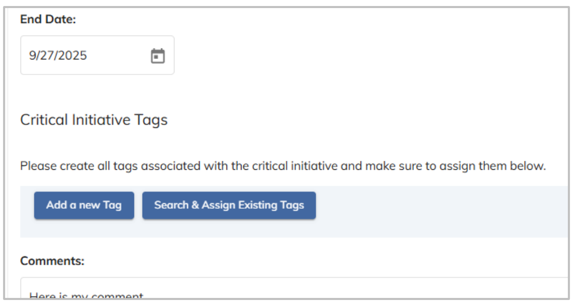
Tags

The Create Objective and Critical Initiatives section of the Planning phase asks for tags to be added. New tags can be created directly in the initiative or existing tags from the Tags list can be assigned. Tagging can be helpful when identifying groups of initiatives/evidence for specific purposes. For example, all initiatives with a tag of “Federal funds” would identify which initiatives are related to Federal funding.

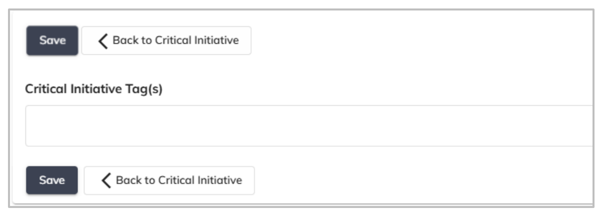
Adding New Tags to an Initiative

Follow these steps to add a new tag to a critical initiative in a plan.

1. Within the critical initiative in the plan, click the **Add a new Tag** button.



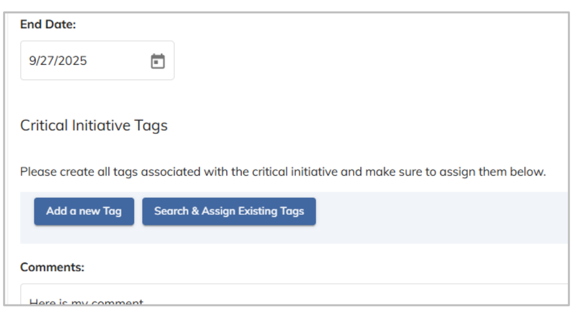
2. Enter a **Critical Initiative Tag(s)**.
3. Click the **Save** button. This adds the tag to the initiative and to the Tags list to be used in other areas of the platform.



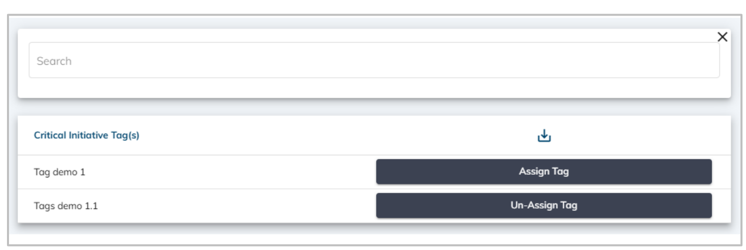
Adding Existing Tags to an Initiative

Follow these steps to add an existing tag to a critical initiative in a plan.

1. Within the critical initiative in the plan, click the **Search & Assign Existing Tags** button.



2. Find the tag you want to add. **Tip:** You can search the list, sort the list by clicking on a column header, and export the list to Excel by clicking the **Export** icon.
3. Click the **Assign Tag** button to the far right to add it to the initiative. (Click the **Un-Assign Tag** button to remove any tags assigned and no longer needed.)
4. When you are done, click the **X** button at the upper right of the list. This returns you to the initiative.

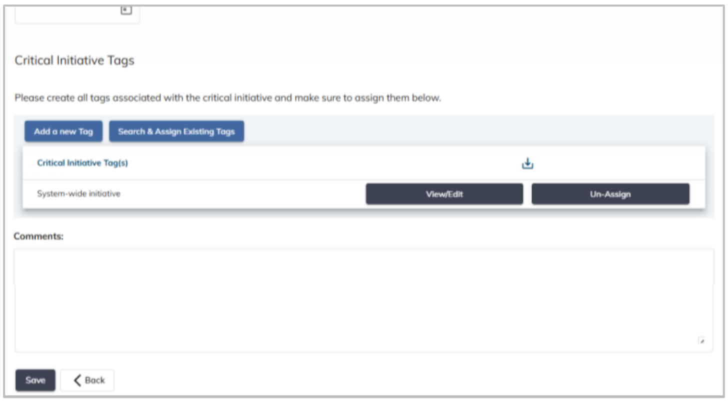


Viewing or Editing Tags in an Initiative

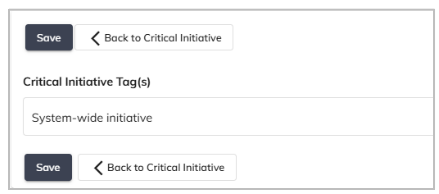
When a tag from a critical initiative is edited, it is automatically updated in the Tags list and in any other initiatives to which it is assigned.

Follow these steps to view or edit the tags assigned to a critical initiative in a plan.

1. In the critical initiative, find the tag you want to view or edit.
2. Click the **View/Edit** button to the far right. This opens the tag.



3. View or make any changes to the tag.
4. When you are done, click the **Save** button. This updates the tag in the initiative and in the Tags list and returns you to the initiative. (Click the **Back** button to return without saving any changes.)



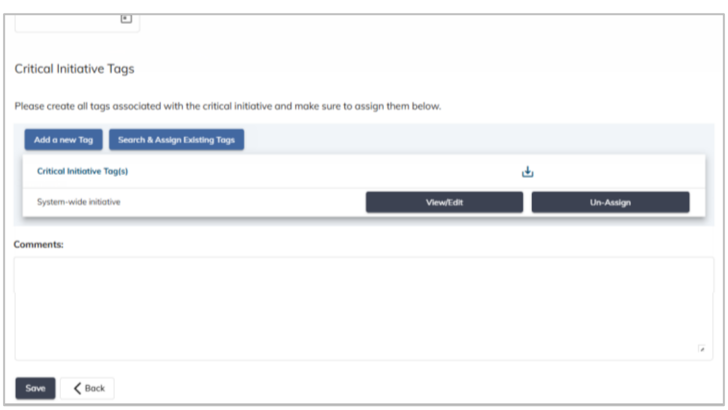
Removing a Tag from an Initiative

Removing a tag from a critical initiative in a plan does not remove the tag from the Tags list or any other critical initiative to which it is assigned.

Follow these steps to remove a tag from a critical initiative in a plan.

Note before proceeding: You will not be asked to confirm this action.

1. In the critical initiative, find the tag you want to remove.
2. Click the **Un-Assign** button to the far right. This removes the tag from the critical initiative.



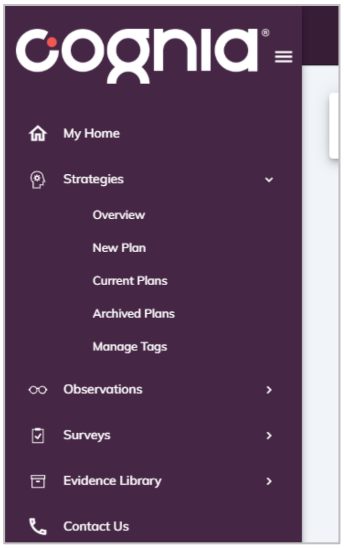
Tags Page

You can access and manage all tags created by users within your institution. Tagging can be helpful when identifying groups of initiatives/evidence for specific purposes. For example, all initiatives with a tag of "Federal funds" would identify which initiatives are related to federal funding.

Accessing Tags

Follow these steps to access tags.

1. Select the **Strategies** menu from the left-side navigation, and then click **Manage Tags**. This opens the Tags page (or if you have access to multiple institutions, first click the institution to open).

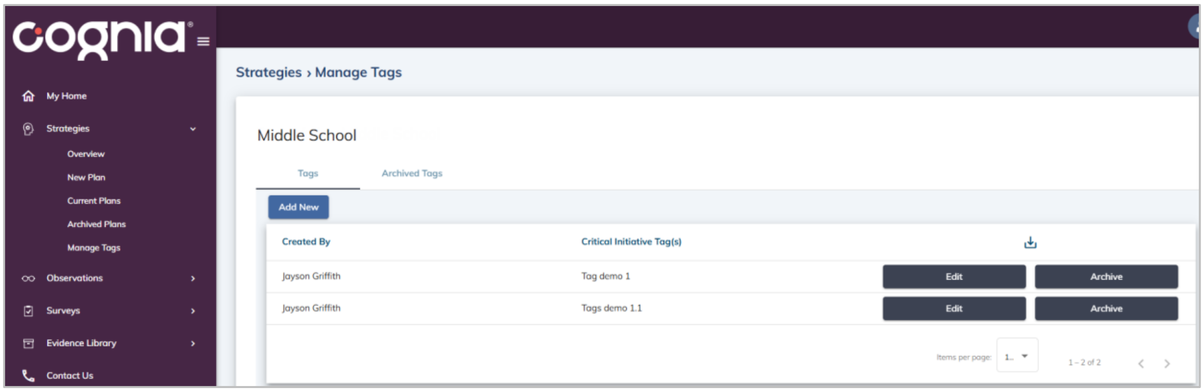


The Tags page displays a table with the tags that have been created, separated into two different tabs. The table includes the columns: **Created By** and **Critical Initiative Tag(s)**.

- **Tags:** The active tags.
- **Archived Tags:** The tags that have been archived.

On the Tags page, you can:

- Sort the table by clicking on a **column header**.
- Export the table to Excel by clicking the **Export** icon.
- Navigate the pages using the **Items per page** drop-down and page **arrows**.

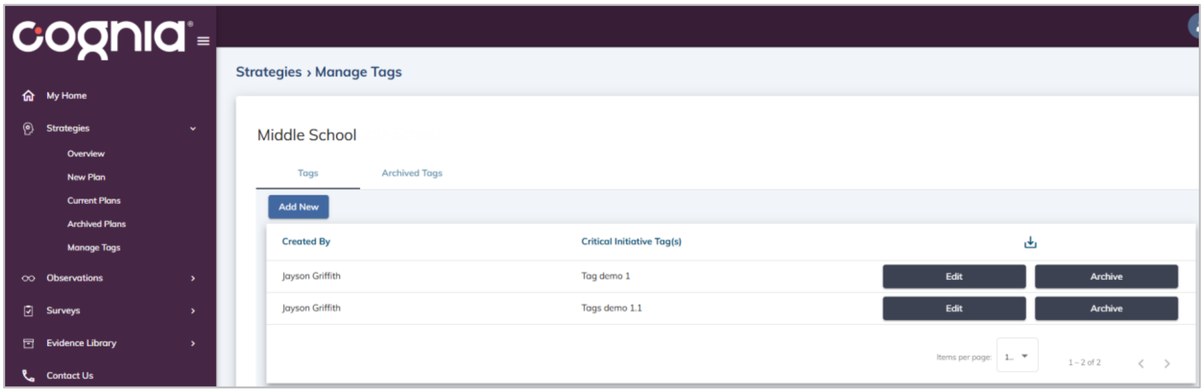


Creating a New Tag

New tags can be created from the Tags page. Tags created here are available for users in your institution to add to their plans.

Follow these steps to create a new tag from the Tags page.

1. From the **Manage Tags** page, under the active **Tags** tab, click the **Add New** button. This opens a new tag.



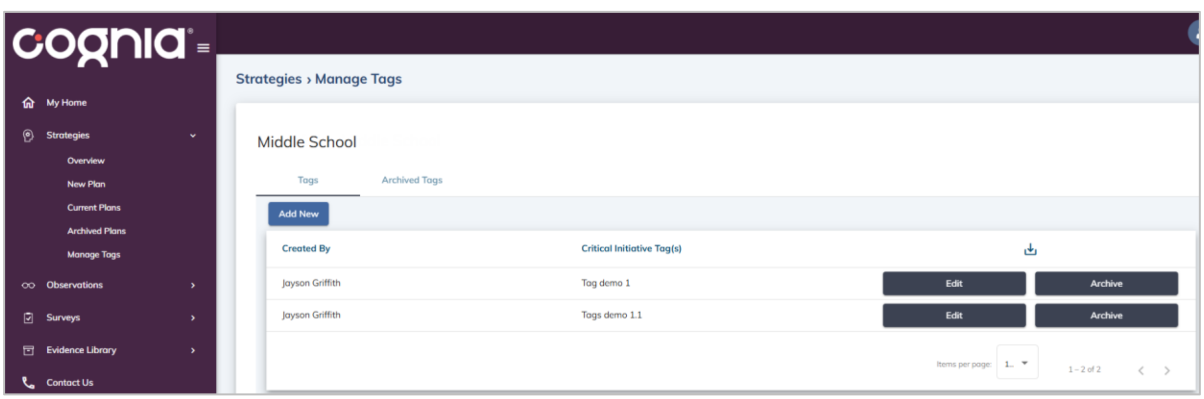
2. Enter a name for the **Critical Initiative Tag(s)**.
3. Click the **Save** button. This creates the tag and makes it available for use.

Editing a Tag

When a tag is edited, it is automatically updated in any plan to which it is assigned.

Follow these steps to edit a tag from the Tags page.

1. From the **Manage Tags** page, find the tag you want to edit.
2. Click the **Edit** button to the far right. This opens the tag.



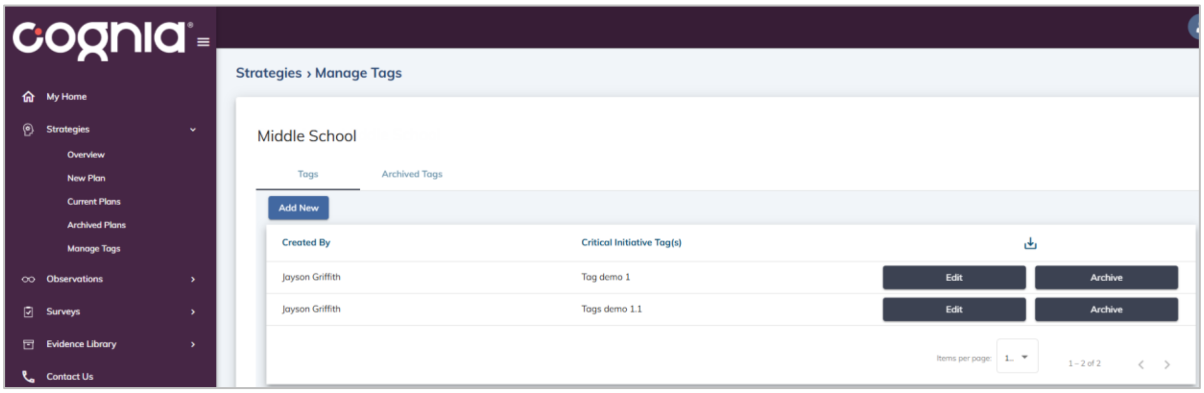
3. Make any edits to the name of the **Critical Initiative Tag(s)**.
4. Click the **Save** button. This updates the tag.

Archiving a Tag

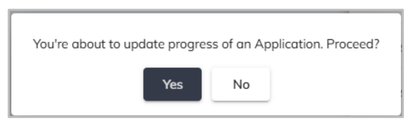
A tag should only be archived if it should no longer be used for plans. Archiving a tag removes it from the list of tags that can be used in a plan.

Follow these steps to archive a tag.

1. From the **Manage Tags** page, find the tag you want to archive.
2. Click the **Archive** button to the far right. This opens a confirmation box.



3. Click the **Yes** button to confirm. This updates the tag and moves it from the active Tags tab to the Archived Tags tab.

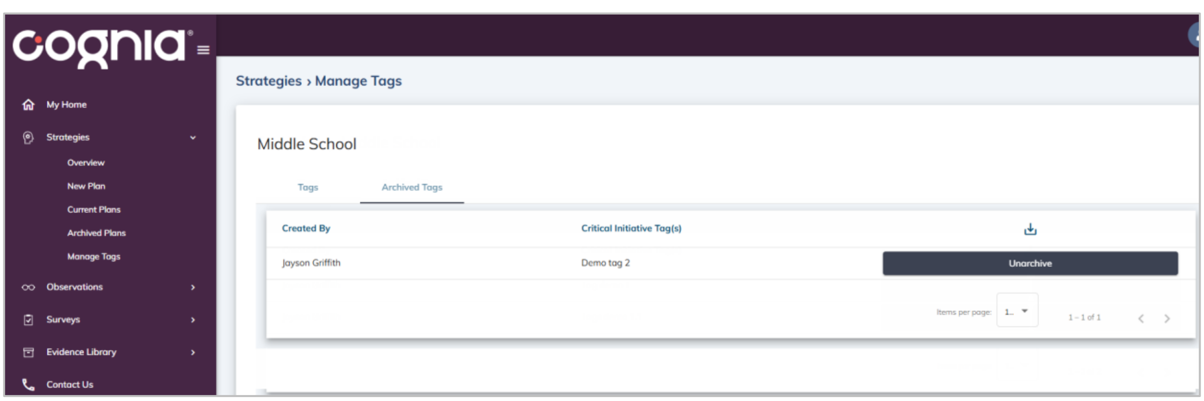


Unarchiving a Tag

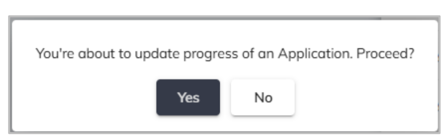
A tag can be unarchived if it should be added back to the list of tags that can be used in a plan.

Follow these steps to unarchive a tag.

1. From the **Manage Tags** page, click the tab **Archived Tabs**.
2. Find the tag you want to unarchive.
3. Click the **Unarchive** button to the far right. This opens a confirmation box.



4. Click the **Yes** button to confirm. This updates the tag and moves it from the Archived Tags tab to the active Tags tab.



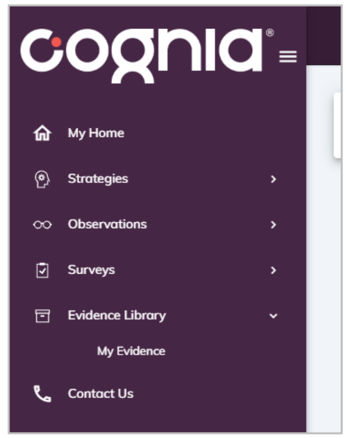
Evidence Library

The Evidence Library contains all evidence created by users within your institution.

Accessing the Evidence Library

Follow these steps to access the Evidence Library.

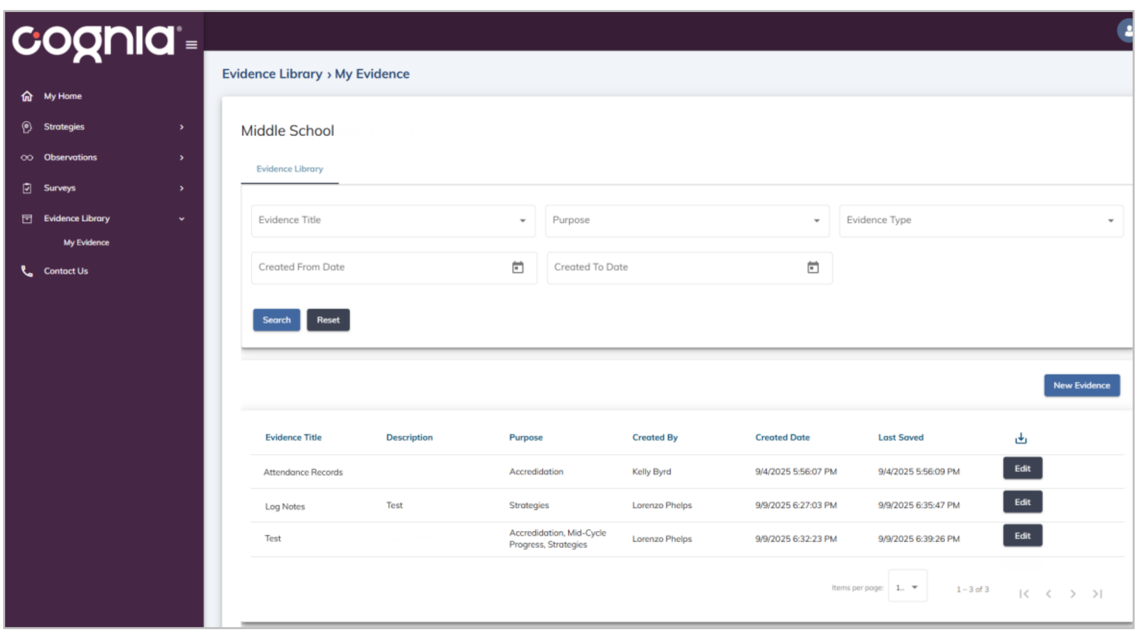
1. Select the **Evidence Library** menu from the left-side navigation, and then click **My Evidence**. This opens the Evidence records page (or if you have access to multiple institutions, first click the institution to open).



The Evidence records page displays a table with the evidence records that have been created by users within your institution. The following columns are displayed: **Evidence Title**, **Description**, **Purpose**, **Created By**, **Created Date**, and date and time **Last Saved**.

On the Evidence page, you can:

- **Search** the table using any of the criteria displayed.
- Sort the table by clicking on a **column header**.
- Export the table to Excel by clicking the **Export** icon.
- Navigate the pages using the **Items per page** drop-down and page **arrows**.

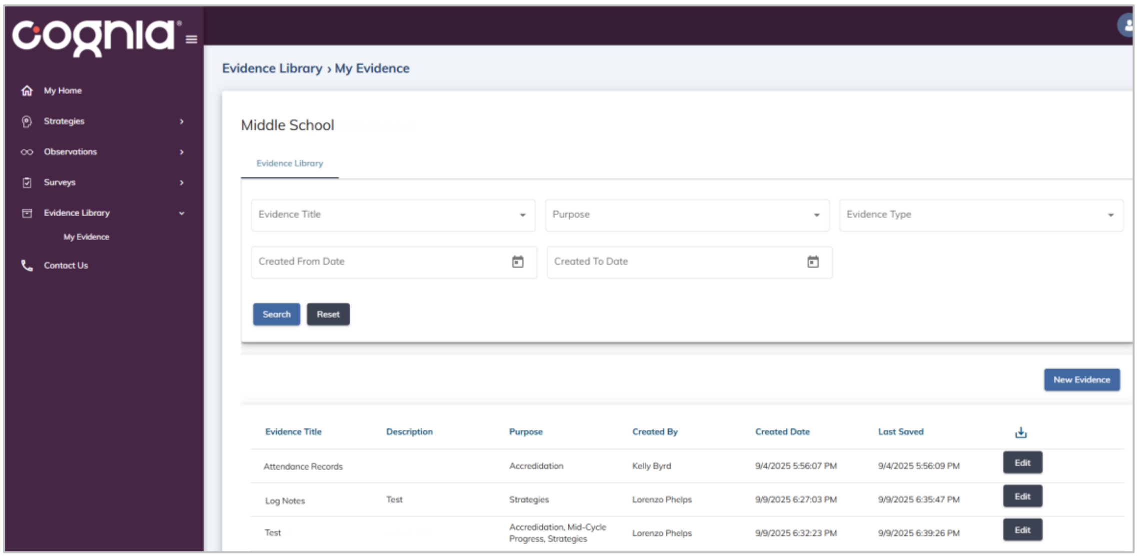


Viewing or Editing Evidence in the Library

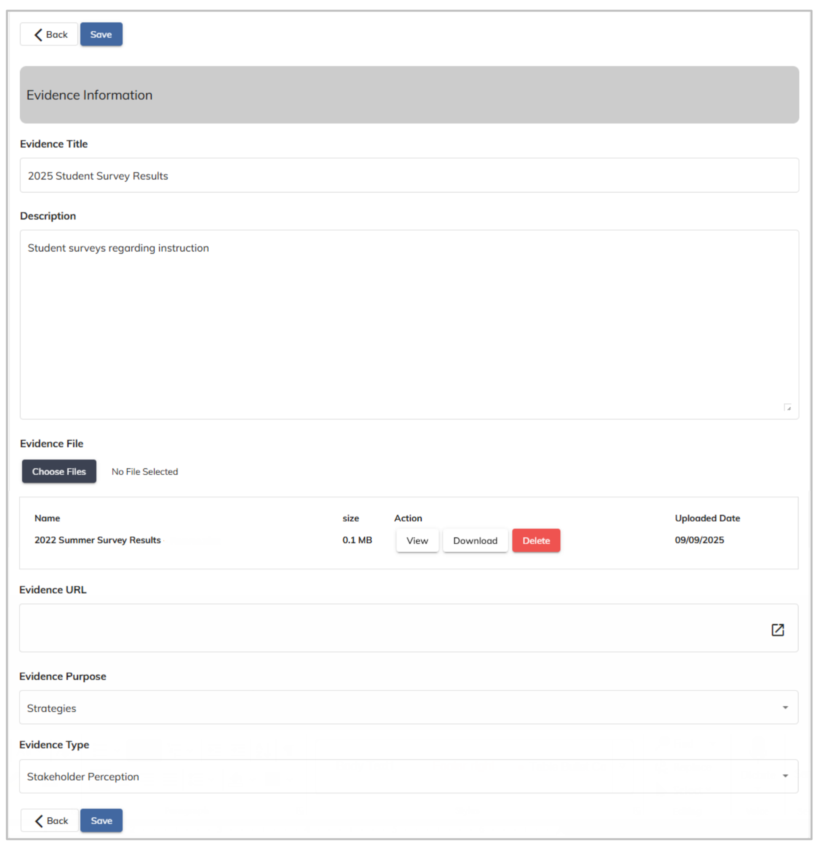
When evidence is edited in the library, it is automatically updated in any plan to which it is assigned.

Follow these steps to view or edit evidence from the Evidence Library.

1. From the **Evidence** records page, find the evidence record you want to view or edit.
2. Click the **View** button to the far right. This opens the evidence record.



3. View or make any changes to the evidence record information.
4. When you are done, click the **Save** button. This updates the evidence in the Evidence Library and in any plan to which it is assigned and returns you to the evidence page. (Click the **Back** button to return without saving any changes.)

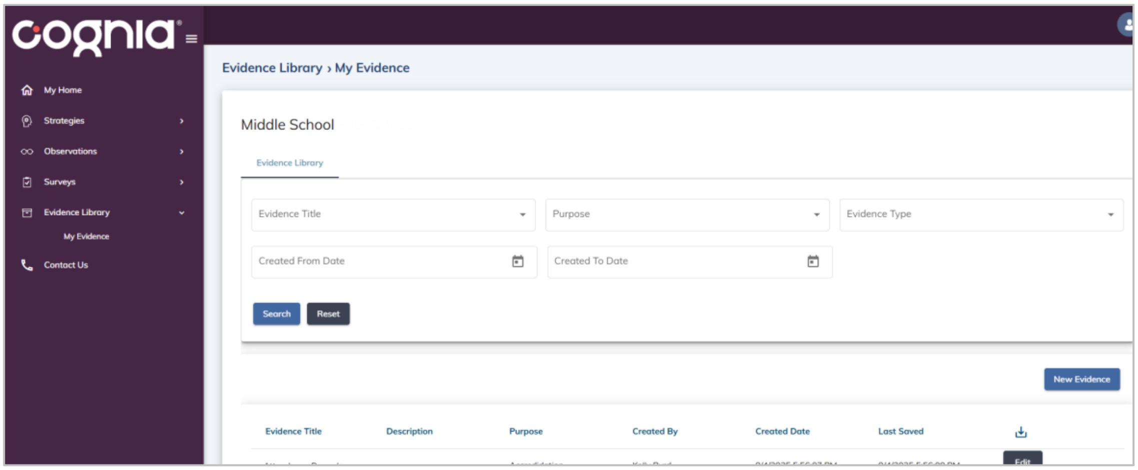


Creating New Evidence in the Library

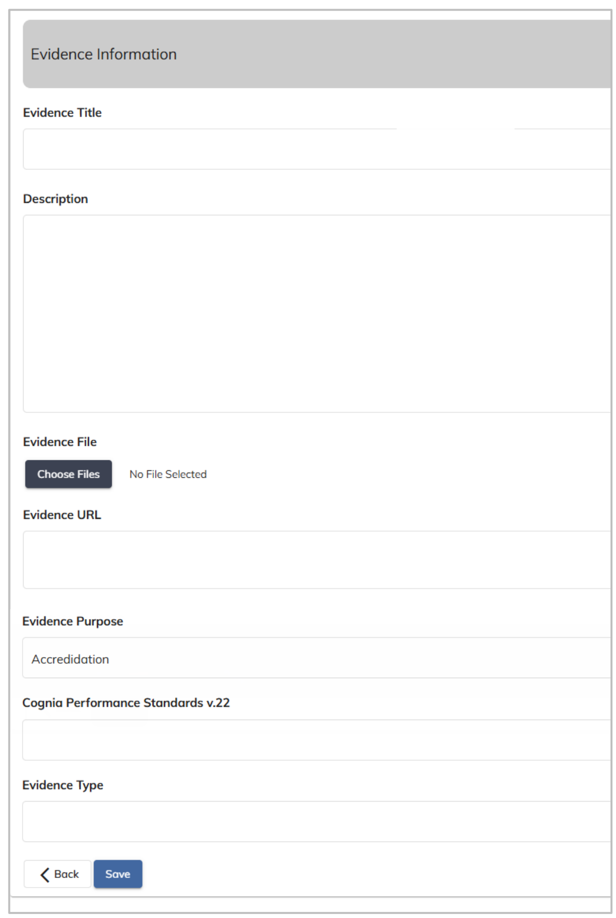
New evidence can be created in the Evidence Library. Evidence created in the library is available for users in your institution to add to their plans.

Follow these steps to create new evidence in the Evidence Library.

1. From the **Evidence** records page, click the **New Evidence** button. This opens the evidence record.



2. Enter an **Evidence Title**.
3. Enter a **Description** for the evidence record.
4. To select evidence:
   a. To add a file, click the **Choose Files** button and then select the file to add. (Only doc, excel, and PDF file types are allowed.)
   b. To add a URL, enter the URL in the **Evidence URL** field.
   c. Select one or more options from the **Evidence Purpose** drop-down. If you selected **Accreditation** or **Certification**:
   d. Select one or more options from the **Cognia Performance Standards V.22** drop-down.
   e. Select one or more options from the **Evidence Type** drop-down.
5. When you are done, click the **Save** button. This adds the evidence to the Evidence Library.



Evidence and Tagging Best Practices

Naming Record

Name the evidence record, using clear, descriptive titles that include key details about the evidence file, including dates or versions. For example: Student Performance_2024-25_v1.xlsx. Stick to a consistent naming convention, avoid special characters, and keep names short but meaningful.

Description

Include a short description, one or two concise sentences that summarize the content, purpose, and any relevant stakeholders, using keywords, to make the file easy to search and understand later.

Tagging Evidence

Tagging your evidence records is optional, but tags enhance the organization and searchability of your evidence. Since tags are nonlinear, a single piece of evidence can belong to multiple categories without duplication, and tags can be used as keywords, making it easier to locate records without knowing the actual record name. There are several ways to tag your evidence records.

- **Evidence Purpose**

  Selecting a purpose will tag your evidence to a stage of accreditation or another purpose you are engaged in with Cognia. You can select multiple purposes, which along with your institution type, will also give you access to additional tags.

- **Standards**

  If you select a purpose associated with Cognia Performance or Certification Standards, you will be presented with the appropriate set of standards for your institution or certification type (school, system, SEA, ESO, early learning, extended learning, STEM, CBE, STEM provider). You can select one or more standards from the list.

- **Evidence Types**

  Selecting a purpose will also provide you with a list of evidence types or keywords that will help categorize your evidence records. You can select one or more types from the list.

Business Rules

When using the Evidence Repository on its own or from within a workflow like Strategies or Accreditation, there are business rules that apply to the evidence record and evidence files.

- **Creating Evidence Records**

  Creating an evidence record within the Evidence Library can be done at any time. Doing so will store your evidence within the platform and will only be accessible by users within your institution.

  Creating an evidence record from a workflow can be done during the completion of that application or plan prior to submitting the form. Doing so will associate or assign the evidence record to the application or plan, as well as store the evidence in the repository for future use.

- **Associating Evidence Records**

  While completing an application or plan, you can associate or assign an evidence record that has already been created in the Evidence Library, either directly or through another application or plan. You can also disassociate or unassign an evidence record from an application or plan if the application has not been submitted, closed, or archived through a workflow. Disassociating an evidence record will not remove the evidence record from the repository.

- **Archiving Evidence Records**

  If a piece of evidence is outdated or no longer needed, you may archive an evidence record within the Evidence Library. Archiving makes the record, and the evidence attached, inactive for selection in another application or plan. If it is already associated with an existing application or plan, it will remain associated.