PROGRAM AUDIT MANUAL

CONTENTS

INTRODUCTION

Acronyms and Icons

Acronyms

The following acronyms appear throughout this guide:

- AMS – Accreditation Management System
- APPM – Accreditation Policy and Procedure Manual
- TC – Team Chair
- PEV – Program Evaluator
- DDL – Drop down list

Icons

Below are the icons, and their meanings, seen throughout the AMS 2.0 interface:

- or - Clicking this icon will allow you to edit that particular field.

- - If you see this icon, hover over it with your mouse to view helpful information.

- - If you see this icon, hover over it with your mouse to view a note.

- -Change Finding Type

- - Delete Finding

- PAF - This icon appears above the textbox in the editor tool; it means this section will appear in the Program Audit Form PDF.

- ES - This icon appears above the textbox in the editor tool; it means this section will appear in the Exit Statement PDF.

Security

The user login information is securely kept and maintained by each user and should not be shared or transferred.

Browser Compatibility

AMS 2.0 has been designed with compatibility in mind, but not at the sacrifice of function. Below is a recommended list of browsers to use when accessing the site:
- Preferred Browser: Google Chrome with latest updates
- Good Alternative Browsers: Microsoft Edge, Mozilla FireFox, and Safari

We do not support Internet Explorer.

Accessing to the Program Audit Editor Tool

- Go to https://amsapp.abet.org/#/user and login using your ABET username and password. If you forgot your username or password, click on the 'Forgot username or password?' link to retrieve the information.
- From the *Dashboard*,
  - Team Chair (TC) - Click on the 'Management > Manage RFEs & Reviews' link on the left menu.
  - Program Evaluator (PEV) – Click on the 'Manage Reviews' link on the left menu.
- On the '*Manage Reviews' page* select the institution that you want to review.
- Click on *Program Audit* tab.

REVIEW STATUS	REVIEW TEAM	🔒 SELF STUDY/REPORT	⚠ PROGRAM AUDIT	🔒 MANAGE STATEMENT

'PROGRAM AUDIT' TAB

Overview of Program Audit tab

Review Details:
- Current review information is listed under this panel.
- TC can assign the responsibilities of a program or give an access to the editor from '**Manage Responsibilities**' button.

Program Audit Details:
- Program audit details are listed under this panel.
- Depending upon the access level, PEV and TC can 'Begin', 'Edit' or 'View' audit from this panel.
- Program name, Assigned PEV and TC's name are listed for each program.
- Following program audit status shows up above the program name.

  - `Not Started` – This appears when the program audit has not been started. The PEV with primary access can begin the program audit.
  - `Waiting for PEV Submission` – This appears when the program audit is currently being worked on by a PEV.
  - `Waiting for TC Review` – This appears when the program audit has not been reviewed. The Team Chair can mark this item as complete from the audit editor.
  - `Reviewed by TC` – This appears when the program audit has been reviewed by the TC.

- o **Finalized** – This appears when the program audit is complete and a final PAF has been generated or can be generated.
- o **Unlocked** – This appears when the program audit has been unlocked after previously being finalized. The program audit can be finalized again by the Team Chair.
- Recommended Action shows up after the program audit is submitted to TC.
- Timestamp of the last time the editor was edited/ shared/ and submitted shows up under each program name.
- TC and PEV can access to the Findings button (after the audit is marked as reviewed by TC).
- TC can access to the following buttons from this panel,
    - o Preview PAF (visible after the audit is initiated)
    - o Preview Findings (visible after the audit is initiated)
    - o Finalize audit (enabled after all program audits are marked as reviewed)
    - o Generate Final PAF (visible after the audit is finalized)
    - o Unlock audit (visible after the audit is finalized)

Manage Responsibilities (Accessible only to the Team Chair):

TC can manage the evaluation roles (Co-Team Chair/PEV) from **MANAGE RESPONSIBILITIES ▾** button.

- The following drop down list (DDL) appears when you click on 'Manage Responsibilities' button.

Team Chairs:
- TC can assign the responsibilities of a program to a particular TC or Co-Team Chair. By default, the TC will be responsible for all programs.
- This option can be used when TC and Co-TCs divide their roles upon the PEVs assigned. Only the TC or Co-TC will have an edit access to the program audit submitted by PEV.
- Following modal appears when you select Team Chairs from the DDL.

MANAGE TEAM CHAIRS

	COOK (VISIT TEAM CHAIR)	MILLER (VISIT CO-TEAM CHAIR)
ELECTRONIC SYSTEMS ENGINEERING TECHNOLOGY	⦿	○
MECHANICAL ENGINEERING TECHNOLOGY	⦿	○

SAVE CANCEL

- Assign TC or Co-Tc from the modal and click on **SAVE** button.

Audit Access:
- The selected team member will have primary edit access to the program audit tool for the designated program. By default, the Program Evaluator will have this access, but TC can give an access to a TC or Co-Team Chair if the PEV is unable to perform their duties.

  Note: When there are two PEVs assigned to the same program, only one PEV can have an edit access to the program audit tool. However, TC can switch this role to other PEV from this modal at any time. This option also could be used when there is an emergent situation that the PEV is not able to perform his/her duty and the TC needs to take over his/her role.

- Following modal appears when you select Audit Access from the DDL, select PEV for each program and click on **SAVE** button.

MANAGE AUDIT ACCESS

INSTRUCTIONS

The team member selected below will have primary edit access to the program audit tool for the designated program. By default the Program Evaluator will have this access, but access can be given to a Team Chair or Co-Team Chair if the PEV is unable to perform their duties.

ARCHITECTURAL ENGINEERING
- ⦿ Terri ▓▓▓▓ (Program Evaluator)
- ○ Rajan ▓▓▓▓ (Visit Team Chair)
- ○ Arnoldo ▓▓▓▓▓▓ (Visit Co-Team Chair)

Edit Institutional Summary (Accessible only to the Team Chair)

The Team Chair can add an institutional summary and strengths to the Preview Findings PDF.

To edit Institutional Summary,
- Click on 'Edit' summary button.

- The Institutional Summary editor will open when you click on this button. You can add text on 'Institutional Summary' textbox.

- You can also add Institutional Strength from the editor. Click on 'Add Strength' button located at top left side of the editor.

- 'Add Strength' modal pops up when you click on 'Add Strength' button. Select number of findings and click on 'Add Findings'.

ADD STRENGTH

ADDING INSTITUTIONAL STRENGTH
Select the number of strength to add to the institutional summary.

Institutional Strength   2   ⌄

ADD FINDINGS   CANCEL

- Institutional Strength textbox will be added to the Institutional Summary editor.

INSTITUTIONAL STRENGTH (1)   ✖

Click to add text...

INSTITUTIONAL STRENGTH (2)   ✖

Click to add text...

- Click on 'Preview Institutional Summary' button to preview Institutional summary

+ ADD STRENGTH   **PREVIEW INSTITUTIONAL SUMMARY**

Begin Audit

Assigned PEV can 'Begin Audit' from the program audit details panel.

- Click on **BEGIN AUDIT** button to create new template of the program audit editor.
  Note: Please note that once you click on 'Begin Audit' button, the button will change to 'Edit Audit.'
- Once you click on 'Begin Audit' button, 'Create Program Audit Template' modal will appear.

Create Program Audit Template:

Use the form to create a template of findings that will be opened in the Program Audit Editor tool.

On the 'Create Program Audit Template' modal,

- Check the box on the left next to the finding you want to include in the template before editing the number of findings of that type. For example: if there are 3 strengths for the program, check program and select 3 from the respective dropdown list.

CREATE PROGRAM AUDIT TEMPLATE

SELECTING FINDINGS

Use the form below to create a template of findings that will be opened in the Program Audit Editor tool.

BUILDING CONSTRUCTION (BACHELOR OF SCIENCE)

☐ Program Strength

☐ Program Deficiency

☐ Program Weakness

☐ Program Concern

☐ Program Observation

Note: Clicking the Generate Program Audit button without selecting any findings will create a bare-bones template that only includes a Program Audit Summary and Program Introduction; however, findings can be added one at a time from the Program Audit Editor.

<div align="right">

GENERATE PROGRAM AUDIT   **CANCEL**

</div>

Note: Please note that clicking the Generate Program Audit button without selecting any findings will create a bare-bones template that only includes a Program Audit Summary and Program Introduction; however, findings can be added one at a time from the Program Audit Editor.

- The following Program Audit Template appears once you click on **GENERATE PROGRAM AUDIT** button.

PROGRAM AUDIT ANSAC

ARIZONA STATE UNIVERSITY

+ ADD FINDING | **🗎 PREVIEW PAF** | **🗎 PREVIEW EXIT STATEMENT**

🔘 COMMENTS
◯ CHANGE HISTORY

ⓘ **USING THE PROGRAM AUDIT EDITOR**
- To add text for each finding click inside a text area below and begin typing.
- When the text area is active a toolbar will be visible with an option to add comments.
- To comment, highlight the text you want to comment on and click the 💬 icon in the toolbar.
- The Program Audit will autosave as changes are made.

🎓 **Construction Management and Technology (B.S.)**

PROGRAM AUDIT SUMMARY ⓘ PAF

	C1	C2	C3	C4	C5	C6	C7	C8	PC	APPM
CURRENT REVIEW	D	D								

INTRODUCTION ES

Introduction

PROGRAM DEFICIENCY (CRITERION 1: STUDENTS) PAF ES   ⟳ ✕

Program Deficiency_Student

PROGRAM CONCERN (CRITERION 1: STUDENTS) PAF ES   ⟳ ✕

Program Concern_Student

PROGRAM CONCERN (CRITERION 2: PROGRAM EDUCATIONAL OBJECTIVES) PAF ES   ⟳ ✕

Program Concern_PEO

RECOMMENDED ACTION

HEATHER FORD	Not to Accredit ⌄

🗎 PREVIEW PAF **🗎 PREVIEW EXIT STATEMENT**   **SHARE DRAFT ❓** **SUBMIT TO TC ❓**

PROGRAM AUDIT EDITOR

- Once you click on 'Generate Program Audit' button, the program audit editor template is generated.
- Click inside a text area and begin typing to add text for each finding.
- The text inside the finding's textbox will **autosave** as changes are made.

Program Audit Summary

The program audit summary is auto-populated based on existing data.

- Click on [icon] icon located on top right side of the Program Audit Summary textbox.
  - If the institution has a review since 2019 review cycle, the previous findings will be auto-populated by the system and these records will not be editable.
  - 'Edit' icon and 'Previous Review' is not visible for Initial Review type.

- On the 'Edit Program Audit Summary' modal, enter the findings from the 'Previous Review' and click on 'Save' button.
- If there are no previous findings to add, check ☐ NO PREVIOUS FINDINGS REPORTED FROM PREVIOUS REVIEW. checkbox and click on 'Save' button.

EDIT PROGRAM AUDIT SUMMARY

Enter the findings from the previous review by using the form below. The findings for the current review are auto-populated when findings are added to the audit template.

☐ NO PREVIOUS FINDINGS REPORTED FROM PREVIOUS REVIEW.

CRITERION 1: STUDENTS	None ⌄
CRITERION 2: PROGRAM EDUCATIONAL OBJECTIVES	None ⌄
CRITERION 3: STUDENT OUTCOMES	None ⌄
CRITERION 4: CONTINUOUS IMPROVEMENT	None ⌄
CRITERION 5: CURRICULUM	None ⌄

SAVE   CANCEL

- The findings for the 'Current Review' are auto populated when findings are added to the audit template.

Add/Change/Delete Findings

Once the template is created, you can add, change or delete findings in the program audit editor tool. But you will not be able to add findings once the program audit is submitted to TC. 'Add Finding' button will be disabled after you submit it.

Add Finding:
To add program findings one at a time,
- Click on **+ ADD FINDING** button, located on top of the page.

+ ADD FINDING | 🗎 **PREVIEW DOCUMENT**

- In the 'Add Finding' modal, select a section from the drop-down list.
- And click on **ADD FINDINGS** button.

ADD FINDING

SELECTING FINDINGS

Select a finding type below and then select the number of those findings or the relevant criteria to add new findings.

MECHANICAL ENGINEERING TECHNOLOGY (AS)

☐   Program Strength

☐   Program Deficiency

☐   Program Weakness

☐   Program Concern

☐   Program Observation

ADD FINDINGS   CANCEL

Once the finding is added either from 'Create Program Audit Template' modal or 'Add Finding' modal, the following screen appears in the editor tool:

CONCERN (CRITERION 8 INSTITUTIONAL SUPPORT)

Click to add text...

Change Finding:

To change finding type,

- Click on ⟳ icon located on top right side of the finding textbox.

WEAKNESS (CRITERION 3 STUDENT OUTCOMES)

Click to add text...

- On the 'Change Finding' modal, select an appropriate finding from the drop-down list.
- Click on **CHANGE FINDING TYPE** button.

CHANGE FINDING

Change finding type for
BUILDING CONSTRUCTION (BACHELOR OF SCIENCE)

Change from **PROGRAM DEFICIENCY** to:

-- SELECT --

CHANGE FINDING TYPE   CANCEL

Delete Finding:

To delete finding type,

- Click on ✖ icon located on top right side of the finding textbox.

WEAKNESS (CRITERION 3 STUDENT OUTCOMES)

Click to add text...

- On the 'Confirm Delete' modal, click on DELETE button.

CONFIRM DELETE

You are about to delete the record *Program Deficiency (Criterion 2: Program Educational Objectives)*, this procedure is irreversible.

Do you want to proceed?

CANCEL   DELETE

Recommended Action

**To add/edit recommended action,**

- Select an action from the drop-down list.

RECOMMENDED ACTION

HEATHER   -- SELECT --

Comments

To add comments to the findings,
- Click inside the desired editable text area in the textbox.
- Highlight the text you want to comment.
- Click on 💬 icon in the toolbar.
- Type your comment in the 'Comment' pop up and click on ^{Save} icon.

Viewing Comments:
- Click on 'Show Comments' button located on top right of the page.

- If there are comments added to some section, you will see the comments section on right side of the textbox.
- Click on 'Highlight' to see the comment's origin; you can also edit/delete/reply to the comments.
- Click on 🚫 icon to turn off comment visibility.
  Note: Please note that you cannot edit or delete comments once the program audit is submitted.

Change History

- To view change history, click on 'Show Change History' button located on top right of the page.
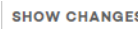

- Please note that you will see '*There are not enough versions for a comparison'* message, if there are not enough versions of the program audit to be compared.
- In the Change History section, you can use either the *Quick View* or *Manual Selection* option to select two program audit versions to be compared. Once a selection has been made, click on ⎸ SHOW CHANGES button to see a read-only view of the program audit with changes from version 1 (V1) to version 2 (V2) highlighted.

Quick View Changes,
- Select a pre-set pairing to see the differences between two versions of the program audit.
- Click on ⎸ SHOW CHANGES button.

Manually Select Changes,
- Use the drop down lists to select two versions for comparison.
- Click on ⎸ SHOW CHANGES button.

Note: Please note that the changes from the first selection to the second selection will be highlighted.
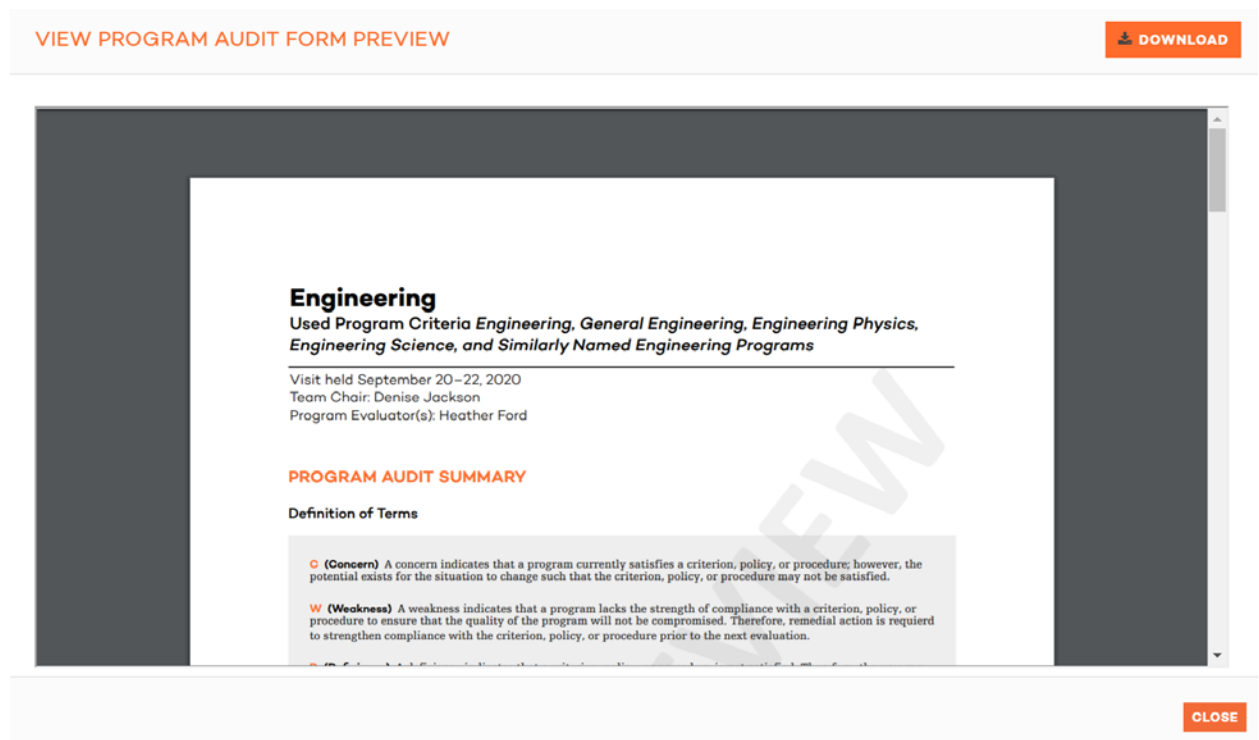
To hide Change History, click on ✍ **HIDE CHANGE HISTORY** button located on top of the screen.

Preview PAF

- Click on 'Preview PAF' button located on top or bottom of the editor to open a read-only preview of the current version of the Program Audit.

  + ADD FINDING | 📄 **PREVIEW PAF** | 📄 **PREVIEW EXIT STATEMENT**

- The following 'View Program Audit Preview' modal appears when you click on 'Preview' button.

VIEW PROGRAM AUDIT FORM PREVIEW   **⬇ DOWNLOAD**

Engineering
Used Program Criteria *Engineering, General Engineering, Engineering Physics, Engineering Science, and Similarly Named Engineering Programs*

Visit held September 20–22, 2020
Team Chair: Denise Jackson
Program Evaluator(s): Heather Ford

PROGRAM AUDIT SUMMARY

Definition of Terms

C **(Concern)** A concern indicates that a program currently satisfies a criterion, policy, or procedure; however, the potential exists for the situation to change such that the criterion, policy, or procedure may not be satisfied.

W **(Weakness)** A weakness indicates that a program lacks the strength of compliance with a criterion, policy, or procedure to ensure that the quality of the program will not be compromised. Therefore, remedial action is reqierd to strengthen compliance with the criterion, policy, or procedure prior to the next evaluation.

CLOSE

- Click on 🖨 button to print and **⬇ DOWNLOAD** button to download the program audit.

Preview Exit Statement
- Click on 'Preview Exit Statement' button located on top or bottom of the editor to open a read-only preview of the current version of the Exit Statement.

  + ADD FINDING | 📄 **PREVIEW PAF** | 📄 **PREVIEW EXIT STATEMENT**

- The exit statement modal appears when you click on 'Preview' button.

- Click on ⬛ button to print and **⬇ DOWNLOAD** button to download the program audit.

Back to Program Audit Details

At any time if you wish to go back to main page (program audit tab), click on ← back to review button located on top or bottom left side of the program audit editor tool.

Share Draft

Assigned PEVs can share working version of the program audit to other team members,
- Click on **SHARE DRAFT** ❓ button located at the bottom of the editor.
- When you share any version of the program audit, a PAF will be generated from the current version of the audit data and made available for PEVs and TCs to view. You will be able to continue editing the program audit and other team members will not see your changes. If you share a later version, your previously shared PAF will be overwritten; only one shared version is available at a time.
  Note: *Once the program audit has been shared it cannot be hidden unless it is replaced by a more recently shared version.*
- The following modal appears when you click on 'Share Draft' button. Enter an optional note and click on 'Confirm' button.

SHARE DRAFT PROGRAM AUDIT

YOU ARE ABOUT TO SHARE THIS VERSION OF THE PROGRAM AUDIT

A PAF will be generated from the current version of the audit data and made available for PEVs and TCs to view. You will be able to continue editing the program audit and other team members will not see your changes. If you share a later version your previously shared PAF will be overwritten; only one shared version is available at a time.

Note: Once the program audit has been shared it cannot be hidden unless it is replaced by a more recently shared version.

Enter an optional note below and click *confirm* if you wish to proceed.

[   ]

CANCEL   **CONFIRM**

Submit to TCs

When the PEV is done editing, it can be submitted to TC from the editor tool. Click on **SUBMIT TO TC ❓** button located at the bottom of the page.

- It is recommended that you submit it only when you are completely done editing. Only TC's and ABET HQ admin can return the draft for editing.
- Once submitted, you will have read-only access to the editor tool and be unable to make additional changes unless the PAF is returned to you.
- The following modal appears when you click on 'Submit to TC' button, enter the optional note and click on **CONFIRM** button.

SUBMIT PROGRAM AUDIT

YOU ARE ABOUT TO SUBMIT THIS PROGRAM AUDIT TO THE TC FOR REVIEW

Make sure you are completely done editing. You will not be able to make further changes unless the program audit is returned.

Enter an optional note below and click *confirm* if you wish to proceed.

CANCEL   CONFIRM

Note: Once the program audit is submitted to the TC, TC will review it and mark it as reviewed or return it to PEV for further editing.

AFTER THE PROGRAM AUDIT IS SUBMITTED TO THE TEAM CHAIR:

Return to PEV

After the program audit is submitted to the TC, TC will have a full access to the editor and can return it to the assigned PEV if needed.

- Click on 'Edit Audit' button located under Program Audit details panel to open the program audit editor.

- Click on **RETURN TO PEV** ❓ button located at the bottom of the tool to send it back to the assigned PEV for further editing.
- The following modal appears, enter an optional note and click on **CONFIRM** button.

RETURN PROGRAM AUDIT

YOU ARE ABOUT TO RETURN THIS PROGRAM AUDIT TO THE ASSIGNED PEV

The PEV will be able to continue editing the audit. They'll need to resubmit before the program audit may be marked as reviewed.

Enter an optional note below and click *confirm* if you wish to proceed.

CANCEL   **CONFIRM**

Mark as Reviewed

After the program audit is submitted to the TC, TC can mark each program as reviewed from the editor tool. Marking a program audit as reviewed will check it off the program list in the program audit tab. Once all audits have been reviewed, the final documents can be generated.

- Click on 'Edit Audit' button located under Program Audit details panel to open the program audit editor.
- Click on **MARK AS REVIEWED** ❓ button located at the bottom of the editor.
- The following modal appears, click on **CONFIRM** button to mark it as reviewed.

MARK PROGRAM AUDIT AS REVIEWED

You are about to mark this program audit as reviewed. Once all audits have been reviewed the final documents can be generated.

CONFIRM   **CANCEL**

Note: Once the program audit is reviewed, the 'Findings' button will appear, and the editor will be on a read only mode.

Clear Reviewed Status

Once the Program Audit is 'Marked as Reviewed,' 'Clear Reviewed Status' will appear on the editor tool. Clearing the reviewed status of a program audit will allow further editing. All audits will need to be reviewed again before the final documents can be generated.

- Open the program audit editor and click on **CLEAR REVIEWED STATUS** button located at the bottom of the editor tool.
- On the 'Clear Reviewed Status' modal, click on 'Confirm' button.

CLEAR REVIEWED STATUS

You are about to set this program audit to having not been reviewed. You will be able to make further edits but the program audit will need to be reviewed before the final documents can be generated.

CONFIRM   **CANCEL**

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Finalize Audit

The 'Finalize Audit' button located under 'Program Audit Details' panel will get enabled once all the programs are reviewed by the TC.

- Click on this button to finalize the program audit
- On the 'Confirmation' modal, click on 'Confirm' button.

Note: Please note that 'Manage Statement' tab will be enabled as soon as the Program Audit is finalized.

CONFIRMATION

Please check that you have finalized all components of the program audit and will not need to make any additional changes before you proceed. Are you sure you want to finalize this audit?

CANCEL   CONFIRM

Note: Once the program audit is finalized, the 'Generate PAF' and 'Unlock' button will appear under Program Audit Details panel, and the editor will be on a read only mode.

Finalized

Construction Management and Technology (B.S.)
Construction Management (2021–2022 Cycle Criteria)

07/26/21 09:16 PM ET   Reviewed by Team Chair
07/26/21 09:11 PM ET   Submitted by PEV

PEV Mohsin   (Primary Access)
Recommended Action: NA

🔒 VIEW AUDIT
🗎 FINDINGS

GENERATE PAF   UNLOCK AUDIT

Preview Findings

The Findings button is visible to both PEV and TC, the pdf consists of a preview of findings for all programs combined in one PDF. This document can be used as an exit statement.

Generate PAF

This button is visible only to the TC. Once all the audits have been reviewed, the final PAF can be generated from this button.

Unlock Audit

This button is visible only to the TC.
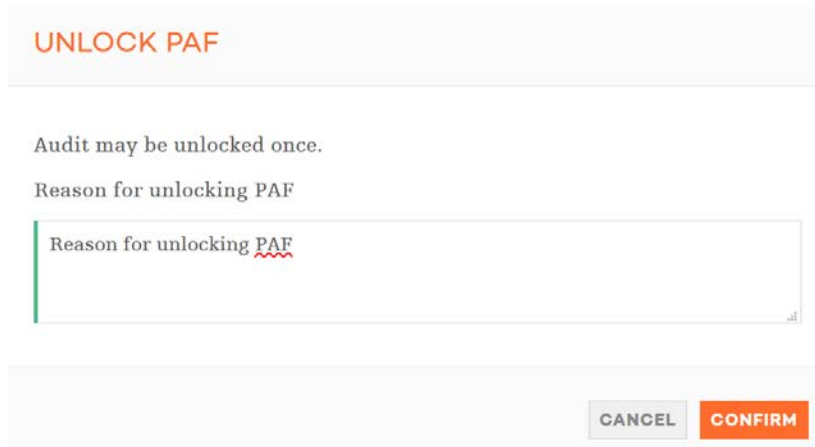- If you need to make any changes after the audit is finalized, click on 'Unlock' button.

- Unlocking the PAF will change the editor to an editable mode.
- On the 'Unlock PAF' modal, enter the reason for unlocking PAF and click on 'Confirm' button.

Note: Please note that Program Audit can be unlocked only once, and it cannot be unlocked 24 hours after the Program Audit has been finalized.

How to Get Help

For assistance with technical issues using the AMS 2.0 web site, please contact our IT support staff by sending an email to techsupport@abet.org.