Instructions for the Annual Update

The annual update is a self-reflection conducted by all programs at Citrus College.

Logging in to Taskstream
There are two ways to log into the system.

1. Use the Citrus Portal (my.citruscollege.edu) and search for Taskstream. Use the link to go to the Portal login, and then put in your usual Citrus login name and password . . . OR . . .

2. Go directly to login.taskstream.com and put in your full email address and the password you gave when you set up your Taskstream account.

After you have logged in, click on the Annual Update for your program to get started.

A Couple Tips
At various times you will see a Directions box which may be opened or closed. You may find it helpful to keep this closed because you can access the same information on this document. Also, the back button on Taskstream does not work. Instead, select Home in the menu at the top of the page. This will take you back to the entry screen where you can see the workspaces available to you.

Now, let's get started. The template consists of two parts: Goals and Resource Requests. There are two tabs in the Goals section.

Progress on Last Year's Goals
You should see this field prepopulated with a table showing the goals you set last year. Next to each goal is a Status Update box. Type "*Complete*," or "*In Progress*," or "*No Longer Applicable*" to report on the progress made toward each goal.

Goals for the Current Academic Year
List the program goals you hope to achieve in the coming year. If you have goals left over from last year that were not completed, you may include any number of those here. Do not write resource requests in this text box (there is a separate section for those) but be aware that all resource requests need to be linked to goals on this list.

1. Click **Check Out**.
2. Click **Create New Set**. For the set name, type "Goals" and list the current academic year. Then select the box that lets other outcomes link to this one and click **Continue**.
3. Click on **Create New Outcome** to write your first goal. Use the Outcome box to give the goal a name and the Description box to express it in sentences. Then click **Continue**.
4. Click **Add Mapping**. Select **Goal sets distributed to (program name)** and then **Go**. Then select the **2021-2026 Strategic Plan Focus Areas** and click **Continue**.
5. Repeat steps 2-4 for each new goal.
6. Click **Check In**.

Resource Requests

There are six tabs in this section. The first five are the categories of resources you may request for your program. For each of these categories, follow the steps below to complete your resource requests. You do not need to use the last tab, Review Summary. That is for the area dean or manager to complete.

1. Click **Check Out** and click **Create New Operational Plan**.
2. Click **Select Set** (at bottom of page) and then click **Select Existing Set** (at top).
3. Select the current year's goals and click **Continue**.
4. Use the check boxes to select one or more goals that the resource requests from this category will help your program achieve. Then click **Accept and Return to Plan**.
5. For each selected goal, you may request resources. To do so, click **Add New Action**. After you have filled in the boxes, click **Apply Changes**. Repeat for each resource request in this category.
6. Click **Check In**.

Submitting the Work: The Annual Update is not complete until submitted. Click on the Submission & Read Reviews tab at the top of the page and select Submit Work for any section that needs to be submitted.

Good work! That's it. You're all done…