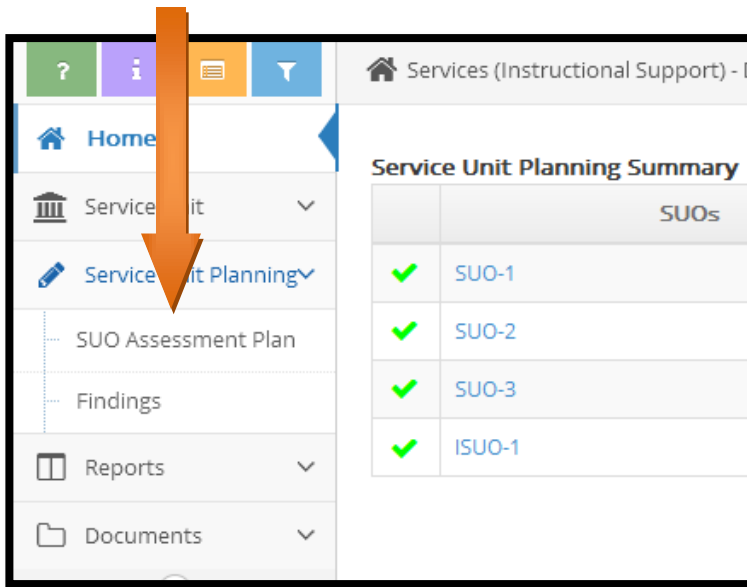



SETTING AN ASSESSMENT CYCLE FOR AN SUO

1. Go to your **Services Unit**.
2. Click on the **Service Unit Planning** menu.
3. Click on **SUO Assessment Plan**.



4. To set the assessment cycle, click on the **Edit** icon  next to the SUO and set these items (see illustration below):
 - i. Assessment Cycle
 - ii. SUO Status: Active
 - iii. Be sure there is a start date there. You do NOT need to change it. The date should reflect when the SUO was originally created. The date can just be approximate.
 - iv. Do not enter an Archived Date. That date is for retiring an SUO that will no longer be assessed.
- Repeat this process for every SUO, ISUO, and/or ISLO in the unit

The screenshot shows the 'Edit' form for a Service Unit (SUO). The form contains the following fields:

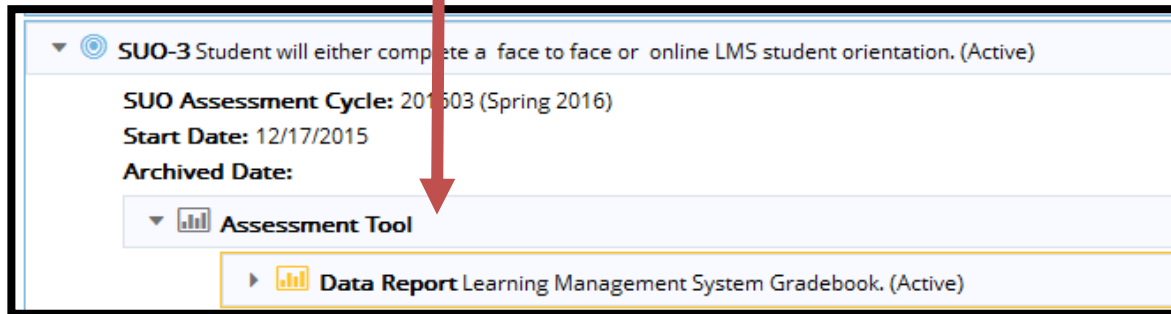
- * SUO Name:
- * SUO:
- SUO Status:
- SUO Assessment Cycle:
- Start Date:
- Archived Date:

NOTE: If you want to add a new SUO, you may do that on the same page in TracDat. Be sure to archive any SUOs that will no longer be assessed (if applicable).

(Continued on next page.)

Assessment Tools

5. Review the assessment tool you previously used for the SUO. If you want to continue to use it, you don't have to enter another one. If you want a new tool or you want to change the performance target, archive the existing tool and create a new one.



6. Repeat Step 5 for all other SUOs, ISUOs, and ISLOs.
7. You may find it helpful to run a report showing your Rotational Plan to see the assessment cycles for all SUOs for your unit.
 1. **Go to the Reports** Tab.
 2. Click on **Ad Hoc**.
 3. Select the report titled "**Rotational Plan for Services – Active SUOs**" by clicking on the report title (it is a hyperlink). The report should open automatically.