Changes to new Annual Report Form amplify user experience

BY DEBORAH H. C. GIN AND ALISSA HORTON

The new ATS Annual Report Form (ARF) is now ready for deployment, with a print version available for reference on the ATS website. The ARF had not been comprehensively revised in more than two decades and required an overhaul to meet the needs of a new generation of schools and a new set of accreditation standards.

The revision allowed for a 40 percent reduction in forms and instructions, from 75 pages to 45 pages, and represents significant input and feedback from more than two-thirds of the 280 ATS member schools.

Pulling back the curtain on the changes

During its June 2023 meeting, the Board of Commissioners of the ATS Commission on Accrediting received a report and demonstration of the new ARF. While not all changes were showcased, types of changes were highlighted, garnering a positive response from the Board. Click on the hyperlinked text throughout the article for brief demonstrations of the new application.

Aesthetics and access

More than 20 forms can be intimidating for someone new to the ARF process. In this revision, ATS data and research staff arranged the **forms into groups**, such as "student-focused" or "personnel-focused" forms. This arrangement makes the task appear more accessible and attainable and helps keyholders to quickly identify which forms should go to which people.

Informed user experience

A big change to the ARF is incorporating **instructions with the relevant form**, rather than only in a separate document at the end. This makes the user experience better informed with less maneuvering. An "off-canvas" feature allows instructions to slide on-screen at the touch of a blue "Instructions" button at the top of the page or a blue "?" button for particular sections on the page. The video also shows a feature that is not new but is little known: data entered by the school the previous year is available on each page, using the "Survey Year" pull-down list at the top of the page.

Enhanced user experience

Two types of changes to the new ARF promise to enhance and streamline user experience. With this revision, **searchability** was incorporated for long lists

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of options, such as student denominations, personnel denominations, or schools where degrees were earned. Options entered this year will **pre-populate** for next year, removing the need to scroll through pages to find the 20 denominations that apply to your school, for example. This not only enhances user experience, it also allows for more options and makes data output more uniform and useable (without the need for labor-intensive scrubbing and coding).

A second important enhancement is bringing **comparison data** right to your doorstep. As shown in the demo, there may be instances when a red warning box appears (e.g., when enrollment totals do not line up correctly). In this case, the comparison cells will now appear below the line in question rather than at the end of the form—and only if there is an error—eliminating form clutter and the need to scroll to the bottom of the form, memorize the numbers, and return to correct the data.

Substantive changes related to principles and practices

A principle followed in the project was including a standardized starting point from which to narrate nuances. This principle guided the decision to provide a **standardized method of computing full-time enrollment (FTE)**. A five-year average of academic load was used for all schools, allowing for apples-to-apples comparison across the industry. Providing this standard means that FTE can now be auto-computed and auto-filled directly on the form.

Another principle that guided the project was streamlining as much as possible the reporting that schools are required to do to their various entities. Where relevant, ATS data and research staff **paralleled existing surveys** and data collection processes with which schools already engage. The library form, for example, was trimmed by more than half and now closely mirrors the IPEDS library form. To ensure ATS stays as closely in sync with changes to other surveys, this video illustrates how high-level pages on those surveys were directly linked so that maintenance and updates would be done on those sites.

The final principle highlighted in this article is ensuring consistency across forms. For example, ATS must collect the right data on the Personnel forms to best categorize amounts on the Salary form. For more than two decades, ATS has used an internal method to determine where a particular salary should be categorized, without direct information from the schools about which is the individual's primary role. With this revision, ATS now **asks schools to designate primary administrative role** among the several an employee may occupy (also expanding the list of possible roles from a survey to the membership). Simple questions were added that will yield better data about full-time employees and full-time faculty status. This will result in much better salary data. Additional changes to the Personnel forms, such as providing ranges for percentage of teach time and the ability to select a primary teaching field, will enhance user experience and provide better data.

2023 ARF collection begins this fall

The comprehensive revision of the ARF could not have been possible without your input. But your participation doesn't end there! The fall collection period begins September 11, and with schools' extra effort this year in resetting their data, ATS can ensure the right people are reflected in the Personnel forms. Schools are invited to consider this an opportunity to reset their data and review their facts and figures for necessary updates and cleaning.

Later in August, ATS Manager of Data and Reporting Alissa Horton will email CEOs with important information that corresponds to this checklist:

> *The fall collection period begins September 11, and with schools' extra effort this year in resetting their data, ATS can ensure the right people are reflected in the Personnel forms.*

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- The school's **CEO reviews** (or delegates, if new) the **keyholder designation** for the ARF application.

- The designated **keyholder receives an email to activate his or her account** and assigns other user accounts, if applicable.

- Data collection commences and continues through the fall semester.

- The **school carefully reviews Personnel forms** (PF-1) for accuracy and completeness—additional details are being requested to further explain each person's role and status.

- **Deadline: December 8** for full set of forms, with a request to complete EF-1 (Enrollment by Race and Gender form) by **October 20**, for an early look at industry enrollment trends.

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