



AMEE FLOW
Balancing Energy, Workload, and Efficiency

Quick Reference Guide: Area Experts

Framework for Leaders Organizing Workflows

This guide outlines the essential steps in following the project tasks you've been assigned in the AMEE Flow platform.

How to Log in to AMEE Flow

You have two login options for accessing your AMEE Flow dashboard:

1. Use your Email Address (*the one the invitation was sent to*)
OR
Use your Unique Login ID (*provided in your welcome email*)
2. On the Login Page
 - o Click the **User** tab to begin.
 - o Enter your chosen login (email or ID) and password.
 - o You can change your password after logging in for the first time.
3. Check Your Inbox for Credentials
 - o Look for an email from AMEE Flow with your login details.
 - o Can't find it? Be sure to check your **spam** or **junk** folder.

Welcome to AMEE Flow!

Your personalized assessment and program review project management platform is just a login away!

- o Access powerful tools to streamline assessment and program review tasks, track progress, and support continuous improvement-all in one intuitive system.
- o **Don't have an account?** Contact an AMEE Flow administrator for login credentials at ameeflow@assessmentmadeeasy.com

TOOL TIP: Save your login credentials in a secure place for future use.

Step 1

Find Assigned Projects

- Go to Main Navigation menu → click My Projects
- Click the “Go to Task” button on the project card on the project you have been assigned to.

AMEE Flow

Red Robbin – Area Expert

MAIN NAVIGATION

- My Projects**
- Role Assignments
- Docs/Reports
- Calendar Schedule
- AMEE Lab
- Contact Support
- Guest Access
- Logout

My Projects

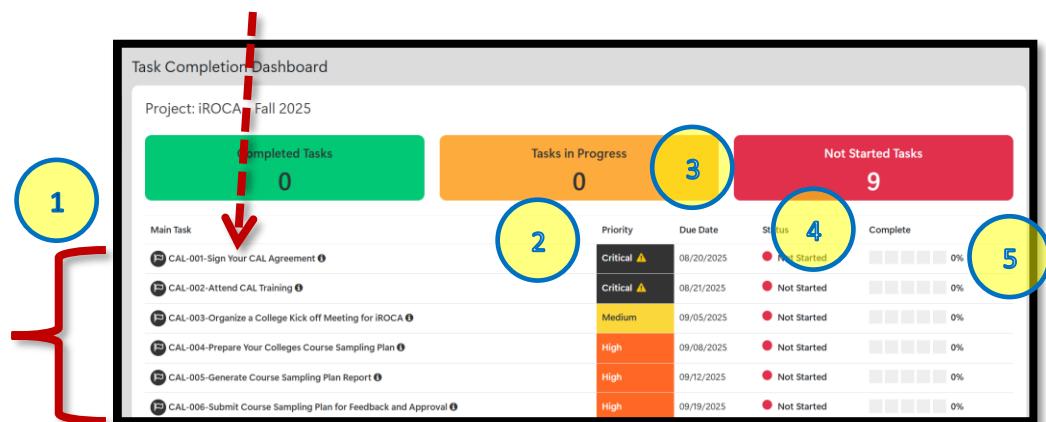
National Assessment Week Planning Com...
Fall - 2025
(4) Main Tasks [Go to Tasks →](#)

iROCA
Fall - 2025
(9) Main Tasks [Go to Tasks →](#)

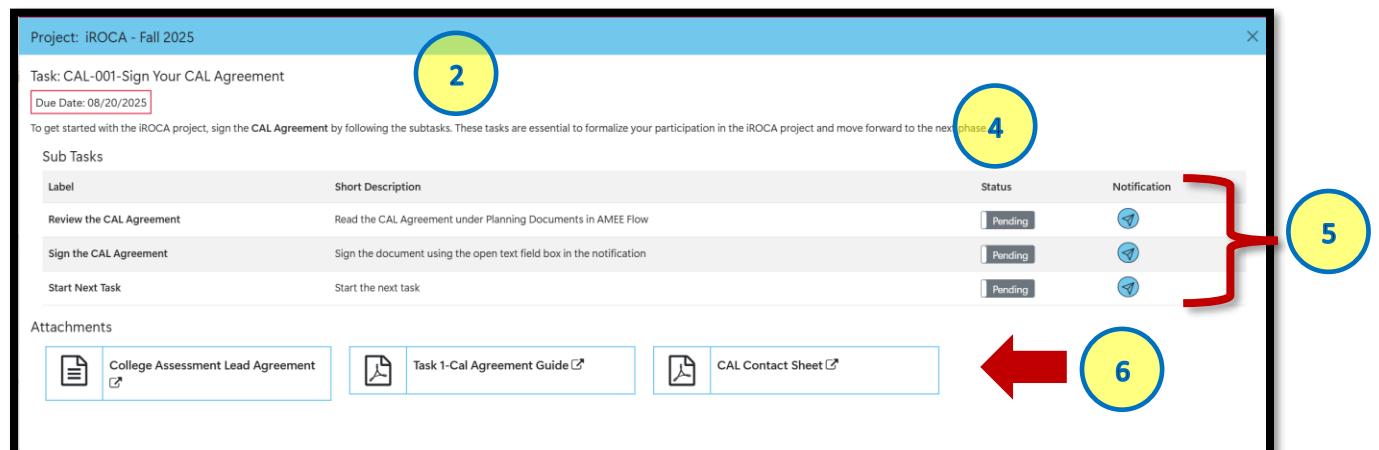
Marketing Campaign Summer 2025-Demo
Summer - 2025
(3) Main Tasks [Go to Tasks →](#)

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- Review all (1) tasks in the first column, (2) their priority, (3) due date, (4) status, and (5) completion bar in the columns to the right of the tasks.
- The green, yellow, and red legend indicates the number of tasks completed, in progress, and not started.
- Click on a Main task to review the details

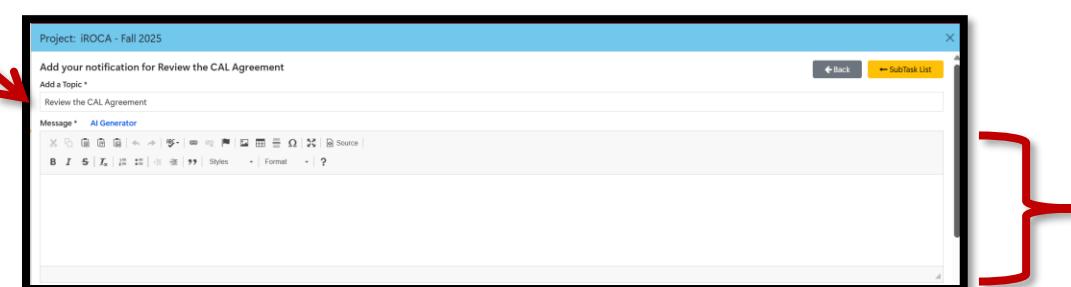


Details include the (1) due date, (2) a description of the task, (3) subtasks, (4) a status bar, (5) a trigger notification reminder, and (6) relevant attachments or links.

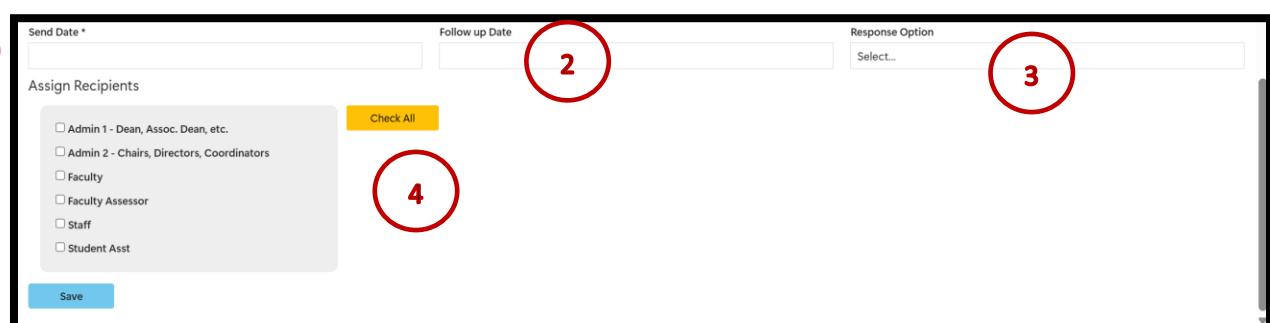


TOOL TIP: Some tasks require you to engage with others. If this is the case, click the notification button and create your notification.

- Add a topic
- Create your message. Use the AI generator to assist you if necessary



- Complete the notification by (1) selecting a send date, (2) adding a reminder follow-up date, and (3) providing a response option if needed; then (4) assigning recipients and save.



IMPORTANT NOTE: Assign a role to potential team members before creating a notification.

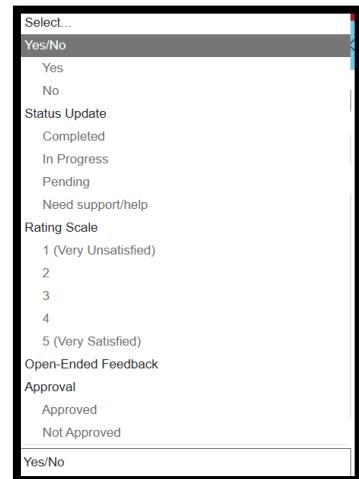
- There are five response options:
 - Yes/No
 - Status update
 - Satisfactory rating scale
 - Open-ended text box
 - Approval

TOOL TIP: If you select the "Response Required" option, be sure to include clear instructions in the notification message field.

For example:

"Please review the attached sampling plan and click the link below to provide your feedback in the comments section by Friday, October 18."

This ensures recipients know exactly what action is expected



Step 2

Pre-Load Your Team to Assign Recipients

- Preload your team before sending notifications.
- Go to **Role Assignments** → Click **Add New**, then add details for each team member, including Name, Email, , Assigned Role

- The roles in AMEE Flow include:
 - **Admin 1** – Reviews & Approves certain task
 - **Admin 2** – Reviews/Provide Feedback
 - **Faculty** – Provide feedback/review content
 - **Faculty Assessors** – automatically added from sampling schedule
 - **Staff/Colleague** – may provide feedback or review content
 - **Student Assistant** – may provide feedback or review content

NOTE: None of these assigned roles will log in to AMEE Flow. All responses needed can be supplied from the email they receive.

Step 3

Plan, Report, and Access Documents Workspace

This workspace serves as the centralized hub for building, managing, and accessing all critical assessment planning materials and reports.

Within this area, if access is provided, users can (A) build a course sampling plan, (B) generate three different reports, (C) view the master alignment map, and (D) access project-related support documents.

A**Build Sampling Plan**

- Go to your Docs/Reports
- Select **Build Sampling Plan** and add the Term, Year, and Oversight Unit and click continue

The screenshot shows the 'Build Sampling Plan' interface. On the left, a sidebar menu is open, showing options like 'My Projects', 'Role Assignments', and 'Docs/Reports'. The 'Docs/Reports' option is highlighted with a red box. In the main area, there's a form titled 'Let's Create Your Sampling Plan' with a sub-section 'Step 1: Identify Term and Year'. It has fields for 'Term*', 'Year*', and 'Unit Oversight*'. The 'Term*' field has a dropdown menu open with 'Select...' highlighted. Three yellow circles with numbers 1, 2, and 3 are overlaid on the screen: circle 1 points to the 'Term*' field, circle 2 points to the 'Year*' field, and circle 3 points to the 'Unit Oversight*' field.

STAGE 1: Select Outcomes-Select all outcomes being assessed and click continue

The screenshot shows the 'Step 2: Identify the Outcomes Being Assessed' page. It lists outcomes grouped by category: ISLO (ISLO 1-7), GISLO (GISLO 1-3), PSLO (PSLO 1-5), and GPSLO (GPSLO 1-5). Each outcome has a 'Yes' or 'No' button next to it. The 'ISLO 1' row has a red box around the entire row, and the 'Yes' button for 'ISLO 1' is highlighted with a green box. Other rows have 'No' buttons highlighted with red boxes. A 'Continue' button is at the bottom.

NOTE: Once you've selected all relevant outcomes, the aligned courses will automatically populate into a schedule of courses.

STAGE 2: Select Courses-Select courses from each outcome tab. Then click save in the upper right-hand corner.

- Once you save your selections, you are automatically creating your sampling plan report.

Step 3: Select Courses

Term: Summer - 2025

ISLO [2, 6] GISLO [1, 2] PSLO [2, 4] GPSLO [2, 3]

ISLO Course	Class/Sec.	Enroll.	Program	Instructor	Select	Assign ISLO	Notes
ART 140 POTTERY	11262 (2)	28	Art & Design	Washburne, Pattie wpa@gmail.com	<input type="checkbox"/> No	1, 4, 5, 6	<input checked="" type="checkbox"/>
COMS 104 LIT IN PERFORMANCE	11563 (4)	23	Communication Studies	Fleming, Mona fl@gmail.com	<input type="checkbox"/> No	1, 4, 5, 6	<input checked="" type="checkbox"/>
COMS 151 INTRO TO PUB SPK	11565 (13)	23	Communication Studies	Fleming, Hilla fl@gmail.com	<input type="checkbox"/> No	1, 3, 4, 5, 6	<input checked="" type="checkbox"/>
COMS 225 ARG AND DEBATE	11565 (13)	23	Communication Studies	Stewart, Martha sakilekai@yahoo.com	<input type="checkbox"/> No	1, 2, 4, 5, 6	<input checked="" type="checkbox"/>
COMS 450 RESEARCH METHODS	11033 (2)	33	Communication Studies	Beasley, Kathy wpa@gmail.com	<input type="checkbox"/> No	2, 7	<input checked="" type="checkbox"/>

Back Save

IMPORTANT NOTE: If you encounter any discrepancies, please leave a note for your project manager by clicking the pencil icon

Editing Schedule of Courses

Click **Sampling Plan Reports** from the left menu, then click on the pencil in the Action column to select courses aligned with the outcomes.

AMEE Flow

Hi, Red Robbin - Area Expert

MAIN NAVIGATION

- My Projects
- Role Assignments
- Docs/Reports
- Build Sampling Plan
- Sampling Plan Reports**
- General Reports
- Alignment Map
- Other Documents
- Calendar Schedule
- AMEE Lab
- Contact Support
- Guest Access

Sampling Plans

Reports

Term/Year	Created On	Feedback	Approval(s)	Action
Summer - 2025	07/24/25, 05:21 AM	View (0)		<input checked="" type="checkbox"/>
Summer - 2025	07/28/25, 06:44 AM	View (0)		<input checked="" type="checkbox"/>

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B Generating Reports in AMEE Flow

B1

- Go to your Docs/Reports. Available reports will be listed.
- Sampling Plan Report**- Select the **sampling plan report** from the left menu and click the term and year.

The screenshot shows the 'Sampling Plans' section of the AMEE Flow interface. On the left, there is a sidebar with a user profile for 'Red Robbin - Area Expert' and a main navigation menu. The 'Sampling Plan Reports' option is highlighted with a red box. Below it, there are other options like 'General Reports', 'Alignment Map', and 'Other Documents'. The main area displays a table titled 'Sampling Plans' with one row: 'Summer - 2025' (Created On: 07/24/25, 05:21 AM, View (0), Action). A red arrow points to the 'Term' dropdown in the table header.

- Click the action buttons at the top to **edit**, **download**, or **share** the report

The screenshot shows the 'Course Sampling Plan Report' page. At the top, it displays 'Area Expert: Red Robbin', 'Term/Year: Summer - 2025', and 'Date: Jul 24, 2025'. Below this is a table titled 'Course Sampling Details' with three rows. To the right of the table is a 'Summary' section containing an 'Executive Summary' and 'Assessment Context' with detailed text. At the bottom right of the report preview area, there is a 'Share' button, which is highlighted with a red dashed arrow.

- The **share button** allows you to submit the plan for review or approval. Just select the role type. An editable automated message will appear. Edit as needed, select the recipients, and send it.

The screenshot shows a modal dialog titled 'Share Your Sampling Plan Report'. It has two main sections: 'Submit for Review & Approval *' and 'Role Type *'. Both sections contain a dropdown menu with the placeholder 'Select...'. The 'Select...' option in the first dropdown is highlighted with a blue background. Below each dropdown are two buttons: 'Submit for review' and 'Submit for approval'.

B2 How to Create a Learning Outcomes Assessment Data Report

- Select the LOADs Report from the left menu and click the “add new” button.

The screenshot shows the AMEE Flow application interface. On the left, there is a sidebar with a user profile for 'Red Robin - Area Expert'. The 'MAIN NAVIGATION' section includes links for 'My Projects', 'Role Assignments', 'Docs/Reports' (which has options for 'Build Sampling Plan', 'Sampling Plan Reports', 'LOADs Report', 'General Reports', 'Alignment Map', 'Other Documents', and 'Contact Support'), and 'Alignment Maps'. The main content area is titled 'LOADs Report' and shows a 'Listing' table with columns for 'Term/Year', 'Feedback', 'Approval(s)', 'Last Updated', and 'Action'. In the top right of this area, there are 'Delete' and '+ Add New' buttons. A red box highlights the 'LOADs Report' link in the sidebar, and a red arrow points to the '+ Add New' button in the listing table.

Follow the prompts to complete the fields. AI will assist in creating the report.

You may also edit, download, and share the Report. Follow instructions on page 7.

This is a modal dialog box titled 'Add new report'. It contains several input fields with asterisks indicating required information: 'Term *' (with a dropdown menu labeled 'Select...'), 'Year *' (with a dropdown menu), 'Courses/Programs *' (with a text input field and a 'add details' link), 'Strengths *' (with a text input field and a 'add details' link), and 'Areas for Improvement *' (with a text input field and a 'add details' link). A red bracket on the left side groups the 'Courses/Programs', 'Strengths', and 'Areas for Improvement' sections.

B3 How to Create a General Report in AMEE Flow

- Click on **General Report** from the left menu and click **Add New**.

The screenshot shows the AMEE Flow application interface. On the left, there is a sidebar with a user profile for 'Red Robin - Area Expert'. The 'MAIN NAVIGATION' section includes links for 'My Projects', 'Role Assignments', 'Docs/Reports' (which has options for 'Build Sampling Plan', 'Sampling Plan Reports', 'LOADs Report', 'General Reports', 'Alignment Map', 'Other Documents', and 'Contact Support'), and 'Alignment Maps'. The main content area is titled 'General Reports' and shows a 'Listing' table with columns for 'Topic Name', 'Feedback', 'Approval(s)', 'Last Updated', and 'Action'. In the top right of this area, there are 'Delete' and '+ Add New' buttons. A red box highlights the 'General Reports' link in the sidebar, and a red arrow points to the '+ Add New' button in the listing table. A red box encloses the text 'Complete the field for title, add the content of the report, and select Generate report.'

This is a modal dialog box titled 'Add New Report'. It contains two main sections: 'Add a Title *' (with a text input field labeled 'Add Title Here') and 'Add a Content *' (with a text input field labeled 'Add Content Details Here'). Below these sections is a 'Generate Report' button. The entire dialog box is enclosed in a red border. A red bracket on the left side groups the 'Add a Title' and 'Add Content' fields.

Complete the field for title, add the content of the report, and select Generate report.

c Accessing Your Campuses' Alignment Map in AMEE Flow

- Go to your Docs/Reports
- Select the **alignment map** from the left menu
- Use the oversight unit dropdown box to find your unit and review the master alignment map.
- If there is a discrepancy, leave a note for your project manager by selecting the pencil next to each course. Then click save to publish your note.

Alignment Map

Oversight Units: MCCAMC

#	Course	ISLO (1)	ISLO (2)	ISLO (3)	ISLO (4)	ISLO (5)	ISLO (6)	ISLO (7)	GISLO (1)	GISLO (2)	PSLO (1)	PSLO (2)	PSLO (3)	PSLO (4)	PSLO (5)	GPSLO (1)	GPSLO (2)	GPSLO (3)	GPSLO (4)	GPSLO (5)	Notes
1	ART-140	Yes			Yes	Yes										Yes					
2	ART-611																Yes	Yes	Yes	Yes	
3	COMS-104	Yes				Yes	Yes	Yes								Yes	Yes	Yes			
4	COMS-151	Yes			Yes	Yes	Yes	Yes													
5	COMS-225	Yes	Yes		Yes	Yes	Yes	Yes													
6	COMS-450				Yes											Yes					
7	MUS-201															Yes					
8	MUS-306															Yes					
9	MUS-684																				

Add your note

Course: ART 140

Notes *

Save

d Other Documents

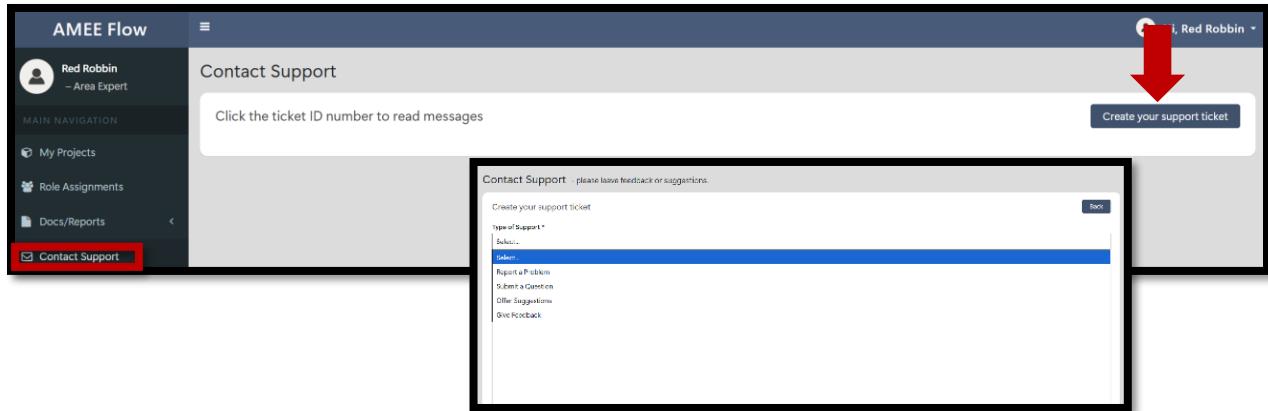
- Go to your Docs/Reports
- Select **other documents** from the left menu
- View the list of resources associated with this project.

Other Documents

#	Document Name/Title
1	College Assessment Lead Agreement
2	Boosting Engagement: AMEE Flow Email Best Practices
3	Task 1-Cal Agreement Guide
4	Task 2-Attend Virtual Orientation/Training
5	Task 3-Organize iROCA Kick Off Meeting(s)
6	Task 4-Prepare a College Course Sampling Plan
7	Task 5-Generate the Course Sampling Plan
8	Task 6-Share the Course Sampling Plan
9	Task 7-Onboard Faculty

Step 4**Contact Support**

- Go to **Main Navigation** on the left side
- Select contact support
- Select “create your support ticket” to get help.

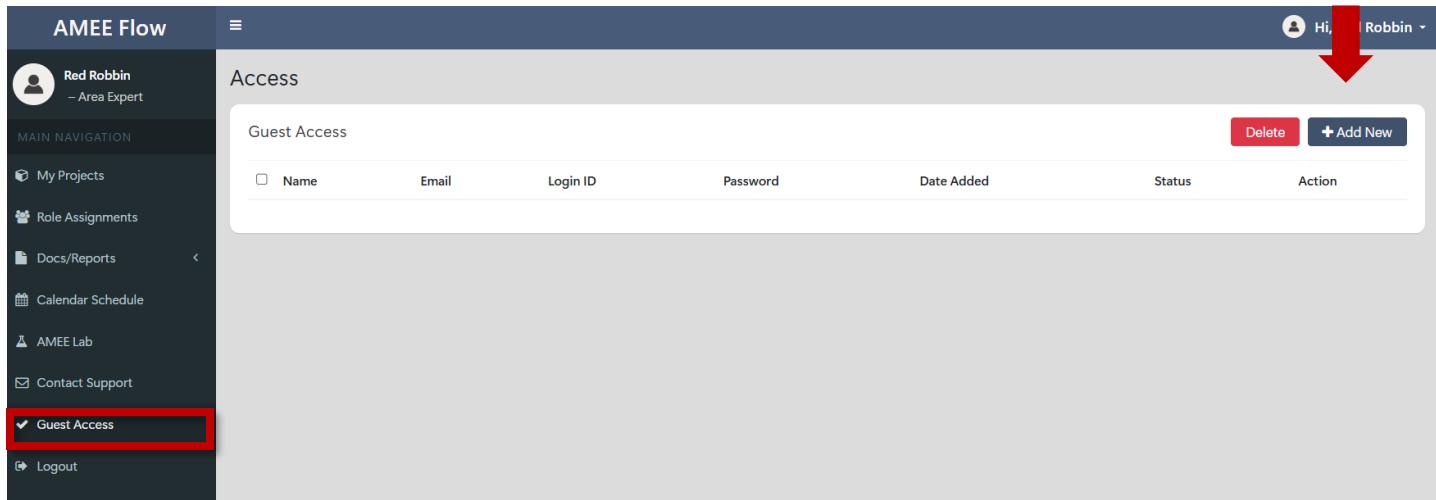


Select the type of support needed, write a detailed message, and send..

How to Grant Access to Your Dashboard

Follow these steps to invite a collaborator as a guest user in AMEE Flow:

1. **Navigate to Guest Access:**
 - o From the **Main Navigation Panel** (left-hand side), click on **Guest Access**.
2. **Add a New Guest:**
 - o Select **Add New** in the Guest Access section.



3. Complete Guest Information:

- o Enter the guest's full name and email address.

IMPORTANT NOTE: Access Level-Guests will have view and edit access to your dashboard, which is **outside your authority**. Only invite guests whom you trust to view and manage the same content you do.

4. Send Invite:

- o Click **Send**. The guest will receive an email with login credentials and instructions.

Reminder:

For security and compliance, avoid sharing sensitive documents or reports unless you are certain the guest has appropriate clearance.