University of Florida Office of Institutional Assessment

2015–16 Institutional Effectiveness Documentation

Accessing and editing your documentation in Compliance Assist!

Timothy S. Brophy
Professor and Director of Institutional
Assessment

Cheryl Gater
Director of SACSCOC Accreditation

assessment@aa.ufl.edu

Table of Contents

Introduction

This guide is designed to go with the PowerPoint presentation of the same name available at http://assessment.aa.ufl.edu/institutional-effectiveness-plans.

The purpose of this guide is to provide instructions for submitting/revising Institutional Effectiveness Documentation Reports and to describe institutional resources available for Institutional Effectiveness reporting.

Accessing the Institutional Effectiveness Documentation Components

Step 1: Log In
- Go to https://ufl.compliance-assist.com and log in with your GatorLink credentials.
- From the Landing Site, click on Planning. (Please note your landing site may have slightly different options than those shown below.)
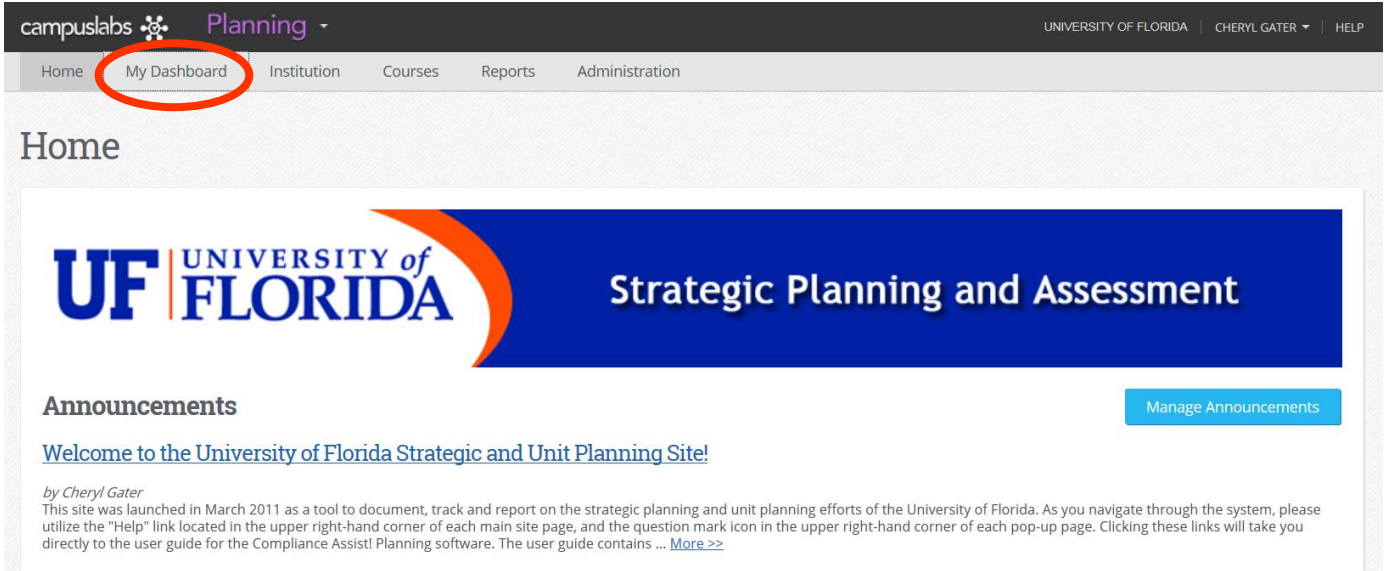

Step 2: Planning Page
- At the Planning page, click on *My Dashboard* at the top of the page.

Step 3: My Dashboard – My Roles Page
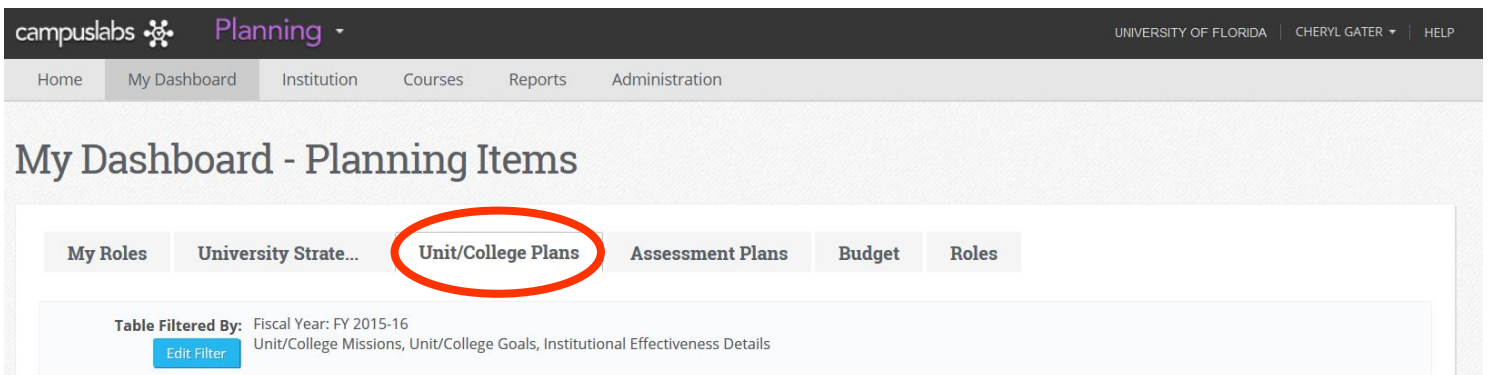- At the *My Dashboard* page, click the blue Edit Filter button and select 2015-16 from the drop down list, then click OK.
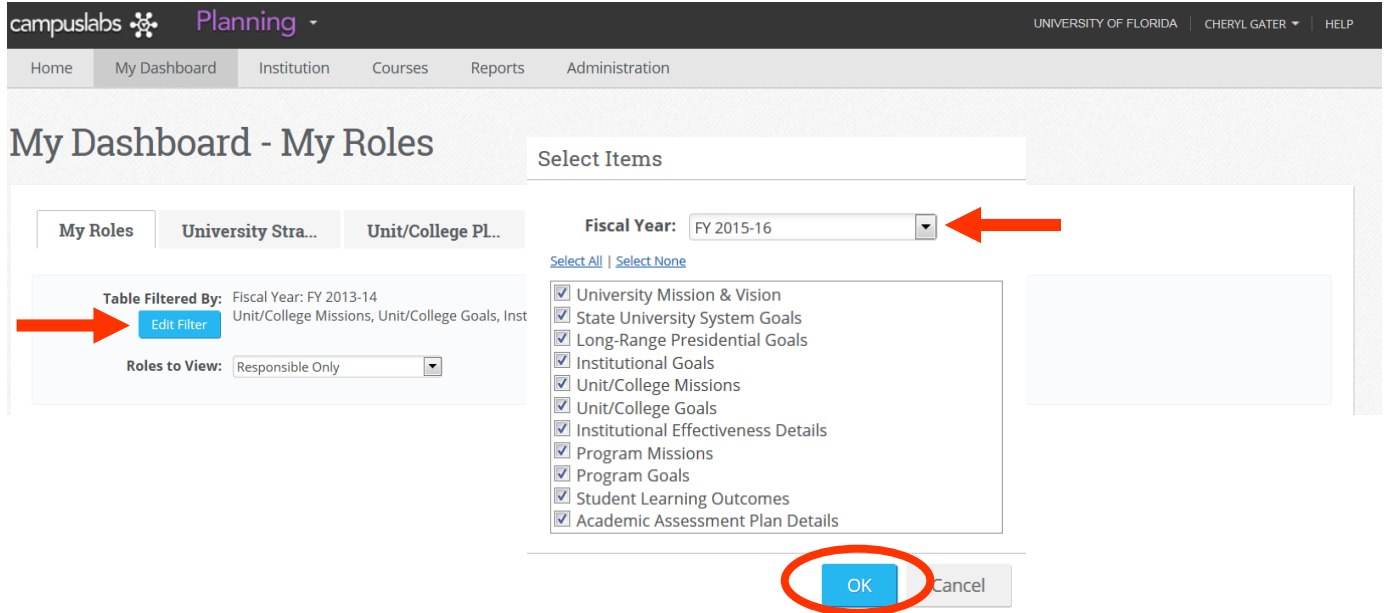
Step 4: Unit/College Plan Tab
- Click the tab marked *Unit/College Plans*

Step 5: Find Your Program

- Using the unit directory on the left side of the screen, click the + symbol to locate your college or unit.
- The examples below show the College of Agricultural & Life Sciences and the Division of Enrollment Management.
- Once your college or unit is selected (highlighted in light blue), you will find three different types of items from the 2014-15 reports: Mission, Goals, and IE (Institutional Effectiveness) Detail which have been rolled over into 2015-16.

Number	Name	Start	End	Progress
	CALS Mission	7/1/2015	6/30/2016	
2014-15 Goal 1	Learning and Teaching	7/1/2015	6/30/2016	
2014-15 Goal 2	Student Population	7/1/2015	6/30/2016	
2014-15 Goal 3	Student Development Programs	7/1/2015	6/30/2016	
2014-15 Goal 4	Stakeholder Engagement	7/1/2015	6/30/2016	
	CALS IE Detail	7/1/2015	6/30/2016	

University of Florida
- Academic Affairs
  - Academic Colleges
    - College of Agricultural & Life Scien
    - College of Dentistry
    - College of Design, Construction, a
    - College of Education
    - College of Engineering
    - College of Health & Human Perfor
    - College of Journalism & Communi
    - College of Liberal Arts & Sciences
    - College of Medicine
    - College of Nursing

Fiscal Year: FY 2015-16

+ New Item

Number	Name	Start	End	Progress
	DEM Mission Statement	7/1/2015	6/30/2016	
2014-15 Goal 1	Optimize resources	7/1/2015	6/30/2016	
2014-15 Goal 2	Develop administrative infrastructure	7/1/2015	6/30/2016	
2014-15 Goal 3	Work collaboratively to broaden the university's presence	7/1/2015	6/30/2016	
	Enrollment Management IE Detail	7/1/2015	6/30/2016	

University of Florida
- Academic Affairs
  - Academic Colleges
  - Chief Financial Officer
  - Enrollment Management
  - Florida Museum of Natural History
  - Genetics Institute
  - Graduate School
  - Harn Museum of Art
  - International Center
  - Latin American Studies
  - Libraries

Fiscal Year: FY 2015-16

+ New Item

Editing the College/Unit Institutional Effectiveness Documentation Components for 2015-16

Mission

- Open the Mission link by clicking on the blue hyperlinked name, and click the Edit tab.

	Number	Name	Start	End	Progress
✎		SVP Academic Affairs Mission	7/1/2015	6/30/2016	➔

SVP Academic Affairs Mission - Unit/College Mission - Compliance Assist

✎ SVP Academic Affairs Mission

View Edit Related Activity Permissions

Export

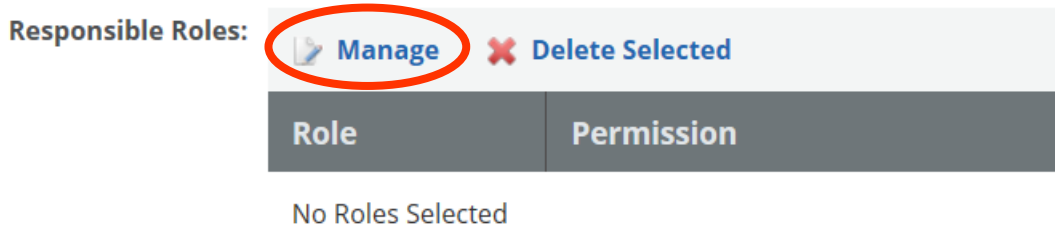Public for this Department and lower
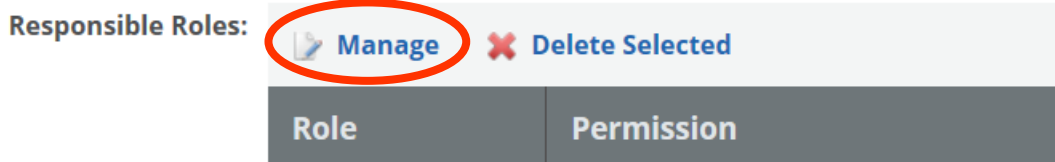
Title: SVP Academic Affairs Mission

☐ Mission Statement

- Modify the Mission Statement field if any changes are needed.

- Progress Field – be sure to select the appropriate progress from the drop down window. If unsure which progress to select, "Ongoing" is appropriate.

Progress: Ongoing ▼

- Responsible Roles – Click Manage if no role is assigned or if changes need to be made to the assigned responsible role.

Responsible Roles: ✎ Manage ✖ Delete Selected

Role	Permission

No Roles Selected

o In User Name, start typing the last name of the person responsible for the mission, typically this is a dean or vice president. If the person's name is incorrect or missing, please email Cheryl Gater at cgater@aa.ufl.edu for corrections or additions.
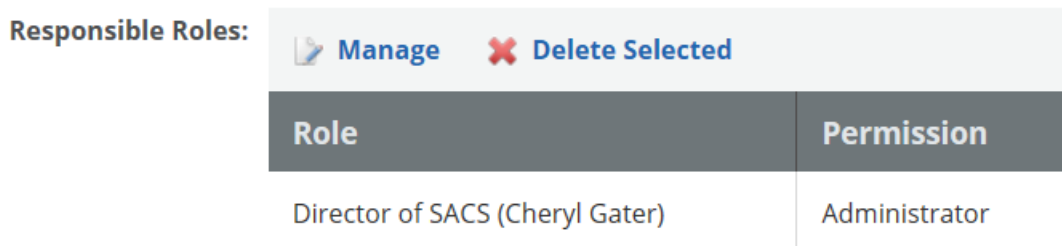
o Select the individual, and then click Search.

o The person's name will appear under Available Roles, check the box to the left of the person's Role Name, then hover your cursor over Add Roles and click Selected.
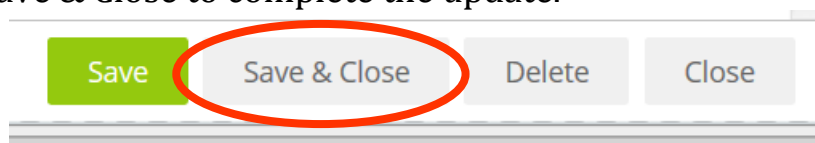

o The person's name will appear to the right under Selected Roles, click Add Roles.

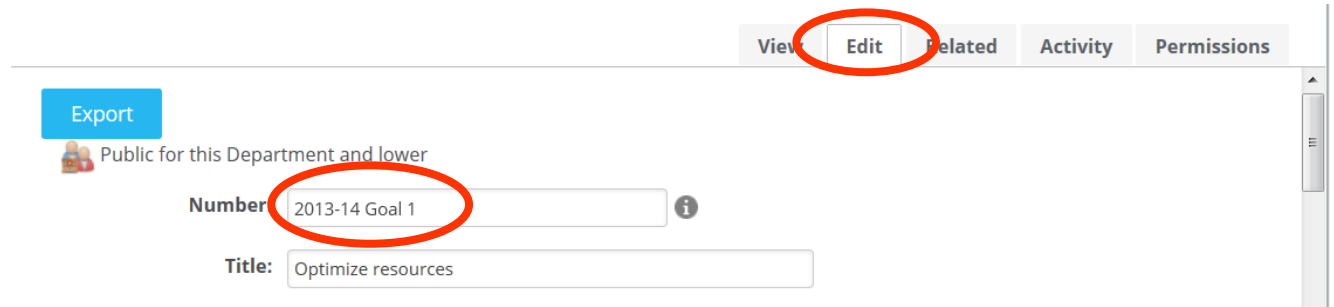o The person is now assigned as the Responsible Role.

- Click Save & Close to complete the update.

Goals

- Open each goal by clicking the blue hyperlinked goal name and then click the Edit tab.

- Update the year in the Goal Number to "2014-15", leaving "Goal" and the number unchanged. You may also modify the number to simply reflect Goal 1, Goal 2, etc. without the academic year indicator.

- Progress Field – be sure to select the appropriate progress from the drop down window. If unsure which progress to select, "Ongoing" is appropriate.

- Responsible Roles – Click Manage if no role is assigned or if changes need to be made to the assigned responsible role.
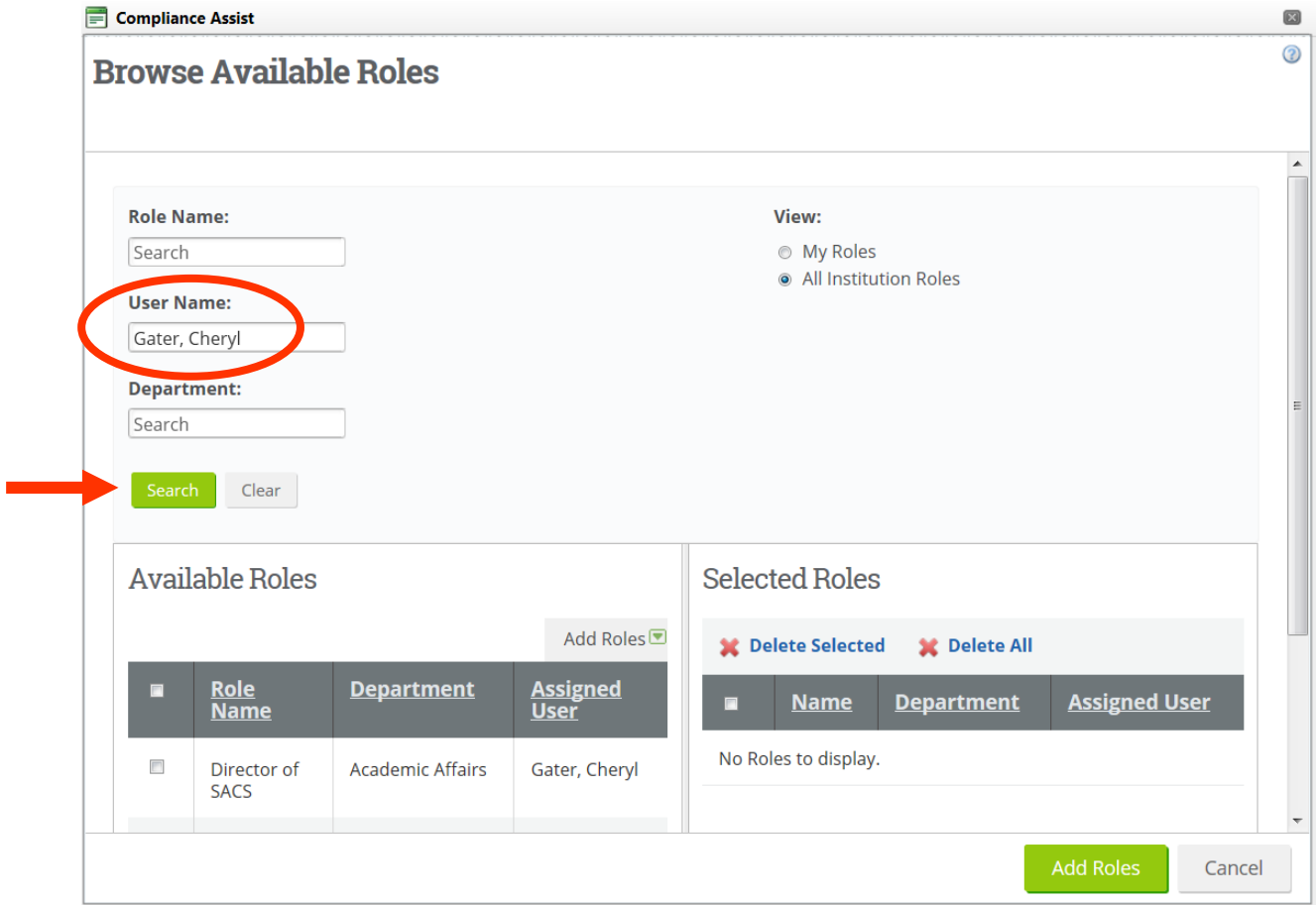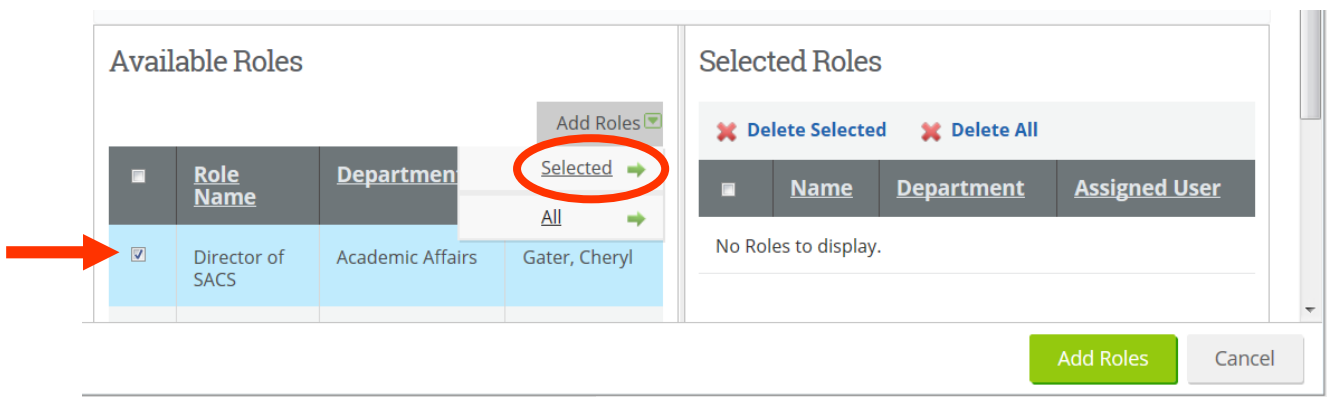

  o In User Name, start typing the last name of the person responsible for the goal, typically this is a dean or vice president. If the person's name is incorrect or missing, please email Cheryl Gater at cgater@aa.ufl.edu for correction or addition.

o Select the individual, the click Search.

o The person's name will appear under Available Roles, check the box to the left of the person's Role Name, then hover your cursor over Add Roles and click Selected.

- The person's name will appear to the right under Selected Roles, click Add Roles.

- The person is now assigned as the Responsible Role.

- Click the Edit button within each field to make any revisions to that field:
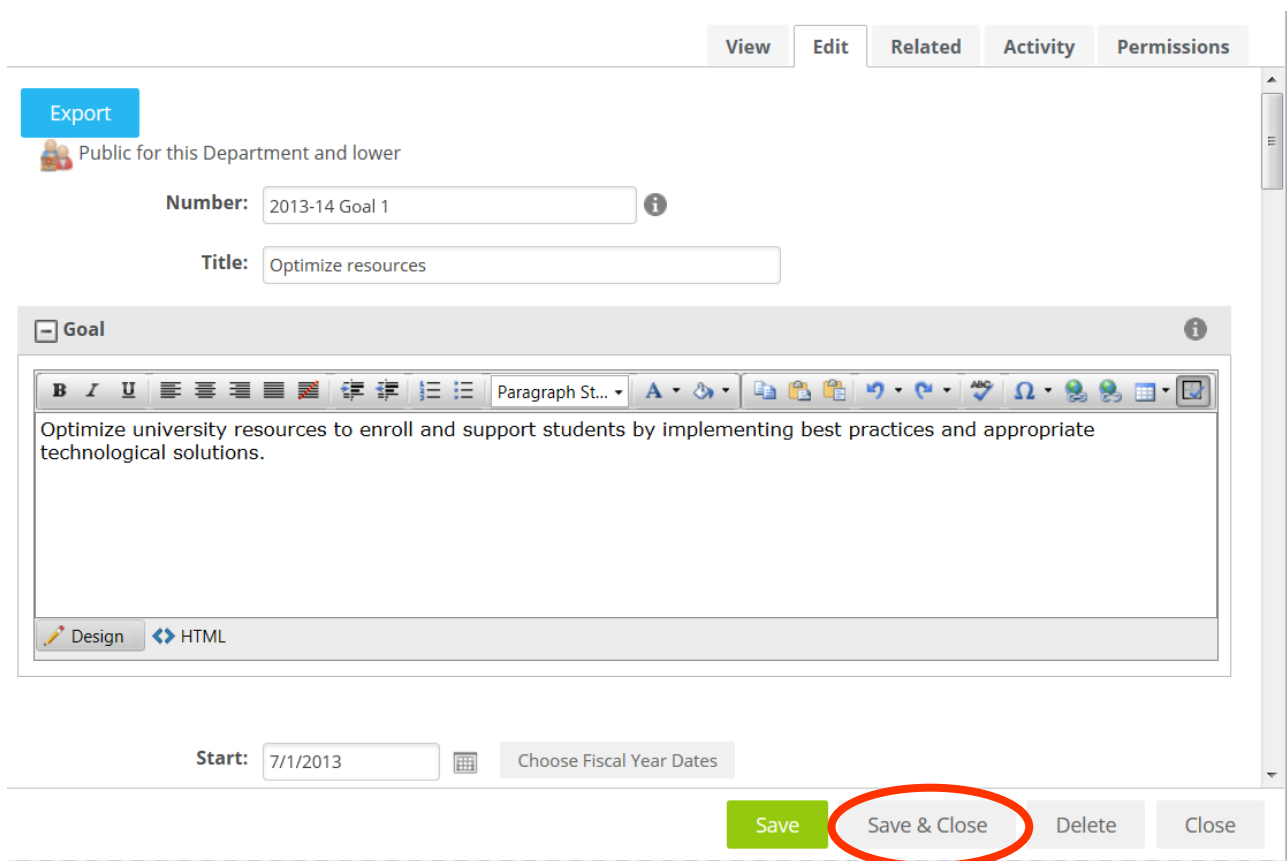

- Action Items
- Measures of Action Items
- Time Period of Action Items
- Resources of Action Items

- Then click Update to update each of the fields.

- Once all fields are updated, Click Save & Close to complete the update to the entire goal.

IE Detail

- Open the IE Detail by clicking on the blue hyperlinked name.
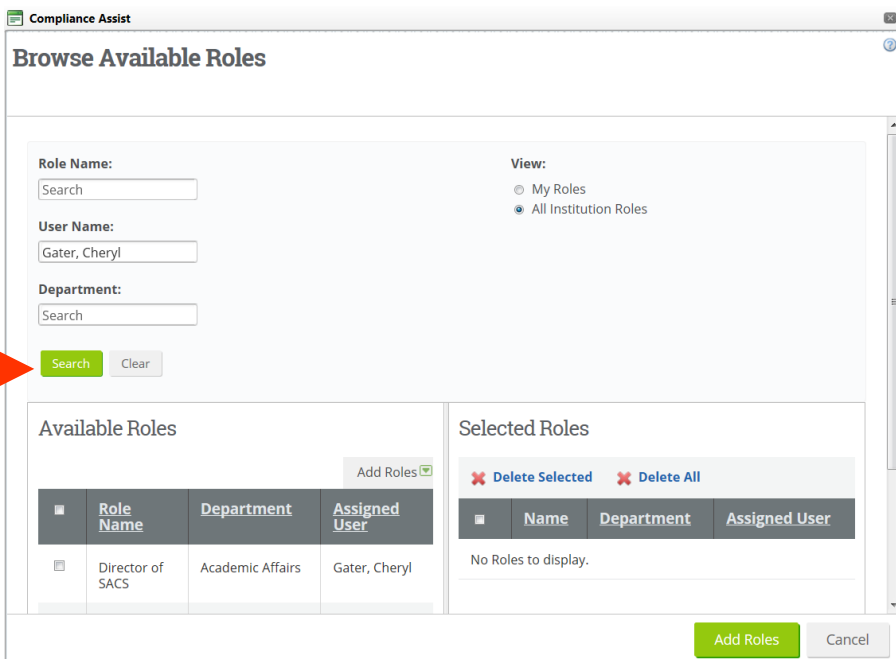- Progress Field – select "Ongoing" from the drop down window.

Progress: Ongoing ▼

- Responsible Roles – Click Manage if no role is assigned or if changes need to be made to the assigned responsible role.

Responsible Roles: ✎ **Manage** ✖ **Delete Selected**

Role	Permission

No Roles Selected

  o In User Name, start typing the last name of the person responsible for the goal, typically this is a dean or vice president. If the person's name is incorrect or missing, please email Cheryl Gater at cgater@aa.ufl.edu for correction or addition.
  o Select the individual, and then click Search.

Compliance Assist

Browse Available Roles

Role Name:	View:
Search	○ My Roles
User Name:	● All Institution Roles
Gater, Cheryl	
Department:	
Search	

Search   Clear

Available Roles

Add Roles ▼

☐	Role Name	Department	Assigned User
☐	Director of SACS	Academic Affairs	Gater, Cheryl

Selected Roles

✖ Delete Selected   ✖ Delete All

☐	Name	Department	Assigned User

No Roles to display.

Add Roles   Cancel

o The person's name will appear under Available Roles, check the box to the left of the person's Role Name, then hover your cursor over Add Roles and click <u>Selected</u>.

o The person's name will appear to the right under Selected Roles, click Add Roles.

o The person is now assigned as the Responsible Role.

- Click the Edit button within each field to make any revisions to that field:

- □ Administrative Support Services

  Edit

  - o Administrative Support Services
  - o Academic and Student Support Services
  - o Research
  - o Community and Public Service
  - o Effectiveness Oversight
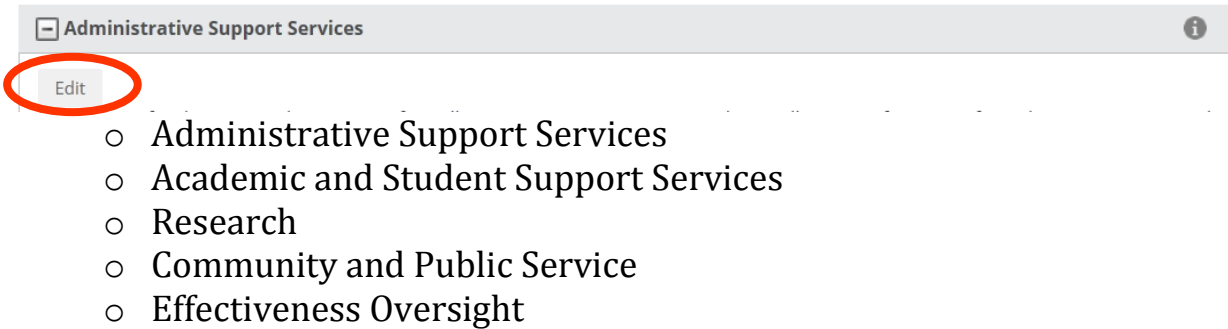
- Click Update to save the changes made to that field.

Administrative Support Services
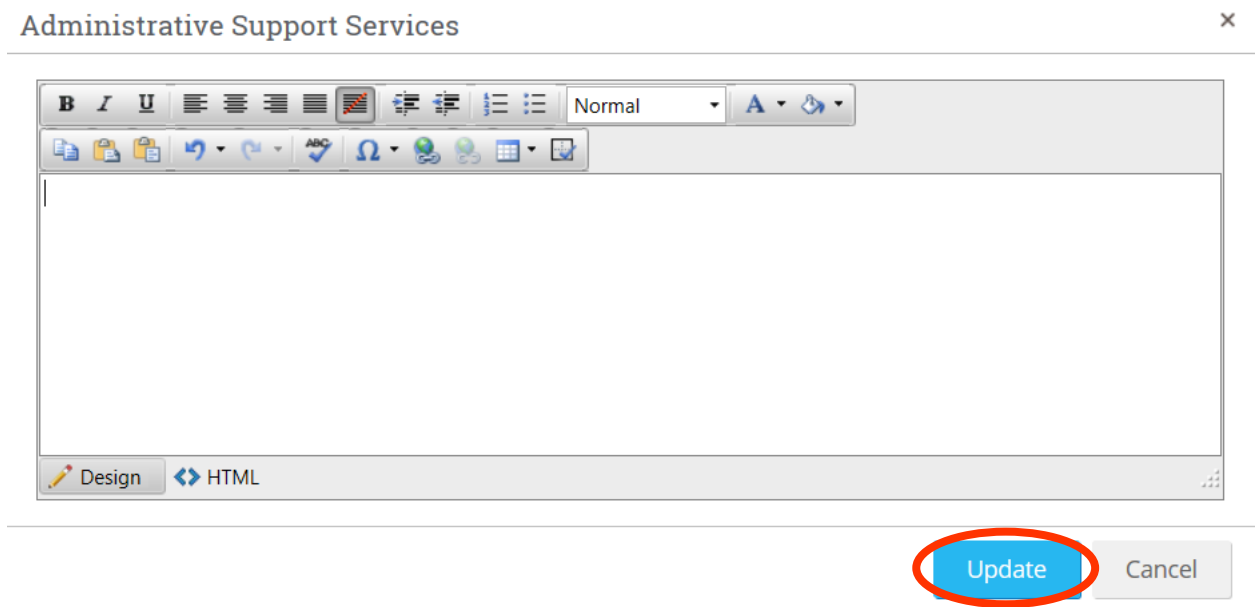
- **VERY IMPORTANT!** After all the information in each field is reviewed, please check the Institutional Effectiveness Report Complete box, and click Save & Close to save all revisions made.

Institutional ☑ ⓘ
Effectiveness Report
Complete:

Last modified 4/8/2014 at 10:20 AM by Cheryl Gater
Created 4/8/2014 at 10:20 AM by Cheryl Gater

Save   Save & Close   Delete   Close
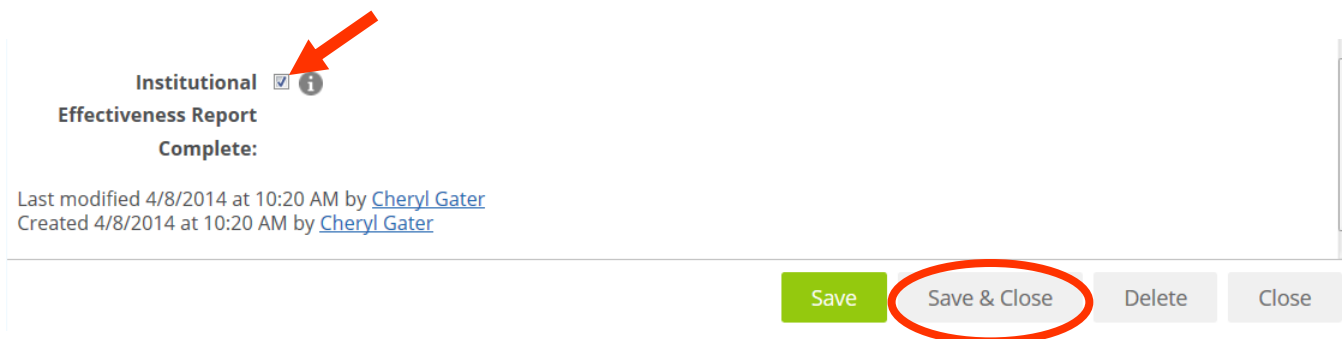
Checklist
- Update Progress field in Mission, Goals, and IE Detail.
- Ensure Responsible Role is assigned to all items: Mission, Goals, and IE Detail.
- Update the Goal Number fields.
- Edit the IE Detail for 2015-16 and check the "Completed" box at the bottom of the detail screen.
- Click **SAVE & CLOSE** to update each item: Mission, Goals, and IE Detail.

Due Dates

Institutional Effectiveness Data Reports		Effectiveness Documentation Planning and Development	Effectiveness Documentation Plans	
Academic year	*Due date*		*Academic year*	*Due date**
			2014-15	June 13, 2014
2013-14	October 10, 2014	October 11, 2014 – June 11, 2015	2015-16	June 12, 2015
2014-15	October 9, 2015**	October 9, 2015 – June 9, 2016	2016-17	June 10, 2016
2015-16	October 14, 2016	October 14, 2016 – June 8, 2017	2017-18	June 9, 2017

*Plans may be submitted in *Compliance Assist!* at any time during the planning and development period.
**Please note all college/unit data reports due by October 9, 2015 (previously only unit level IE data reported, not college-level)

Resources
- http://assessment.aa.ufl.edu/institutional-effectiveness-plans

Further Assistance
- Email assessment@aa.ufl.edu or call Institutional Assessment at (352) 273-4476