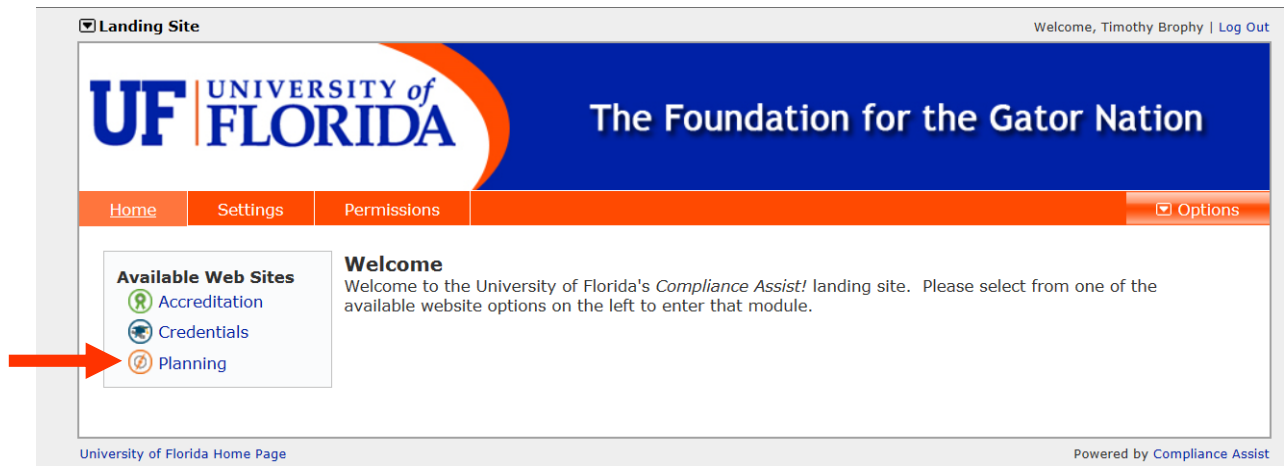


## Updating Institutional Effectiveness Plans in Compliance Assist

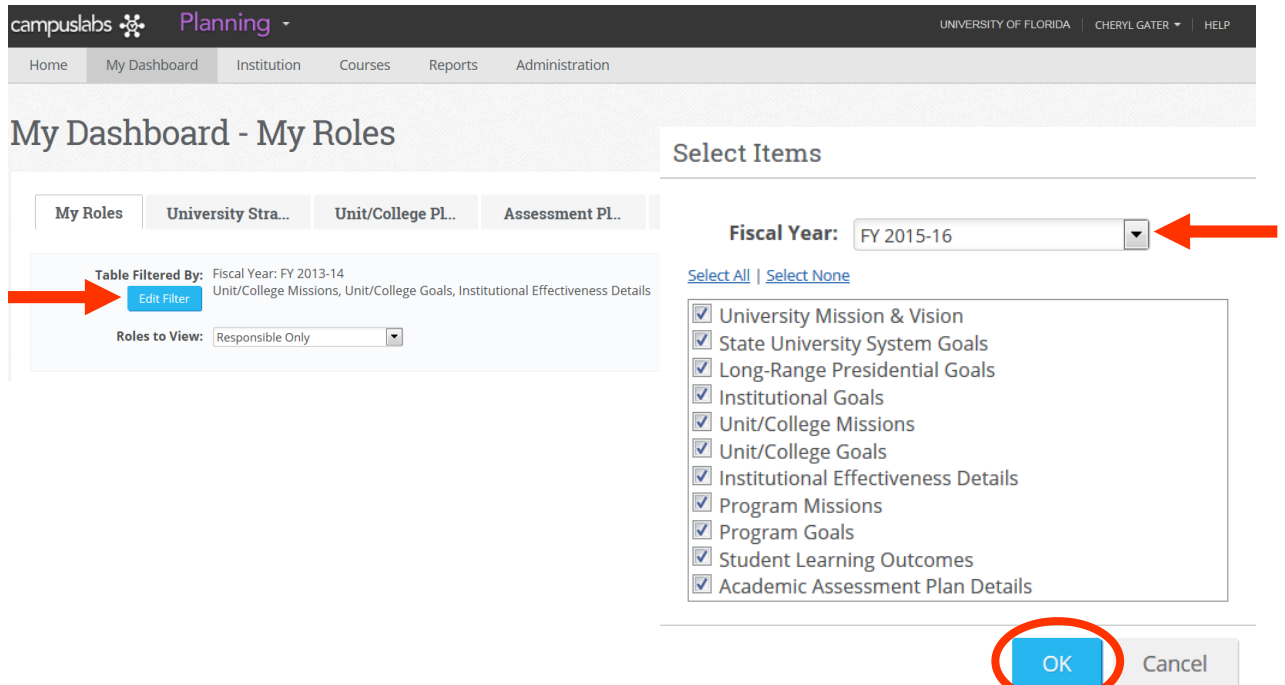
Three Components:

1. Mission
2. Unit/College Goals
3. Institutional Effectiveness (IE) Detail

- Log into [Compliance Assist \(https://ufl.compliance-assist.com/index.aspx\)](https://ufl.compliance-assist.com/index.aspx) and enter your GatorLink username and password.
- Click “Planning” from the list of Available Web Sites.



- Now click “My Dashboard” and then click the blue “Edit Filter” button and select the next fiscal year. The system will default to the current year. Then click “OK”.



- Next click the “Unit/College Plans” tab.

My Roles   University Strate...   **Unit/College Plans**   Assessment Plans   Budget   Roles

Table Filtered By: Fiscal Year: FY 2014-15  
[Edit Filter](#)   Unit/College Missions, Unit/College Goals, Institutional Effectiveness Details

University of Florida

- Academic Affairs
- Agriculture & Natural Resources, IFAS
- Development & Alumni Affairs
- General Counsel
- Health Affairs
- SVP & COO
- University Relations

Number	Name	Start	End	Progress
No items to display				

- Then select the appropriate unit or college from the listing on the left. You can expand VP areas by clicking on the “+” to the left of each title. As an example, Business Affairs is displayed below:

My Roles   University Strate...   **Unit/College Plans**   Asses

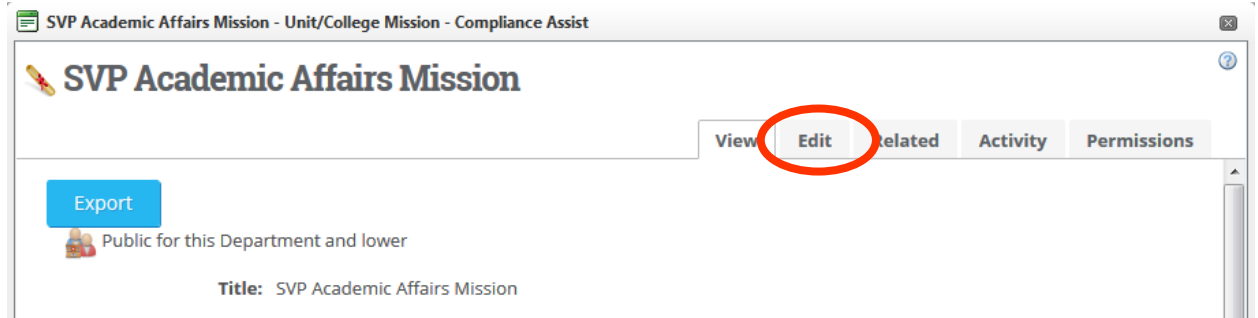
Table Filtered By: Fiscal Year: FY 2014-15  
[Edit Filter](#)   Unit/College Missions, Unit/College Goals, Institutional

University of Florida

- Academic Affairs
- Agriculture & Natural Resources, IFAS
- Development & Alumni Affairs
- General Counsel
- Health Affairs
- SVP & COO
  - Business Affairs**
  - Chief Information Officer
  - Human Resource Services
  - Research
- University Relations

Number
Goal 1
Goal 2
Goal 3

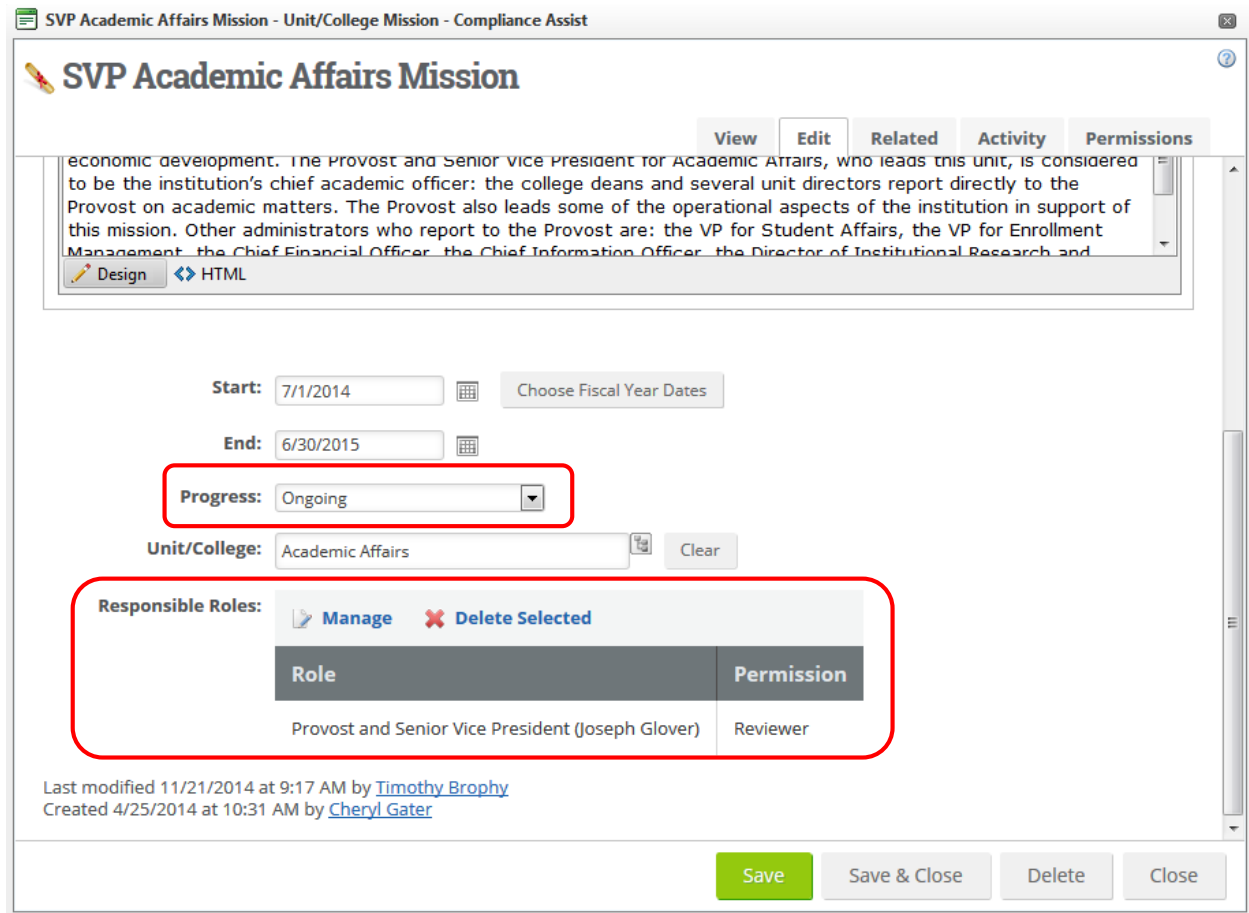
- To edit an item already in the system, click on the blue hyperlinked name, and that item will open in a new window. The item will default into the view mode, but click the “Edit” tab to make revisions.



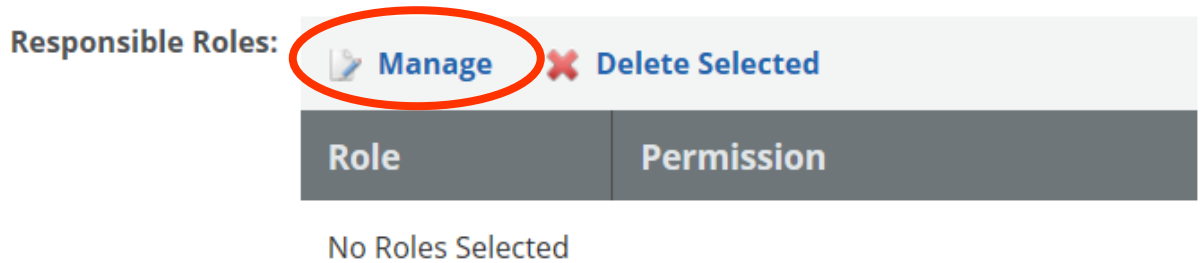
## Mission

Mission Items to check for accuracy or update:

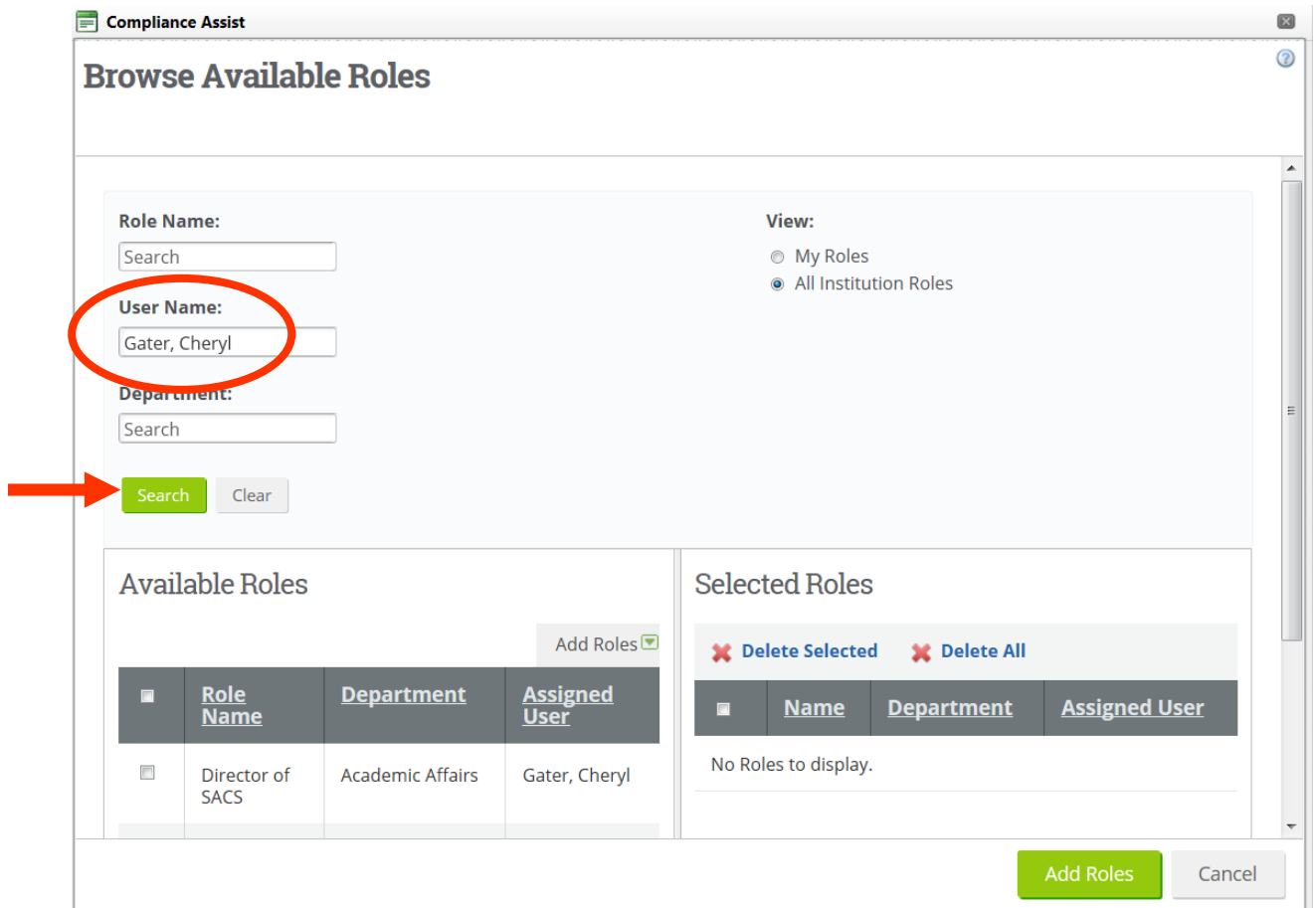
- Mission
- Progress
- Responsible Role



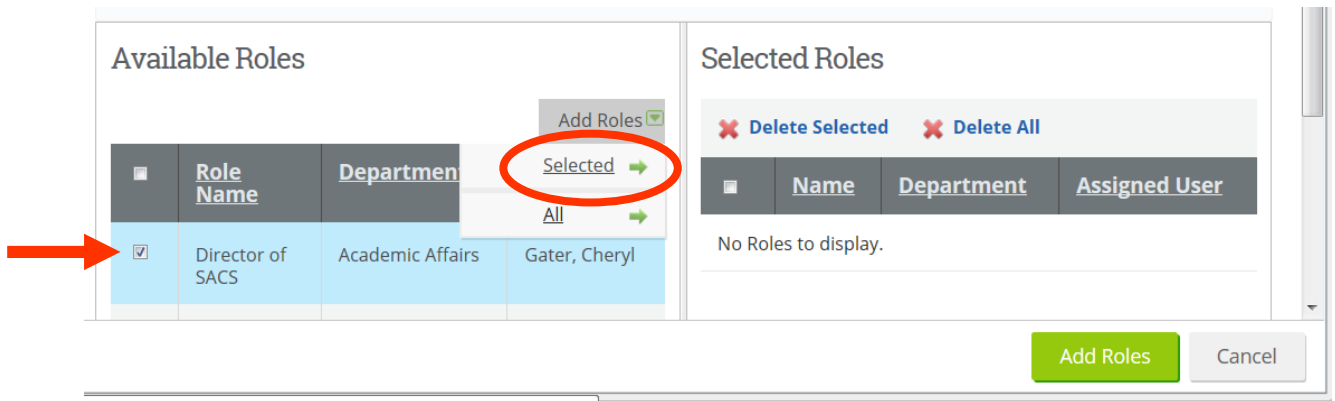
- To update the Progress field, select the appropriate option from the drop down window.
- To update the Responsible Roles field, click “Manage” and a new window will open.



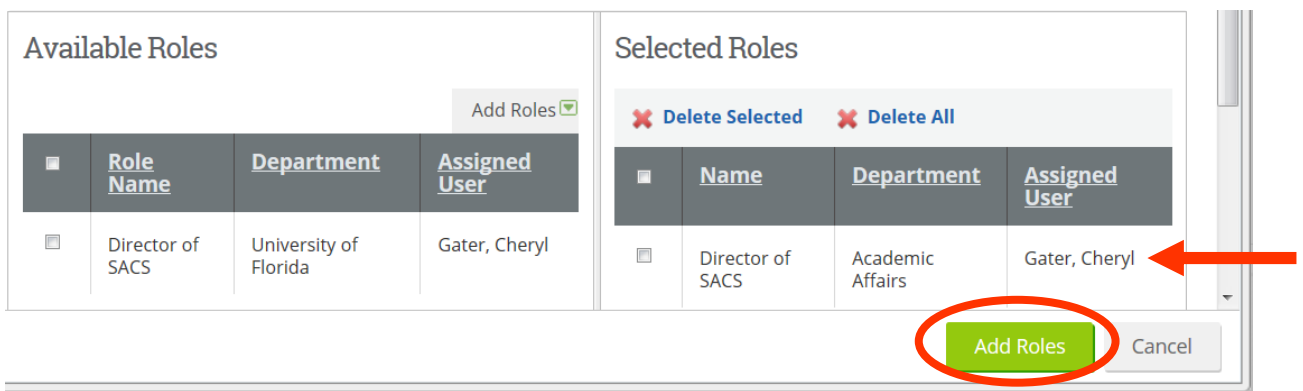
- In the User Name field, start typing the last name of the person responsible for the mission, the field will auto populate for you to select the individual. Once you have selected the individual, click “Search”.
- 
- If the person’s name is incorrect or unavailable, please email Cheryl Gater at [cgater@aa.ufl.edu](mailto:cgater@aa.ufl.edu).



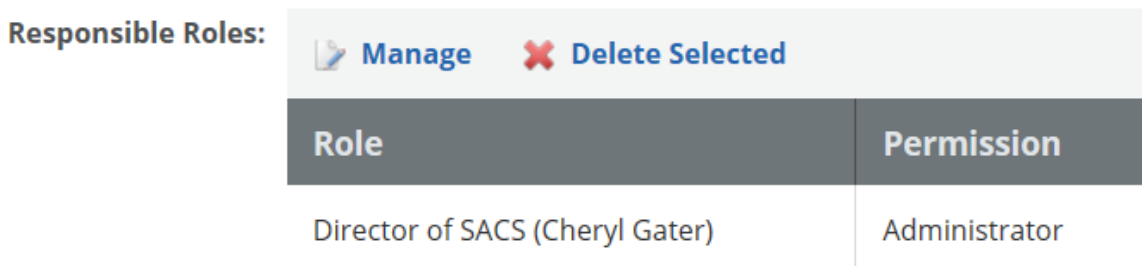
- Once the person is selected, his/her name will appear under “Available Roles”, check the box to the left of the person’s Role Name, then hover your cursor over “Add Roles” and click “Selected”.



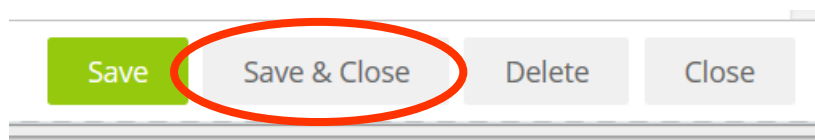
- Now the person’s name will appear to the right under “Selected Roles” and you can click “Add Roles” to assign that person as the Responsible Role:



- The person’s name will now appear under the Responsible Roles of the item:



- Once all other edits and changes have been made or the information in the system is verified, click “Save & Close” to save all of your work.








## Unit/College Goals

Unit/College Goal items to check for accuracy or update:

- Goal
- Update Number field
- Responsible Role
- Progress
- Action Items
- Measures of Action Items
- Time Period of Action Items
- Resources of Action Items

- To update each Unit/College Goal, click the blue hyperlinked name.

+ New Item

	<u>Number</u>	<u>Name</u>
		<a href="#">SVP Academic Affairs Mission</a>
	2014-15 Goal 1	<a href="#">Top 10 status</a>
	2014-15 Goal 2	<a href="#">UF Online</a>
	2014-15 Goal 3	<a href="#">UF Common Core</a>
		<a href="#">SVP Academic Affairs IE Detail</a>


- The goal will open in the “view” format, to edit click the “Edit” tab in the upper right corner.

Top 10 status - Unit/College Goal - Compliance Assist

### Top 10 status

View **Edit** Related Activity Permissions

Export

 Public for this Department and lower

Number:  ⓘ

Title:

- Verify there are no changes to the Unit/College Goal or make necessary edits.

- Update the “Number” field.
  - You may either update the number to Goal 1, Goal 2, etc. or continue using the fiscal year and update it to reflect the future fiscal year and goal number, for example, 2015-16 Goal 1, 2015-16 Goal 2, etc.

Top 10 status - Unit/College Goal - Compliance Assist

## Top 10 status

View Edit Related Activity Permissions

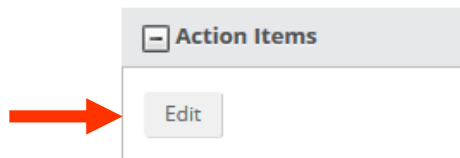
Export

Public for this Department and lower

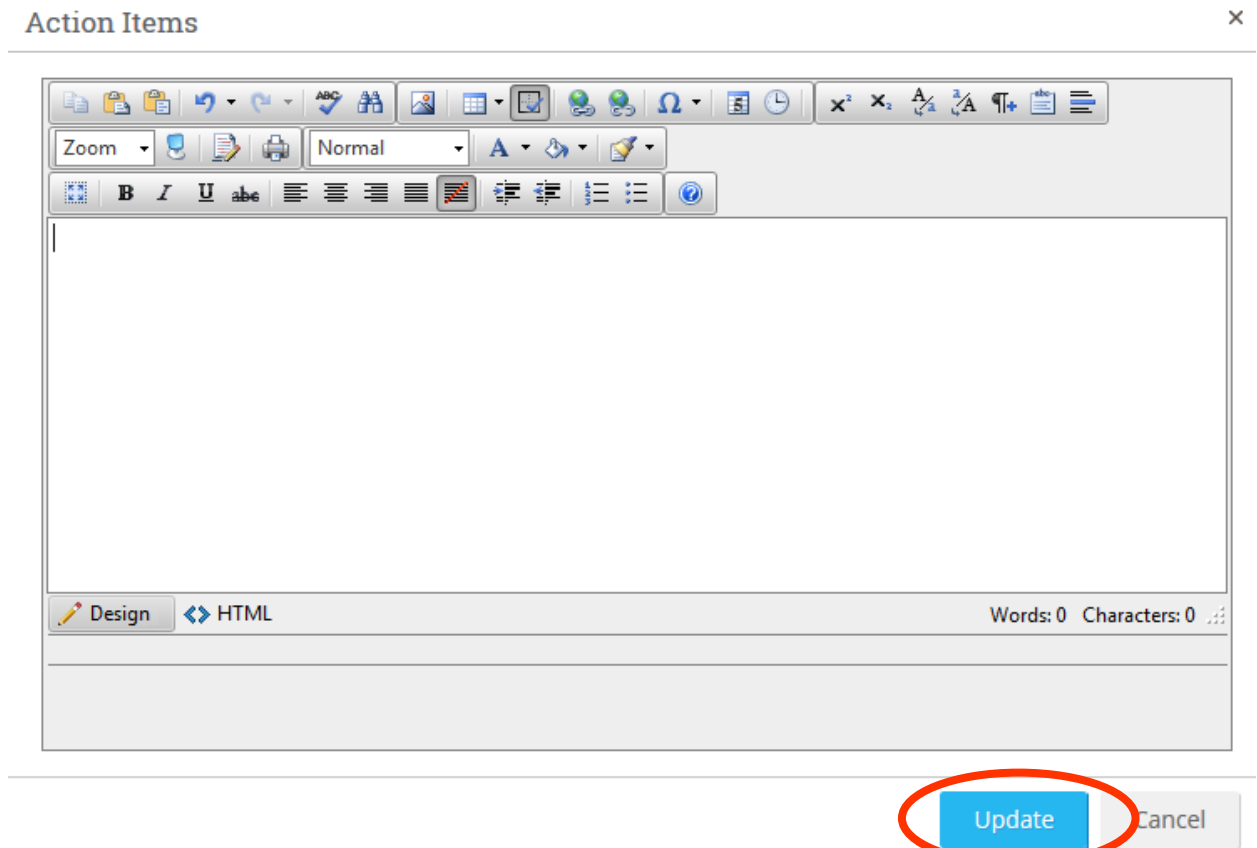
Number: 2014-15 Goal 1

Title: Top 10 status

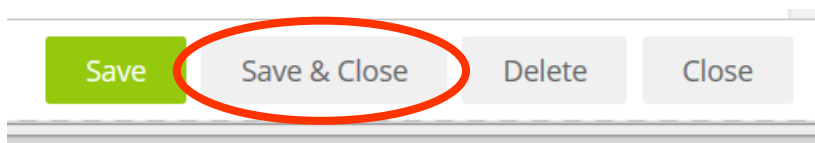
- Assign a Responsible Role (directions are the same as for the Mission section).
- Select the appropriate option from the Progress field drop down menu, if uncertain “Ongoing” is fine, or verify the option selected is accurate.
- Verify there are no changes to the Action Items or make necessary edits.
  - To Edit the Action Items, click the grey “Edit” button directly below the Action Items title.



- A new text box window will open.
  - Once the edits are complete, click the blue “Update button.”



- Once all other edits and changes have been made or the information in the system is verified, click “Save & Close” to save all of your work.



- Verify there are no changes to the Measures of Action Items or make necessary edits. To edit this field, the directions are the same as listed under “Action Items”.
- Verify there are no changes to the Time Period of Action Items or make necessary edits. To edit this field, the directions are the same as listed under “Action Items”.
- Verify there are no changes to the Resources of Action Items or make necessary edits. To edit this field, the directions are the same as listed under “Action Items”.



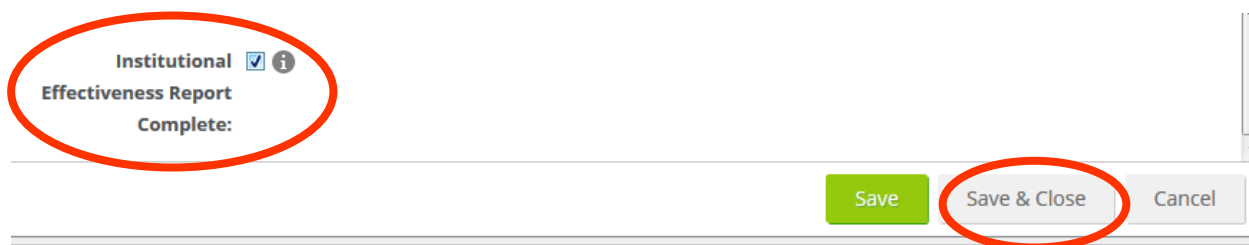
## Institutional Effectiveness (IE) Detail

IE Detail items to check for accuracy or update:

- Progress
- Responsible Roles
- Administrative Support Services
- Academic and Student Support Services
- Research
- Community and Public Service
- Institutional Effectiveness Report Complete

- To open the IE Detail item, click on the blue hyperlinked name, then click the “Edit” tab.
- Select the appropriate option from the Progress field drop down menu, if uncertain, “Ongoing” is fine, or verify the option selected is accurate.
- Assign a Responsible Role (directions are the same as for the Mission section).
- For the *Administrative Support Services* section, verify the information in the system is accurate or make revisions.
  - To make revisions, click the grey “Edit” button under the “Research” title.
  - Make changes then click the blue “Update” button.
- For the *Academic and Student Support Services* section, verify the information in the system is accurate or make revisions.
  - To make revisions, click the grey “Edit” button under the “Research” title.
  - Make changes then click the blue “Update” button.
- For the *Research* section, verify the information in the system is accurate or make revisions.
  - To make revisions, click the grey “Edit” button under the “Research” title.
  - Make changes then click the blue “Update” button.
- For the *Community and Public Service* section, verify the information in the system is accurate or make revisions.
  - To make revisions, click the grey “Edit” button under the “Research” title.
  - Make changes then click the blue “Update” button.
- For the *Assessment Oversight*, verify the information in the system is accurate or make revisions.
  - To make revisions, click the grey “Edit” button under the “Assessment Oversight” title.
  - Make changes then click the blue “Update” button”.

**\*\*Very Important!** Once all the sections of the Mission, Unit/College Goals, and IE detail have been verified or edited, be sure to check the box in the IE detail to the right of “Institutional Effectiveness Report Complete”. Then click “Save & Close”.



- This will indicate the IE Planning is done and ready for review. If you make all the changes and fail to check that box, the unit/college will come up on a report generated by Institutional Assessment indicating the IE Plan is not completed.

### Checklist

- Be sure appropriate Progress option is selected for Mission, Unit/College Goals, and IE Detail.
- Ensure the Responsible Role is completed for all items: Mission, Unit/College Goals, and IE Detail.
- Update the Number field in Goals.
- Check the box to indicate Academic Assessment Plan Entry Complete.

### Resources

#### **Reporting and Planning Calendar**

<b>Institutional Effectiveness Data Reports</b>		<b>Institutional Effectiveness Plans</b>	
<i>Academic year</i>	<i>Due date</i>	<i>Academic year</i>	<i>Due date*</i>
2015-16	October 14, 2016	2016-17	July 29, 2016
2016-17	October 13, 2017	2017-18	July 28, 2017
2017-18	October 12, 2018	2019-20	July 27, 2018
2018-19	October 11, 2019	2019-20	July 26, 2019

\*Plans for the next academic year may be submitted any time after the data report due date.

- <http://assessment.aa.ufl.edu/academic-assessment>
- Institutional Assessment 273-1090 or [assessment@aa.ufl.edu](mailto:assessment@aa.ufl.edu)