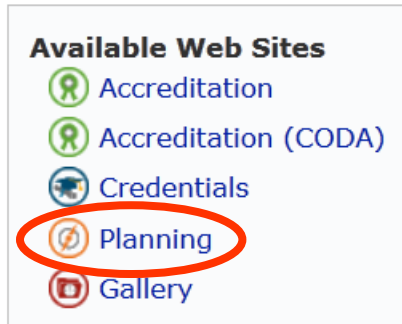
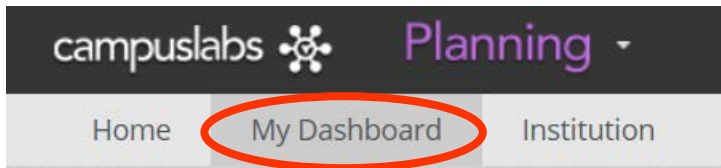


## Compliance Assist Annual Data Reporting – Unit/College Goals

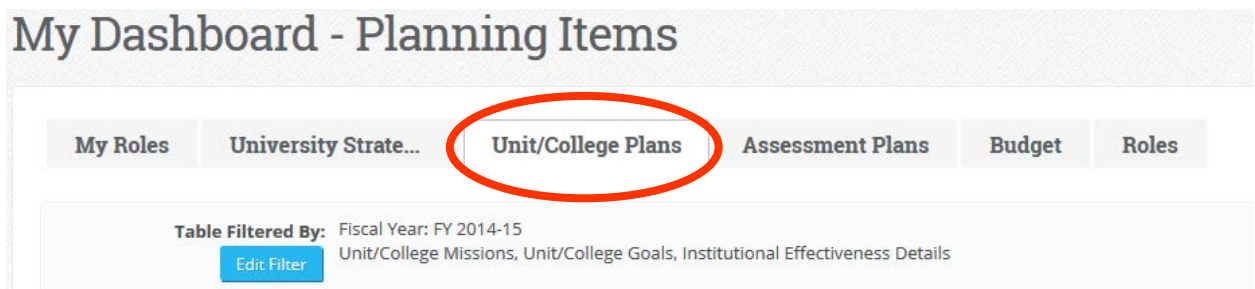
- ❖ Log into Compliance Assist using your GatorLink credentials at <https://ufl.compliance-assist.com>
- ❖ Click “Planning” from the Available Web Sites listing on the left:



- ❖ Click “My Dashboard” in the light grey banner across the top:



- ❖ Click the “Unit/College Plans” tab under My Roles



- ❖ Select your unit/college from the organizational chart on the left hand side. To ‘drill down’ in the org chart, click the “+” to the left of Senior VP Unit if necessary. In this example Business Affairs is selected. You can verify it’s the program selected as it is highlighted in light blue.

My Roles
University Strate...
Unit/College Plans

**Table Filtered By:** Fiscal Year: FY 2016-17  
 Unit/College Missions, Unit/College Goals, Unit/

Edit Filter

### Organization Tree

- [-] University of Florida
  - [-] Academic Affairs
  - [-] Agriculture & Natural Resources, IFAS
  - [-] Development & Alumni Affairs
  - [-] General Counsel
  - [-] Health Affairs
  - [-] SVP & COO
    - Business Affairs

### Items Related to Business Affairs

+ New Item

	Number
	Goal 1
	Goal 2


- ❖ **VERY IMPORTANT!** Click the blue “Edit Filter” button and select the previous fiscal year in the pop up window, then click “OK”.
  - The system defaults to the current year and you will always be entering data for the previous year. You must ALWAYS edit the filter to reflect the previous year when entering annual data information.

**Table Filtered By:** Fiscal Year: FY 2017-18  
 Unit/College Missions, Unit/College Goals,

[Edit Filter](#)

---

Select Items

Fiscal Year:  

[Select All](#) | [Select None](#)

- Unit/College Missions
- Unit/College Goals
- Unit/College Actions for Improvement
- Institutional Effectiveness Details

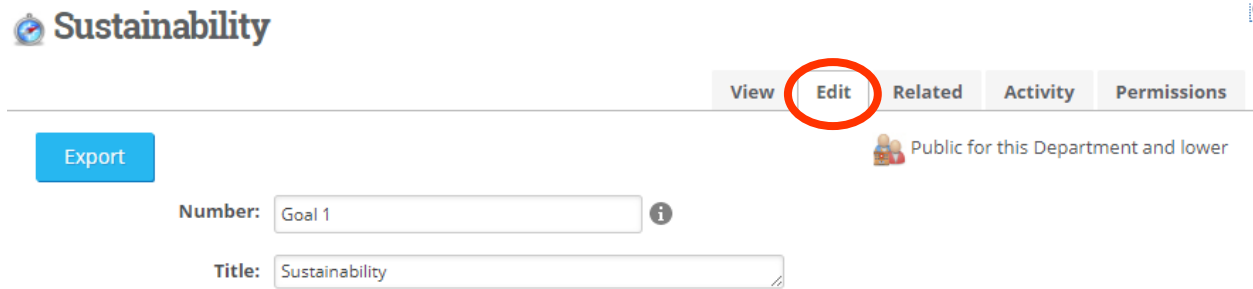
[OK](#) [Cancel](#)

- ❖ To edit a goal, simply click on the blue, hyperlinked “Name”.

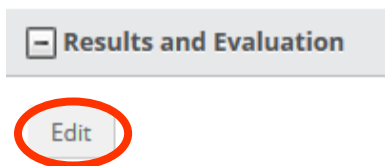
[+ New Item](#)

	<u>Number</u>	<u>Name</u>
		<a href="#">Business Affairs Mission, Vision and Values</a>
	Goal 1	<a href="#">Sustainability</a>
	Goal 2	<a href="#">Safety</a>
	Goal 3	<a href="#">Service</a>
		<a href="#">Business Affairs IE Detail</a>

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

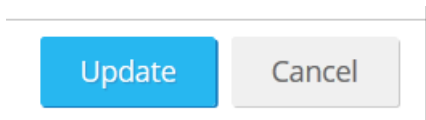


- ❖ Scroll to the lower part of the goal, and you will see the “Results and Evaluation” field. To enter information in this field, click the grey “Edit” button under the title.

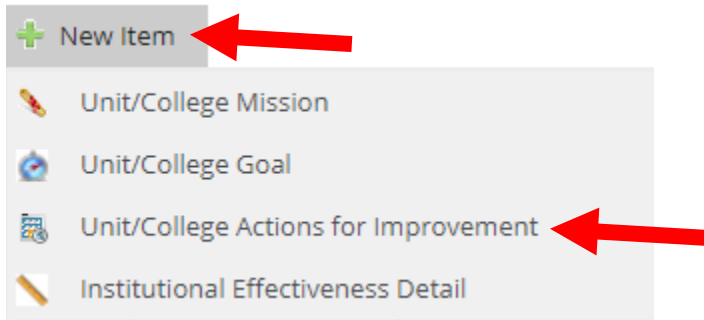


A few guidelines for entering data:

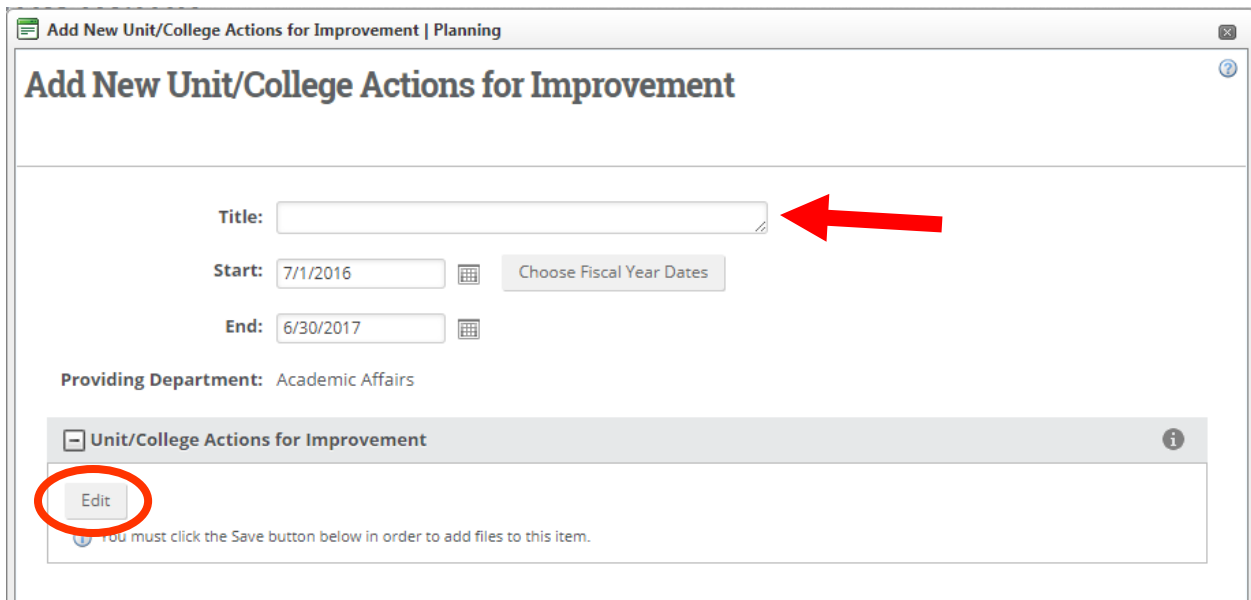
- Results and Evaluation:
  - Briefly state your results in a narrative format.
  - Include or attach the data you collected in summary form.
- ❖ Once the information has been entered for that section, click the blue “Update” button.



- ❖ Effective for 2016-17 data reporting and moving forward, please enter the “Unit/College Actions for Improvement” by clicking the “New Item” button, and clicking “Unit/College Actions for Improvement”.



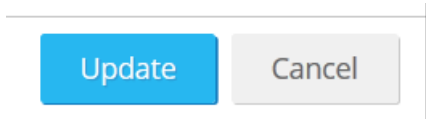
- ❖ Enter the title, then click the grey “Edit” button to enter the holistic actions for improvement for the entire college or administrative unit.



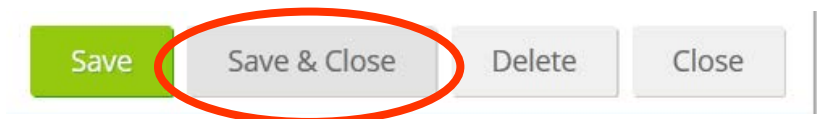
A few guidelines for entering actions for improvement:

- State who reviewed the results.
- Refer to the results that were reviewed.
- State actions taken in past tense. For example:
  - “Based on our review, we decided to...”
  - “Our results led us to modify our goal to...”
  - “We developed a new measure for this long term goal based on our review...”

- ❖ Once the information has been entered for that section, click the blue “Update” button. For each field, the blue “Update” button must be clicked to save the entered information.



- ❖ Once **all** the information for the goal has been entered and updated, click the “Save & Close” button at the bottom, right-hand side of the screen. This will return you the goals listing where you can select the next item to update.



- ❖ Once all the goals for the year have been updated, you’re done. Everything is complete for the annual data entry!
- ❖ Contact Information regarding Compliance Assist: Cheryl Gater, 392-4208, [cgater@aa.ufl.edu](mailto:cgater@aa.ufl.edu)
- ❖ Contact Information regarding reporting data, attachments, or other assessment questions: Tim Brophy, 273-4476, [tbrophy@aa.ufl.edu](mailto:tbrophy@aa.ufl.edu).