Compliance Assist: Planning

Submission of Annual Assessment Data (Updating and Editing)
for King University Units and Programs

Getting to the Planning and Assessment Module

1. Go to my.king.edu
2. Log in to the site with your username and password (if you ever have any problems with this, please contact Information Technology (email helpdesk@king.edu).
3. Click on the "Campus Labs" link at the top (the icon that looks like a cogwheel with a "C" in the bottom, right-hand corner). If you have an issue with accessing this link, please email jthead@king.edu.

Getting to Your Area in Planning and Filtering

1. Either (a) click on the "Plans" tab at the top, left of the page (looks like an octopus) or (b) click on the "Departmental Planning and Assessment" link at the bottom, right of the page.
2. If (a), select "Departmental Planning and Assessment" in the drop-down menu near the "Plans" tab. *This is very important to make sure you are in the right area of assessment and in the correct academic year; please make sure you click on the tab for "Departmental Planning and Assessment" if you intend to work on the current year. Previous year's data fall under different tabs. Please contact Jason Thead (ext. 6373) for specific questions.*
3. Make sure you are in the correct academic year (which is found above the "Plans" drop-down menu near the top, left of the page). The site defaults to the current academic year so if you need a different academic year you will need to change the year. To change the academic year, simply select it from this drop-down menu.
4. Next, locate your area in the organizational chart on the left hand side of the screen. All academic programs can be found in their respective Academic Schools, all of which can be found under Academic Affairs (located near the top of the organizational chart). Clicking on each level will provide further options for levels. Please note that the School of Arts and Sciences is arranged by departments; please look for your academic program under the correct departmental level (see the next item below). For easier access to your exact location in Compliance Assist, you may click on "Dashboard" at the top, left of the screen (the house) and then click "Departmental Planning and Assessment" in the bottom of that screen. *If you are unable to view your area, it is most likely due to Jason Thead not setting your permissions correctly. Please contact him (jthead@king.edu ext. 6373 to resolve this).*
5. For those schools that are also divided into departments, make sure you keep "opening up" all levels to your academic program. For example, the "Chemistry" department houses the academic programs for "Chemistry," "Biochemistry," and "Forensic Science." Thus, each of these areas would need to be "opened." The most important thing is to remember to get to the "lowest" level in your particular area in the organizational chart.

Getting Familiar with Your Section of Compliance Assist

1. When you reach your academic program, to the right of the organizational chart (the "flow" area) is what you should think of as your "assessment workspace." This "assessment workspace" will contain all the important elements of your assessment report: support of the King mission, your outcomes, your measures, and your curriculum map.

2. Most likely, you will see that you have items already listed in this assessment workspace. You should see "[Area Name] Support of King Mission" and "[Area Name] Curriculum Map." If the IE Office has copied over your information from the previous year correctly, you will possibly see your student learning objectives or unit objectives and measures. If the IE Office has not copied over these from the previous year, please contact them to have this done (*again, jthead@king.edu*).

Updating and Editing Existing Items in Your Assessment Workspace

1. Click on the item you would like to update or edit in the list of items in your assessment workspace.
2. Once that item opens up, make any changes or add new information. This interface has an "auto save" feature, which can be undone with "Ctrl+Z" or "right click" to Undo. If you are typing a long narrative, I suggest typing it in a word processor, first, since information can easily be lost from Compliance Assist by copying over information and having the system auto save.
3. Some fields have a window that looks like a "mini version" of Microsoft Word. This is where you will type in your narrative regarding this item (or change the existing narrative). You also have the ability to use several formatting options (bold, italic, bullets, etc.).
4. You can also copy and paste this information from another source such as a Word document. If you wish to do this, click on "Edit." You have the option to "Paste" or "Paste as text;" it is encouraged to always use the latter paste function to avoid "carrying over" any aggravating formatting bugs that may exist.
5. Please note that you have the ability to add tables, hyperlinks, images, symbols, subscripts, superscripts, etc. There is also a spell check and grammar check function.
6. Once you have the information included in this text field (either by typing the information directly or copying and pasting from another source), it will save and give you a confirmation that it has done so (a green check and a time-stamp outside of the text box).
7. For any of the items in your assessment workspace, you are able to include attachments in the specific fields. Most likely, you would use this to include copies of scoring rubrics or attach a summary of assessment data if you would rather not embed extensive data into the field itself. To do this, click on either the blue "+ File" or "+ Folder." If you are attaching several documents for any one section, you should first create a "Folder." If you are attaching just a single document you should add a "File." The uploading interface that appears after clicking either blue option should have the same interface as attaching a document to an email; you can select multiple items to upload at once, because of it.
8. For each item you edit, please indicate the status of that item in the drop down menu for the "Progress" field. These progress options communicate the status of an item to the IE Office. For a full list of Progress items, please see the "Progress Indicators," below.
9. To save all the information you just added to an item, click "Done" at the bottom of the screen. This will take you back to your "assessment workspace."

Submitting Your Curriculum Map

1. You will still submit your Curriculum Map in an Excel file as an attachment to an item in your assessment workspace.
2. To do this, from your "assessment workspace" click on the Curriculum Map item. If this item has not been copied over from the previous year, the IE Office can do this for you, or you can

add your own. When the item has been copied over, the only thing you will need to do is attach the most current version of the curriculum map to this item.

3. To attach the curriculum map, click on the "+ File" tab near the bottom of the screen. Again, the interface is that of attaching an email. The file(s) you upload will appear in the "Plan Item Files" section.
4. Once you upload the document, you can click on the blue "Edit" box (square with a pencil in it) to re-name the upload.
5. In the "Name" field, please name your curriculum map file as "[Academic Program Name] Curriculum Map."
6. Click "Save" (***not*** "Done") to save this name.
7. You are able to upload multiple files but most likely you won't need to do this. If you do, see the item above regarding "Folders".
8. Last, to indicate the status of this item, use the drop down box next to "Progress" to indicate its status.
9. Once you have uploaded the needed files, click "Done". This will take you back to your "assessment workspace."

Relating Objectives to King's Strategic Plan

1. New for 2018-19, please ensure you are "relating" your Objectives to King's Strategic Planning Goals and Objective.
2. Academic programs will also need to begin removing IDEA Objectives as measures.

A Few Things to Remember

1. Please note that you should have several assessment measures for each student learning outcome or unit objective. These measures are separated from the outcome/objective, and will each need to be updated.
2. Always ensure to disaggregate information in the "Summary of Assessment Data Collected" box, as appropriate. This will apply to your unit/program if you offer services or instruction at multiple locations or in multiple modalities.
3. As with any software of this nature, you are encouraged to continually ensure the items are saving to ensure that your work is saved. I would suggest having a separate space for these items (potentially a word document) to ensure nothing is lost.
4. If you ever need to print a hard copy of an item in your assessment workspace, open up the item and click the blue button titled "Read View" at the bottom of the screen. From here, you can "Print" (and then "Save to PDF") or "Share Item" if you wish to share it with another user. Once you are done, you can click "Go to Item in Planning."
5. A report can be generated for your entire area by click the "Reports" tab after ensuring you are in the correct year and plan area. After clicking the "Reports" tab, you can run the report "Departmental Planning and Assessment" to either create a Word, PDF, or CSV version of your data. Please contact Jason Thead (*jthead@king.edu*) for assistance on this feature.
6. To log out of Compliance Assist, click on your name at the top, right hand corner of the Compliance Assist site. This should re-direct you to the Portal.

Progress Indicators

1. The following Indicators can be used by areas as they review and/or complete items:
    a. **Revised** – to be used by areas to indicate an item's progress DURING the planning process (at any point in the academic year before the reporting cycle) for any item that has been revised from the previous academic year
    b. **Reviewed -** to be used by areas to indicate an item's progress DURING the planning process (at any point in the academic year before the reporting cycle) for any item that has been reviewed but not revised from the previous academic year
    c. **On Schedule** – to be used by areas to indicate an item's progress DURING the reporting cycle (May of each academic year) if data will soon (by July) be available but is not currently
    d. **Completed -** to be used by areas to indicate an item's progress AFTER the reporting cycle (beyond May of each academic year) once an item has all necessary data
    e. **Delayed** – to be used by areas to indicate an item's progress AFTER the reporting cycle (beyond May of each academic year) if data will not be available soon (beyond July); ensure this item is addressed once data is available

2. The following Indicators will be used by the IE office as they review items:
    a. **Overdue -** to be used by the IE office to indicate an item's progress AFTER the reporting cycle (beyond May of each academic year) if an item does not have an Indicator listed as is also incomplete
    b. **Action Required -** to be used by the IE office to indicate an item's progress AFTER the reporting cycle (beyond May of each academic year) if an item has been "Completed" but is lacking an element
    c. **Finalized -** to be used by the IE office to indicate an item's progress AFTER the reporting cycle (beyond May of each academic year) if the item is complete for the academic year