Compliance Assist- Planning

Instructions for submitting Annual Planning and Assessment Data

If you have issues accessing your area or inputting data, contact Institutional Research and Assessment (jthead@king.edu/ext. 6373).

Accessing Compliance Assist- Planning

1.1 Go to my.king.edu

1.2 Log in to the Portal (for issues with logging-in, contact Information Technology (via portalinfo@king.edu).

1.3 If not re-directed via the above url, click the "Compliance Assist- Planning" icon at the top (a cogwheel with a "C" in the bottom, right-hand corner).

Navigating Compliance Assist- Planning

2.1 From the dashboard click on either the (a) "Area Planning and Assessment" link at the bottom, right of the page or (b) "Plans" tab at the top, left of the page (looks like a triangle). Option (a) should direct to your area, automatically.

2.2 Ensure you are in the correct "Time Period" (current/correct Year from the drop-down), "Plan" (working under "Area Planning and Assessment" from the drop-down), and "Organizational Unit" (working at the "lowest" level of the organization chart – see point 2.5, below).

2.3 From option (b), select "Area Planning and Assessment" via the drop-down menu near the "Plans" tab. *Different menu options house archived data; contact Institutional Research and Assessment for assistance.*

2.4 Ensure you are in the correct year (found above the "Plans" drop-down menu near the top, left of the page).

2.5 Locate your area in the organizational chart on the left-hand side of the screen. Academic programs are found in their respective Schools/Colleges, which can be found under Academic Affairs (located near the top of the organizational chart). Clicking on each level will provide further options from which to choose. *If you are unable to view your area, contact Institutional Research and Assessment.*

2.6 For those Schools divided into Departments, or for Administrative Departments that are divided by area, make sure you continue down the organizational chart to your area. For example, the "Chemistry" department houses the academic programs for "Chemistry," "Biochemistry," and "Forensic Science." Each of these areas should be "opened." The most important thing to remember is working in the "lowest" level in your particular area of the organizational chart.

Getting Familiar with Your Section of Compliance Assist

3.1 You should think of space to the right of the organizational chart "flow" as your "assessment workspace." This "assessment workspace" contains the important items of your assessment report: Support of the King Mission, Outcomes, Measures, and Curriculum Maps (programs, only).

3.2 Hopefully, items are already populated/listed in this assessment workspace. If nothing is populated, see point 2.2, above, before contacting Institutional Research and Assessment.

Updating Items in Compliance Assist- Planning

4.1 Click on the item you would like to update or edit from the list of items in your assessment workspace.

4.2 Once the item loads, make any changes by clicking in the appropriate field. The interface will "auto save," which can be undone by "Ctrl+Z" or "right click" to Undo. If you are typing a long narrative, or copy/pasting from a webpage, first type/paste in a word processor before copy/pasting into the field.

4.3 Some fields have a window that looks like a "mini version" of Microsoft Word. This window will be used for narrative regarding the item (or to change the existing narrative).

4.4 Several formatting options exist (bold, italic, bullets, etc.), as well as options to add tables, hyperlinks, images, symbols, subscripts, superscripts, etc. There is also a spell check and grammar check function.

4.5 Once the information is included in a text field (either by typing the information directly or copying and pasting from another source), it will save and confirm that it has done so (a green check and a time-stamp will appear outside of the text box). If this confirmation doesn't appear, click the white space outside of the text field.

4.6 For each edited item, indicate the status via the drop down menu under the "Progress" field. These progress options communicate the status of an item to the Institutional Research and Assessment Office. For a full list of Progress items and descriptions, please see the "Progress Indicators" provided on the document "Compliance Assist- Planning Field Definitions."

4.7 To save the information added to an item, click "Done" at the bottom of the screen. This will direct back to your "assessment workspace."

Uploading Files/Submitting Curriculum Maps

5.1 Some of the items in the assessment workspace have specific fields that can support attachments. To upload an attachment, click on either the "+ File" or "+ Folder." If you are attaching several documents, first create a "Folder." Individual documents can be added via "+ File." After clicking either option, an uploading interface will appear. This functionality is the same as attaching a document to an email; to select multiple items to upload at once, hold "Ctrl" and select each file. Once a document is uploaded, you can rename the attachment via the "Rename" link.

5.2 For Academic Programs, submit the Curriculum Map as an Excel file attachment. From your "assessment workspace," click on the Curriculum Map item. If this item was not copied from the previous year, create a new item via 6.2, below. Otherwise, attach the current version of the curriculum map to this item.

5.3 Via the "Rename" link, name your curriculum map file "[Academic Program Name] Curriculum Map [current year]." Click "Save" (***not*** "Done") to save the name.

5.4 Once you have uploaded the needed files and indicated the status of the item via the "Progress" indicator, click "Done". This will take you back to your "assessment workspace."

Creating, Relating, and Deleting Items in Compliance Assist- Planning

6.1 To relate a Measure to an Outcome or an Outcome to a Strategic Planning Goal or Objective, click the "+ Supports" or "+ Support By" links. This will display items to relate provided from the area of the organizational chart. The Strategic Planning Goals and Objectives are at the "Institution" level under the "Strategic Planning." Other items exist within your area. Once you have used the org. chart to navigate to the specific area, you can create the relation by clicking on the item title or the "+" icon. Relations can be removed via the "X" icon to the right of the item name. Once you have selected all items, click "Back to Plan Item."

6.2 To create a new item, click "+ Plan Item" from the main page of the assessment workspace. You must, at least, give the item a number, name, and description. You can also relate the new item to an existing item.

6.3 To delete an item, select it from the assessment workspace. At the bottom of the item, click "Delete." This will prompt you to confirm.

A Few Things to Remember

7.1 Several assessment measures should exist for each student learning or department outcome. These measures are items that exist separately from the outcome, and each needs to be updated.

7.2 If your department/program offers services or instruction at/in multiple locations/modalities, ensure to disaggregate data in the "Summary of Assessment Data Collected" field.

7.3 Continually check the items to ensure they are saving your work. Having a separate space for these items (potentially a word document) is best practice to guarantee work is not lost.

7.4 In order to print a copy of an item in your assessment workspace, click the "Read View" link at the bottom of the item screen. You can "Print" ("Save to PDF") or "Share Item" from this page. See point 7.5, below, for more information. Once you are done, you can click "Go to Item in Planning."

7.5 Reports can be generated for entire areas via the "Reports" tab (again, ensure the correct year and plan area are selected). The report "Departmental Planning and Assessment" will either create a Word, PDF, or CSV version of the existing data.

7.6 Log out of Compliance Assist by clicking on your name at the top, right hand corner of the site. This should re-direct to the Portal log-in screen.