

Compliance Assist **Planning** Instructions

Log in to Compliance Assist <https://humboldt.compliance-assist.com/index.aspx>

Select “Planning”

Select “My Dashboard”

Select “Student Services” Tab

Click on “your area”

To add a Mission Statement

- Hover over “+New Item” and click on Mission Statement
- Create a Short title- example Housing and Residence Life Mission Statement
- Choose Academic Year Dates (mission statements will likely include this year and next as it likely won’t change)
- Progress= ongoing
- Click Edit in the Mission Statement Field and enter full mission statement
- Click Save
- Once Saved, click the Related tab at the top
- Under Items this Mission Statement supports, click add. You should relate your mission statement to the EMSA mission statement by clicking on EMSA in the org chart and selecting the appropriate box. Click apply.

To edit your Mission Statement

- Click on the Mission Statement
- Click on the edit tab at the top
- Make changes
- Click Save and Close

To add a Goal

- Hover over “+New Item” and click on Goal
- Fill out the number (1, 2, 3) and title fields (shorter goal title) (hint: use the Circle I bubble anywhere if you need help)
- Choose Academic Year Dates (goals will likely include this year and next as they don’t usually change)
- Progress= ongoing
- Click Edit in the Description of Goal Field and enter full goal statement statement
- Once Saved, click the Related tab at the top
- Under Items this Goal supports, click add. You should relate goal to your own mission statement as well as the appropriate EMSA Goal by selecting the appropriate box. Click apply.

To edit a Goal

- Click on the Goal
- Click on the edit tab at the top
- Make changes
- Click Save and Close

To add an Outcome

- Hover over “+New Item” and click on Outcome
- Fill out the number and title fields. It will likely be helpful for you to identify outcomes with their goals. For example- “1a.” could represent the first outcome that supports Goal 1.
- Choose Academic Year Dates (it defaults to current year)
- Progress= ongoing
- Select the type of outcome and learning domain (if applicable)
- Click Edit in the Description of Outcome Field and enter full outcome statement with any additional relative info
- Select all the measurement strategies that apply to this outcome from the drop down.
- Click Edit in the Assessment Method field and enter your “methodology.” Note: Documents can be attached to this section once you click Save.
- Click Edit in the Resources and Dependencies and add statements here if applicable.
- Once Saved, click the Related tab at the top
- Under Items this Outcomes Supports, click Add. You should relate the outcome to the respective goal it supports. Click Apply.

The remaining fields and items will be filled in once your assessment has been complete.

To edit or add to an existing Outcome

- Click on the Outcome
- Click on the edit tab at the top
- Make changes or add text to the appropriate fields
- Click Save and Close

The Investments Item will include your staffing and budget info. EMSA will generate those reports and add them to Planning for you.

The EOY Summary and Recommendations will serve as your “executive summary” at the conclusion of the AY.

To add your EOY Summary and Recommendations

- Hover over “+New Item” and click on EOY Summary and Recommendations
- Add End of Year Summary as the Title
- Select Progress as Achieved
- Click Edit in the Summary and Conclusions field and add your narrative
- Click Edit in the Next Steps and Plans for Improvement field and add your narrative
- Click Save and Close