How to Enter an Annual Report into Compliance Assist

*Note:* Any program, department, college, or office within the institution is referenced as a “unit” in the following instructions.

1. **Logging In:** Enter [https://uncc.compliance-assist.com](https://uncc.compliance-assist.com) or [https://uncc.campuslabs.com](https://uncc.campuslabs.com) and click Compliance Assist. Enter your NinerNET Credentials. After authentication, the Planning Module should appear on the Announcements Page.

2. **Click on “My Dashboard” to get started.**

3. **Click on the College/Unit Strategic Plan tab.**
4. Note the blue button and “Fiscal Year.” If the correct year is not appearing, click the button and change to the desired year. All data is organized by calendar/fiscal year. If your area operates on CALENDAR year, “CY” indicates the year in which to enter data. If your area operates on FISCAL year, “FY” indicates the year in which data is entered. The example below indicates the Calendar/Fiscal year for Calendar Year 2016 and Fiscal Year 2016-17.

5. From the Organization Tree on the left, click the unit for which you are entering the Annual Report. You may need to scroll down and click on the “+” boxes to expand the tree to access your unit. In this example, Art & Art History is selected.
6. Click the “New Item” box to the left of the Org Tree above the viewing pane.

7. Select “Unit/College Annual Report” from the dropdown box.
8. Enter the name of the unit for which you are entering your report. In this example, we typed “Art & Art History” for the Department of Art & Art History.

9. If your unit is NOT in the division of Academic Affairs, enter the narrative for your Annual Report in the box labeled “NON-ACADEMIC AFFAIRS UNITS ONLY: Highlights of the Year”. For units that ARE in the division of Academic Affairs, ignore this box and keep scrolling.
10. **Academic Affairs Units**: Enter the Annual Report narrative in the text boxes as they relate to the three Academic Affairs Goals. There is a separate box for Goal 1, Goal 2, and Goal 3. Here, “Highlights Related to AA Goal 1” is shown.

11. Each narrative box is accompanied by a drop down menu to select the types of accomplishments discussed in each. Multiple types may be selected. This better facilitates institutional-level reporting.

12. After entering the narrative as related to each of the three Academic Affairs goals, scroll down to “Examples of Data-Based Improvements During the Year.” Explain at least three examples of assessment-informed improvements made in your unit last year.
13. **VERY IMPORTANT:** When finished entering data, click the green button. Click early and often to avoid losing any work.

14. After saving, any supporting documentation may be attached to your report (press releases, data files, dashboards, etc.). Scroll all the way down to the bottom of the form until “File Library” appears. Click to attach the files from your computer (Word, PDF, Excel are all acceptable formats). You may separate your documents into folders, by clicking and adding folders to the File Library, if desired.
15. When finished adding supporting documents, they will appear in the file library. Click the [Save & Close] button. The report will appear in the viewing pane and can be edited as needed by clicking on the hyperlink.