

ComplianceAssist! Assessment Quick Reference Guide
Unit Strategic Planning: Developing an Annual Progress Report

Compliance Assist is a web-based tool for documenting, tracking, and reporting unit strategic planning efforts. The following is a brief step-by-step summary with video tutorials for completing strategic planning progress reports.

For instructions on how to enter/update an annual plan for monitoring progress towards strategic goals, please refer to steps 1 - 5 on the Building and Monitoring a Strategic Plan Quick Reference Guide.

Steps for Entering an Annual Progress Report





STEP 6: Entering Results and Use of Results (Strategic Plans tab)

1. Select the underlined unit outcome name and select Edit tab
2. If budget requests were submitted, use the Budget Approval field to indicate budget outcome
3. If budget requests were approved or partially approved, select edit to update the Budget Resources Spent/Received field, enter the information, and select Update
4. To add supporting documentation, use the file library, select Upload File(s), Select your file, select Upload File
5. To enter/update Results and Impact , select Edit, enter the information, and select Update
6. To add supporting documentation, expand Comments and Attachments and select Upload File(s), Select your file, select Upload File
7. Select the Progress status from the drop-down list at the bottom of the page
8. Select Save and Close after all fields have been entered or updated
9. Complete these steps for each unit outcome

STEP 7: Viewing and Printing your Strategic Plan

1. Select Reports at top of page
2. Select program name using organizational chart on left (to expand chart, select the plus button)
3. Select Generate under the Actions column for the Unit-Level Strategic Planning Report
4. In the Generate Report Request window, select PDF, Word, or Excel from the drop-down
Note: PDF is the recommended format for printing and saving
5. Select appropriate start and end date for the time period of interest
6. Select Generate Report
7. Select Download to view generated reports
Note: The system will send an email when the report is ready to be viewed

Compliance Assist Symbol Legend

	i Bubble	Provides Instruction/Descriptions
	Paper	Unit Information, Mission, Vision, SWOT
	Blue sphere	Unit Goal
	Stopwatch	Unit Outcome