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Compliance Calendar
USER GUIDE

Document version 2

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Attain Compliance Calendar

Compliance Calendar explained

The Calendar brings together into one module elements from the Outlook scheduler, a task manager and project management as a way of managing complex and recurring compliance obligations. The Compliance Calendar (CC) module comes with pre-loaded legislation, a list of links to useful resources and a library of pre-configured tasks making it easy to get started.

In creating the CC we were able to draw on the extensive knowledge of our clients to add a comprehensive database of legislation, useful resources and important information to ensure creating and maintaining your calendar is as easy as possible.

Overview

The CC provides users with a comprehensive list of compliance tasks tailored to provide all the relevant information a user needs to complete the compliance task appropriately and on time.

Once your organisation has assigned a series of tasks to you as a user, you will be able to access each task in your personal compliance calendar. Your calendar will contain all the calendar tasks that have been assigned to you by your organisation. The CC provides a visual representation in date order of all your compliance tasks, making it easy to see what tasks are due and what progress has been made towards completion.

Tasks can consist of just one task, or a task consisting of a subtask. To understand how levels of tasks work, consider that a complex task could consist of an *Event task* titled for example, *Council Election 2027*, and a number of attached *subtasks* that are added to this *Event task* representing each component of the election process. The advantage of breaking down a complex task into distinct subtasks is that each subtask can be assigned to different employees with the person assigned the primary *Event task* responsible for managing/ensuring each subtask is completed before signing off the completion of the *Event task*. In practice this means the *Event task* will only be completed when all subtasks have been satisfactorily completed first.

Whether you have been assigned an *Event task* or a *Subtask* the following instructions apply to completing the tasks assigned to you.

Getting started

After logging in to Attain you will be able to select the 'Calendar tasks' icon.

Calendar tasks

View and manage your calendar tasks

STEP 1: Viewing tasks that have been assigned to you

Here you will be presented with all the tasks that have been assigned to you. You have the option to view the list of tasks as a *Searchable list* (shown below) or as a *Timeline view*.

After your organisation has assigned you a task it will be automatically added to your individual Calendar, so you will have a visual reminder of all the tasks that have been assigned specifically to you in an easy-to-understand calendar format with the task due dates clearly shown.

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Searchable list view 14	Timeline view

Enter keywords to search 🔍 | ⦿ To be completed | ○ Completed | ○ All

Status	Task No	Responsibility
Due 1 May 2025	**C09-3 Annual General Meeting of Electors** Give Public Notice and hold General Meeting of Electors - to be held within 56-days of adoption of Annual Report	Sean Jones
Due 31 May 2025	**C74-13 Gift & Travel Register Online - Internal Audit** Audit the Register for: Compliance with Admin.Reg.28A Register accurately records all declarations Declaration form complies with disclosure requirements under s.5.82 and s.5.83	Sean Jones
Due 31 Aug 2025	**C74-14 Gift & Travel Register Online - Internal Audit** Audit the Register for: Compliance with Admin.Reg.28A Register accurately records all declarations Declaration form complies with disclosure requirements under s.5.82 and s.5.83	Sean Jones
Due 30 Nov 2025	**C74-15 Gift & Travel Register Online - Internal Audit** Audit the Register for: Compliance with Admin.Reg.28A Register accurately records all declarations Declaration form complies with disclosure requirements under s.5.82 and s.5.83	Sean Jones

Select any task from the list to commence working on this task.

STEP 2: Requirements

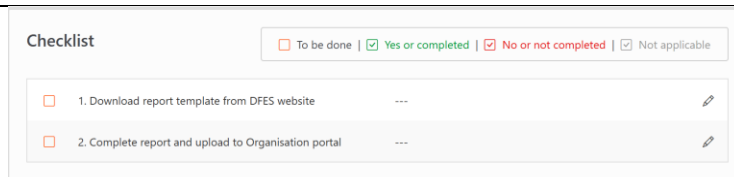**A description of what needs to be done**

Carefully read through the *Requirements* section to understand what needs to be done to complete this task. Be sure to check if there are any Resources attached to the task that may assist you. You will also be able to select a link to relevant legislation, access any available guidelines and/or policies or other resources that have been added to this task that will assist you to confidently complete all requirements of this task.

1) Review the Requirements section. a. The task requirements detail the actual work that needs to be done and what the required outcome should be.	**Requirements** Reg.19DA (1) A local government is to ensure that a corporate business plan is made for its district in accordance with this regulation in respect of each financial year after the financial year (2) A corporate business plan for a district is to cover the period specified in the plan, which is to be at least 4 financial years. (3) A corporate business plan for a district is to — (a) set out, consistently with any relevant priorities set out in the strategic community plan for the district, a local government's priorities for dealing with the objectives and aspirations of the community in the district; and (b) govern a local government's internal business planning by expressing a local government's priorities by reference to operations that are within the capacity of the local government's resources; and (c) develop and integrate matters relating to resources, including asset management, workforce planning and long-term financial planning. (4) A local government is to review the current corporate business plan for its district every year.
2) Relevant *Resources* b. In this section any relevant information to assist you complete this task will be added here (if available). This information provides users with the opportunity to understand the policies, guidelines and references at play when performing their duties in respect of this task.	**Resources** If required, add links to any applicable policies, guidelines and references to this template, which will automatically appear in each calendar task (see *Help* for more information). [Add] *AS/NZS ISO 31000:2009 Risk Management*, AS/NZS ISO 31000:2009 Risk Management ✖ *DLGSC WA Local Government Accounting Manual*, WA Local Government Accounting Manual released by the Department of Local Government, Sport and Cultural Industries ✖
3) Relevant Legislation c. In this section you will be able to select links to any legislation associated with this task.	**Legislation** *Local Government (Administration) Regulations 1996*, s.19DA Corporate business plans, requirements for (Act s. 5.56) *Local Government Act 1995*, s.5.56 Planning for the future

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STEP 3: Checklist

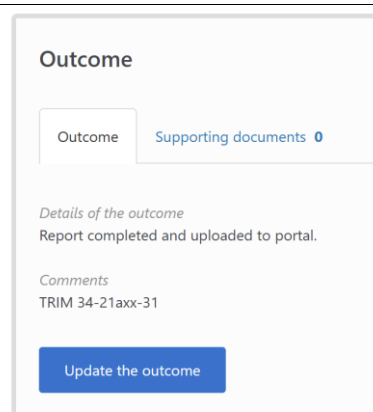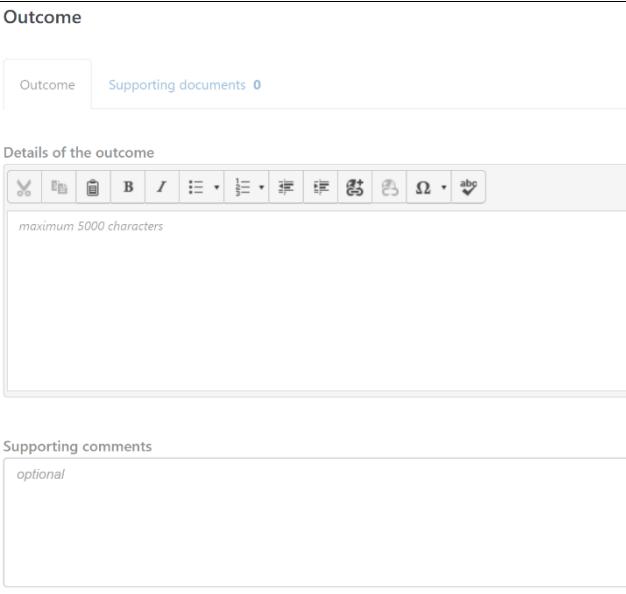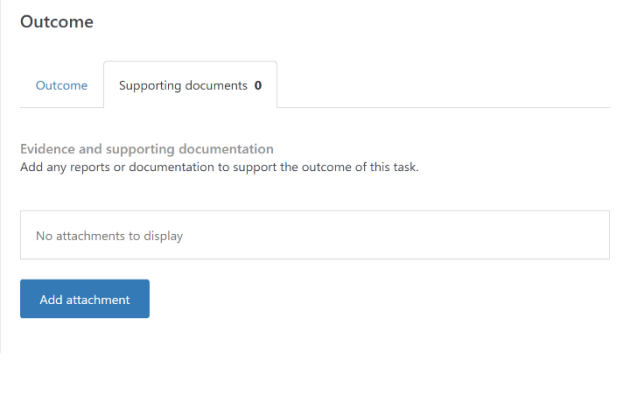|	

4) Next you will see the Checklist section (if this has been added to the task – not all tasks will have a checklist.)
 	
    a. The checklist is a feature for providing you with a checkable list of items that are a visual guide for completing the key requirements of the task.
 	
    b. You will need to address each item in the check list before you are able to submit the task as complete.
	Checklist — To be done | Yes or completed | No or not completed | Not applicable
	
	1. Download report template from DFES website ---
	
	2. Complete report and upload to Organisation portal ---

STEP 4: Completing the task in Attain

5) When you are ready to complete the task in Attain select *Add an outcome*.	**Outcome** Outcome Supporting documents **0** *Details of the outcome* Report completed and uploaded to portal. *Comments* TRIM 34-21axx-31 Update the outcome

6) You will now be able to enter details confirming you have completed the task as per requirements. You also have the option to add any additional supporting comments.	**Outcome** Outcome Supporting documents **0** Details of the outcome [toolbar: cut, copy, paste, B, I, lists, indent, Ω, spellcheck] *maximum 5000 characters* Supporting comments *optional*

7) Uploading documents/files.
    a. Important: Some tasks will require you to upload forms or reports as evidence the task has been completed appropriately. Alternatively, you can upload any additional documents that you consider relevant in completing this task.
    b. Select *Add attachment*
	Outcome
	
	Outcome Supporting documents **0**
	
	Evidence and supporting documentation
	Add any reports or documentation to support the outcome of this task.
	
	No attachments to display
	
	Add attachment

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8) After selecting *Add attachment* you will have the option to upload any file to this task. This is useful to upload a form or report or other additional files.	**Add attachment** Cancel Add a title to summarise the attachment *maximum 200 characters* Description of the attachment *optional - maximum 1000 characters* Attachment file Allowable file types include images, text files, *PDF*, *Word*, *Excel* and *PowerPoint* documents. The file size must not exceed **20 MB**. Select file... Drop file here
9) You are now ready to complete this task by selecting *I am ready to submit this task as completed.*	*Status* Due 19 December 2025 100% completed *Last recorded activity* 8 April 2025 12:48 *Risk score* No data *Assigned to* Flick Smith (demouser150@integms.com.au) I am ready to submit this task as completed
10) Fill in the required information, tick the box and select *submit.* The task is now recorded as complete.	← Submit as completed Please ensure you have checked and verified the information is correct before submitting this task *A notification will be sent to* Flick Smith (demouser150@integms.com.au) *Add a note to your notification* *optional - maximum 200 characters* ☐ I confirm the task has been completed and is ready for submission Submit

Repeat these instructions for each task you wish to complete.

STEP 5: Editing a task after it has been completed in Attain

The CC has a process allowing for editing of a completed task.

11) If after completing a task you decide the task needs to be edited in some way you can select *Withdraw to make some changes*.	*Last recorded activity* Submitted 8 April 2025 12:50 *Risk score* *Assigned to* Flick Smith (demouser150@integms.com.au) Withdraw to make some changes
12) Confirm you wish to continue.	Are you sure you want to withdraw this completed task? Withdrawing this task will revert the task to an unsubmitted status. Use this option Are you sure you wish to continue? Yes I am sure, please continue Cancel
13) Once you have made the edits, complete the task by selecting you are ready to submit task.	I am ready to submit this task as completed

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Thank You

We at Integrity would like to express our appreciation for your support of our products. We assure you of our continued commitment to innovative design and improvements that will allow you and your organisation to meet the highest standard in compliance management.

We will keep you informed as new products come online and we look forward to making your experience with us enjoyable, professional and effective.

Please feel free to contact us at info@integms.com.au if you have any questions or would like information about our other products.

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Easy and Efficient Management of Primary Returns, Annual Returns, Gift & Travel Disclosures, Delegations, Related Party Disclosures.

New Compliance Calendar

Easily manage forms

No more paper-based forms
Submit forms online
Identify types of gifts
Intuitive and user-friendly
Secure online access

Keep track of submissions

View the status of forms and delegations across the organisation

Get guidance for each form

Comprehensive help and detailed examples, give guidance when and where it is needed.

Reduce the risk of non-compliance

Keep track of cumulative gift values from the same gift giver and identify prohibited gifts. Manage delegations quickly and easily
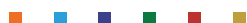
No setup required

✅ attain is ready to go. We set it up. You use it. It's that simple.

Reduce costs

✅ attain is an online service. This means that you only pay for the subscription, not the software.

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