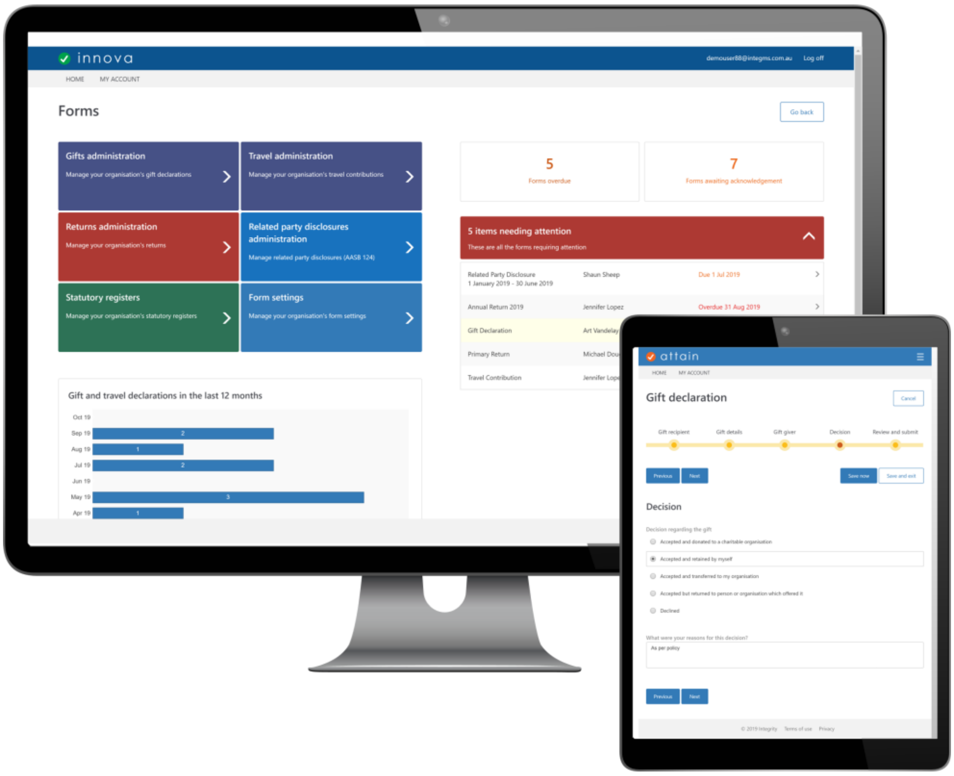
attain
by integrity

User’s (Employee) guide and operation manual

Attain 4.0 compliance management system



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1. Introduction

Attain is designed for local governments who wish to meet high standards of compliance within resource and cost restrictions. It provides seamless and efficient management of gifts, travel, returns, delegations and related party disclosures.

Attain does this by completely replacing inefficient paper-based systems with:

- Online access to all forms, anytime from mobile devices
- Electronic acknowledgments, receipts and reminders
- Full monitoring and reporting features for better governance oversight
- Easily generated Compliance Registers for posting online
- Complete management, reporting and monitoring of compliance activities
- Full audit ready reporting

This guide will take you through the initial set up process and provide you with important information about using Attain.

The following sections are covered in this guide:

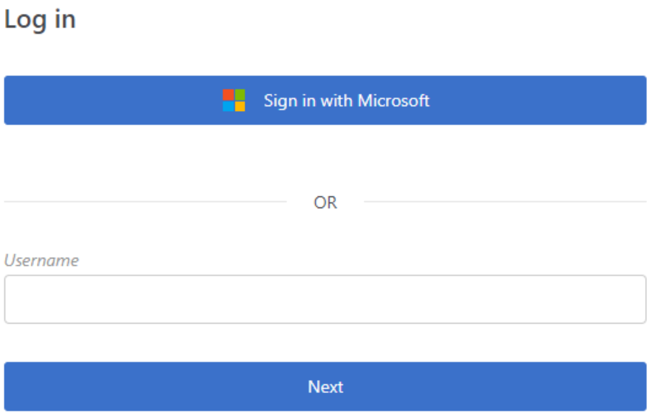
- Registering and signing into Attain
- Managing your forms
- Submitting forms
- Submitting specific forms
- Useful features

Don’t forget to check out the useful information in the Help sections in Attain.

IMPORTANT: If you have any questions or need assistance, please use the Get Help option on the Home screen to send a request to your organisation’s support contact.

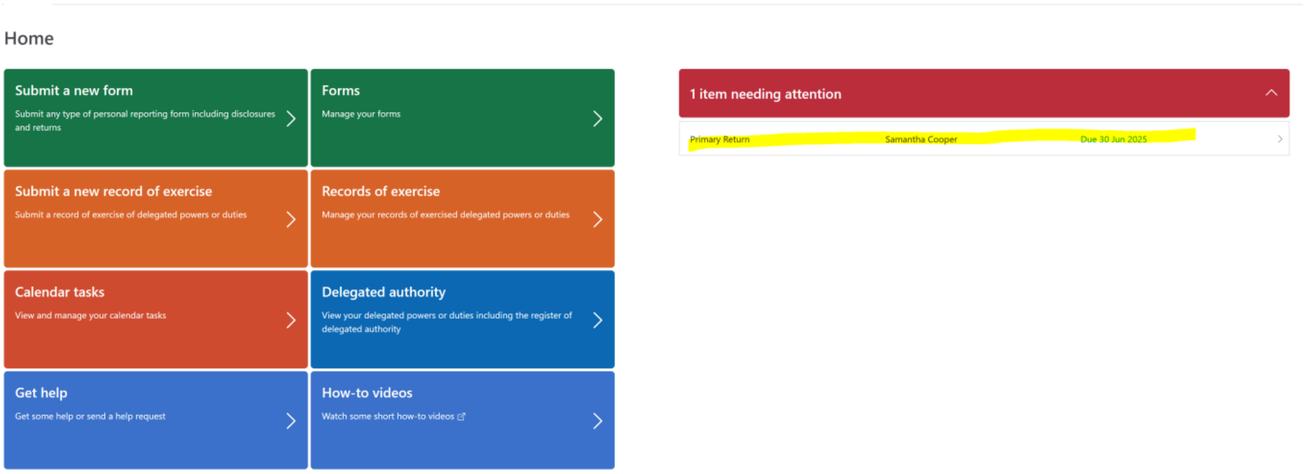
Begin using Attain - Single Sign On (SSO)

Begin by navigating to the sign in page, https://app.attain.au/ After selecting this link you'll be taken to the Login page to begin the sign in process.



To sign in to Attain the simplest and easiest to use is Microsoft Single Sign-On (SSO).

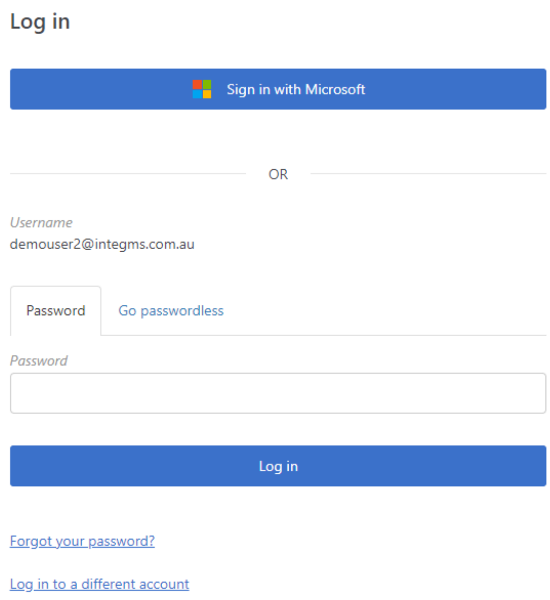
Select *'Sign in with Microsoft'* and you will be prompted to enter your Organisational Credentials. You will then be taken straight to the Attain *Home* screen



Primary Return Samantha Cooper Due 30 Jun 2025

Alternative Login Option - Signing in using a password

If you have previously registered in Attain (and you cannot use SSO) you can choose to sign into Attain using a password that you set up when you registered in Attain. To see the password option, enter your Username at the Login screen and then select *Next*.



Log in

Sign in with Microsoft

OR

Username: demouser2@integms.com.au

Password | Go passwordless

Password

Log in

Forgot your password?

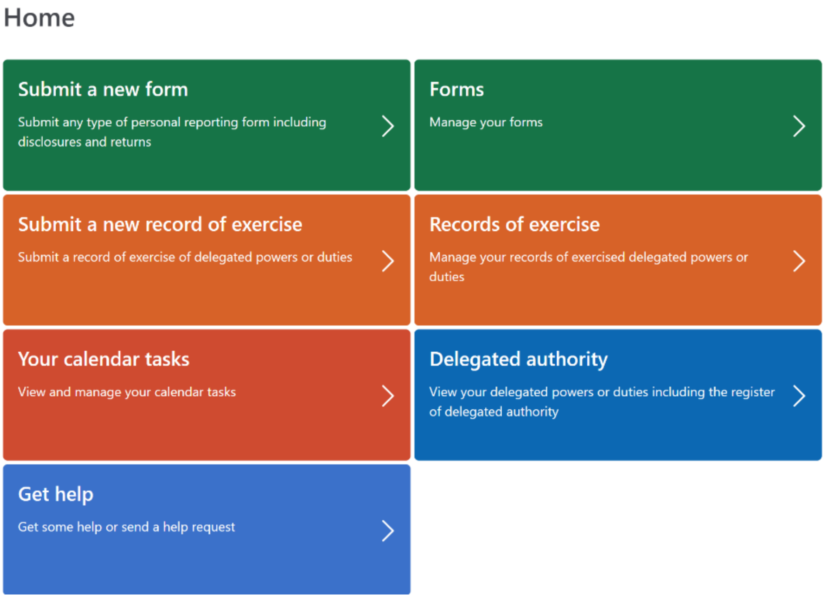
Log in to a different account

If you've forgotten your password, select the option *Forgot password* to reset your password. Once signed in, you will be taken to the *Home Page* of Attain. You can now lodge forms and update your personal details. You should also see your *Items Needing Attention* list on the right-hand side of the page that contains forms, tasks and/or requests requiring your attention.

If you have NOT previously registered in Attain (and you cannot use SSO) you will need to confirm your account. One the Log in Screen, enter your email address. You will then see the message *Account Not Confirmed*. Enter your email address and select the button *Send or Resend Confirmation*. You will then receive an email with a secure link that will take you to the *Register* page. Enter your email address and choose a password (pay attention to the rules for choosing a password displayed on screen). Select the button *Register*. You can then log in using these details.

Managing your forms

Once you have signed into Attain you will be taken to the Home screen. From here you can navigate to various areas to assist you with submitting and managing your statutory forms.



Home

Submit a new form
Submit any type of personal reporting form including disclosures and returns

Forms
Manage your forms

Submit a new record of exercise
Submit a record of exercise of delegated powers or duties

Records of exercise
Manage your records of exercised delegated powers or duties

Your calendar tasks
View and manage your calendar tasks

Delegated authority
View your delegated powers or duties including the register of delegated authority

Get help
Get some help or send a help request

If an option that you believe you should have is not listed, contact your Administrator (their details will be shown when you open the *Get Help* and submit your request).

Submitting Forms

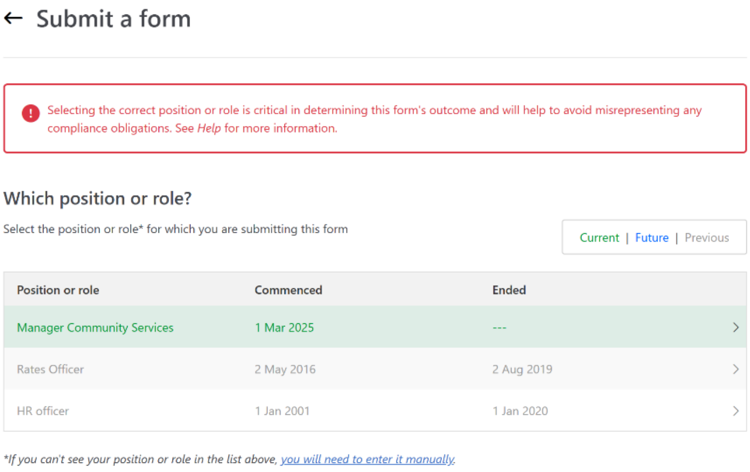
Items Needing Attention List

If you have a form outstanding (such as a Primary or Annual Return), it will appear in your Items Needing Attention list. Select the item from the list, or if the item you need to submit is not there, select the icon Submit New Form in the top left of the screen.

If you select an item from the Items Needing Attention list, you will be taken straight to that form. However if you select the icon Submit New Form, you will need to confirm the position you wish to submit the form under.

If your organisation has already assigned you to a position in Attain, this field will be pre-populated with the relevant position and role you occupy. If this is the case, you just need to confirm by selecting the Position.

Important: Staff members who have acted in, or occupied previous positions, will see a list of all their positions here. Choose the position that is most relevant to the form you are submitting.



← Submit a form

Selecting the correct position or role is critical in determining this form's outcome and will help to avoid misrepresenting any compliance obligations. See *Help* for more information.

Which position or role?

Select the position or role* for which you are submitting this form

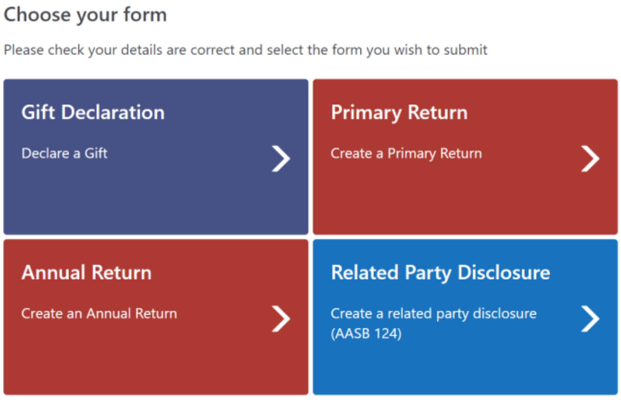
Position or role	Commenced	Ended
Manager Community Services	1 Mar 2025	---
Rates Officer	2 May 2016	2 Aug 2019
HR officer	1 Jan 2001	1 Jan 2020

**If you can't see your position or role in the list above, you will need to enter it manually.*

In most cases your current position title and role will appear automatically. However, if you are using the option to *self-register* or your current position is not listed, you will need to select *Can't see your position or role in the list* and you will be able to manually enter your position title and chose the role that relates to the position you are occupying that is relevant to the form you are submitting.

Once you have selected your position and *Continue* you will be taken to the screen to choose the form you wish to submit.

Only Key Management Personnel will be able to select Related Party Disclosure forms.



Choose your form

Please check your details are correct and select the form you wish to submit

Once you select a form you will see detailed help and guidance (on the right of the screen) that will assist you to navigate through the form.

Submitting Specific Forms

Submitting a Gift

Attain provides a comprehensive gift management process that will provide you with a reliable way to keep track of all your gift values, gift givers (donors), and allow you to identify potential conflicts related to the gifts you have accepted. However, Attain is entirely dependent on the accuracy and extent of the information you enter. If the data you enter is wrong or not provided, this will affect the accuracy of the information Attain is able to provide. We recommend you disclose all gifts and regularly check your disclosures to ensure they are accurate and up to date. If you have any concerns use the Get Help option on the Home screen to seek assistance.

To enter a gift (including travel) disclosure:

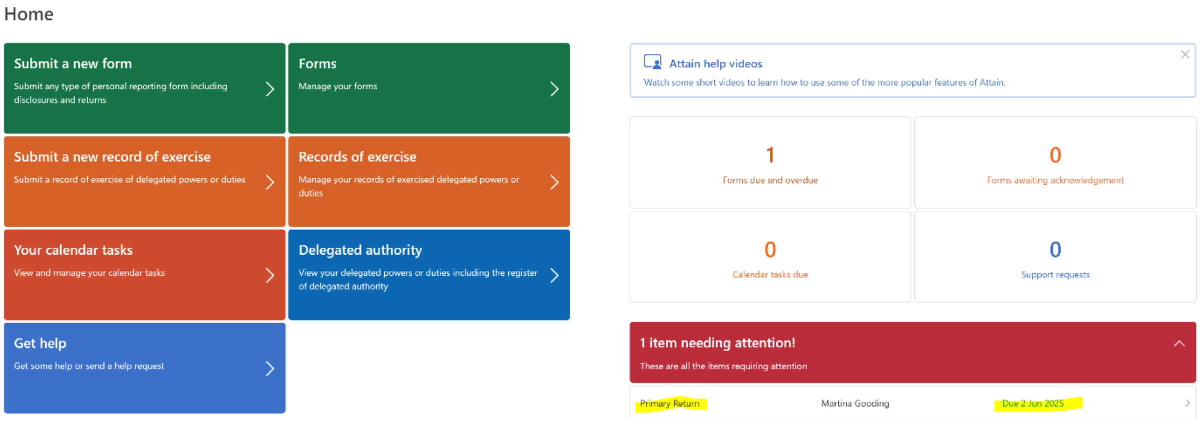
1. From the Home Screen, select Submit a New Form
2. Now choose the position you wish to submit this form under. Your position is the position under which you are submitting the form. For example, you might occupy two positions within your organisation, your substantive position, and also be acting in a second temporary position. In this instance, it is important to choose the organisation position applicable to the form that you are submitting.
3. Now choose the Form that you wish to submit, in this case, Gift Declaration.
4. Ensure your details are correct, then press Next
5. Follow the prompts and the onscreen help to enter the details of the gift.
6. Once you have entered the gift details, you will be the taken to the Review and Submit page.
7. Note the Submission Summary on the right-hand side of the page will contain details of the cumulative value of gifts from this gift donor, and how the gift will be treated in the registers.
8. Scroll down to see the Declaration box. Confirm the details are correct and submit.

Submitting a Primary or Annual Return

An Annual Return can be commenced at any time during the financial year but cannot be submitted until the designated form submission period (1 July – 31 August).

A Primary Return can be submitted anytime. Usually this is within 3 months of your start date in a relevant position (including any acting role).

1. From the Home Screen, select form from your Items Needing Attention list on the right hand side (if you don't see this form in your Items list, select the icon Submit New Form).



Home

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Records of exercise
Manage your records of exercised delegated powers or duties

Your calendar tasks
View and manage your calendar tasks

Delegated authority
View your delegated powers or duties including the register of delegated authority

Get help
Get some help or send a help request

Attain help videos
Watch some short videos to learn how to use some of the more popular features of Attain.

1
Forms due and overdue

0
Forms awaiting acknowledgement

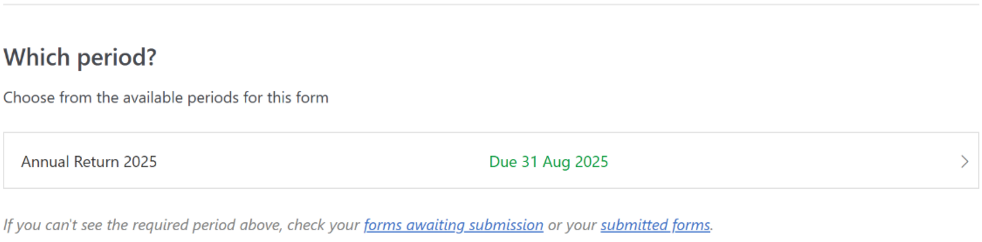
0
Calendar tasks due

0
Support requests

1 item needing attention!
These are all the items requiring attention

Primary Return	Martina Gooding	Due 2 Jun 2025

2. If you have selected a Primary Return, you will be taken straight to the form to commence entering your information.
3. If you are submitting an Annual Return, you must now confirm the period the return is for. You should only see one option (the current year), however if you see more than one ensure you select the appropriate year.



Which period?

Choose from the available periods for this form

Annual Return 2025	Due 31 Aug 2025

If you can't see the required period above, check your forms awaiting submission or your submitted forms.

4. Attain will ask you whether you wish to copy data from a previous return to populate this form (only if you have previously submitted a Return in Attain). You can still make any changes before submitting the new Return.
5. Complete each section of the Return appropriately and you will reach the *Review and Submit* page.
6. Confirm the details are correct in the *Declaration* box and the details you have entered are correct, then press Submit.
7. Once your Return has been submitted, you will receive an email acknowledging it has been received in accordance with section 5.77 of the Act. If you do not receive an acknowledgement contact your organisation's Support person to check that they have received your Return.

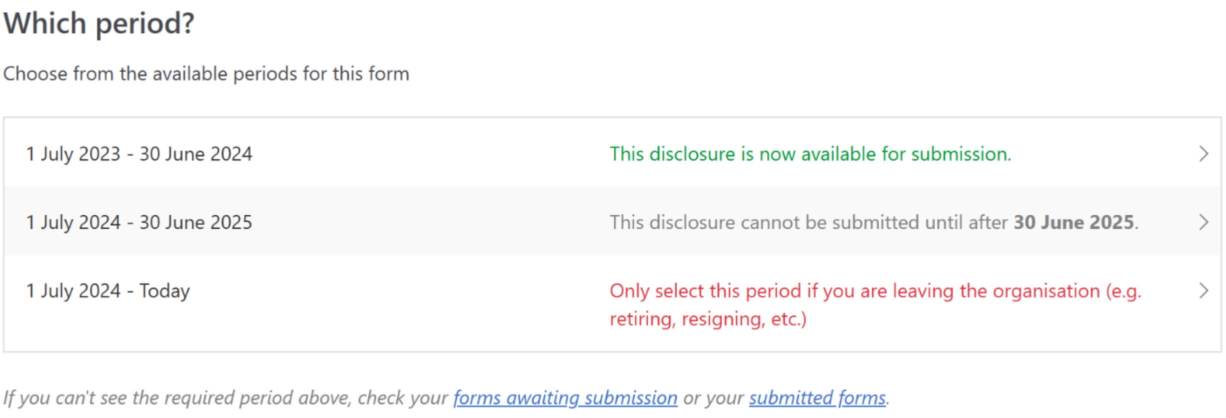
Attain keeps a full audit trail of every form submitted and acknowledgment sent. You can review and print a copy of any form you have submitted at any time. You can also send a copy of any form you have submitted via email.

Now that you have submitted your Return, Attain will remember this data and when the time comes to create your next Return, Attain will provide you with the option to copy data from a previous Return to pre-populate the next Return saving you time and effort.

Submitting a Related Party Disclosure

If you have been defined as a Key Management Personnel (KMP) you will need to complete a declaration form at financial year-end, (and/or other periods defined by your organisation).

1. From the *Home* Screen, select *Related Party Disclosure* form from your *Items Needing Attention* list on the right-hand side of your screen.
2. Now select the appropriate disclosure period:



Which period?

Choose from the available periods for this form

1 July 2023 - 30 June 2024	This disclosure is now available for submission.
1 July 2024 - 30 June 2025	This disclosure cannot be submitted until after **30 June 2025**.
1 July 2024 - Today	Only select this period if you are leaving the organisation (e.g. retiring, resigning, etc.)

If you can't see the required period above, check your forms awaiting submission or your submitted forms.

   a. *This disclosure is available for submission*. This is the current period and will usually be the period you need to select to submit the disclosure that is due.
   b. *This disclosure is available to commence but cannot be submitted until [date]*. This is the next period that a disclosure will be due but is not due yet.
   c. *Only select this period if you are leaving the organisation* … This option should only be used if you are leaving the organisation prior to the submission period. It will allow you to submit a disclosure outside the set disclosure period.

3. You will be given the option to copy the information from one of your previous forms (if you have submitted a Related Party form through Attain previously). You can still make any changes before submitting the new form.

IMPORTANT: This form is designed to be used as information becomes available. If you do not have all the information to hand to complete this form, it is possible to save your place using the *Save and exit* button at the top right.

4. Enter the information required, and you will be brought to the *Review and Submit* Page. You can Save and Exit at any time by selecting the button in the top right corner of your screen.
5. Check to make sure all the details you have entered are correct as once this form is submitted it cannot be amended.
6. Tick the box confirming the form is correct and ready for submission, followed by *Submit*. This form recipient is locked by your Administrator, so you do not need to select one.

Submit a record of 'Exercise of Delegated Authority'

Attain provides the ability to record the use of a delegation. This is useful to keep track of the times a delegation is exercised on behalf of the officer with the delegate authority. In other words, when the 'acting through' principle is being used. Attain employs a workflow process to ensure the record being created records the delegation being used and can only be submitted for approval to the officer assigned the authority to exercise this delegation.

Officers with delegated powers or duties have the option to manage all records that relate to the exercise of any delegation that is assigned to them. These Users will see a table showing all *Active* and *Submitted* records that relate to themselves. That is, they can see those records that they have created or submitted. In this way a User, can monitor records they have submitted for approval, and see those that have been returned for further attention.

To enter a record of the use of a delegation follow these steps:

1. From the Home Screen, select Submit a New Record of Exercise
2. You will be presented with a list of delegations applicable to your organisation. From the list, choose the relevant delegation you are exercising. You may use the search function to assist in locating the relevant delegation.
3. Next select the officer or committee (the entity) that has been delegated the authority to exercise the delegated powers or duties.

IMPORTANT: If you (or the position you occupy) has been delegated the authority to exercise powers under this delegation, select your name from this list as the person exercising the delegated powers or duties. If your name does not appear and you have been formally delegated authority to exercise this delegation, contact your organisation's Administration Support Person to have the list amended. You can do this using the *Get Help* option located on the *Home* screen.

If you have not been delegated the authority to exercise this delegation (you are using the 'acting through principle'), you will need to select the name of the officer from this list, who will be receiving this form and formally exercising the authority under this delegation.

4. Next enter the details of the Record of Exercise, after which you will be brought to the *Review and Submit* page.
5. The record can now be sent to the intended recipient for their review and final submission as a record of the exercise of this delegation. Please ensure you have verified that the information is correct before sending the form.
6. You have the option here to *Add a Note* to the Record, and to send an email notification to the recipient before selecting *Send for Review and Submission*.

IMPORTANT: If you choose to tick the box to send a notification to the recipient, an email will be sent to the form recipient you have selected (the person that has the authority to exercise this delegation), alerting them that a new record has been submitted for their review and final submission.

Compliance Calendar

1. From the Home page, select My Calendar Tasks. 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 *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.

2. Select any task to start working on it.
3. Review the requirements of the task and once you are ready to complete it, select *Update the Outcome*.

Note – if your task has a Checklist, you must address each item of the Checklist prior to completing the task.

4. 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.
5. You are now ready to complete this task by selecting *I am ready to submit this task as completed*.
6. Tick the box and select *submit.* The task is now recorded as complete.

Useful features

Forms

This is the place you can use to manage your forms. You can use this feature to keep track of any forms you have created and are yet to submit or see a history of previous forms you have submitted.

Copy to new form

Look out for the time saving feature of copying the contents from a previous form to a newly created form. For example, after you have submitted your Primary or Annual Return for the first time, the next time you need to complete this form you will have the option to copy its contents to a newly created Return. This feature is also available for Related Party disclosures.

Sending a Help Request

1. From the Home Screen, select *Get Help*
2. Here you can see your *Open and Resolved Support Requests*. You can also submit a new request by selecting the *Submit New* tab.
3. Enter the details of your support request and select *Send Request*. The request will be sent to the Administration Support person for your organisation.

Note: Once sent, your request will be saved allowing for comments to be added at any time by either the recipient or the sender. Each comment that is added will send an automated email to the intended recipient.

Setting your reminders

1. From the *Home* Screen, select *My Account* at the top of the page.
2. Select the *My Preferences* tab
3. Here you can manage your options surrounding reminders sent from the Attain system. You can select to receive Email Reminders when forms are due or overdue and can choose when and how often you receive them (default timing is to receive reminder emails every Monday).

Items Needing Attention list

Your *Items Needing Attention* list contains Forms that are due or overdue. This list is unique to you and contains tasks that need your attention. As you complete a task, it will be removed from the list.

Thank you

Thank you for choosing to use Attain and we hope you find it an easy and convenient way to manage your compliance obligations. We are constantly developing new products and ways to assist you and make compliance less of a burden. We welcome any feedback you would like to share with us, please send any comments to support@integms.com.au