



Department of
Education

Shaping the future

Program Kaartdijin Preparation Guide

This guide gives a summary of important steps that schools without Compass can take before starting the Program. Early preparation is not compulsory, but tasks like cleaning up data can help schools get ready for a smooth transition to the new system.



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Who is this Preparation Guide for?

This guide is for schools without Compass (“**non-Compass schools**”) outlining how they can prepare before they transition to the new School Information System (SIS) (also known as the **Kaartdijin (Compass) Portal**).

This guide gives a summary of the first phase (“**Phase 1**”), along with steps to help your school prepare. It provides an overview of what’s included in this first phase and what to expect. While it doesn’t cover everything, it highlights actions schools can take before starting.

Important! This guide is optional.

Starting early **isn’t required** but taking steps like reviewing and updating (“cleansing”) your school data can help prepare your school for the journey.

This guide is in addition to the more detailed guide (the “**deployment journey Guide**”) you will receive when you start your rollout (also called “**Deployment**”).

Symbols used

 Things you can do	<p>This symbol is for tasks you can start now if you choose. Doing these tasks will help with planning and getting your school ready for the rollout.</p> <p>For example, to ensure a smooth transition to the Kaartdijin portal (Compass), it’s important to make sure that the student, parent, and staff information in your Student Information System (Integris) is accurate and up to date.</p> <p>This is the most important task you can begin right away. While you can wait until Phase 1 begins, starting sooner will make things easier later.</p>
 Learn (read-only)	<p>This symbol signifies it is a read-only section. Learn about each stage in Phase 1 and the systems used. Together, each section explains the stages of Phase 1.</p>

Which term will my school start their deployment journey?

To find the term your school is starting in, please follow the link on the program’s Ikon page: [School deployment schedule for Phase 1](#).

Please note the term is provided but not the date your school will start. The above link also explains how your school will be advised about the deployment process.

About the guide’s layout

Each section in this guide tells you which type of school it is for, for example: Primary, Secondary District etc. Symbols are also used, and simple step structures for instructions. The 2 key symbols identify information and things you can do:

The  and  symbols are used for positive and negative statements. For example, they indicate whether you need to check something or whether you should not do something.

Ikon links

Additional information is available on Ikon, such as current training guides for SIS Classic (Integris) or details about Program Kaartdijin. These links will be provided where relevant.

Steps

Instructions are provided in numbered steps:

- Step 1. Instruction
- Step 2. Instruction



Where to get help when using this guide

This guide gives a summary of the first phase (“**Phase 1**”) of the Kaartdijin Program, along with extra tasks you can choose to start before beginning your rollout.

If tasks are about SIS Classic (Integris), the SIS you are currently using, a link is provided to the related Ikon content.

If you still need assistance, you can:

1. Log a request via the Kaartdijin Support form (ServiceNow):
[Request Catalogue - ICT Self-Service Hub \(service-now.com\)](#); or
2. Join the Connect Community and ask your question there. Many schools already live with Compass or that have completed these preparatory tasks are available to help:
[Connect Community](#).

Glossary

With any new system, there are new words and terms.

We explain these in this guide as they appear.

A glossary is also available on the KIDS site, accessible from the quick links on the home page: [Phase 1 Glossary](#).



Important considerations for school leaders

There are key things school leaders should think about as they prepare for the transition to the Kaartdijin solution. This is a brief overview of what schools may need to consider.

Business Plan Alignment

Identifying alignment	Teacher capacity	ICT
<ol style="list-style-type: none">1. How does the Kaartdijin solution align with your existing priorities?2. How can the Kaartdijin solution value add?3. Are there timing considerations that may impact on adopting the Kaartdijin solution?	<ol style="list-style-type: none">1. How can I make best use of my leading lights?2. How will I provide additional support to those who need it?3. How can I minimise impact on workload in the initial implementation?	<ol style="list-style-type: none">1. What additional hardware do we need – devices for teachers, thermal printers, kiosks?2. Are there considerations for our existing infrastructure?3. Do I need additional technical support?

Business process and other applications

Considering business processes and other applications	Kaartdijin options	Timeline and competing activities
<ol style="list-style-type: none">1. Are there current business processes that may need to change because of Program Kaartdijin?2. What third-party application could be impacted by the Kaartdijin solution?3. How will I manage and communicate business process change to my staff? When?4. How will I manage and communicate changes to SMS arrangements? Disabling of OutReach+.	<ol style="list-style-type: none">1. How will we embed the minimum activities of attendance recording and behaviour/suspensions?2. What other available options should be considered as secondary priorities?3. Do we need to consider non-Kaartdijin functions?	<ol style="list-style-type: none">1. What upcoming activities may impact our implementation of the Kaartdijin solution?2. What opportunities exist to support implementation and training?



Introduction

Important note regarding downloads of guides

- All guides, including this one, are only current on the day they are downloaded.
 - While every effort is made to ensure the information in the guides is accurate, **amendments or improvements may occur from time to time.**
 - If you download the guide again, please save over the old file with the newly downloaded guide. Destroy any printed copies.
 - Note: The guide is dated in the bottom footer.
-

About the program

Program Kaartdijin is also known as the **Kaartdijin solution**. It is being introduced to all schools in 2 phases, called **Phase 1** and **Phase 2**. There is information about what is included in each phase below.

To learn more about Program Kaartdijin, visit the program's Ikon page:

 <https://ikon.education.wa.edu.au/-/program-kaartdijin-and-sis-replacement/>

What is the “deployment journey”?

This is a term you will hear frequently throughout the Kaartdijin solution.

“**deployment journey**” refers to a school's path as they switch (“**transition**”) to the Kaartdijin solution and consists of Phases 1 and 2. This guide outlines steps for schools to take before starting the journey, focusing on Phase 1.

Phases consist of **stages**.

Difference between phases and stages

- **Stages** are specific steps within a phase. Phase 1 and Phase 2 of Program Kaartdijin each have 6 stages.
- **Phases** are broader and continue beyond the stages. For example, schools must complete and then use Phase 1 for at least 6 months before starting Phase 2.

Both Phase 1 and Phase 2 have a 6-stage deployment to help schools go live.

The **stages** of Phases 1 and 2 are called:

- | | |
|---------------------|----------------|
| 1. Launch | 4. Familiarise |
| 2. Plan and Prepare | 5. Go-live |
| 3. Training | 6. Support. |

The tasks differ to fit the system features of each phase.

You'll receive a **deployment journey Guide** for each phase. It gives detailed instructions and comes with training and support.

Functionality by phase

Learn more about the functionality in each phase: [Functionality by Phase](#).

About Phase 1

- Phase 1 begins with the 6-stage, 8-week deployment, where schools get ready to use the new system. These stages mark the start of Phase 1, which continues after going live (“**Go-live**”).
- Phase 1 focuses on student administration, including school attendance, student behaviour and wellbeing, school report generation, and system maintenance, such as action management and optional events.
- During Phase 1, schools use both SIS Classic (Integris) and Compass. While Compass handles attendance, behaviour, and wellbeing, Integris remains the main system for enrolments and personal profiles.

Illustration of Phase 1 stages

See the next page for the **Phase 1 Stages 1-6 diagram**.

Phase 1 Stages 1-6: schools currently not using Compass

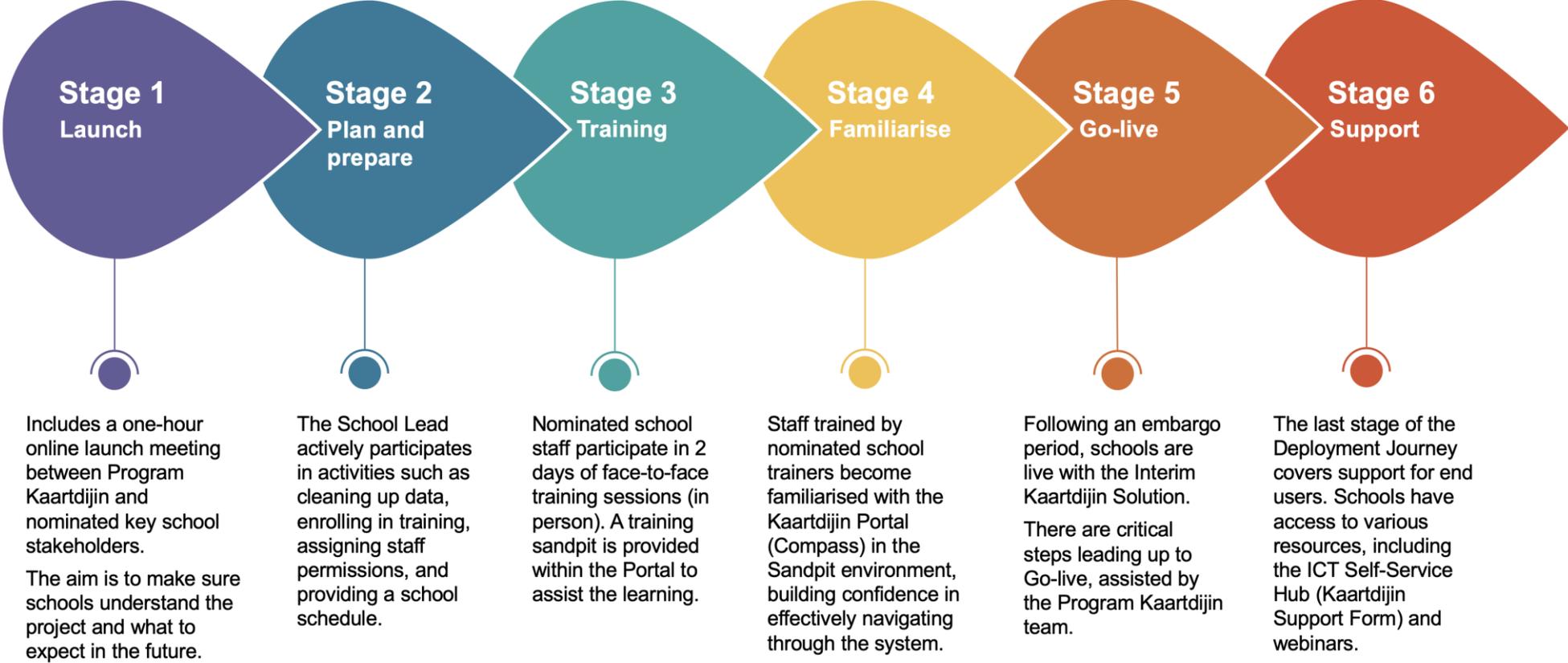


Figure 1 Phase 1 Stages 1-6



Overview: Phase 1

This section is for:

- All schools currently **not using Compass**

Schools complete several activities across the six stages of Phase 1.

👉 Your active participation is important for ensuring a smooth process.

This preparation guide will help you learn about each stage; you can start early preparations if you wish.

Key roles

Principals must nominate 3 stakeholders. These staff are called “**nominated stakeholders**” and includes your main Program Kaartdijin contact (the “**School Lead**”).

Nominated stakeholders

👉 The **nominated stakeholders** are responsible for completing all activities and steps for Phase 1 and 2 within an allocated timeframe for each stage.

Schools can start thinking about who is going to be most suitable, now. The 3 nominated stakeholders should be selected from these key school staff roles:

- Principal
 - Deputy Principal
 - Manager Corporate Services.
- } School Lead +
2 nominated stakeholders

School Lead responsibilities

The **School Lead** is the main contact between your school and Program Kaartdijin. We strongly recommend choosing a backup School Lead to keep things running smoothly if the first person becomes unavailable.

Main duties:

- Making sure the tasks required for the program are finished
- Communicating with Program Kaartdijin via the school's **Microsoft Teams Deployment channel** (there is more about that in this guide)
- Being responsible for the outcomes, while working with other key people.

Other key people

Other key people (also called ‘**stakeholders**’) may include:

- 👉 School Officers
- 👉 School Attendance Officers
- 👉 School Timetable Lead
(where applicable).

The School Lead and other key people act as Program Kaartdijin champions. They will refer any questions they can't answer from staff during the rollout to the program.

Training requirements: The School Lead and 2 other key people must attend 2 full consecutive days of face-to-face training.

You will book your training after the Launch meeting. See: **About the Launch Meeting.**

Roles and responsibilities

Table 1 outlines the responsibilities and key activities for the School Lead and Principal (or their delegated authority), for driving the deployment of Phase 1.

Key roles	deployment journey responsibilities and key activities
Principal Acting Principal (delegated authority)	Involved at critical steps of the deployment journey, including: <ol style="list-style-type: none"> attending the Launch meeting (see below). communicating this transformational change to your staff and parent community selecting nominated stakeholders and the School Lead signing off on the school's readiness for Go-live.
School Lead	Nominated by the principal to drive the school's transition to the Interim Kaartdijin solution: <ul style="list-style-type: none"> Prepares, reviews and updates (“cleanses”) administrative data and completes deployment journey activities as per the KIDS School Site. May delegate activities to relevant staff, such as the Network Administrator and Manager Corporate Services. Ensures data integrity, assigns staff permissions, and personalises the Kaartdijin portal (Compass). Holds ongoing responsibility to support the school post Go-live. Must attend face-to-face training sessions and share learnings with wider school staff during the Familiarise stage.

Table 1 Responsibilities and key activities required during the deployment journey



For an overview of all roles and responsibilities during the program, please visit the [KIDS Home page](#).



About the Launch Meeting

There is a one-hour online ‘**launch meeting**’ for the nominated school stakeholders and the Program Kaartdijin team. They will learn:

- **About the program:**

Ensure schools have a good understanding of Program Kaartdijin, its

goals, and the expectations for the stages in Phase 1.

- **How schools can prepare:**

The Deployment Team will share information on what things schools can do before formally starting the deployment journey.



Overview: systems used in Phase 1

 Information only, no action required.

This section is for:

-  All schools currently **not using Compass**
-

Systems used in Phase 1

SIS Classic (“Integris”)

- Remains the main source for managing staff, student, parent and timetable data during Phase 1 and Phase 2.
- Used for new staff setup and changes.

DAM (DOE Account Management)

- Continues to manage user permissions and role groups.
- Only DoE email addresses should be imported into the Kaartdijin portal.
- School leaders or delegates are responsible for maintaining high-quality data.

Kaartdijin portal (“Compass”)

- From Go-live, staff will manage attendance, events (optional), scheduling, communication (noting schools may continue to use current methods of communication), and student wellbeing.

You will learn more about the systems when you start the deployment journey. This guide refers to the systems as Integris and Compass. In simple terms, data from Integris is transferred to Compass.

The data names and mapping differ between the two systems, so you may see different terms and need to make changes in Integris to ensure proper data flow.

You don't need to complete everything before starting the deployment journey, but if something is highlighted as important in this guide, it's because it will benefit your school later.



Stage 1 Launch

This section is for:

- All schools currently **not using Compass**

The Launch stage starts with a meeting that provides an overview of the deployment journey. (See: **About the Launch Meeting**.)

After that meeting, your school will receive links and resources to help further prepare for the journey.

However, some information is available now in this section.

We understand system changes aren't easy. It can be frustrating for schools to balance daily tasks while learning new technology. To help, the Program has created a full support framework for your school.

The first part of this support is the Program Kaartdijin team. The second part includes multiple channels through which schools can get help.

Support structure during deployment

- **Deployment Support Team:** A dedicated team will help your school through Phase 1 and again in Phase 2. This team includes key staff focused on ensuring your school transitions smoothly to the Kaartdijin solution.
- **Liaison Officer:** Your assigned Liaison Officer will guide and support you throughout, ensuring clear communication and helping as your school moves toward the Go-live stage.
- **Principal Project Officer:** Working alongside your Liaison Officer, the Principal Project Officer helps manage the deployment and address any challenges.
- **Training Team Representative:** A Training team representative also supports your school, offering resources and training to prepare staff for the transition.

This support structure is designed to give your school the guidance and resources needed for a smooth and successful transition to the Kaartdijin solution.

Communication channels

There are **7 channels** to aid smooth communication between your school and Program Kaartdijin members throughout the deployment journey.

Ikon

**Program
Kaartdijin
page**

✓ **Read now**

Read more about the program on the Ikon Program Kaartdijin page, including details on what the Department is funding and who to contact regarding Compass modules.

This page is updated each term: [Program Kaartdijin Ikon page](#)



**KIDS Home
page**

✓ **Okay to access now**

The KIDS Home page is accessible to Department of Education stakeholders, staff, and school users. It provides details about the deployment journey, Program timeline, FAQs, contact details, and important links.

To login to the [KIDS Home page](#):

1. **Open the KIDS Home Page.**
2. **Enter Your Credentials:**

If you are not already logged into Microsoft Office 365, use your departmental email and password to log in.

If you are already logged into Microsoft Office 365, you will be automatically redirected to the KIDS Home Page without needing to enter your credentials again.



KIDS School Site (KSS)

Access will be given after the Stage 1 Launch meeting

The **KIDS School Site** is a restricted site to manage and track activities and progress during the deployment journey. Selected team members can mark tasks as done and upload needed documents.



Deployment Teams channel

The Teams channel will be set up the Launch meeting

Your school's **Deployment Teams channel** is a communication platform for chats between the Program Kaartdijin team and your school during the deployment journey. It works like a chat room, letting you communicate and collaborate in real time.

Your Liaison Officer and Principal Project Officer from Program Kaartdijin will be in this chat. Only the Principal and nominated School Lead will get access and invitations to this channel. The chat will be removed at the end of your journey.

For those new to Teams, there is a training guide available on Ikon. Refer to [Use Microsoft Teams to work online](#).



Resource Hub

No need to start learning before your deployment journey

The Resource Hub is a complete site with help cards and videos to train you and your staff. Knowing it's easy to forget details, the hub has refresher materials you can access anytime.

Key features include:

- **Categorised Resources:** Materials are sorted by staff role, so they can find the training they need.
- **Diverse Formats:** The hub has training in different formats, like videos and easy-to-follow help cards, to suit different learning styles.
- **Convenient Access:** You can reach the resources directly from the KIDS Home page, so they're always available when needed.

Using the Resource Hub will help your team stay informed and confident as you work with the new systems and processes in the Kaartdijin portal (Compass).



Connect Community

✓ Okay to join now

The **Connect Community** is where schools can ask questions and share knowledge. (Note that during your deployment journey, you will use other channels for support, such as the Deployment team phone line and Teams.)



Deployment team phone line

⬮ Provided at the Launch meeting

The **Deployment phone line** will be available for general enquiries throughout your journey from 7:30am to 5:00 pm.



Recap of what staff can explore now

Ikon

The Program Kaartdijin page is updated each term.

[Program Kaartdijin Ikon page](#)



[KIDS Home page](#)

See page 13 for how to login.



Watch the Program Kaartdijin Introduction video.

[Program Kaartdijin Introduction](#)



Overview: Stage 2 Plan and Prepare

This section is for:

- All schools currently **not using Compass**
- ✓ Start now (not compulsory but highly recommended)

Introduction

During the **Plan and Prepare** stage, the Kaartdijin team will play a crucial role in assisting your school with data preparation for uploading to your Kaartdijin sandpit.

Your “sandpit” (a more detailed description is provided later in this guide) is a testing or pre-production environment during the **Training** stage and before the **Go-live** stage.

✓ Start early!

Note that it is not compulsory to start early, however, some actions can be initiated now. This is highly recommended.

Proactive planning will help allocate resources effectively and save time as you embark on the deployment journey.

✓ Data review and preparation

Reviewing and preparing your data – also known as **cleansing** data – is an important preparation task that should be started as soon as possible. This will help a smoother migration to the Kaartdijin portal (Compass) later.

What does “cleansing data” mean?

This means fixing any discrepancies in student, parent and staff data to ensure data can transfer from the current SIS to the Kaartdijin SIS portal.

✓ Resource allocation

Forward planning allows you to effectively allocate necessary resources, such as staff time and training materials.

Consider the roles and responsibilities of your team members and ensure they are prepared for their tasks during the deployment journey.

Why cleanse school data?

Before data can be transferred, your school data must meet minimum data standards. Data currently in Integris must align properly with the fields and structure in the new Kaartdijin (Compass) system.

To achieve this, schools need to review and clean up student, parent, and staff information in Integris to make sure it's accurate and in a format that is accepted by Compass.

When can you begin cleansing your data in SIS Classic (Integris)?

- ✓ It is never too soon to start cleansing your data.
- ✓ Start with reviewing your staff, student, and parent data in SIS Classic.

What data schools need to cleanse

All schools must review and update the **following 3 areas** to ensure smooth data import into the Kaartdijin portal. Schools that use the SIS Timetable module will have some additional data tasks. This includes:

- ✓ **Student Information:** Ensure all student records are accurate and up to date, including contact details, enrolments, and attendance.

- ✓ **Parent and Guardian Information:** Confirm that parent and guardian contact details are correct, linked with siblings and there is no duplicate data.
- ✓ **Staff Information:** Make sure all staff records, roles, and contact information are current.
- ✓ **Timetables (only if school uses SIS Timetabling).**

Data fields: summary

The following data field summaries are important for the transfer of data in Integris to Compass and need to be reviewed.

Student Data:

Students on Admissions, Current and External rolls in Integris must have a valid entry for:

- Form
- Year
- Address

If you have a combined Kindergarten and Pre-primary class in Integris, ensure Kindy students have a separate Form from Pre-primary students.

IMPORTANT Students should only be placed on the External roll when:

- There is a Section 24 alternative attendance arrangement in place.
- The student attends the Community Kindergarten hosted by your school.

All other students should be moved to the Former roll.

Parent Data

The parent/carer details entered in the PG1 and PG2 tabs of the Family Group section of Current and Admissions roll student records in Integris must have a valid entry for:

- First Name
- Surname
- Gender
- Address
- Email address and/or mobile phone number
- Family Mail Marker*

* To enable email and/or SMS communications, PG1 and PG2 records must include an email address and/or mobile phone number. The *Family Mail Marker* field also needs to be checked.

Staff Data

Staff must be on the Current roll in Integris and have a valid entry for:

- First Name – must match the entry in HRMIS
- Surname/Last name – must match the entry in HRMIS
- E number – must be 8 characters with an E e.g. E0123456
- Staff Type – e.g. teaching, non-teaching
- Entry date in the past
- No leave date

Timetable Data

If your school uses SIS Timetabling, there are some additional data tasks.

Grid Names must:

- contain the current school academic year.

Subject Codes must not:

- be less than 3 characters
- contain any special characters or spaces

Teaching sets:

- must have a staff member assigned

Subject Codes must not:

- be less than 3 characters
- contain any special characters or spaces

All classes that appear on the timetable, including duty grids, must have a staff member assigned. It is recommended to assign a room to all classes. If the student is offsite, add a room to describe the location e.g. Offsite – TAFE, Offsite – SWL, and assign an admin staff member e.g. student services, attendance officer, as the teacher.

Before cleansing

Ikon instructions

👉 For detailed information and instructions on how to review and update your data in Integris, go to Ikon page [Prepare SIS Classic Integris data for Program Kaartdijin implementation](#) and download the Integris Data Preparation Guide.

Will I lose access to data in Integris?

No, you won't lose access to data in Integris*. The data from Integris will be copied to the Kaartdijin portal overnight using CompassLink. Integris will still be the main source for enrolment and timetabling data (students, classes, parents, and staff), so it's important to keep it updated even after you go live. This ensures that the Kaartdijin portal receives daily updates.

Once your school begins the deployment journey, any errors or warnings during data import will be flagged in a Diagnostic report. The Kaartdijin team will send this report back to your school to fix the data in Integris.

* After going live, the Kaartdijin portal will become the main system for attendance and behaviour records (**chronicle**).



Parent (PG1 and PG2) data preparation and cleansing

This section is for:

- All schools currently **not using Compass**
 - Not compulsory but highly recommended to start early

Why you need to cleanse this data

- In SIS Classic (Integris), each student is connected to each of their parent/s or caregiver/s.
- When the Kaartdijin portal (Compass) syncs with Integris, it finds all students linked to a parent in a family and merges them into one account in the Portal.
- Every student is assigned PG1 (and PG2 if needed) as their emergency contact caregiver.
- Only PG1 and PG2 from Integris are imported into the Kaartdijin 'People' records.
- Any other family members or emergency contacts recorded in SIS Classic (Integris) will show as emergency contacts in the Portal. For 'Other contacts' to appear in Compass, a mobile number must be entered in the mobile number field in SIS Classic (Integris).

Student, sibling and caregiver addresses

In Compass, caregivers and students are linked together by a common address to create a family group. It is important that the caregiver information and address is identical in the for students, their siblings and caregivers.

Integris has 4 address lines however, Compass only has two. Any data stored in lines 3 and 4 of the Address field will not be sent to Compass.

Noting: in Phase 2, Compass will validate addresses using Google Maps.

Important note regarding gender

The Integris export reports do not include parent/guardian gender, however, gender is required for syncing into the Kaartdijin portal.

- ✓ Any missing gender fields will be flagged in the Diagnostic Report before your Familiarise stage during the deployment journey.
- The Deployment team will provide this report if any warnings arise. You do not need to take any action before this time.



Run the PG1 and PG2 Ad Hoc report

To access and use the Compass PG1 and PG2 Ad Hoc Report, first import the report file. For **instructions**, refer to the [Import Ad Hoc report](#) on the Ikon *Run reports in SIS Classic* page.



After you have run the report

Step 1. Select the 'Import an ad hoc report in SIS Classic' to import this report into Integris. (See Figure 2 next page.)

Step 2. When completed, you will be able to see and access this report 'Compass PG data check – address line 1-4' report in Integris.



Check the PG1 and PG2 records

Follow these steps to ensure data is entered correctly for when synced to the Kaartdijin portal.

Step 1 Check PG1 and PG2 records for each student

Field names you need to check:

- First name
- Surname/last name
- Address

✓ The surnames and first names for PG1 and PG2 must **match exactly** in both parent/caregiver location and student record.

✓ Check for correct spelling and the use of upper and lower case, particularly in surnames with Mc, Mac or hyphens.

✓ Make sure **fields 3 and 4 are empty**. Why? Integris has 4 address fields; however, **only the first 2 are synced with Compass**.

✓ Enter all street details into the first 2 fields.

⇒ See Figure 3: *Address fields in Integris*

Step 2 Check at least one of these 2 fields is complete

At least one of these fields must be filled in:

- ✓ email Address AND/OR
- ✓ mobile Phone Number.

✓ Ensure PG1 and PG2 email addresses and mobile phone numbers **match exactly** in in both parent/caregiver location and student records.

✓ Ensure PG1 and PG2 entries **have different email addresses**.

⊗ **Do not enter a mobile number into Phone 1 or Phone 2 fields**

Step 3 Check the Family Mail Marker box (Figure 3)

✓ Verify each PG1 or PG2 record for anyone you want to email or send SMS messages to. This information will be transferred to Compass so you can contact those PGs via email or SMS.



Figure 2 Family Mail Marker check box in SIS Classic (Integris)

Step 4 Check all student have an address in SIS Classic (Integris)

✓ Check all students have an address in Integris.

This ensures it is clear whether they live with a parent contact or not.

Step 5 Verify PG1 and PG2 in Integris

🔴 For caregivers with multiple students at the school (e.g. siblings), check the caregiver data is identical for each student.

Step 6 Update PG1 and PG2 records in Integris if required

In Integris, parents are listed for each student. The Kaartdijin portal will merge multiple entries for the same parent.

- The caregiver fields for each student in SIS Classic (Integris) MUST match exactly.

The screenshot displays the 'Personal' tab in the Integris system. The 'Address' section is highlighted with green checkmarks, indicating that the address information is complete and verified. The address fields are as follows:

Field	Value	Status
Address	51 Calluna Way	✓
Town/Sub	FORRESTFIELD	✓
State	WA	✓
Postcode	6058	✓
Country		

Other visible fields include:

- Surname: Abdul-Kadir
- Legal Surname: Abdul-Kadir
- DOB: 8 JAN 2009
- 1st Name: Jacen
- 2nd Name: Kevin
- 3rd Name:
- Preferred Name: Jacen
- Year: 10
- Reference: 6186
- Central ID: 20000402700006151
- Form: 10MEN11
- House: Phoenix
- UPN: T000402721001
- Student No.: 32392031
- USI:
- Tel. 1: 0413 139 117
- Tel. 2: 0409 207 111
- Student Mob.: 0417 290 241
- Family Representative:

Figure 3 Address fields in Integris



Student data preparation and cleansing

This section is for:

- All schools currently **not using Compass**
 - Not compulsory but highly recommended to start early.

Once you have checked and amended the PG1/PG2 records, you will need to go through student records.

The time needed to complete data cleansing in SIS Classic (Integris) will depend on the current state of your data and the size of your school community.

- ✓ Students on both the current and external rolls in SIS Classic (Integris) will be synced to the Kaartdijin portal (Compass) through an overnight import via CompassLink sync.



Data cleansing steps

- Step 1. Complete the first 5 steps for Student Data Preparation (below)
- Step 2. Check for Students with Access Restrictions
- Step 3. Review and correct any Student Attendance Reporting (SAR) errors
- Step 4. Verify student Western Australian Student Numbers (WASN)



REMINDER: Check PG1/PG2 names, emails, and phone numbers

It is important the information for PG1 and PG2 (names, emails, and phone numbers) matches exactly with data entered in the student's PG1/PG2 records. Accurate and consistent records are essential for successful data merging and syncing within the Kaartdijin portal.



Student Data Preparation

- ✓ Complete these 5 steps.

STEP 1 Student addresses

All students must have a home address recorded in SIS Classic (Integris).

- Ensure student addresses in SIS Classic (Integris) are accurate and complete to reflect the data correctly.

STEP 2 Form groups

All students must have a Form group (do not use 'not specified').

STEP 3 Year levels

All students must have a year level assigned.

STEP 4 Check lesson attendance structures

If you have a Secondary structure, you will need to inform your Liaison Officer during the Plan and Prepare stage once you commence your deployment journey. This will ensure your lesson attendance is configured correctly in your Portal.

Step 1. Go to: Lesson Attendance > Parameters > Year Groups.

Step 2. Schools should check the value they have against each year group.

If there is a period structure other than 'Primary or Timetabling,' you will need to provide your Liaison Officer with details of the additional school defined lesson attendance structure. You will do this on your deployment journey.

STEP 5 Student medical condition (if required)

Note: This step is only necessary if updates are required for a student's known medical condition. Medical conditions, along with the Daily Management Plan and Emergency Response Plans recorded in SIS Classic (Integris), will sync to the Portal.

To ensure accurate data, update student medical conditions in SIS Classic (Integris).

Note: Ensure the Daily Management Plan and Emergency Response Plans are completed if they need to be viewed in the Portal.



Students with Access Restrictions

This section is for:

- ✓ All schools currently **not using Compass**

There are two options to consider when applying access restrictions to parents/caregivers:

1. **Total restriction:** this eliminates **all** communications, indicates the student cannot be picked up by the parent/caregiver and disables their ability to login to the Parent Portal.
2. **Partial restriction:** this indicates the student cannot be picked up by the parent/caregiver however, communications and access to the Parent Portal is granted.

 **Important:** There will be tasks to complete in your Kaartdijin portal when your school is given access, including for students with partial access restrictions. The School Lead will assist this during the Familiarise stage.



Check for WASN numbers

This section is for:

- All schools currently **not using Compass**
 - Not compulsory now, but highly recommended.

About the Western Australian Student Number (WASN)

- WASN numbers are recorded for all students in SIS Classic (Integris) under the '**Student Number**' field.
- Student numbers will be imported into the Portal.
- If a student's WASN number is missing, search for it or request it through SCSA and update it in SIS Classic (Integris). You will continue to be able to update WASNs in Compass.

Student profiles with a '0' (zero) in the report will be added to the Kaartdijin portal. For example, this applies to students moving from other states where their Student Number is set to 7 zeros: 0000000. Students without a WASN can be added to the admissions roll while waiting for their WASN.

 **Important:** Schools need a process to manage the update of records quickly, once they receive the WASN.

Check for and update Student WASN numbers

While the student profiles with a '0' will be imported, it is important to ensure all students have WASN numbers. This is part of regular student data maintenance. While this step is not required for the Program Kaartdijin transition, it is strongly recommended.

Staff data preparation cleansing

This section is for:

- ✓ All schools currently **not using Compass**
-

Importance of Departmental email addresses in Compass

Staff access

- ✓ **All staff need a Department of Education email address** to access the Kaartdijin portal. This differs to Integris requirements, which allows any email address including private addresses.
- ✓ Schools will need to ensure a Departmental email address is recorded in **DAM** for all staff needing Portal access. Follow the usual procedure for editing a staff member's account in DAM and add their DOE email address.

Staff records

✓ **All staff records must include the letter 'e'** before their e-Number. If a personal email address is in DAM, even with an E-number, that staff member will not be transferred to the Portal. This may include:

- Active Casuals (Relief staff) not acquired through the Casual Staff Seeker process
- Non-teaching staff.

What staff data is imported?

Current staff

- ✓ All current staff data from SIS Classic (Integris) will be imported into the Kaartdijin portal.
- ⊗ Staff with a past expiry date in SIS Classic (Integris) will not be imported into the Portal.
- ✓ Schools can still access former staff details, if needed, in SIS Classic (Integris).

External staff

- ⊗ External staff like relief and IMSS teachers not listed on the current roll in SIS Classic (Integris), will **not** be imported into the Portal.
- ⊗ You will give external staff access when you assign permissions in DAM on your deployment journey.



Check and update staff members

- ✓ To ensure accurate data in the Kaartdijin portal (Compass), follow these steps.

Step 1 Check every current staff member has the following data entered

- a. First and Last name (must match the name in HRMIS/DAM)
- b. Valid E number (E0000000) – ensure it is complete, with the E

- c. Staff type
- d. Future end date or no end date
- e. Commencement date (in the past).

Step 2 Move staff who have left your school to the 'Former' roll.



Check and update casual staff

Casual staff includes relief teachers and Instrumental Music Teachers.

- ✓ Assign a department email manually using the DAM Visitor process.
- ✓ Casual staff must have a DOE email address; they are assigned a Microsoft A3 (Enterprise) license.
- ✓ Ensure all current and new casual staff have DOE email addresses in DAM *before* Phase 1 Deployment.
- ✓ Add Casual staff to the current roll in SIS Classic (Integris).

When the staff member is added to SIS Classic (Integris), assign the correct group in DAM to enable the mapping of Kaartdijin portal (Compass) permissions.

Timetable data preparation cleansing

This section is for:

-  Schools that use the Timetabling module in SIS Classic (Integris)

This section is not for:

-  Schools that do not use the Timetabling module in SIS Classic (Integris)

Important!

Schools that use the Timetabling module in SIS Classic (Integris)

These schools will need to cleanse **2025** timetables to include only one teacher per session. This is because the Data Sync Tool you will use later for the timetable import cannot pick up more than one teacher per session. (*Do not do 2024 timetables.*)

 **Note:** Your Liaison Officer will configure (set up) your Portal during the Plan and Prepare deployment journey stage.



Timetabling data preparation

- While **not compulsory**, we recommend you start to review and update (“**cleanse**”) your timetable data in SIS Classic (Integris) as soon as possible, allowing reasonable time to complete this action.
- The estimated time to complete data cleansing activities in SIS Classic (Integris) will vary depending on how clean your school's timetabling data currently is and the size of your school.
- Starting early can help avoid last-minute issues.

Steps to cleanse timetabling data

Step 1. Cleanse data within SIS Classic (Integris)

- To ensure your SIS Classic (Integris) meet specified data requirements for Kaartdijin portal (Compass), follow this table.

TABLE LEGEND:  will import  will not import

MPS data requirements	Format requirements
Subject & Class Codes  Codes 1 or 2 characters will not import.	 Physical Education = PE  Physical Education = PHE  Science = SCI  Math =MAT7  Math = MA8  Math = M9

<p>Remove symbols from Codes</p> <p> Symbols such as: . or _ cannot be used as they will not import.</p>	<p> 7_SCI, PE.1, VIS/ART</p> <p> 7SCI, PE1, VISART</p> <p>Symbols in Subject and Class codes will automatically be removed upon importing timetable into Compass.</p> <p>Example: ENG1-1 will import as ENG11.</p> <p>Review subject names that may be affected and decide if you need to make other changes. Example next page...</p> <p>Example: MAT_7, MAT-7 will have same code and require review to remain unique.</p>
<p>Grid Name</p> <p> Must contain the current school academic year for the student</p>	<p>Grid names should contain years levels entered as (for example):</p> <p> Year 7, Year 8, Year 9, Year 10, Year 11, Year 12</p> <p> Y09 - 2024, Y8 2024</p> <p>You do not need to add the academic year to the Grid name.</p> <p>The naming convention must be correct, or the year levels won't import into Compass properly and will show as cross-year.</p> <p>Note: Compass lists all Year 11 and 12 students as cross-year. This is because many certificate and ATAR courses take 2 years, with students starting in Year 11 and finishing in Year 12.</p>
<p>Staff member and room assigned</p>	<p>Ensure every teaching set on any grid has a staff member and room assigned. Teaching sets without a teacher and room will not import into the portal.</p>

Step 2. Copy data and fill out MPS tab

- During the **Plan and Prepare** stage, if the timetable module is used and reflects in lesson attendance, you'll need to copy your school's timetable data and use it to fill out the MPS tab in the MPS Template.
- For now, focus on **cleansing** your timetable data in SIS Classic (Integris).

 No further action is required at this stage.

Overview: Scheduling, Master Period Structure (MPS) and School Development Days tabs

This section is for:

-  All schools not using Compass

When your school begins the deployment journey, you'll need to complete an Excel template that sets up scheduling for roll-marking in both forms and classes.

This template will be available on your KIDS School Site.

 **Note:** There is no action required. However, some optional activities are included where applicable. You can choose to wait until you commence your deployment journey.

This table provides an overview of the tabs that apply for you to complete in the School Schedule Builder and MPS Template, depending on year levels at your school.

You will only complete the relevant tabs based on your school's Classification group.

Year levels	School Schedule Builder and MPS Template Tabs			
	Kindergarten	Primary	Timetabling	School Details & Development Days
PP - 12				
KK - 11				
KK - 12				

Table 2 School Schedule Builder matrix

Templates for each of the tabs will be provided when you begin your deployment journey.

What is the Schedule Builder Template?

In Compass, the "School Schedule Builder" is where you will set up:

- your school start and finish times for AM/PM attendance marking
- your school start and finish times, including breaks and lesson start and finish times for timetabling and custom period-based attendance marking
- School Development Days
- term dates.

The template is a spreadsheet you will use to create your roll-marking for class group names, room, and Teacher allocation.

- The template allows for the building of simple, core-level schedules within the Kaartdijin portal (Compass).

The setup ensures your school's specific scheduling and roll-marking needs are integrated into the system, streamlining the transition and ensuring all attendance and timetable structures are correctly aligned when you go live.



👉 Schools using the SIS Classic (Integris) Timetabling module

Schools using the Timetabling module in SIS Classic (Integris) will need to review and clean their Timetabling data ***before*** completing the School Schedule Builder on their deployment journey.

For detailed information and instructions to review and update timetable data, refer to *Part 4: Timetable Data* of the Integris Data Preparation Guide available to download from [ikon](#).

Important: Clean up your timetable to include only one teacher per session. The Data Sync tool you and your Liaison Officer will use at the later stage for the timetable import cannot pick up more than one teacher per session.



What schools can start now

- ✓ Ensure you know who all your teachers are for each class.
- ✓ If any teachers are new or yet to commence by the time of deployment, make a note to include this information in the template.
 - This proactive step will save time, as the Liaison Officer won't need to search for a 'missing teacher' who simply hasn't started yet.

🔴 Configuration note: No action is required now. When you commence your deployment journey, your Liaison Officer will configure/setup your Portal to allow staff to mark roll/attendance and access their schedules.

✓ It is essential the school's Integris data matches specified data requirements.



School Details Development Days tab: all schools

This section is for:

- All schools currently **not using Compass**

As part of setting up your Kaartdijin portal, you will need to enter your 3 **School Development Days** (not including public holidays) into the **School Development Days Tab**.

🔴 You don't need to do this now, but make sure you have the 3 dates ready to enter when you reach this step in your deployment journey.

✓ *You can commence cleansing parent, staff and student data before your deployment journey if you wish.*



Overview: non-timetabled classes

This section is for:

- All schools currently **not using Compass**
-

Specialist and instrumental music classes won't be set up during your deployment journey. You can set these up after Go-live.

Note: Specialist teachers won't have scheduled sessions or rolls in your Portal, but any staff member can mark any roll in the Kaartdijin portal (Compass).

Instructions will be available in the online Resources hub during your Phase 1 deployment journey.



Overview: DAM staff permissions

This section is for:

- All schools currently **not using Compass**
-

Setting Permissions for Kaartdijin portal (Compass)

- Permissions control what tasks and content your staff can access in the Portal.
- During the Phase 1 Plan and Prepare stage, your school will assign permission groups. This defines which staff will be placed in the Digital Asset Management (DAM) system.

There is no need to do anything right now. You will select permissions for each staff member on your deployment journey.



Optional Action: Student wellbeing data and documented plans

This section is for:

● All schools currently **not using Compass**, which require student wellbeing data and Documented Plans to transfer to the Kaartdijin portal.

Gather student wellbeing data and Documented Plans

⚠ **Important:** Student behaviour and wellbeing data will **not** automatically sync from SIS Classic (Integris) to the Kaartdijin portal.

✓ **Recommendation:** Collect all student wellbeing and documented plans data (e.g: Risk Management Plans and Individual Education Plans).

⚠ **Important:** You can manually add to student plans after Go-live, if needed.

⚠ **Important:** Adding student behaviour and wellbeing information is a manual process and **with no bulk upload option**. The procedure for adding this information to student records will be covered during your training session.

Steps to prepare:

- Step 1. Collect all student wellbeing and documented plans data.
- Step 2. Store the data securely for later access after Go-live.
- Step 3. When saving files, always use this naming convention:
Student surname Initial date.pdf
(e.g. Sampson J 23112022.pdf)

⚠ Do not use any symbols or special characters in the file names.



Overview: Stage 3 Training

This section is for:

- All schools currently **not using Compass**
 - General information about training. No action required.
-

About the post-launch training session

After the launch, you will receive an email from Program Kaartdijin detailing the upcoming training session, which will span 2 days. By the end of the training, participants will be well-prepared to champion the use of the solution and provide support across the school.

Pre-Training

🔴 **Important:** An online pre-training session must be completed before attending the face-to-face training during your deployment journey. You will be given more information about this closer to the time.

- The pre-training will cover essential functions of the Kaartdijin portal (Compass), which will be tailored for your school during the face-to-face sessions.
- The pre-training link will be available on your KIDS School Site under 'Kaartdijin solution Getting Started.' This link can be shared with additional staff members.

Resources Available

These resources will support your learning of essential functions during the Interim Kaartdijin solution:

- Training guides
- Help cards
- Videos
- Online masterclasses

Training Goals

- Build confidence in using the new Kaartdijin portal (Compass) independently.
- Empower attendees to share knowledge within the school community.
- Develop an internal knowledge base to align with the Department of Education's policies and procedures.

About the face-to-face training

The Kaartdijin Training team will conduct face-to-face training over 2 days. You will be able to register for training after the Launch Meeting.

Training Model:

- **Interactive Format:** The training is designed to actively engage participants.
- **Up to 3 Staff Representatives:** Each school can send up to three staff members to gain the knowledge necessary for supporting the rollout of the new system within the school community.

During Training

- You will be able to use the time with the training team to set up various aspects of the Kaartdijin portal (Compass) for your school.

Attendee Selection for Kaartdijin Training

✓ You can begin thinking about who you will send on the training, bearing in mind what they will be required to do when they return to your school.

- **Explore KIDS Home Page:** Attendees should familiarise themselves with the Kaartdijin Program via the KIDS Home Page.
- **Select 5 or 6 Attendees:** Choose 5 or 6 potential attendees to ensure coverage in case of unavailability. A maximum of 3 staff members can attend the training.
- **Championing Program Kaartdijin solution:** Select representatives who will promote the new Kaartdijin solution within the school community.
- **Diverse Representation:** Include a mix of teaching and support staff to ensure effective support for colleagues post-training.
- **School Leads will book** this training after the Launch meeting.

Laptops

- Laptops will be provided to all the attendees during the training sessions at the Metro (Atwell) location.
- However, we ask regional schools to please bring your own device (BOD).

Post-Training Support

- Your school's nominated champions will guide and support staff in upskilling on the new solution.
- Champions must ensure all staff are trained by conducting training sessions or by facilitating self-guided training on the Interim Kaartdijin solution Hub.

Application of Knowledge

- Staff will apply their training during the **Familiarise stage**, preparing to use the Kaartdijin portal (Compass) after the Go-live.



Overview: The Sandpit environment

- Used during Stage 3 Training and, Stage 4 Familiarisation

This section is for:

- All schools currently **not using Compass**
 - General information only, no action required.

About your School's Sandpit ('the Sandpit')

During the Training and Familiarisation Stages, your school will have access to a 'sandpit'—a practice area for the Kaartdijin portal prior to its official launch.

- **Access:** The sandpit link will match the Kaartdijin portal link after going live.
- **Setup:** Initial setup will retain important data post-launch. Note all test data will be deleted during the Embargo period.
- **Appearance:** Note the portal's appearance may differ for each staff member based on their assigned roles in DAM.

Support

The Program Kaartdijin team will assist you and your staff in the sandpit during your deployment.

The Sandpit Guide

You will be provided with a handbook, *The Sandpit Guide*. It contains tailored tasks for each staff member to complete in the sandpit before going live.

Types of Data

1. **Imported Data:** Includes user accounts, templates, and schedules.
2. **Training Data:** Information gathered during training sessions.
3. **Go-Live Data:** School's live data.

Important Notes

- **Test Data:** Any data created during training must be managed within specific dates. You will be guided regarding this by the Deployment team.
- **Data Deletion:** Certain entries (like attendance data and behaviour chronicle entries) will be deleted before go-live during the Embargo Period. Some entries will need to be manually deleted to maintain data quality. You will be guided by your Liaison Officer.



Overview: Stage 4 Familiarise

This section is for:

- All schools currently **not using Compass**
 - General information only. No action required.
-

Putting Training into Practice

After completing your training, you will practice what you've learned in the Sandpit environment. It's important to get familiar with the daily processes you need to know before launching the **Interim Kaartdijin solution**. This will help you feel confident navigating the **Kaartdijin portal (Compass)**.

Rolling Out Training

- During Familiarise, you will support your school staff, based on your preparation in the **Training Stage**. The training team will cover essential activities different roles will need to complete their work after Go-live.
- **Note:** During the Training and Familiarisation Stage, you will have access to your Kaartdijin sandpit environment, which is the same as the Kaartdijin portal (Compass).
- This sandpit will become your live portal after Go-live.

Data Sync Tool (DST)

A **Data Sync Tool (DST)** will be installed on your local school's server during the Familiarisation Stage for schools currently not using Compass who use SIS Timetabling Schools.

- Further information will be provided during deployment.

Important action!

- ✓ It's crucial for you and your school staff to know how to mark your own roll and that of a colleague before Go-live.

Sign off template: Principal approval

● A sign-off template will be provided to your principal. Their approval is required before the Program Kaartdijin team allows the school to go live.



Overview: Go-live readiness – the Embargo period

This section is for:

- All schools currently **not using Compass**
 - General information only.
-

Definition

Go-live readiness is a key checkpoint to assess if your school is prepared for the official launch of the Kaartdijin portal (Compass)

The checkpoint ensures school staff can perform necessary functions as outlined in the Sandpit guide during the Familiarisation stage.

Timing

This assessment occurs during the **Embargo period** before the planned Go-live date. During this time, no school staff should access the Portal.

Ongoing Processes

Continue using SIS Classic (Integris) and DAM for day-to-day operations.

Post-Confirmation Activities

Once Program Kaartdijin receives confirmation of readiness, the team will:

- Bulk delete training test data from the sandpit.
- Set up system integrations.
- Conduct final checks.
- Prepare the environment for Go-live.

Important Note:

- ⊗ No portal modifications can occur during this period.



Overview: Stage 5 Go-live

This section is for:

- All schools currently **not using Compass**
 - General information only.
-

The Go-live stage is when you will start, stop and continue certain activities.



The Start Stop Continue Guide

This handbook gives you advice on what to start, stop, and continue regarding student attendance, timetables, behaviour, and wellbeing data in the **Interim Kaartdijin solution**.

- **Start:** What tasks and activities you should begin once you are using the interim Kaartdijin solution
- ⊗ **Stop:** What tasks and activities you should stop doing once you are using the interim Kaartdijin solution
- ⊘ **Continue:** What tasks and activities you should keep doing once you are using the Interim Kaartdijin solution

The Start Stop Continue guide will be available on your KIDS School Site when you start the deployment journey.

Some important points

Review of Attendance Records

The School Lead will need to review all attendance records created in SIS Classic (Integris) from the Go-live date, including entries for vacations, suspensions, and future attendance notes.

The official source for records

Before Go-live: SIS Classic (Integris) is the official source for attendance records.

After Go-live: Compass will be the official source for all attendance records.

Handling suspensions during the cutover period

- If a suspension starts before Go-live and extends past the cutover date, you need to enter it in Integris Behaviour **for the entire suspension period**.
 - To ensure continuity in the Kaartdijin portal, create an attendance note in Compass for the remaining suspension period post-cutover.
- ⊗ Guidance will be provided during the deployment journey.



Overview: Stage 6 Support

Support available following Go-live.

This section is for:

- All schools currently **not using Compass**
 - General information only.
-

Once your school is live with the Interim Kaartdijin solution, there will be options to seek support and/or further guidance.

For queries and/or issues:

You will be able to still log a request via the Kaartdijin Support form (ServiceNow): Request Catalogue - ICT Self-Service Hub (service-now.com).

Additionally, support remains available via:



Program Kaartdijin Resources Hub

Navigate to the [Online Resources Hub](#) for a range of help cards and videos.



Webinars

Refresher training ([webinar](#)) via the Online Resources Hub.



The Connect Community

This is where schools can ask questions and share knowledge. The Program Kaartdijin team can also answer your questions.



The KIDS Home page

The [KIDS Home Page](#) remains accessible to Department of Education stakeholders, staff, and school users. It will be updated for Phase 2.

End of Preparation Guide for Schools currently not using Compass