Getting ready for the next academic year

Below is a list of recommended steps to help you get ready for the next academic year.

COMPASS+

STEP	ACTIONS	RESOURCES	
Step 1 Data management If your MIS or URN will be changing, please let us know!	• Use the Data Status page to check contact details for your IT Manager, update if necessary • Ask your IT Manager to whitelist (allow) the CEC domain so our emails aren't flagged as spam - **@careersandenterprise.co.uk** • Ensure you know who your institutions Groupcall Xporter School Portal Administrator is. This should be the person who manages your MIS. Refer to Groupcall guidance to add new Admins • Check year groups have end dates and all learners have a learner email in your MIS • In Compass+ go to Learner > Current > Select the 'Email' filter to check learner emails are showing. If no learner emails are showing in Compass+, please submit a support request and let us know. **If you want to download interests and destinations for learners leaving at the end of the academic year, please ensure you get their permission to tick the 'consent for long term tracking' box.**	Data Status page Data Management Learner Data Interests and Destinations	☐ ☐ ☐
Step 2 Evaluations	• Complete your last Compass evaluation for the academic year by 31st August • If appropriate, complete an Internal leadership review and record responses in Compass+.	Compass evaluations Internal leadership review	☐ ☐
Step 3 User management	• Check user access and de-activate staff who have left your institution • Add new users i.e. SENDCo, Pastoral Staff, Heads of Department etc.	User management	☐
Step 4 Activities	• Copy activities across to next year *(Remember to go into these activities in September and assign new learners and groups to them once learner data is updated in Compass+)* • Enter GBM1 activities - Remember you can go back and amend at any time • If not entering directly into product, share blank Activities Upload Template with appropriate staff ready for September. **If you use a Partner Platform to record interactions, don't copy activities across to next academic year, continue to upload into Compass+ instead – at least every half-term.**	Make sure you only copy activities across once! Activities Using Compass+ with a Partner Platform	☐ ☐
Step 5 From September…	• If learners appear in the wrong year group, teaching group or form group, check with your IT Manager that your MIS data is up to date for the new academic year. If your MIS data is up to date, but learners still appear in the wrong groups, please contact us. **Please don't use FSQ until learners have been set up correctly for the new academic year, this will ensure learners complete the right version of the questionnaire for their year group.**		☐
Step 5 Further guidance and support	• Watch our Getting ready for the next academic year webinar • Complete free online training to prepare for the updates to the Gatsby Benchmarks • Access resources to explore how to use Compass+ effectively in compliance with the updated Statutory guidance for careers.	Watch previous webinars The CEC Academy Statutory guidance updates	☐ ☐ ☐

We pause the sync between Compass+ and Management Information Systems in August and restart in early September, you will not see up to date learner data in Compass+ during this time. You can still access all areas of Compass+ but will not be able to add learners/groups to activities or generate/send FSQ links.