Planning for 2026

This checklist has been crafted to guide you through essential year-end updates—from archiving old records to setting up new training, updating rosters, and refining your sales and marketing efforts. Each step is designed to streamline your workflow, keep your data accurate, and optimise your MYPT system for success. By following these steps, you'll start the year with a clear, organised foundation that positions you for smooth operations and meaningful client engagement.

- [x] **Archive Old Client Records:**
  Review and archive any inactive client records.

- [ ] **Update Client Engagements:**
  Confirm that all clients have accurate statuses in their engagements.

- [ ] **Staff Profiles & Permissions:**
  Review staff profiles and update access permissions. Remove access for former employees, adjust permissions for role changes, and ensure that all current staff have the necessary access to meet their responsibilities for the new year.

- [ ] **Review Sales Pipeline & Opportunities:**
  Evaluate the current sales pipeline and close or archive any outdated opportunities. Confirm the status of active opportunities and ensure accurate reporting to streamline efforts for the new year.

- [ ] **Adjust Funding Settings:**
  Review invoicing, cost codes, pricebooks and templates for the new year.

- [ ] **Update Marketing Campaigns and Contact Lists:**
  Archive outdated marketing campaigns and review contact lists for accuracy. Prepare and segment lists for the new year, clean out unsubscribed or outdated contacts, and update tags to target new campaigns effectively.

Review and Reset Time and Attendance:

- [ ] Ensure all roster templates are updated for the new year. Remove any clients or sessions that won't continue, and create new templates as needed.
- [ ] Update public holidays for 2026.
- [ ] Review roster rule groups and ensure all relevant staff are added or removed.

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- **Check Data Accuracy:**
  Conduct a data audit to verify the accuracy of all client and staff information.

- **Clean Up Forms and Templates:**
  Archive outdated forms and templates and update those in use for the new year. Ensure that these templates align with updated workflows, policies, and compliance standards.

- **Organise Projects:**
  Complete or archive older projects from the previous year. Update templates to reflect new workflows or timelines.

- **Review Client Goals:**
  Establish any goals for the new year, ensuring alignment with their plans.

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- **Document Management:**
  Archive outdated organisation documents and set up new versions for the upcoming year, ensuring they reflect any updated policies, procedures, or branding.

- Review document categories and sub-categories and add in any new requirements.

- **Training Requests for the New Year:**
  Identify any training needs for staff in the new year, including onboarding for new hires, refresher sessions, and upskilling for specific roles. Contact **CSUMS@mypcorp.com** with your requirements for a quote early to ensure adequate support throughout the year.

- **System Health Check:**
  Schedule a system health check with MYP support to optimise usage and address any issues before the new year begins. Contact **CSUMS@mypcorp.com** to schedule. $750+GST for a report and follow up session.

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Training & Compliance:

- Update induction and training modules to reflect new policies, legislation, and organisational changes.
- Archive outdated modules and refresh role-based induction pathways.
- Check staff training completions and expiries (First Aid, CPR, NDIS Worker Screening, medication competency, etc.).

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