



OMEGAFI®

Prep & Cleanup Checklist

- Remove alumni and other non-returning members**
 - If updates are made in Vault: Chapter> Update Member Status
 - If updates are made outside of Vault: Updates will need to be made in your (Inter)National Headquarters database and they will automatically import into Vault
- Make sure last term's initiated members have an Initiated (or equivalent) membership status.**
 - If updates are made in Vault: Chapter> Update Member Status
 - If updates are made outside of Vault: Updates will need to be made in your (Inter)National Headquarters database and they will automatically import into Vault
- Add new members**
 - If updates are made in Vault: Chapter> Add New Members
 - If updates are made outside of Vault: Updates will need to be made in your (Inter)National Headquarters database and they will automatically import into Vault
- Update officers**
 - Chapter> Officers
- Update Vault user access**
 - Power Icon (looks like a gear)> Vault Users
- Give non-returning members an Inactive Billing Status**
 - Billing> Update Billing Status
 - If you've already updated all member statuses, try this shortcut: Billing> Review Member Roster and Billing Roster Discrepancies
- Update Billing Groups**
 - Billing> Update Billing Groups
- Assign new members to a billing group**
 - Billing> Assign Members Without Billing Groups
- Confirm the upcoming term's billing is setup AND correct**
 - Billing> Billing Overview
- Update the statement contact information**
 - Billing> Update Statement Contact Information
- Add any missing transactions from last term**
 - Billing> Add Transactions in Mass *OR* Add Transactions to a Group
- Archive old members**
 - Billing> Archive Members
- Pay any outstanding bills/invoices**
 - Bill Pay> Payments
 - Use your Officer Purchasing Card to make any virtual payments
- Update Officer Purchasing Cards**
 - Bill Pay> Officer Purchasing Cards
- Review outstanding notifications**
 - Notification Bell Icon