



Launch Checklist For New Year

MAKE SURE YOUR ACCOUNT IS READY TO START ON THE ONBOARDING PROCESS FOR THIS YEAR. [INSTRUCTIONS AVAILABLE HERE.](#)

☐ Form Approved

- ✓ Review your previously approved form. Read how to do a form review [here](#).
- ✓ Ensure your waivers and consents are current for this year.
- ✓ Ensure all links to handbooks or third party forms are current for year.
- ✓ Messaging templates reviewed and approved.



☐ Members Alerted of ePACT

- ✓ Communications to members :
 - [New to ePACT](#)
 - [Returning Members](#)
- ✓ Reference to ePACT is on website or other materials.



☐ Data Pipeline Set Up

- ✓ Send new Activity or Program ID (Flex Reg) to am@epactnetwork.com or your Customer Success Manager.
- ✓ Once the next call is made, review to make sure it looks right and then :
 - Let us know we can turn on Auto-Invites
 - Turn on [Auto-reconfirms](#) and [auto-reminders](#).

