

Launch Checklist For New Year

MAKE SURE YOUR ACCOUNT IS READY TO START ON THE ONBOARDING PROCESS FOR THIS YEAR. <u>INSTRUCTIONS AVAILABLE HERE.</u>

Form Approved

- Review your previously approved form. Read how to do a form review <u>here.</u>
- 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





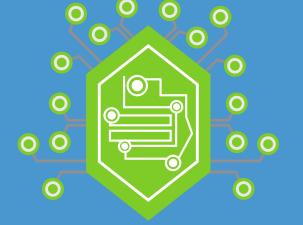
- Communications to members :
 - New to ePACT
 - <u>Returning Members</u>



Reference to ePACT is on website or other materials.



- Add your programs to the API and make a call to see if there are any issues.
- 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 <u>Auto-reconfirms</u> and <u>auto-reminders.</u>



For more information, please visit our Help Center or contact us at help@epactnetwork.com 1.855.773.7228.