



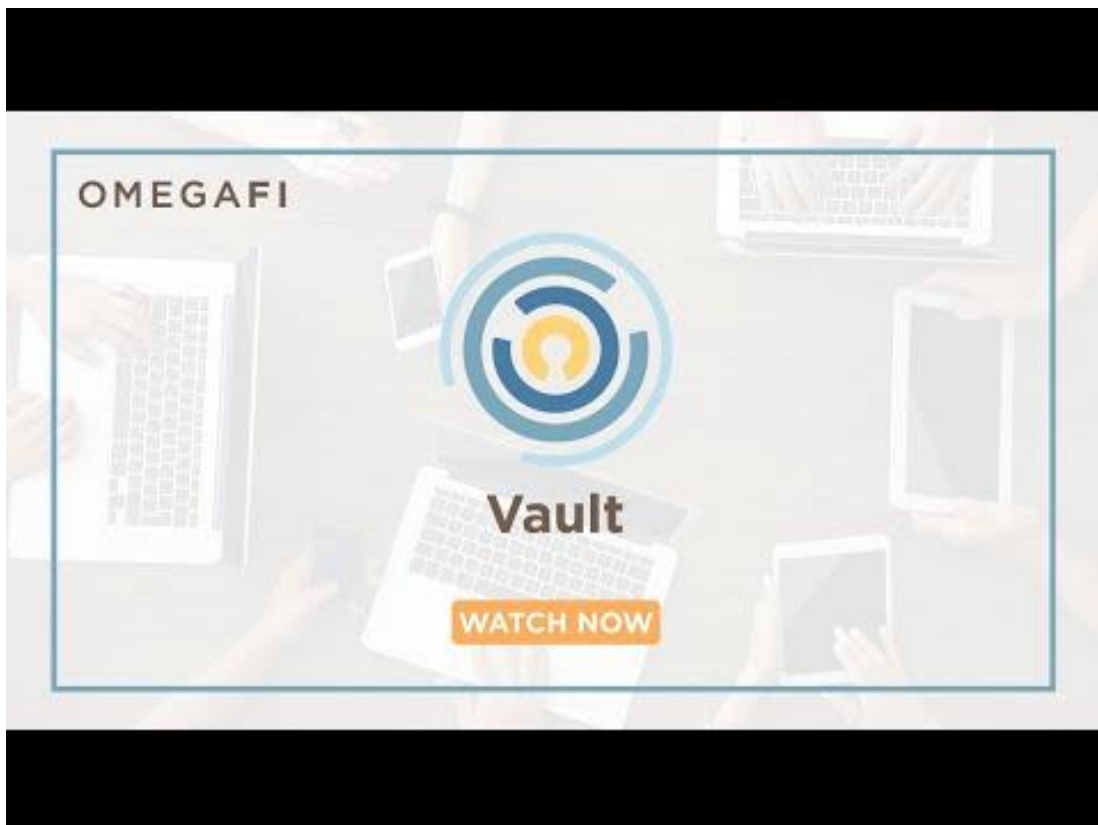
OMEGAFI®

January 18, 2024



**VAULT**

**Whether you were unable to attend, or need to refer back,  
here is the recording of this week's webinar on  
[VAULT: New Year Prep & Cleanup](#)**





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## Don't forget your **Prep & Cleanup Checklist** to ensure you start the new term with **SUCCESS!**

### PREP & CLEANUP CHECKLIST

- Remove alumni and other non-returning members
- Make sure last term's initiated members are listed as Initiates
- Add new members
- Update officers
- Update Vault User Access
- Give non-returning members an Inactive Billing Status
- Update Billing Groups/ assign new members to Billing Groups
- Confirm the upcoming term's billing is setup AND correct
- Update the statement contact information
- Add any missing transactions from last term
- Archive old members
- Pay any outstanding bills/invoices
- Update Officer Purchasing Cards
- Review Notifications