



OMEGAFI®

March 21, 2024



# LegFi

## A Quick Spring Clean!

Save & use this quick checklist below to ensure your chapter's account is ready for spring and summer.



### Review & Update Member Invoices

• **Check your members' past due invoices** and make sure all are up-to-date and/or paid. Send any additional reminders via text, email, or on-demand e-statements if needed.

• **Invoice for miscellaneous charges**, as applicable, before the term is over to ensure your chapter receives that final cash deposit.

### Review New Members

• If you added any new members later in the term, ensure you have invoiced their applicable charges.

### Clean Up Your Roster



## OMEGAFI®

- **Member Roster:** Mark members who disaffiliated, transferred, or graduated as "Archived". \*Note: If members still have an outstanding balance archiving is not necessary. Please reach out to [LegFi Support](#) to archive any members. You are billed for everyone on your roster.
- **Member Group:** Update the member groups as applicable depending on how you have them set up. \*Ex: If a member has opted out of living in the house for next term, move them to an Out of House member group.
- **Review Treasury Card**
  - Review all treasury cards and mark any not-in-use as inactive.
  - Reset any spending limits for current cardholders during spring and summer breaks.
- **File Your Form 990**
  - Every year, your chapter is required to file a [File 990 form](#) with the IRS. Pull reports from LegFi that are needed to file & submit your information as soon as possible to ensure your 990 is filed on time.

For any additional questions, email us at [info@legfi.com](mailto:info@legfi.com) or  
access the [LegFi Help Center](#)

OmegaFi, 1300 6th Ave, Columbus, GA 31901  
[Unsubscribe](#) [Manage preferences](#)