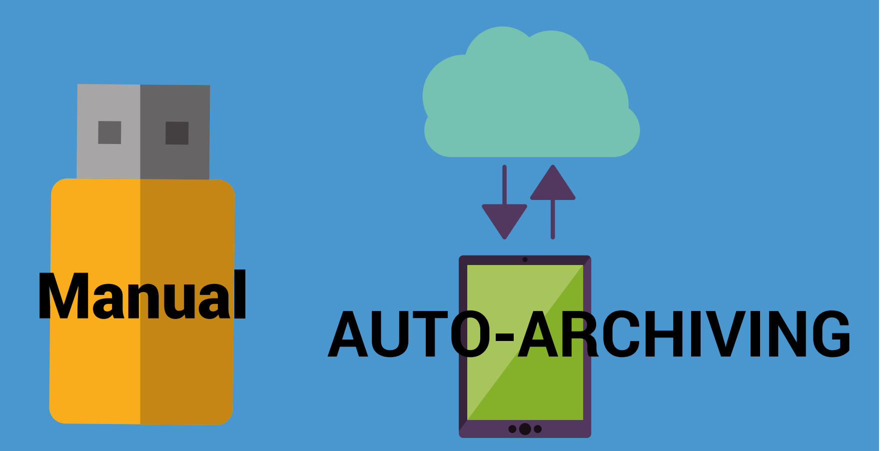
ePACT your emergency network

Getting Ready for a New Year

If you are using one dashboard for multiple programs, or if you are getting ready for a subsequent year, here are a few tips to get your account ready!

1 Take a manual archive if needed or check Archive settings

This is optional and may not be necessary. Instructions on how are available here. You can also purchase auto-archiving for peace of mind. If you have this feature, take a moment to check your archive period in Org Settings.



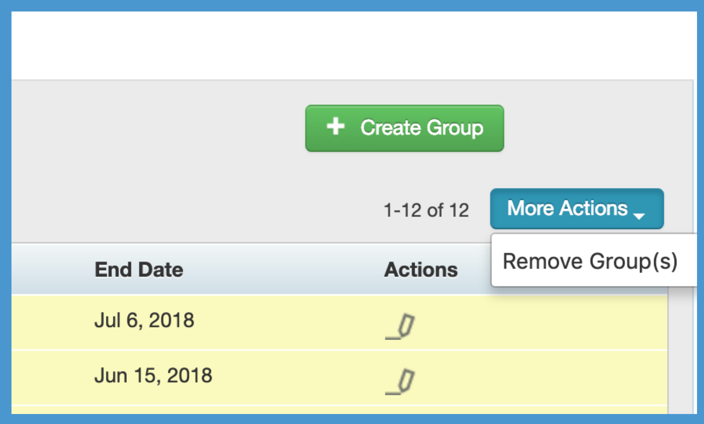
2 Review Form, update waivers and consents and prepare health screening questions.

You can do s form review by following the instructions in this help article. You should also review and update your waivers & consents. If you are using the Health Screening tool, be sure to review your settings and questions.

3 Remove previous groups & certain staff admins

On Your groups tab, click on "Select All/Page" and then on More Actions>Remove Groups.

On your Admin tab, select the staff members you need to remove and on More Actions>Remove Administrators

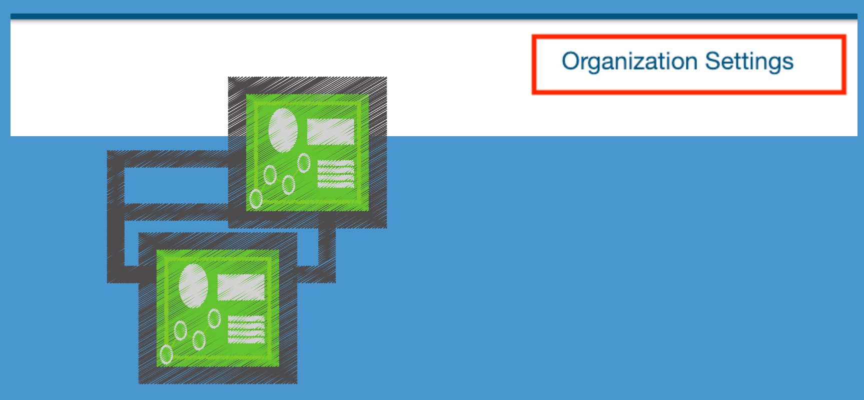


4 Set Auto-reminders & Auto-reconfirms

Set Auto-reminders to encourage your families to complete their form in a timely matter.
To have families review their information, set up auto-reconfirms (6-12 months is the recommendation.).

5 Set up API or Upload Settings

Depending on the type of integration, be sure to set up the API for this year/new program, or send us the correct Activity/Program IDs. If you are using lists, double check your upload settings in " Organization Settings."



6 Add ePACT to your website or handbooks

Every year, there will be families new to ePACT. Don't forget to communicate that you are using ePACT on your website or other promotional materials. A marketing package is available here.

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

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

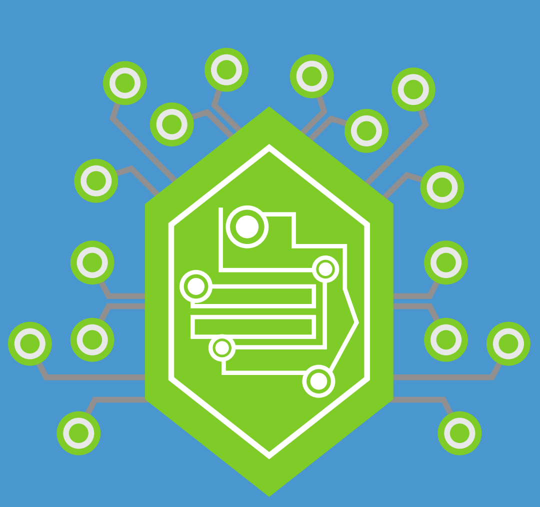
- Review your previously approved form. Read how to do a form review here.
- Ensure your waivers and consents are current for this year. (Learn how to update waivers here.)
- Ensure all links to handbooks or third party forms are current for year.
- Messaging templates reviewed and approved.

Members Alerted of ePACT

- Communications to members :
  - New to ePACT (Video).
  - Returning Members (Video).
- 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. Or update the activities directly on your registration system (VSI).
- 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.
  - Review Archive & Check In / Out Archive Settings.



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