

ANNUAL WEBSITE TRANSITION CHECKLIST

Review the [Annual Website Transition User Guide](#) for details on each of the steps below.

Complete	Task
PRIOR TO JUNE 1	
FINALIZE Online Membership Drive	
☐	After your applicants have accepted the invitation to join your chapter, APPROVE the application in the Intake Manager and ACTIVATE the non-legacy daughters in Daughter Intake Status of the mother's profile.
Run any reports for graduating members and your Treasurer prior to updating member statuses	
☐	Prior to changing statuses for your graduating members, run any reports to document requirements, hours and awards for members graduating out of your chapter. You will also want to give a Status Tally report to your Treasurer with the 2025-2026 membership totals.
ADD Member Statuses effective June 1	
☐	ADD the correct member status to ALL graduating member profiles effective June 1, per VP Membership's information, using the Status Mass Assign tool.
☐	Review and update any other specific situation for members such as those on a leave of absence.
VERIFY Graduating Class Year for Ticktockers	
☐	RUN the Member - Directory Information report in Query Tool to ensure that each Ticktockter has the correct Graduating Class year in their profile. UPDATE or ADD the graduating class year in any Ticktockter profile, if necessary.
ASSIGN New GLOBAL leadership positions for Patronesses and Ticktockers	
☐	ASSIGN leadership job positions to Patronesses effective June 1 (or sooner to allow for transition training), in the member profile or by using the Position Mass Assign tool in the Position Manager.
☐	ASSIGN leadership job positions to Ticktockers effective June 1 in the member profile or by using the Position Mass Assign tool in the Position Manager.

ON OR AFTER JUNE 1

ASSIGN Additional Requirements Specific to your Chapter

- ☐ Chapters may assign additional requirements using the Requirements Manager tool.
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VERIFY Annual Transition Activities

- ☐ **RUN** the Requirements - Requirements Summary report in **Query Tool** to verify that all members have the proper requirements assigned to their profile for the upcoming year.
 - ☐ **RUN** the Member - Position History report in **Query Tool** to verify that all members have the proper leadership positions for the upcoming year.
 - ☐ **RUN** the Status Tally report in **Query Tool** to review the statuses your chapter has assigned to your members. This report will be used to confirm that all statuses are correct and that your membership totals are correct for NCL, Inc. billing/invoicing. A copy should be given to your Treasurer for the 2026-2027 membership totals.
 - ☐ **RUN** the Member - Directory Information report in **Query Tool** to verify that each Ticktocker has the correct graduating class year.
 - ☐ **RUN** the Liaison Position with no Organization Information - per Chapter in **Query Tool** to identify any Philanthropy Liaison positions which are NOT set up correctly with the Liaison for Organization.
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NEXT STEPS ON OR AFTER JUNE 1

- ☐ Upload award information for Members from the closing year using Supplemental Import tool.
 - ☐ If necessary, create the incoming Ticktocker Class Calendar in the Registration Tool Manager.
 - ☐ Update the Notifications section of forms in the **Form Builder** tool so the system emails the submissions to the proper members. These forms include:
Membership Inquiry Form
Change of Status Request Form
Above and Beyond Philanthropy Report
Chapter Expense Report
Request to add a meeting or event to a calendar
Request to add a philanthropy event to a calendar
Request to change a meeting or event on a calendar
Request to change a philanthropy event on a calendar
Ticktocker Position Interest Form - For Ticktockers Entering 8th, 9th, 10th, 11th and 12th grades
Whom Do You Nominate for Office?
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☐	If necessary, update information on your public website using the Chapter Public Webpage tool.
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☐	If necessary, update information on your Chapter tab.
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