

BUILDER LAUNCH CHECKLIST

Profiles

- Create/Update Reviews *(if applicable)*

Tags

- Create/Update Tags *(if applicable)*

Notifications

- Enable/Update Health Profile Notifications
- Updated Subgroup Notifications by going to **Settings > General > Organization > Notifications** column *(if applicable)* [Returning Orgs Only]

Health Profile

- Check spelling
- Check to see that Authorizations print normally
- Complete Expirations
- Confirm that no Instructional text is used when it should be part of an Authorization
- Confirm questions are nested correctly under questions and headers
- Check that phone and email fields are set with proper validation format
- Verify that all links open in a new tab and are up to date
- Update translations for any new or modified questions

Branding

- Double check that any old branding text has been updated [Returning Orgs Only]
- Check logo
- Confirm protection plan text is correct *(if applicable)*

Subgroups

- Check that the Start, End, Due, and Lockout Dates make sense (none are in the past or far future)

Test Profiles

- Deactivate **Form Review Test Profiles** registrations

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If using the **Registration** module, please address these additional items:

Registration Setup

- Confirm Organization Filters are still accurate (reach out to your IS if it needs to be adjusted)
- Update Payment Plan Due Date (*if applicable*) (reach out to your IS if it needs to be adjusted)
- Enable convenience fees (*if applicable*)
- Check Display order (chronological or alphabetical) and subgroup headers
- Confirm that Registration Open and Close Dates are set correctly
- Save Early Registration Code (*if applicable*)
- Add-ons
 - Confirm add-ons are correct (spelling, amount, etc.)
 - Confirm that any shared add-ons from previous years are newly created
- Coupons
 - Confirm coupons are correct (spelling, amount, etc.)
 - Confirm that any shared coupons from previous years that are being used are newly created (unless they are multi-use e.g. "bypassdeposit")
 - Check if coupons should be automatically applied
 - Check coupon expiration dates (*if applicable*)
- GL Codes
 - Confirm that custom GL codes are set up for sessions, add-ons, or coupons (if you wish to use custom GL codes)

Finances

- Ensure you have ACH set up for Payouts (*Finances Setup > Payout Settings > Account Information*)

Test Profiles

- Do NOT deactivate registrations from your Registration Test Profiles; this account will purge before your registration open date