

*With the June 30 end of the 2022-2023 fiscal year fast approaching, outgoing officers should finalize membership business to ensure the database is ready for the new year. Here's a task list to help you with that transition.*

**Finalize 2022-2023 membership**

*These three steps must be completed by June 30. Database membership functions will be unavailable July 1 through July 15.*

- ✓ Confirm that your PTA is reporting the correct number of members. You can follow the tutorial [here](#) if you need help verifying your numbers.
- ✓ Add any not-yet-reported members. You can follow the tutorial [here](#) if you need help. Skip ahead to 2:00 in the linked video for the part about adding members.
- ✓ Don't forget to download a year-end member roster. You can follow the tutorial [here](#).

**Pay any outstanding invoices**

- ✓ Confirm that your PTA is up to date with all dues payments. If you need help navigating the Group Billing menu, follow the tutorial [here](#).

**Update invoice email recipients**

- ✓ Each PTA needs to designate the officers who will receive email notifications about new invoices. This is done in the Group Billing menu by clicking "Manage Invoice Settings." The steps are covered in the Group Billing tutorial linked above. If you forget this task, next year's invoices will be emailed to this year's officers.

**Report your officers**

- ✓ Starting April 1, you can report your newly elected 2022-2023 board members in the Committees menu. [Here's](#) a tutorial.
- ✓ If you haven't yet reported your full 2022-2023 board, please ensure that is done too.

**Update PTA contact details on the Group Info page**

- ✓ Visit the Group Info page and ensure all the information there is up to date.
- ✓ Update the name and email address of your primary PTA contact. The primary contact should be your president, secretary, or an email address for the entire board.

**Update Admins**

- ✓ It is the responsibility of the outgoing board to grant admin status to new officers, passing along access to the database. The tutorial is [here](#).