

With the end of the fiscal year fast approaching, outgoing officers should finalize membership business to prepare the database for the new year. Here's a task list to help with that transition.

- Download final membership reports**

Note: this should be completed in the first week of July before membership numbers roll back to zero for the new fiscal year.

 - ✓ It's important to archive a report containing membership figures for all your council's PTAs. [Here's a video](#) that demonstrates how to navigate the Group Profiles Report, where you can access this vital data.
- Export reports for financial review and reconciliation**
 - ✓ Council treasurers should regularly check memberplanet's finance reports to ensure everything lines up financially. [Here's a video](#) on how to access the most useful reports. Don't forget to download copies for your year-end financial review.
- Check the list of incoming officers at PTAs in your council**
 - ✓ Local PTAs that have held elections should be reporting their incoming board members in the Committees section of memberplanet. [Here's](#) how you can access that information. Now is a great time to send reminders to any PTA that has not yet done so.
- Report your council's new officers**
 - ✓ You can report your own newly elected board members in the Committees menu. [Here's a how-to video](#) . Note: If you are behind on elections, please input whomever will be in charge of your council on July 1.
 - ✓ If you haven't yet reported your full outgoing board, please ensure that is done too so we can maintain a record of who was in charge during this year.
- Update council 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](#).