### REMINDERS CHECK LIST

**HOUSEKEEPING**

* Select **Reminders🡪Print Labels and Letters**.
* Click the **CLICK TO LIST AND DELETE LABELS/LETTERS** button to list any previously queued MCIDs.
* Click the **Check/Uncheck All** box to check all listed MCIDs.
* Click the **Delete Checked** button.
* Check that the drop-down list at top of page shows **1‑Member**.
* Select **Reminders🡪Display Expired** to display **Members with expired memberships** list.
* Return to and review the list.
* Look for checkboxes in the **Email?** and **Mail?** columns.
* Click the MCID link for any supporter with **NO** checkboxes to review their Member Information.
* If the supporter has no email or mail address, or if information in Notes indicates that the supporter does not wish to be contacted, leave the **Email?** and **Mail?** flags unchanged (i.e, “No”).
* Otherwise, update the **Email?** and/or **Mail?** flags to “Yes” based on the presence of an email or mail address.
* Change **Mbr Inactive?** flag to “Yes” for those that have no email or mail address.
* Return to and review the list.
* Look for values of 3 or greater in the **Rem Cnt.** column to identify supporters that have not responded to repeated reminders.
* Click the MCID link for those supporters and determine if their **Mbr Status** should be changed to “0-Contact” or if their **Mbr Inactive?** flag should be set to “Yes.”
* Organizational policy should determine at what point to stop sending reminders to a supporter by changing the supporter’s record to inactive.
* Return to and review the list.
* Click the checkbox in the **Inactive?** column for any remaining MCIDs that are determined to be inactive.
* Click the **MakeInactive** button at the bottom of the **Inactive?** column to set the **Inactive?** flag to “Yes” for the checked MCIDs.

**EMAIL REMINDERS**

* Return to and review the list.
* Click on the checkboxes in the **Email?** column for all MCIDs who are candidates (**Rem Cnt.** = blank) for receiving the -First Notification email reminder message.
* Click the **SendEmail** button at the bottom of the **Email?** column.
* Select the appropriate email message template.
* You can now optionally edit the Subject line or message.
* Click the **Submit** button to display list of recipients and the email message.
* Each supporter’s “Correspondence” log is updated with the date and the subject line of the email message sent. Also, a copy of the email just sent and a list of all those it was sent to is available for review, for a limited time, by selecting **Reports🡪Mail Log Viewer**.
* Repeat previous steps for ‑Second Notification (**Rem Cnt.** = 1) and ‑Final Notification (**Rem Cnt**. = 2) email reminder messages. Those MCIDs with **Rem Cnt.** of 3+ need to be individually reviewed.
* Repeat previous steps for **2-Volunteer** and **3-Donor** records using the drop-down list at top of page.

**MAIL REMINDERS - POSTCARDS**

* Return to and review the list.
* Select **1-Member** from drop-down list at top of page.
* Click on the checkboxes in the **Mail?** column for all MCIDs to be sent a postcard (**Rem Cnt.** = blank).
* Click the **SendMail** button at the bottom of the **Mail?** column.
* Select **Label Only**
* Click the **Submit** button.
* Repeat for **2-Volunteer** and **3-Donor** records.
* Select **Reminders🡪Print Labels and Letters**.
* If needed, enter the number of blank labels at the top of a partially-used first page of labels.
* Click the **Submit** button under **Print Labels** to print labels for the postcards.
* Click **Close**.

**MAIL REMINDERS - LETTERS**

* Select **Reminders🡪Display Expired** to list the remaining records
* Select **1-Member** from drop-down list at top of page.
* Click on the checkboxes in the **Mail?** column for all MCIDs that need to be sent the Renewal Reminder Letter (hopefully all those that remain).
* Click the **SendMail** button at the bottom of the **Mail?** column.
* Repeat above steps for **2-Volunteer** and **3-Donor** records.
* Select **Reminders🡪Print Labels and Letters**.
* If needed, enter the number of blank labels at the top of a partially-used first page of labels.
* Click the **Submit** button under **Print Labels** to print labels for the letters.
* Click **Close**.
* Select the **Renewal Reminder Letter.**
* If the logo is to be printed, check the **“Include letterhead image in output?”** box.
* Click on the **Submit** button under **Print Form Letters**. The letters to be printed will display.
* Print the letters.
* Scroll to the end of the letters and click **Close**.

**HOUSEKEEPING**

* Select **Reminders🡪Print Labels and Letters**.
* Click the **CLICK TO LIST AND DELETE LABELS/LETTERS** button to list any previously queued MCIDs.
* Click the **Check/Uncheck All** box to check all listed MCIDs.
* Click the **Delete Checked** button.