YOUR 30-DAY CAMPAIGN LAUNCH CHECKLIST

Keep the momentum going from approval to closeout. A 30-day booking campaign starts when the approved organizer activates it—not on the initial application date.

BEFORE YOU ACTIVATE

☐ Confirm the organization name, campaign goal, authorized coordinator and campaign time zone.

☐ Review and accept the final organization agreement (after legal approval).

☐ Complete secure organization payment onboarding and provide an official IRS Form W-9 as required.

☐ Choose General Organization Fund or enable Individual Member Tracking; confirm the roster and goals.

☐ Generate the organization link / QR code and member links / QR codes.

DAYS 1–7 · KICKOFF

☐ Print or share the fundraiser flyer with the actual group link and campaign deadline.

☐ Have participating members share their personal links and QR codes; encourage family, alumni and supporters.

☐ Remind supporters that the webinar is online from home—no office visit required.

DAYS 8–23 · ACTIVE PROMOTION

☐ Review booking progress and valid qualified attendance in the private dashboard.

☐ Continue personal outreach without pressuring supporters; use approved promotional language.

DAYS 24–30 · FINAL PUSH

☐ Share the confirmed booking deadline and accurate days remaining.

☐ Tell supporters that eligible appointments can occur during the later completion window.

DAYS 31–44 · APPOINTMENT COMPLETION

☐ No new bookings under the expired campaign; preserve previously booked appointments.

☐ Follow up only with supporters who consented; allow rescheduling within the program’s rules.

AFTER CAMPAIGN CLOSEOUT

☐ Review final provider-verified attendance, disputes and adjustments.

☐ Confirm the amount approved for payment and the payout status.

☐ Request a new campaign if needed; historical results remain on the previous campaign.

This is a campaign planning aid, not a substitute for signed program terms or provider qualification rules.