Get Ready Checklist

WebAdMIT's Transfer Settings Process

Use the recommended checklist below to follow your progress through each Transfer Settings process. Check off each step once it's completed.

✓	WHEN	WHAT	WHERE
	4-6 months before the new cycle starts	Review your program(s) and delete any that you aren't using and don't want to be carried forward into the new cycle.	Configuration Portal
	2-3 months before the new cycle starts	Look for an email alerting you that the Configuration Portal has opened.	Configuration Portal
	2 months before the new cycle starts	Review all templates created by you and other users and delete/deactivate any that you are not using and do not want to be carried forward into the new cycle.	WebAdMIT
	2 months before the new cycle starts	Instruct all users in WebAdMIT to change any Lists, Exports, PDF Manager templates, and Email Templates to be "visible by Everyone" or shared with the WebAdMIT Administrators Work Group if they would like to have these items carried forward into the new cycle.	WebAdMIT
	1-2 months before the new cycle starts	Review your program(s) and make any changes as needed. Submit your program(s) for review and alert your Account Manager and Client Success Manager.	Configuration Portal
	1 month before the new cycle starts	Decide who is the Institution Manager for your organization. Ensure that they are listed as an Institution Manager and placed in the WebAdMIT Administrators Work Group for the previous and new cycles. This person can: • Initiate the transfer for your organization. They will become the owner of the transferred Lists, Exports, and PDF Manager templates and will have editing and deletion abilities. Also, ensure that they have access to all programs in the previous and new cycles. • Edit all users' accounts to ensure they are placed in the appropriate Work Groups and have the appropriate program(s) added to their account.	WebAdMIT
	Day of the new cycle start	Look out for an email alerting you that the CAS application and WebAdMIT have opened.	WebAdMIT

	First week after the new cycle starts	Look for the **Transfer Settings from Previous Setup** panel on the Dashboard. Alert the individual who will be transferring your settings that this is available.	WebAdMIT
	After the transfer has completed	Check all features to ensure they carried forward correctly, and make edits as needed.	WebAdMIT