

DPV TO DPO IMPLEMENTATION CHECKLIST

ENHANCED DPV TO DPO CONVERSION	<u>Implementation Coordinator (IC) Contact Information:</u>
Date Completed <input type="checkbox"/> _____	Implementation Step
<input type="checkbox"/> _____	1. Readiness Assessment Your IC will provide the link to the <i>Readiness Assessment</i> .
<input type="checkbox"/> _____	2. Initial Data Submission The completed <i>Readiness Assessment</i> will trigger a confirmation email including instructions for creating and sending a backup to your IC.
<input type="checkbox"/> _____	3. Screen Design Your IC will build your DonorPerfect system and send you login details so you can review it.
<input type="checkbox"/> _____	4. Online Appointment Scheduling You must schedule an appointment with your IC to discuss any additional questions or changes.
<input type="checkbox"/> _____	5. Screen Appointment/Approval In this call, you and your IC will work toward screen approval.
<input type="checkbox"/> _____	6. Data Conversion Assignment On the Monday following your screen approval, your IC will have a Data Conversion Specialist assigned to your conversion.
<input type="checkbox"/> _____	7. Final Data Submission You will submit your final data to your Data Conversion Specialist on an agreed upon date.
<input type="checkbox"/> _____	8. Data Conversion Your Data Conversion Specialist will convert your data into DPO.
<input type="checkbox"/> _____	9. System Testing Your IC will review and test your DPO system.
<input type="checkbox"/> _____	10. Final Invoice Your IC will provide a final invoice with payment instructions if an outstanding account balance exists or payment information is not on file.
<input type="checkbox"/> _____	11. Activation Notification Once we receive your final payment information, your IC will send you an email with your activation information and login details.
<input type="checkbox"/> _____	12. New Client Webinar (Click here to register.) After you receive your Activation Notification, consider attending the New Client Webinar. We offer this webinar every Friday at 1 P.M. ET.