RLI-HOA Event Registration & Close Out Steps (v1)
(Executive Summary)

120+ days prior --
The District includes projected RLI Events in their yearly Calendar. Suggest placing a "Save the Date" district-level event on the District's Calendar to promote future RLI event(s). (Use "District Event" as the Event Category in DACdb Calendar) Also include future RLI Events in District Newsletters, etc.

60+ days prior --

• District RLI Coordinator completes the RLI Event Budget Estimate to determine the appropriate RLI Fee to charge. Submit the Budget Estimate with Fee recommendation along with the desired RLI Event information to the RLI-HOA Registrar to get the RLI Event set up in the RLI-HOA DACdb Calendar (with registration open and visible to all HOA districts).
• Be aware of the RLI-HOA Registration, Cancellation, & Reimbursement Guidance.

Event Day --
Use the registration data collected in the RLI Event's Backroom in DACdb to assist with accurately checking and updating everyone's RLI participation and payment data.

Within 15 days after the RLI Event --
Partially close out the event by doing these registration updates in DACdb:

• Cancel the registration for those who did not complete their Part.
• Verify/correct the member profile and RLI Part; then enter a check mark in the Check-In column for those who did complete their RLI Part.
• "Post the Class" to add course completion to each deserving member's DACdb profile.
• Save or print the "Post Class" Confirmation window/page for your records and email a copy along with some brief summary comments about your event to the RLI-HOA Registrar.
• "Post the Class" only once! Make any future course completion corrections/additions manually as needed for this class.

Within 30 days after the RLI Event --
Finish closing out the event by doing these payment update steps:

• Verify/update the RLI Fee and Payment information for everyone registered in DACdb.
• For anyone who paid but did not compete, determine whether to retain their payment for a future event or refund their payment.
• Resolve all payment issues to achieve no amounts due and no refunds owed in DACdb.
• Submit the RLI-HOA Expense Report to the RLI-HOA Treasurer.
• Submit a copy of the RLI-HOA Expense Report to your Regional RLI Coordinator and the RLI-HOA Registrar.

Note: See the appropriate RLI-HOA Event Setup, Budget, Cancellation, or Close-Out Guides for more details. There are often special situations encountered with RLI Events. Don't hesitate to ask for assistance from your Regional Coordinator, the Registrar, or other RLI-HOA Leaders. Upon request, the Registrar will update the registration and payment data in DACdb for a District Coordinator.