



2022-23 DATES TO REMEMBER

May

May 6	Chapter Life Membership submissions due for June BOD meeting
May 18	May 2022 Leadership Connection Call – register here
May 31	Deadline to enter Certification maintenance hours
	End of HFMA fiscal year

June

June 1	Start of HFMA fiscal and membership year and DCMS chapter year
	Reminder: Make sure your PCI compliance is completed annually for your merchant account. Do not let it expire!
June 15	June 2022 Leadership Connection Call – Register here for the 2022-23 series of monthly calls. Please note, all sessions are scheduled from 2-3 p.m. CT.
June 26-29	Annual Conference Denver, CO <i>*this is not a chapter requirement to attend</i>

July

July 1	Complete Chapter Verification Form
	Chapter Success Plan due to RE. Chapters will be asked to provide verbal updates on these goals during Regional calls throughout the year.
	Updated Founder's Points Due
	Submit Annual Educational Program Plan. This can be accomplished by using the Event Request Form whereby the HFMA team will set up the events in Cvent on behalf of the chapter.
	Finalize close
July 20	July 2022 Leadership Connection Call – Register here for the 2022-23 series of monthly calls. Please note, all sessions are scheduled from 2-3 p.m. CT.

August

August 1	IRS Form 990
	Financial Review
	Authorization of Inclusion of Chapter Information for the Group Tax Return Form
	Certification of Chapter Organization

	Practice of Operating Policies Form
	Enter Chapter Budget into Quick Books
	Conflict of Interest Form (all voting directors and officers of the chapter must complete via Cvent survey)
August 17	August 2022 Leadership Connection Call – Register here for the 2022-23 series of monthly calls. Please note, all sessions are scheduled from 2-3 p.m. CT.

September

September 1	Reminder: Make sure your PCI compliance is completed annually for your merchant account. Do not let it expire!
September 15	Informational Form 990 (Excel Document) Due – HFMA Accounting will prepare upon submission of Annual Review and send for review and final completion to leader
	Chapter Life Membership Submission due for the October BOD meeting.

October

October 16-18	Volunteer Leadership Meeting Chicago, IL
October 19	October 2022 Leadership Connection Call – Register here for the 2022-23 series of monthly calls. Please note, all sessions are scheduled from 2-3 p.m. CT.

November

November 16	November 2022 Leadership Connection Call – Register here for the 2022-23 series of monthly calls. Please note, all sessions are scheduled from 2-3 p.m. CT.
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December

December 1	Reminder: Make sure your PCI compliance is completed annually for your merchant account. Do not let it expire!
December 21	December 2022 Leadership Connection Call – Register here for the 2022-23 series of monthly calls. Please note, all sessions are scheduled from 2-3 p.m. CT.

January

January 18	January 2023 Leadership Connection Call – Register here for the 2022-23 series of monthly calls. Please note, all sessions are scheduled from 2-3 p.m. CT.
January 31	Deadline for Treasurers to issue 1099s to vendors Send 1096 to IRS – Summary of 1099s issued

February

February 15	February 2023 Leadership Connection Call – Register here for the 2022-23 series of monthly calls. Please note, all sessions are scheduled from 2-3 p.m. CT.
February 28	Morgan Award Nomination Due

March

March 1	2023–24 Chapter Leadership and Committee Rosters deadline (Presidents-elect)
	Chapter/Region Success Award submission due
	Chapter Life Membership Submission due for the April BOD meeting.
	Reminder: Make sure your PCI compliance is completed annually for your merchant account. Do not let it expire!
March 15	March 2023 Leadership Connection Call – Register here for the 2022-23 series of monthly calls. Please note, all sessions are scheduled from 2-3 p.m. CT.

April

April	IRS Notice CP259A – If received, please send to accounting@hfma.org and HFMA will respond)
April 12	April 2023 Leadership Connection Call – Register here for the 2022-23 series of monthly calls. Please note, all sessions are scheduled from 2-3 p.m. CT.
April 16-18	Leadership Training Conference San Antonio, TX

May

May 17	May 2023 Leadership Connection Call – Register here for the 2022-23 series of monthly calls. Please note, all sessions are scheduled from 2-3 p.m. CT.
May 31	End of HFMA fiscal year Deadline to enter Certification maintenance hours

Additional Resources

- [Leadership Connection Community Group](#) – this is a community group exclusively for chapter and regional leaders. The Association will provide updates via this community so plan to drop by the community weekly or [set your email digest](#) preferences accordingly. This community will also serve as a connection point for chapter leaders.
- For a full list of **Financial requirements & responsibilities** view the table on the [Finance Operations](#) webpage in the Chapter Resource Center.
- To view the **DCMS policy** for a full list of chapter requirements, visit the [Chapter Planning and Resource Guide](#) webpage.
- To locate your **chapter member roster**, go to the [Reporting and Reporting Tools](#) webpage and click Chapter Portal.
- To locate your chapter's **membership survey results**, go to your chapter's specific [community group](#) and locate the Library folder named Membership.
- To download your **chapter or regional logo** visit the [Communication](#) webpage.
- Looking for a template **HFMA 101 presentation** or other presentation? Visit the [Presentations](#) webpage.
- Looking for information on the **Enterprise Organizations** in your area? Check out the Enterprise Client Goals spreadsheet and the list of current Enterprise organizations by chapter. Both are updated monthly and can be found on the [Enterprise page](#) of the Chapter Resource Center.

- Use the [**Event Request Form**](#) to request assistance with live, virtual or digital events and sponsorship set up.
- Use the [**Website Request Form**](#) to request a new website build or updates to an existing website.
- For event or website-related questions, please contact onehfma@hfma.org.
- For all other chapter questions, please contact chapter@hfma.org.