

Issue Number 8 April 2020

In This Issue

How to Set Up A Virtual Event

Cvent Tip of the Week: April 9th Edition

Virtual Events

With the ever-changing environment due to COVID-19 news and updates from around the world, we acknowledge that many chapters are being faced with the decision to postpone or cancel upcoming live events. As you work through event decisions at the local chapter level, we wanted to provide you with a reference guide to walk you through creating a virtual event with Cvent and your webinar platform (zoom, to go, etc.)

How to Set Up A Virtual Event

1. Create an event in Cvent as you would for a live event. For past Chapter Relation's webinars, the event configuration was set up to include: Sessions, Feedback Surveys, Badges and Certificates, Email Invitations, Event Calendar and Weblinks. If a fee is associated with your webinar be sure to include fees in the event configuration.

NOTE: For a virtual event, Cvent is being used as the registration platform. To capture engagement of each member, it was voted on by the REC in June to require the events to be in Cvent in order for us to start collecting the data. If the event registration is not processed in Cvent, the chapter and/or member information will not be captured. Zoom has the ability to pull an attendance list of registrants that logged on to the webinar. If you are using other webinar platforms you will have to look into your license and settings to see if this feature is available. Cvent allows for an attendance report collected through excel with registrant's first and last name and email address to be uploaded into the system, this will allow attendees to get credit for joining the webinar.

2. Schedule a webinar in your webinar platform. The Chapter Relation's Team uses Zoom as our platform, but any can be used if your chapter is utilizing something different. If you currently do not have a platform and would like one, please reach out to the Chapter Relation's Team as we have licenses available for purchase under our Zoom account.

3. Copy and paste your webinar platform link into your Event Reminder and Registration Confirmation Emails. Please see the below images to view how this information was added to these emails for past Chapter Relation's Webinars.

To Become Part of the Distribution List for Cvent Tips of the Week:

In the Chapter Relations Center, under Chapter Resources, Cvent, there is a sign up form to be added to our distribution list.

About Us

The Chapter Relations Team is always here for Chapter Assistance. If you ever have any questions or concerns please reach us at chapter@hfma.org

Join our Social Media Pages. Search for us based on the information below and join, follow or like!

[Instagram](#): hfmadreamteam

[LinkedIn](#): Chapter Relations Team

[Twitter](#): @hfmadreamteam

Leadership Connection

Community – A new, one-stop destination for HFMA chapter news is here! Check out the Leadership Connection community group by logging into your HFMA account online and navigating to [Community](#); this group will be listed under My Groups. We've already been at work in the Leadership Connection group, posting

EMAIL
Event Reminder ▾

hfma™

Dear ExampleContactFirstName,

The Chapter Leader Webinar: Metrics and Awards is fast approaching. Please make a note of it on your calendar. Zoom Connection information is below. Additional details are below.

Time: 2:00 PM

Date: March 25, 2020

[Add to calendar](#)

Please click the link below to join the webinar.

<https://zoom.us/j/851088427>

Or iPhone one-tap (US Toll): [+16468769923.851088427#](tel:+16468769923.851088427#) or [+16699006833.851088427#](tel:+16699006833.851088427#)

Or Telephone:

Dial: [+1 646 876 9923](tel:+16468769923) (US Toll) or [+1 669 900 6833](tel:+16699006833) (US Toll)

Webinar ID: 851 088 427

Confirmation Number: ExampleContactConfirmationNumber

Sincerely,

Chapter Relations

chapter@hfma.org

discussions and files to the Library, so get engaged and check it out!

EMAIL
Registration Confirmation ▾

hfma™

 Add to Apple Wallet

Event: Chapter Leader Webinar: Metrics and Awards

Attending: ExampleContactFirstName ExampleContactLastName

Time: 2:00 PM CST

Date: March 25, 2020

Confirmation Number: ExampleContactConfirmationNumber

[Add to calendar](#)

Connection information for the webinar is:

<https://zoom.us/j/851088427>

Or iPhone one-tap (US Toll): [+16468769923.851088427#](tel:+16468769923.851088427#) or [+16699006833.851088427#](tel:+16699006833.851088427#)

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We look forward to our time together soon.

Sincerely,

Chapter Relations

4. If you are hosting a webinar with multiple sessions, similar to our Virtual Leadership Training Conference, create one event in Cvent and enter each session under the event. Each session should be created in your webinar platform as a different webinar so that there are different links for each session. Each link from your webinar platform can then be added to its corresponding session in Cvent under sessions, advanced settings, registrant information. Based on the sessions registered for, the corresponding information will be pulled into the Registration Confirmation email so it is available for the registrants on the day of the event.

Details Answers Custom Fields Fees **Advanced Settings**

Additional Information

Display Priority: 0 ?

Registrant Information: ?

1,000 characters remaining

CrowdCompass Integration

Sync this session with CrowdCompass: Yes No

↳ **Integration Points**

The following integration points are active for this session. To manage your account's integration points, you can go to Administration > Integrations > Push API Integrations > Configuration Details.

Invitee/Guest Registers for a Session

Create or update an attendee: Yes

Invitee/Guest Cancels Registration for a Session

Create or update an attendee: Yes

5. Your event is ready to be launched! Remember to add to your Event Reminder and Registration Confirmation Emails for registrants to add the event to their calendars. This feature, to connect the event to the registrant's calendar, is not yet available in Cvent Flex.

Thank you for reading the Cvent Tip of the Week. If you have any questions regarding Cvent please reach out to Erica Roccario-Thorpe, Project Management Administrator, at ethorpe@hfma.org.