



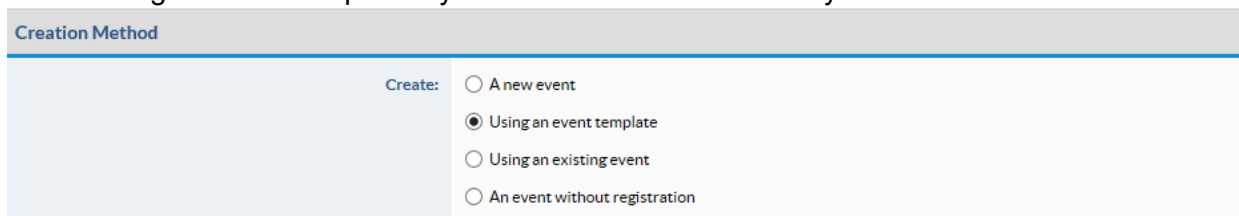
OCTOBER 1 DCMS REPORTING DEADLINE: HOW TO ENTER YOUR EDUCATION PLAN INTO CVENT

Entering in your chapter's education plan for the year does not require the chapter to have all event details completed. Once the event has been created, all event details can be added at a later date.

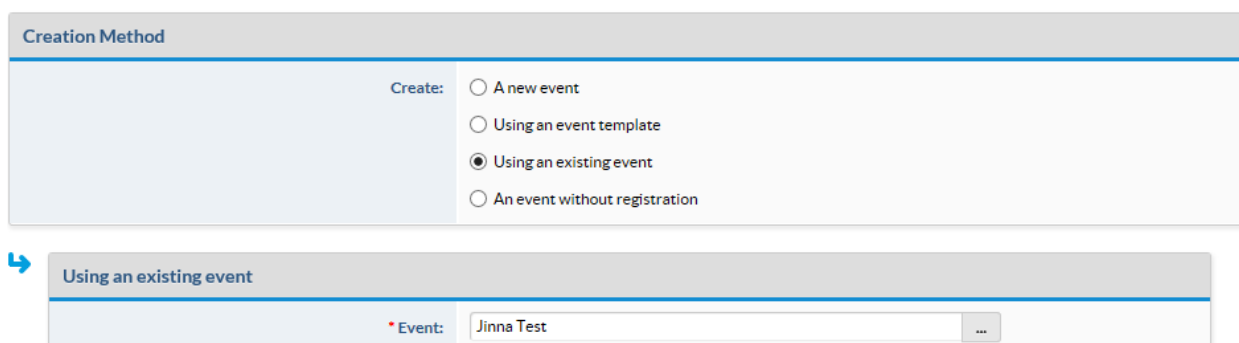
1. Create Event



2. Select using an event template if you haven't created an event yet in Cvent.



- a. If you have created an event in Cvent already, select Using an existing event and select the event you wish to copy.



3. Basic Information

- a. Enter title of event using the chapter name first (i.e. First Illinois Revenue Cycle Conference)
- b. Select category using the drop down

4. Registration

- a. Add registration capacity, or leave blank for unlimited

5. When

- a. Select time zone
- b. Enter registration deadline
- c. Enter start date
- d. Enter end date

6. Where

- a. Add venue details

7. Event Planner

- a. Add event planner details

8. Custom Event Fields

- a. Select event type
- b. Select event visibility – Region:
 - i. One or more Regions can be selected. This will populate the next window with the chapters within that region.
- c. Select event visibility – Chapter:
 - i. Select all chapters you wish to have visibility to this event.
- d. Davis Year: 2019-20
- e. Enter in the chapter's estimated member attendees, estimated non-member attendees, and estimated program hours per attendee.

Custom Event Fields	
* Event Type:	Chapter
Other Event Format:	
* Event Visibility - Region:	Region 1
* Event Visibility - Chapter:	Connecticut Chapter
* Davis Year:	2018-19
* Estimated Member Attendees:	50
* Estimated Non-Member Attendees:	50
* Estimated Program Hours per Attendee:	12
Event Planner(s) - Chapter:	

9. Click Next, which will bring you to Step 2 – Select the Event's Features
 - a. Event Details. Under Pricing, check the Fees box and then a drop down will appear allowing you to select the chapter's merchant account from the drop down (the event cannot be created without this selected). Continue to add any event details or scroll down to the bottom of the page and click Next.
 - b. Website & Registration. Continue to add any event features or scroll down to the bottom of the page and click Next.
 - c. Promotion & Communication. Continue to add any event or scroll down to the bottom of the page and click Finish. This completes the DCMS education plan requirement.

As event details become available, add those to the event. If you have questions regarding event setup, there are several ways to get the information you need 24/7 using Cvent [Help & Support](#):



Solutions:

Events

jdavis@hfma.org

My Profile

Help & Support

Cvent Community

Log Out

Contacts

Admin

Dashboards

Recent Items



- Search the Cvent Community by entering in a brief question or the topic;
- Click on the icon for Chat with Us;
- Call Cvent Customer Care directly at 866.987.8191

For HFMA related questions, please contact a member of the Chapter Relations Team at chapter@hfma.org.