Event Process Document & FAQs

DIGITAL EVENT ROLES & RESPONSIBILITIES

Role	Description	Who is Responsible?
Event Requester	Submit Event Request Form to kick off Cvent registration setup. Form should be submitted **AT LEAST** 30 days prior to a webinar and 60-90 days prior to a live event or multi-day digital event. This allows for ample marketing time to chapter/region members.	Chapter/Region
Cvent Event Setup	Set up all aspects of an event in Cvent to prepare for registration.	One HFMA team
Event Questions	Answer any event-related questions for attendees or potential attendees. During the Cvent event setup process, the One HFMA team will request an email address from the chapter/region for this purpose.	Chapter/Region
Registration/Technical Questions	Answer any Cvent-related questions to assist with the registration process.	One HFMA team
Zoom Technical Support	Join the Zoom webinar if requested during pre-webinar time to assist with the audio/video check. During this time the HFMA team member will assign the Zoom host role to one of the chapter/regional leaders. After the host role is assigned to the chapter, the HFMA Member/Volunteer Experience Team member will exit the webinar.	One HFMA team
Moderator	Make introductory comments and introduce the speaker prior to a presentation. Facilitate questions during and following a presentation.	Chapter/Region
Webinar Support/Zoom Host	Watch the chat and Q&A box and launch any polling questions. End the meeting/webinar once presentation is wrapped.	Chapter/Region
Post-Event Emails	Send feedback surveys, certificates of attendance, and any other post-event materials to attendees via Cvent.	One HFMA team
Event Presentations	If presentations or any materials from the event need to be added to chapter/regional website, complete the Website Request Form.	Chapter/Region

***For additional webinar process information, see the end of this document: Webinar Process**

IN-PERSON EVENT ROLES & RESPONSIBILITIES

Role	Description	Who is Responsible?
Event Requester	Submit Event Request Form to kick off Cvent registration setup. Form should be submitted **AT LEAST** 30 days prior to a webinar and 60-90 days prior to a live event or multi-day digital event. This allows for ample marketing time to chapter/region members.	Chapter/Region
Cvent Event Setup	Set up all aspects of an event in Cvent to prepare for registration.	One HFMA team
Event Questions	Answer any event-related questions for attendees or potential attendees. During the Cvent event setup process, the One HFMA team will request an email address from the chapter/region for this purpose.	Chapter/Region
Registration/Technical Questions	Answer any Cvent-related questions to assist with the registration process.	One HFMA team
Pre-Event Emails	Develop content to be communicated to attendees such as Know Before You Go information. Send content to One HFMA team to be included in Cvent emails.	Chapter/Region
Post-Event Emails	Send feedback surveys, certificates of attendance, and any other post-event materials to attendees via Cvent.	One HFMA team
Event Presentations	If presentations or any materials from the event need to be added to chapter/regional website, complete the Website Request Form.	Chapter/Region

BEST PRACTICES

- Submit Event Request Form to kick off Cvent registration setup. Form should be submitted **AT LEAST** 30 days prior to a webinar and 60-90 days prior to a live event or multi-day digital event. This allows for ample marketing time to chapter/region members.
- Provide all known information during Event Request Form submission. This will cut down the number of information-gathering emails.
- During event setup, prompt response to information-gathering emails will allow the event setup process to flow in a timely manner. **Ensure there is one chapter/regional volunteer that serves as the key point person in communicating to the One HFMA team.**
- Send all questions to onehfma@hfma.org rather than individual staff members to ensure timely response to emails.
- When choosing event dates, look at the event calendars for your region or surrounding chapters to ensure there isn't overlap. This will allow best potential for member and business partner attendance.

FAQs

When should we expect to hear from the One HFMA team after our Event Request Form is submitted?
Someone from the One HFMA team will reach out with a status update and any questions regarding setup within 5-7 business days.

Can we make updates after the initial event is set up?
Yes, we can make changes once an event is open. Please note that any changes related to fees are more difficult to update after an event is open, so we recommend having all registration and guest event fees determined when the event form is submitted. Updates will be made once per week to existing events.

Does the One HFMA team communicate with speakers and sponsors?
No, since speaker and sponsor/business partner relationships are typically local, that communication role will remain with chapters/regions.

If we want to learn how to do things in Cvent ourselves, is there a resource or Help Desk we can use?
Yes, you can access Cvent Help & Community which houses a variety of articles and how-to instructions.

If we want our event presentations or other event materials posted to our website, how do we do that?
If presentations or any materials from the event need to be added to chapter/regional website, complete the Website Request Form.

Our chapter already started to set up an event in Cvent. Can the One HFMA team continue setting it up for us?
Yes, the One HFMA team can help with already started events but the best practice is to allow the team to set up the event from the beginning. There are many new processes and updates made to Cvent features that the team is aware of that will help streamline events but these features can be difficult to add to an already created event. Just like a baking recipe, it's best for one baker to see the recipe through to final product than for a new baker to pick up in the middle without knowing what ingredients have been added to the mixture.

Webinar Process

PRE-WEBINAR

- Zoom Webinars are set up so that only the host and panelists can mute/unmute their own audio and share their video and screen during the session. Attendees join in listen-only mode. Zoom Webinars also allow the use of a "Practice Session" where anyone with a Zoom panelist link can join the webinar prior to the webinar starting for attendees.
- If polling questions will be used during the webinar, those should be sent to the HFMA Member/Volunteer Experience Team at onehfma@hfma.org at least 1 business day prior to the webinar so the questions can be added to Zoom.
- Speakers and chapter leaders doing the introductory comments should join the webinar 15-20 minutes prior to start time to do an audio/video check. At this time the speaker should also check to be sure they're able to share their screen to run their PowerPoint slides.
- HFMA Member/Volunteer Experience Team member will join the webinar if needed during this pre-webinar time to assist with the audio/video check. During this time the HFMA team member will assign the Zoom host role to one of the chapter leaders. The host role will allow the chapter to start and end the webinar, unmute any participants that wish to speak, and launch any poll questions during the webinar. After the host role is assigned to the chapter, the HFMA Member/Volunteer Experience Team member will exit the webinar.
- To go live with the webinar (allowing attendees to join):
  - o In the top banner, click **Start Webinar**.

- o Click **Start** to begin the webinar and allow attendees to join the webinar.
  The host and other panelists will see a banner at the top of Zoom window that lets them know the webinar is now live.
- o If webinar recording is enabled, you will hear an announcement made saying the webinar is being recorded.

- During introductory comments, advise attendees to add any questions to the Q&A box so you have everything in one location. You may also need to check the Chat box periodically in case someone mistakenly entered a question there.
- If you have polls, follow the below instructions to launch those.

How to launch a poll

Polls are not immediately available to meeting participants, as the host needs to launch a poll for participants to respond to. *These polls will be created before the meeting starts by the HFMA Member/Volunteer Experience Team.*

1. Start the scheduled Zoom meeting that has polling enabled.

2. In the meeting controls, click the **Polls** button

3. At the top of the polling window, select the poll you would like to launch (if multiple polls were created)

4. Click **Launch**.
   The participants in the meeting will now be prompted to answer the polling questions. The host will be able to see the results live.

5. Once you would like to stop the poll, click **End Poll**.

6. Click **Share Results** to share the results to the participants in the meeting.