



2023-24 DATES TO REMEMBER

May

May 1	Chapter Life Membership submissions due for June Board of Directors meeting
May 17	May 2023 Leadership Connection Call – 2-3pm CT
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
	Quarterly Founders Awards ordering deadline
	Reminder: Make sure your PCI compliance is completed annually for your merchant account. Do not let it expire!
June 21	June 2023 Leadership Connection Call – 2-3 pm CT
June 24	Volunteer Leadership Meeting Nashville TN
June 25-28	Annual Conference Nashville TN <i>*this is not a chapter requirement to attend</i>

July

July 1	Complete Chapter Verification Form (includes Annual Educational Program Plan this year)
	Chapter Success Plan due to RE. Chapters will be asked to provide verbal updates on these goals during Regional calls throughout the year.
	Finalize close
July 19	July 2023 Leadership Connection Call – 2-3 pm 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 16	August 2023 Leadership Connection Call – 2-3 pm CT

September

September 1	Quarterly Founders Awards ordering deadline
	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
September 20	September 2023 Leadership Connection Call – 2-3 pm CT

October

October 1	Chapter Life Membership submissions due for November Board of Directors meeting
October 18	October 2023 Leadership Connection Call – 2-3 pm CT

November

November 15	November 2023 Leadership Connection Call – 2-3 pm CT
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December

December 1	Quarterly Founders Awards ordering deadline
	Reminder: Make sure your PCI compliance is completed annually for your merchant account. Do not let it expire!
	Nominating Committee meet to identify nominees for 2024-2025 ballot
December 20	December 2023 Leadership Connection Call – 2-3 pm CT

January

January 17	January 2024 Leadership Connection Call – 2-3 pm CT
January 31	Deadline for Treasurers to issue 1099s to vendors
	Send 1096 to IRS – Summary of 1099s issued
	Nominating Committee finalizes nominees for 2024-2025 ballot

February

February 15	Ballot sent to members if election is completed electronically
February 21	February 2024 Leadership Connection Call – 2-3 pm CT
February 28	Morgan Award Nomination Due

March

March 1	2024–25 Chapter Leadership and Committee Rosters deadline (Presidents-elect)
	Chapter/Region Success Award submission due
March 1	Chapter Life Membership Submission due for the April Board of Directors meeting
	Reminder: Make sure your PCI compliance is completed annually for your merchant account. Do not let it expire!
March 20	March 2024 Leadership Connection Call – 2-3 pm CT

April

April	IRS Notice CP259A – If received, please send to accounting@hfma.org and HFMA will respond
April 17	April 2024 Leadership Connection Call – 2-3 pm CT
April 21-23	Leadership Training Conference Orlando FL

May

May 15	May 2024 Leadership Connection Call – 2-3 pm CT
May 31	End of HFMA fiscal year
	Deadline to enter Certification maintenance hours

Additional Resources

- **Leadership Connection calls** – Register [here](#) for these calls that occur monthly from 2-3p
- [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 [Chapter Portal](#) which can be accessed from the Chapter Resource Center home page.
- 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.