



## 2026-27 DATES TO REMEMBER

### May

May 1	<a href="#">Chapter Life Membership</a> submissions due for June Board of Directors meeting
May 20	Monthly Leadership Connection Call – 2-3pm CT
May 31st	End of HFMA fiscal year

### June

June 1	Start of HFMA fiscal year, membership year, and DCMS chapter year
	Quarterly Engagement Awards ordering deadline
	HFMA Officer & Industry Experts Speaking Request deadline
	Reminders: <ul style="list-style-type: none"><li>• <a href="#">Update chapter website</a> with new leadership and sponsors</li><li>• Make sure your PCI compliance is completed annually for your merchant account. Do not let it expire!</li></ul>
June 17	Monthly Leadership Connection Call – 2-3 pm CT
June 7-10	Annual Conference ( <i>not a chapter requirement to attend</i> ) National Harbor, Maryland

### July

July 1	Finalize financial close
July 15	Monthly Leadership Connection Call – 2-3 pm CT

### August

August 1	<a href="#">Chapter Verification Form</a> due (DCMS requirement)
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	Chapter Success Plan due to Regional Executive (DCMS Requirement). Chapters will be asked to provide verbal updates on these goals during Regional calls throughout the year.
	<b>Chapter</b> Financial information due (DCMS requirements): <ul style="list-style-type: none"> <li>• IRS 990 Tax Compliance Survey – certify via <a href="#">Cvent survey</a></li> <li>• Financial Review – complete and upload via <a href="#">Cvent survey</a></li> <li>• Chapter Financial forms to sign off on via <a href="#">Cvent survey</a> (Authorization of Inclusion of Chapter Information for the Group Tax Return form, Certification of Chapter Organization, Practice of Operating Policies form)</li> <li>• Chapter Budget entered in Quick Books</li> </ul>
	<b>Regional</b> Financial information due: <ul style="list-style-type: none"> <li>• Financial Review – complete and upload via <a href="#">Cvent survey</a></li> <li>• Regional Financial forms to sign off on via <a href="#">Cvent survey</a></li> <li>• IRS 990 Tax Compliance Survey – certify via <a href="#">Cvent survey</a></li> </ul>
	<a href="#">Conflict of Interest Form</a> due (all <b>voting</b> directors and officers of the chapter must complete via <a href="#">Cvent survey</a> )
	Chapter Treasurer training due – <i>Link coming soon</i>
	President and Regional Executives training due - Volunteer Code of Ethics Responsibilities – <i>Link coming soon</i>
August 19	Monthly Leadership Connection Call – 2-3 pm CT
August 31	Review Membership Survey results posted to Chapter's Microsoft 365 account (provided by HFMA)

## September

September 1	Quarterly Engagement Awards ordering deadline
	<a href="#">HFMA Officer &amp; Industry Experts Speaking Request</a> 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 <i>This is a DCMS requirement</i>
September 16	Monthly Leadership Connection Call – 2-3 pm CT

## October

October 1	<a href="#">Chapter Life Membership</a> submissions due for November Board of Directors meeting
October 21	Monthly Leadership Connection Call – 2-3 pm CT

## November

November 18	Monthly Leadership Connection Call – 2-3 pm CT
November 30	Review Membership Survey results posted to Chapter's Microsoft 365 account (provided by HFMA)

## December

December 1	Quarterly Engagement Awards ordering deadline
	HFMA Officer & Industry Experts Speaking Request deadline
	<a href="#">Morgan Award</a> Nomination Due
	Reminder: Make sure your PCI compliance is completed annually for your merchant account. Do not let it expire!
	Chapter Nominating Committee meet to identify nominees for 2027-2028 ballot
December 2	President-Elect Leadership Prep Call – 2-3 pm CT
December 16	Monthly Leadership Connection Call – 2-3 pm CT
December 24 – January 1	HFMA Offices closed for Holidays

## January

January 13	Ballots/Bylaws Deep Dive – 2-3 pm CT
January 20	Monthly Leadership Connection Call – 2-3 pm CT
January 27	Ballots/Bylaws Q&A – 1:30-2:00 pm CT
January 31	Deadline for Treasurers to issue 1099s to vendors
	Send 1096 to IRS – Summary of 1099s issued
	Chapter Nominating Committee finalizes nominees for 2026-2027 ballot

## February

February 10	Engagement Award Program Validation form due (DCMS Requirement)
	HFMA Officer & Industry Experts Speaking Request deadline
February 10	Ballots/Bylaws Q&A – 1:30-2:00 pm CT
February 15	Ballot sent to members if election is completed electronically
February 17	Monthly Leadership Connection Call – 2-3 pm CT
February 28	Review Membership Survey results posted to Chapter's Microsoft 365 account (provided by HFMA)

## March

March 1	<a href="#">2026–27 Chapter Leadership and Committee Rosters</a> deadline (Presidents-elect) [DCMS Requirement]
	<a href="#">Chapter/Region Success Award</a> submission due
	<a href="#">Chapter Life Membership</a> 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 17	Monthly Leadership Connection Call – 2-3 pm CT

## April

April	IRS Notice CP259A – If received, please send to <a href="mailto:accounting@hfma.org">accounting@hfma.org</a> and HFMA will respond
April 18-20	Leadership Summit (DCMS Requirement) Atlanta, GA
April 21	Monthly Leadership Connection Call – 2-3 pm CT

## May

May 19	Monthly Leadership Connection Call – 2-3 pm CT
May 31	End of HFMA fiscal year

## Additional Resources

- **Connect**
  - 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.
  
- **Membership**
  - **Chapter member rosters** are located on the Chapter Portal which can be accessed from the Chapter Resource Center [home page](#).
  - **Membership survey results** are located in your Chapter's Microsoft 365 account (provided by HFMA)
  - **Enterprise Organization** information for your area can be found on the [Enterprise page](#) of the Chapter Resource Center. Check out the Enterprise Client Goals spreadsheet and the list of current Enterprise organizations by chapter. Both are updated monthly.
  
- **Communications**
  - To download your **chapter or regional logo** visit the [Communication](#) webpage.
  - Looking for a template **HFMA 101 presentation** or other presentation? Visit the Topics & content development area of the [Event and Website Resources](#) webpage.

- **Operations**
  - 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.
  
- **Forms**
  - Complete the HFMA [National Officer Speaking Request](#) form to request the HFMA CEO (Ann Jordan), Board Chair, Chair-Elect, or Secretary/Treasurer to speak at your event (must be submitted at least six months prior to event)
  - 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.
  
- **Key Contacts**
  - For event or website-related questions, please contact [onehfma@hfma.org](mailto:onehfma@hfma.org).
  - For all other chapter questions, please contact [chapter@hfma.org](mailto:chapter@hfma.org).