



## One HFMA Event & Event Support Standards of Service

This document provides supplemental documentation to the One HFMA Support Services document, outlining submission timelines and roles/responsibilities.

### I. Submission Timelines

Submit your [Event Request Form](#) no later than the dates listed on the timeline overview below. Of course, Chapters/Regions are welcome to submit information in advance of these timeframes! The minimum information required for a Save The Date is date, location, and title.

- **Webinars, Standalone Networking Events, & Fundraisers:** at least 45 days in advance of event date(s)
- **Web Series, Virtual Events, & Half-Day In-Person/Hybrid Education Events:** at least 60 days in advance of event date(s)
- **Single Day In-Person/Hybrid Education Events & Event Sponsorship (without exhibit booth location selection):** at least 75 days in advance of event date.
- **Multi-Day In-Person/Hybrid Education Events & Event Sponsorship (with exhibit booth location selection):** at least 90 days in advance of event date(s)
- **Annual Sponsorship Creation:** at least 30 days before you plan to issue renewal notices

The purpose behind the submission timelines includes, but is not limited to:

- Event support requires close collaboration between the Association and the chapter/region. To ensure successful rollout of an event, the expectations must be met by the parties involved. It is imperative that all parties take a fair and reasonable approach to event support.
- Allows appropriate time for set up, review, & testing before opening registration. This is particularly helpful with events with larger levels of customization (hybrid events, multi-day education events with networking events, audience customizations, etc.).
- Ample time to promote/market the event to your members and sponsors.
- The Association's Zoom license is offered on a first-come, first-serve basis, so the further out you can provide notice, the better chance we can provide webinar/virtual event support.

#### Important Reminders:

- Events are set up in order of submission, regardless of event date.





- Once the Event Request form is submitted, a Member/Volunteer Experience team member will be in touch with a status update within 5-7 business days.
- If a chapter/region submits requests outside of the submission timeline window, support is not guaranteed.

## II. Event Support Roles & Responsibilities

### Webinars, Web Series (certification, Excel etc.) & Virtual Events

Chapter/Region	One HFMA
<p><b>Submit Event Request Form with event details</b></p> <ul style="list-style-type: none"> <li>• Test registration process and confirm approval to open registration</li> <li>• Provide agenda/speaker/communication updates, as needed</li> <li>• Act as main point of contact for attendee questions</li> </ul>	<p><b>Use Event Request Form details to set up Cvent</b></p> <ul style="list-style-type: none"> <li>• Registration process (questions, fees, discount codes, payment options)</li> <li>• Agenda &amp; Speakers</li> <li>• Zoom details</li> <li>• Set up CPE credits/CPE certificate (as needed)</li> <li>• Set up Feedback Survey</li> <li>• Marketing Support (as requested)               <ul style="list-style-type: none"> <li>○ Canva design – standard template (for social media)</li> <li>○ Email Communications – Invitation, Registration Confirmation, Event Reminder</li> <li>○ Event website</li> </ul> </li> </ul>
<p><b>Pre-Event Logistics</b></p> <ul style="list-style-type: none"> <li>• Confirm Event Reminder/Certificate of Attendance/CPE Details</li> <li>• Send speaker emails to One HFMA at least (1) business day in advance of the event</li> <li>• Confirm Chapter representative that will act as moderator at least (1) business day in advance of the event</li> <li>• Send poll questions to One HFMA a minimum of (1) business day prior to event.</li> </ul>	<p><b>Update event details, as needed</b></p>
<p><b>Day Of Management</b></p> <ul style="list-style-type: none"> <li>• Prepare housekeeping announcements/script</li> </ul>	<p><b>Zoom Support</b></p> <ul style="list-style-type: none"> <li>• Add event details to Zoom</li> </ul>





<ul style="list-style-type: none"> <li>• Prepare sponsor slide (if applicable)</li> <li>• Join Zoom 15-minutes prior to start time for technology check</li> <li>• Manage chat box, Q&amp;A and polling</li> </ul>	<ul style="list-style-type: none"> <li>• Issue calendar invite to speakers and Chapter/Region representative with unique login information</li> <li>• Enter poll questions</li> <li>• Join Zoom 15-minutes before event to help lead technology check with speakers and chapter/region representative (exits Zoom after technology check)</li> </ul>
<p><b>Post Event</b></p> <ul style="list-style-type: none"> <li>• Submit speaker presentations to include with post-event email communication &amp; add to Chapter website (if needed)</li> </ul>	<p><b>Post Event</b></p> <ul style="list-style-type: none"> <li>• Upload recording(s) to YouTube</li> <li>• Pull Zoom participation reports for Chapter/Region records (as requested)</li> <li>• Mark participation (as requested)</li> <li>• Issue Feedback Survey within 3 business days (as requested)</li> <li>• Issue CPE certificates/Certificates of Attendance one week after event date (as requested)</li> </ul>

**In-Person/Hybrid Events**

<b>Chapter/Region</b>	<b>One HFMA</b>
<p><b>Venue Management</b></p> <ul style="list-style-type: none"> <li>• Contracting</li> <li>• Communications &amp; Logistics (food &amp; beverage, audio visual, room set up)</li> </ul>	<p><b>Review venue contracts (as requested)</b></p>
<p><b>Conference Management</b></p> <ul style="list-style-type: none"> <li>• Put together event details/agenda</li> <li>• Speaker outreach &amp; logistics (collect bios, photos, presentations)</li> <li>• Marketing event (beyond Invitation email)</li> </ul>	<p><b>Use Event Request Form details to set up Cvent</b></p> <ul style="list-style-type: none"> <li>• Registration process (questions, fees, discount codes, payment options)</li> <li>• Agenda &amp; Speakers</li> <li>• Venue details (in-person)</li> <li>• Zoom details (hybrid)</li> <li>• Set up CPE credits/CPE certificate (as needed)</li> <li>• Set up Feedback Survey</li> <li>• Marketing Support (as requested)               <ul style="list-style-type: none"> <li>○ Canva design – standard template (for social media)</li> </ul> </li> </ul>





	<ul style="list-style-type: none"> <li>○ Email communications – Save the Date, Invitation, Registration Confirmation, Event Reminder</li> <li>○ Event website updates</li> </ul>
<p><b>Submit Event Request Form</b> with pricing, agenda, speaker, CPE details</p> <ul style="list-style-type: none"> <li>● Test registration process</li> <li>● Provide approval to open registration to One HFMA</li> </ul>	<p><b>Update event details, as needed</b></p>
<p><b>Pre-Event Logistics</b></p> <ul style="list-style-type: none"> <li>● Provide agenda/speaker/communication updates, as needed</li> <li>● Provide Know Before You Go communication verbiage</li> <li>● Act as main point of contact for any attendee questions</li> </ul>	<p><b>Additional Support (as requested)</b></p> <ul style="list-style-type: none"> <li>● Set up name badge template</li> <li>● Set up OnArrival settings (on-site badge printing, attendance/CPE tracking)</li> <li>● Issue 'balance due' notifications to attendees who have not paid</li> <li>● Issue refunds</li> <li>● Mark attendees as paid once a check is received</li> </ul>
<p><b>On-Site Management</b></p> <ul style="list-style-type: none"> <li>● Order supplies (name badges, name badge ribbons, signage, sponsored items, etc.)</li> <li>● Print and organize name badges</li> <li>● Event scripting</li> <li>● For hybrid events:           <ul style="list-style-type: none"> <li>○ Confirm Chapter representative that will act as moderator at least (1) business day in advance of the event</li> <li>○ Send poll questions to One HFMA a minimum of (1) business day prior to event.</li> </ul> </li> </ul>	<p><b>Zoom Support (hybrid events)</b></p> <ul style="list-style-type: none"> <li>● Add event details to Zoom</li> <li>● Issue calendar invite to speakers and Chapter/Region representative with unique login information</li> <li>● Enter poll questions</li> </ul> <p>Join Zoom 15-minutes before event to help lead technology check with speakers and chapter/region representative (exits Zoom after technology check)</p>
<p><b>Post Event</b></p> <ul style="list-style-type: none"> <li>● Confirm event/session attendance has been marked by Chapter/Region, or send sign-in sheets to One HFMA (if needed)</li> </ul>	<p><b>Post Event</b></p> <ul style="list-style-type: none"> <li>● Mark event participation (as requested)</li> <li>● Issue Feedback Survey within 3 business days of receiving attendance details from Chapter/Region</li> </ul>





<ul style="list-style-type: none"> <li>• Submit speaker presentations to post on Chapter website (if needed)</li> </ul>	<ul style="list-style-type: none"> <li>• Issue CPE certificates/Certificates of Attendance one week after sign-in sheets received (as requested)</li> </ul>
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**Annual Sponsorship, Event Sponsorship & Exhibit Hall Booth Selection Creation**

<b>Chapter/Region</b>	<b>One HFMA</b>
<p><b>Submit Event Request Form with sponsorship details</b> (sponsorship levels, benefits, capacities, pricing, exhibit hall layout)</p> <ul style="list-style-type: none"> <li>• Test sign-up process and provide approval to open sign-up to One HFMA</li> <li>• Provide updates, as needed</li> <li>• Act as main point of contact for any sponsor questions</li> </ul>	<p><b>Use Event Request Form details to set up Cvent</b></p> <ul style="list-style-type: none"> <li>• Sponsorship sign-up process (questions, logo upload, fees, discount codes, payment options)</li> <li>• Booth location selection confirmation (as requested)</li> <li>• Set up Payment Confirmation email</li> </ul>
<p><b>Sponsorship Management</b></p> <ul style="list-style-type: none"> <li>• Track sponsor benefits.</li> <li>• Communicate discount codes to sponsor contacts.</li> <li>• Ensure any necessary supplies are ordered to fulfill sponsor/exhibitor benefits.</li> </ul>	<p><b>Update sponsorship &amp; exhibit booth sign-up details, as needed</b></p>
<p><b>Submit logo/sponsor webpage updates using the Website Request Form</b></p>	<p><b>Additional Support (as requested)</b></p> <ul style="list-style-type: none"> <li>• Draft an annual sponsorship renewal notice email.</li> <li>• Issue 'balance due' notifications to attendees who have not paid.</li> <li>• Issue refunds.</li> <li>• Mark sponsorship as paid once a check is received.</li> </ul>





### III. One HFMA Event & Cvent Support Expectations

*(all timelines displayed assume chapter/region has provided materials within their specified timelines. If additional information is provided after an event is closed, the Association will work with the chapter/region on a per case basis to see if the work can be completed.)*

- If the chapter/region submits all information prior to the required timeline, the Association will commit to having a status update within five to seven business days of receiving information.
- After Cvent registration goes live, the Association will make any requested updates to registration process/event webpage within three to five business days.
- If requested, the Association will review event venue contracts. Contract review will be completed and comments sent back to the Chapter/Region within 14 days of request.
- If requested, the Association will provide a graphic (standard template) that can be used for social media promotion of event.
  - Chapter and Regional Events: If requested, the Association will enable the Attendee Hub conference app. For assistance with app population, visit Cvent's Community or call the Premium Support Line at 866-987-8191.
    - **Please Note:** If a chapter elects to use an alternative conference app, the chapter is responsible for any associated payment & populating all event information in the app.
- If requested, the Association will enable OnArrival Premium for Chapter/Region events utilizing on-site printing solutions and/or session tracking for CPE documentation purposes.
- If requested, the Association will send event reminders to the event attendees via Cvent at a cadence provided by the chapter/region. *Please note, it is a best practice for the chapter/region to also send at least one communication to the attendees via their own email account if worried about spam filters.*
- If requested, for multi-session webinar/hybrid events, the Association will assist in checking mics/video for speakers 15 minutes prior to each session. *Please note, this only applies when using Zoom Webinar. If Zoom Meeting is used or one Zoom is set up for the entire day's sessions, all speaker mic/video checks must be completed at the start of the day.*





- If requested, the Association will pull a final list of registrants and send to the chapter/region's designated event coordinator within three business days of the event. It will be up to the chapter to send that list to any sponsors that request such information.
- If requested, the Association will create a CPE or Certificate of Attendance to be distributed to attendees one week after the event concludes. The information required to be included on the certificate will be supplied by the chapter.
- If requested, the Association will record the sessions and provide the recordings to the chapter/region within three business days of the event's conclusion.
- If requested, the Association will post event recordings/presentations to Cvent event.
- If requested, the Association will set up event or cross-event reports to be distributed to volunteer leaders via email on a one-off or recurring cadence.

### **Additional Solutions**

There are several other solutions available for Chapters/Regions to use, as a benefit provided to you from HFMA. Please note these are not currently supported under the One HFMA Support Services Project Plan, so Chapters/Regions are responsible for set up and management of these solutions. For assistance with these solutions, visit [Cvent's Community](#) or call the Premium Support Line at 866-987-8191.

- **Attendee Hub Conference App & Website:** An event app and website containing all your event details, including information that automatically integrates from your registration website: sessions, speakers, exhibitors, and attendees.
- **Exhibit Management (excluding LeadCapture):** The Exhibitors feature helps your exhibitors manage the team and content they'll need at your event.
- **Speaker Resource Center:** Manage all your event speakers in one place, while also streamlining communications, tracking tasks, collecting speaker bios, headshots, session details, and presentations, and generating reports.
- **EMarketing:** A platform to house and distribute your email campaigns and newsletters.
- **Abstract Management (Speaker RFP):** A tool that enables you to manage the complete Call for Speakers process, from collecting submissions to publishing final selections into your event's agenda.

