



2026-27 DATES TO REMEMBER

May

May 1	Chapter Life Membership 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: • Update chapter website with new leadership and sponsors • Make sure your PCI compliance is completed annually for your merchant account. Do not let it expire!
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	Chapter Verification Form due (DCMS requirement)
	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.
	Chapter Financial information due (DCMS requirements): • IRS 990 Tax Compliance Survey – certify via Cvent survey • Financial Review – complete and upload via Cvent survey

	- Chapter Financial forms to sign off on via Cvent survey (Authorization of Inclusion of Chapter Information for the Group Tax Return form, Certification of Chapter Organization, Practice of Operating Policies form) - Chapter Budget entered in Quick Books
	Regional Financial information due: - Financial Review – complete and upload via Cvent survey - Regional Financial forms to sign off on via Cvent survey - IRS 990 Tax Compliance Survey – certify via Cvent survey
	Conflict of Interest Form due (all voting directors and officers of the chapter must complete via Cvent survey)
	Chapter Treasurer training due – <i>This course is available in the HFMA My eLearning dashboard.</i>
	President and Regional Executives training due - Volunteer Code of Ethics Responsibilities – <i>This course is available in the HFMA My eLearning dashboard.</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
	HFMA Officer & Industry Experts Speaking Request 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	Chapter Life Membership 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
	Morgan Award 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	2026–27 Chapter Leadership and Committee Rosters deadline (Presidents-elect) [DCMS Requirement]
	Chapter/Region Success Award submission due
	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 17	Monthly 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 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.

- o Use the [Website Request Form](#) to request a new website build or updates to an existing website.

- **Key Contacts**

- o For event or website-related questions, please contact onehfma@hfma.org.
- o For all other chapter questions, please contact chapter@hfma.org.