Behind the Scenes: Powering Local Events with One HFMA Support

LEADERSHIP JUST LEVELED UP.

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Overview

- What is One HFMA?
- Getting Started
- Registration is Open! Now What?
- Post Event Process
- Roles and Responsibilities
- Frequently Asked Questions

What is One HFMA?

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One HFMA Project Plan Scope

- Chapter & Region website support
- Standalone Survey Creation
- Chapter Ballot Creation & Distribution
- Chapter Engagement Awards & President’s Award ordering
- Events & Sponsorship set-up

Types of event set-up support

- **Chapter/Region Webinars:** Spanning 60-90 minutes
- **Webinar Series:** Session spanning 60-90 minutes over several consecutive weeks
- **Virtual Events:** Multiple sessions spanning over 90 minutes over a single day or consecutive days.
- **Networking Events:** Not attached to an education event
- **In-Person/Hybrid Education Events:** Half-day, single day, or multi-day events
- **Annual Sponsorship:** Allow organizations to confirm their sponsorship level.
- **Event Sponsorship & Exhibit:** Event sponsorship opportunity sign-up, exhibit table purchases, exhibit booth location selection.

Getting Started

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Add Event Details to Chapter Calendar

Have date and venue secured, but not ready to open registration?

- **Submit a 'Save the Date' Request:** This request collects basic event details (event name, date, location) to add to chapter Event Calendar.

- **Communicate to Members:** If requested, One HFMA will create a Save the Date email communication & send it to chapter members.

Once you are ready to open registration,

submit an Event Request Form with the details

Make Note of Submission Timelines

To be equitable to all Chapters/Regions, events are set up in order of submission, regardless of event date. If deadlines are not met, support is not guaranteed.

- **Webinars, Webinar Series, & Standalone Networking Events:** At least 45 days in advance of event date(s).
- **Virtual Events:** At least 60 days in advance of event date(s).
- **In-Person or Hybrid Education Events:** At least 9-10 weeks in advance of event date(s).
- **Event Sponsorship & Exhibit Creation:** Submit in advance of or with your event details.
- **Annual Sponsorship Creation**: At least 30 days before you plan to issue renewal notices.

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.

Prepare to Open Registration

- **Details, Details, Details:** Provide as many details as possible to the One HFMA Team at the start, which might include:
  - Reference details from a previous event (website pages to include, registration fees, cancellation policy, discount codes).
  - Include any custom details your Chapter wants included (registration questions, policies, website pages, logos, rosters).
- **Ask Questions:** Do you have an event you want set up that will have unique qualifiers for the registration process? Our team is always happy to talk through any questions you might have and brainstorm ways to achieve your event goals.
- **Trust the Process:** We are always learning and may know a new way to set up an event to better streamline the registration experience.

Details to confirm before opening registration

The minimum information needed get registration set up & open:

- Date
- Location
- Custom questions your Chapter/Region wishes to collect during registration
- Registration fees
- Cancellation/refund policy
- Check payment address (if applicable)

Discount codes, agenda outlines, session descriptions & speaker information can be submitted later!

Review the Event Details

- **Test Registration:** Fully review the registration process, in particular a few areas that are difficult to make changes to once an event opens and fees are collected:
  - Registration Types
  - Fees
  - Changing the event type (in-person to hybrid)

- **Confirm approval to open event**: We do not open registration until we receive written approval.

Registration is Open!
Now What?

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Event Updates

Email event updates to onehfma@hfma.org with all event updates. Make sure the email includes the information below:

- Name of the Chapter/Region
- Name of the event that requires the update
- Event dates
- Specific information that needs to be updated

Information Needed Before Event Date

If these details are not already included on the initial set up form, please provide the information by the timelines below.

Webinars, Web Series & Virtual Events

- 5 Business Days Prior
  - Verify CPE/Certificate of attendance requirements for attendee communications (if applicable)
  - Polling questions (virtual events)
- 1 Business Day Prior
  - Speaker emails for Zoom invite
  - Confirm chapter representative who will host the webinar
  - Polling questions (webinars)

In-Person & Hybrid Events

- 7 Business Days Prior
  - Name badge template assistance (as requested)
  - Event Reminder/Know Before You Go verbiage
- 5 Business Days Prior
  - Verify CPE/Certificate of Attendance credits & Field of Study (if applicable)
- Hybrid Events
  - Polling questions (if applicable)
  - Confirm chapter representative who will host the Zoom element

Post Event Process

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Event Wrap Up

Webinars, Web Series & Virtual Events

Within 3 business days, the One HFMA team will:

- Pull the attendee report from Zoom
- Download the webinar recording & upload to YouTube
- Save presentation as PDF
- Mark attendee participation in Cvent
- Send Event Feedback email to attendees containing a link to the recording, presentation PDF & feedback survey link

If a CPE or Certificate of Attendance is needed, an email containing a link to download the certificate will be sent to attendees 1 week after the conclusion of the event.

In-Person & Hybrid Events

Within 3 business days of receiving the participant list, the One HFMA team will:

- Mark attendee participation (if needed).
- Save any speaker presentations as PDFs (as requested)
- Send the Event Feedback email to attendees containing links to the speaker presentations and feedback survey link.

If a CPE or Certificate of Attendance is needed, an email containing a link to download the certificate will be sent to attendees 1 week after the feedback survey is sent to attendees.

Roles & Responsibilities

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Chapter/Region: Webinars, Web Series & Virtual Events

Submit Event Request Form

- Test registration process and provide approval to open registration to One HFMA
- Provide agenda/speaker/communication updates, as needed
- Act as main point of contact for any attendee questions

Pre-Event Logistics

- Confirm Event Reminder/Certificate of Attendance/CPE Details
- Send speaker emails to One HFMA at least (1) business day in advance of the event
- Confirm Chapter representative that will act as moderator at least (1) business day in advance of the event
- Send poll questions to One HFMA a minimum of (1) business day prior to event.

Day Of Management

- Prepare housekeeping announcements/script
- Prepare sponsor slide (if applicable)
- Join webinar 15-minutes prior to start time for technology check
- Manage chat box, Q&A and polling

Post Event

- Submit speaker presentations to include with post-event email communication & add to Chapter website.

One HFMA: Webinars, Web Series & Virtual Events

Use Event Request Form details to set up Cvent

- Registration process (questions, fees, discount codes, payment options)
- Agenda & Speakers
- Zoom details
- Set up CPE credits/CPE certificate (as needed)
- Set up Feedback Survey
- Marketing Support (as requested)
  - Canva design (for social media)
  - Email Communications – Invitation, Registration Confirmation, Event Reminder
  - Event website updates

Update event details, as needed

Zoom Support

- Set up details in Zoom
- Issue calendar invite to speakers and Chapter/Region representative with unique login information
- Enter poll questions
- Join Zoom 15-minutes before event for technology check

Post Event

- Upload recording(s) to YouTube
- Pull Zoom participation reports for Chapter/Region records (as requested)
- Mark participation (as requested)
- Issue Feedback Survey & CPE certificates/Certificates of Attendance

Chapter/Region: In Person Events

Venue Management

- Contracting
- Communications & logistics

Conference Management

- Put together agenda
- Speaker outreach & logistics (collect bios, photos, presentations)
- Marketing event (beyond Invitation email)

Submit Event Request Form

- Test registration process
- Provide approval to open registration to One HFMA

Pre-Event Logistics

- Provide agenda/speaker/communication updates, as needed
- Provide Know Before You Go communication verbiage
- Confirm CPE/CEU hours, if needed
- Act as main point of contact for any attendee questions
- Order supplies (name badges, name badge ribbons, signage, sponsored items, etc.)
- Print and organize name badges
- Event scripting

Post Event

- Email attendance/session sign-in sheets to One HFMA (if needed)
- Submit speaker presentations to post on Chapter website (if needed)

One HFMA: In-Person Events

Review venue contracts (as requested)

Use Event Request Form details to set up Cvent

- Registration process (questions, fees, discount codes, payment options)
- Agenda & Speakers
- Venue details
- Set up CPE credits/CPE certificate (as needed)
- Set up Feedback Survey
- Marketing Support (as requested)
  - Canva design (for social media)
  - Email Communications – Invitation, Registration Confirmation, Event Reminder
  - Event website updates

Update event details, as needed

Additional Support (as requested)

- Set up name badge template
- Set up OnArrival settings (on-site badge printing, attendance/CPE tracking)
- Issue ‘balance due’ notifications to attendees
- Issue refunds
- Mark attendees as paid when a check is received
- Schedule reports for distribution to event POC

Post Event

- Mark participation (as requested)
- Issue Feedback Survey
- Issue Feedback Survey & CPE certificates/Certificates of Attendance

Annual & Event Sponsorship/Exhibit Set Up

Chapter/Region

Sponsorship & Exhibit Management

- Put together annual/event sponsorship package benefits & pricing
- Confirm annual/event sponsorship capacities (if applicable)
- Provide exhibit hall diagram for booth selection (if applicable)

Submit Event Request Form

- Test sponsorship sign-up process
- Provide approval to open sponsorship sign-up to One HFMA
- Act as main point of contact for any sponsor questions

One HFMA

Use Event Request Form details to set up Cvent

- Sign-up process (questions, payment options)
- Add sponsorship package fees/benefits
- Sponsorship level/exhibit booth selection (as needed)

Additional Support (as requested)

- Issue sponsorship renewal email (annual sponsorship sign-up)
- Issue ‘balance due’ notifications to attendees
- Mark sponsors as paid when a check is received
- Schedule reports for distribution to sponsorship POC

Frequently Asked Questions

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Event Request vs. Website Form

Event Request Form

- Add information to your Event Calendar
- Submit event or sponsorship set-up details for set-up in Cvent
- Submit an event venue contract for review/feedback
- Submit a creation request for a standalone survey

Website Update Form

- Update your Chapter leadership & board information
- Update or add new web page content
- Add/remove sponsor logos
- Add event presentations / recordings from past events

Submissions

- **Why do we need to use the event request form to submit our information?**

  The form assists our team with process, workflow, and helps ensure all event details are captured up front. This allows our team the opportunity to start the event registration set up instead of reaching out to gather the missing information.

- **Our chapter already started to set up an event. Can the One HFMA team continue setting it up for us?**

  We are happy to assist with events/sponsorship set up from start to finish and tailor the details to your specific needs; however, to minimize confusion we ask that the Chapter submit an event request form with the details. If Chapters elect to do the Cvent set up on their own and need assistance, our process is to introduce our Cvent support contact.

Other Cvent Solutions

- **Are there any other solutions available in Cvent available for Chapters/Regions to use?**

  Yes, there are several other solutions that are available for Chapters/Regions as a benefit provided to you from HFMA. Please note these solutions are not currently supported under the One HFMA Project Plan (other than OnArrival Premium), so Chapters/Regions are responsible for set up & management of these solutions.

- **Available solutions include:**

  - OnArrival Premium
  - Speaker Resource Center
  - Exhibit Management
  - Attendee Hub Conference App
  - EMarketing
  - Abstract Management