



## 2024-25 DATES TO REMEMBER

### May

May 1	<a href="#">Chapter Life Membership</a> submissions due for June Board of Directors meeting
May 15	Monthly 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 year, membership year, and DCMS chapter year
	Quarterly Engagement Awards ordering deadline
	HFMA National Officer Speaking Request deadline
	Reminders: <ul style="list-style-type: none"> <li>• Update chapter website 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 19	Monthly Leadership Connection Call – 2-3 pm CT
June 23-24	Volunteer Leadership Meeting (DCMS Requirement) Las Vegas NV
June 24-27	Annual Conference Las Vegas NV <i>*this is not a chapter requirement to attend</i>

### July

July 1	Finalize financial close
July 17	Monthly Leadership Connection Call – 2-3 pm CT

## August

August 1	<a href="#">Chapter Verification Form</a> 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): <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>
	Regional 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 Cvent survey)
	Chapter Treasurer training due - <a href="#">Accounting Guidelines for Volunteer Leaders</a>
	President and Regional Executives training due - Volunteer Code of Ethics Responsibilities (located in your <a href="#">E-Learning</a> )
August 21	Monthly Leadership Connection Call – 2-3 pm CT
August 31	Review Membership Survey results posted to Chapter Community

## September

September 1	Quarterly Engagement Awards ordering deadline
	HFMA National Officer 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
September 18	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 16	Monthly Leadership Connection Call – 2-3 pm CT

## November

November 20	Monthly Leadership Connection Call – 2-3 pm CT
November 30	Review Membership Survey results posted to Chapter Community

## December

December 1	Quarterly Engagement Awards ordering deadline
	HFMA National Officer 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 2025-2026 ballot
December 4	President-Elect Leadership Training Conference Prep Call – 2-3 pm CT
December 18	Monthly Leadership Connection Call – 2-3 pm CT

## January

January 15	Monthly 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
	Chapter Nominating Committee finalizes nominees for 2025-2026 ballot

## February

February 10	Engagement Award Program Validation form due (DCMS Requirement)
	HFMA National Officer Speaking Request deadline
February 15	Ballot sent to members if election is completed electronically
February 19	Monthly Leadership Connection Call – 2-3 pm CT
February 28	Review Membership Survey results posted to Chapter Community

## March

March 1	<a href="#">2025–26 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 19	Monthly Leadership Connection Call – 2-3 pm CT
March 31	Review Membership Survey results posted to Chapter Community

## 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 16	Monthly Leadership Connection Call – 2-3 pm CT

## May

May 4-6	Leadership Training Conference (DCMS Requirement) Nashville TN
May 21	Monthly Leadership Connection Call – 2-3 pm CT

May 31	End of HFMA fiscal year
	Deadline to enter Certification maintenance hours

## 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 on your chapter’s specific [community group](#) under the Library folder named Membership.
  - **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 [Presentations](#) 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).