

Chapter Leader General Onboarding

Questions? Contact your HIMSS chapter manager or chapters@himss.org.

- [Angie Claypool](#) for: Canada, Pacific, Southeast, and Southwest Chapters
- [Carrie Simon](#) for: East, Midwest, and Rocky Mountains Chapters

Chapter Leader eNews

- Sent to all chapter leaders the 2nd Tuesday of each month
- Confirm your subscription preferences in the himss.org member center
 - If you unsubscribe from all HIMSS emails, you will not receive the eNews
- Add himss@emailhimss.org to safe senders list

Quick Links

- [Chapter Leader Resource Area](#) – sign-in through green box to redirect through HIMSS SSO
- [Accountability Reporting](#)
- [Chapter request form](#) (collaboration, speaker, financial support)
- [Marketing/branding material](#) – username chapter's info email, password set by owner or provided by HIMSS
- OneDrive – email chapters@himss.org for individual chapter's link if tool is utilized
- [Email portal](#)
- [Zoom](#)
- [Accelerate](#) and [Chapter Leader Group](#)
 - Ensure you have a bio photo and profile updated with your chapter role
- [Chapter Leader YouTube channel](#) (chapter leader academy and webinar recordings)

How-to's

- **Chapter events:** Let HIMSS staff know about your events. Send details to chapters@himss.org to post on the HIMSS calendar of events. Include chapters@himss.org on all mass email distributions.
- **Board changes:** Submit chapter board changes throughout the year to HIMSS staff or chapters@himss.org
- **Email changes:** To update a primary email address, log into himss.org to update your HIMSS account email (connected to the chapter leader and chapter distribution list) and update auto forwarding of chapter emails through the instructions below. Email chapters@himss.org to update your email on a board group email.

- **Chapter requests:** Submit [chapter request form](#) for collaboration approval, speaker assistance, or financial support
- **CPHIMS and CAHIMS CEUs:** Chapters are [preapproved to offer CPHIMS and CAHIMS CEUs](#) for all chapter education sessions
- **Update chapter bylaws:** Contact your chapter manager to assist with the process
- **Email password or auto forwarding updates**
 - mail.himsschapter.org > username is the email address > password is set by current owner
 - top right horizontal bars > settings
 - left column > change password
 - left column > incoming mail > change forwarding email addresses

Chapter Annual Checklist

The purpose of the chapter annual checklist is to provide an outline of ongoing chapter leader action items. This checklist is only a sample and chapter leaders should add additional action items specific to the chapter.

Q1 (July – September)

- Submit [Chapter Board List](#) for Accountability Reporting | **Due July 1**
- Update [chapter email address](#) forwarding and board group email (password set by current owner) – this will be done by HIMSS staff if included in the Chapter Board List submission
- Update chapter banking information and ensure a minimum of two signatories
- Add updated board and/or chapter documents to OneDrive (or other document repository)
- Update web and social presence
- Chapter leaders review [governance material](#), bylaws, role descriptions, and specific chapter processes
- New chapter leaders utilize [Chapter Leader Development](#) resources (review handbooks/onboarding document and attend Chapter Leadership Academy)
- Host board kick-off meeting and/or [leadership retreat](#)
- Notify membership and stakeholders of new chapter board
- Submit [Administrative Report](#) for Accountability Reporting | **Due August 1** (discuss with chapter board awards submission through report)
- Attend virtual Chapter Leader Exchange

Q2 (October – December)

- US chapters submit [form 990](#) to IRS | **Due November 15**
- Submit [Financials](#) for Accountability Reporting | **Due November 1**

Q3 (January – March)

- Board meets to discuss election planning and develop timeline

Q4 (April – June)

- Adhere to chapter's [election](#) timeline for open call for nominations, election processes, and announcement of winners/non-winners
- Submit new FY board list to HIMSS staff immediately following election
- Officer transition and potentially host officer transition meeting

HIMSS Provided Tools

Chapter tools provided by HIMSS are under review. HIMSS is working with the Chapters Task Force to review the tools for feedback to make enhancements. Tools listed below may change this fiscal year.

Tool Vendor	Description
OneDrive	Document repository.
Chapter website Drupal platform	Backend includes email tool, voting/polling tool, membership list download, free event registration tool.
Chapter email addresses RackSpace	Domain @himsschapter.org – Two emails per chapter at no cost, \$15 per year for additional emails. Chapter board group email, no cost.
Chapter webinar Zoom	Email chapters@himss.org or complete the form to add a Zoom license.
Election polling Self-built into website	Log into chapter specific website.
Event registration Self-built into website	Log into chapter specific website. For free events only.
Email Marketo	Log into chapter specific website.
Chapter Brand Portal Classic Color	Downloadable templates and swag store.
Auto reporting Membership database	<ul style="list-style-type: none"> • Monthly membership report (first Friday) – Pres, Pres-Elect, Membership Chair Comm Chair • Monthly financial report (10th) – Pres and Treasurer • OA PC list: Email your chapter manager • Monthly Google analytics report (1st) – President email provided by HIMSS
Chapter Leader Resource Area Drupal platform	<ul style="list-style-type: none"> • Resources and templates for chapter management.