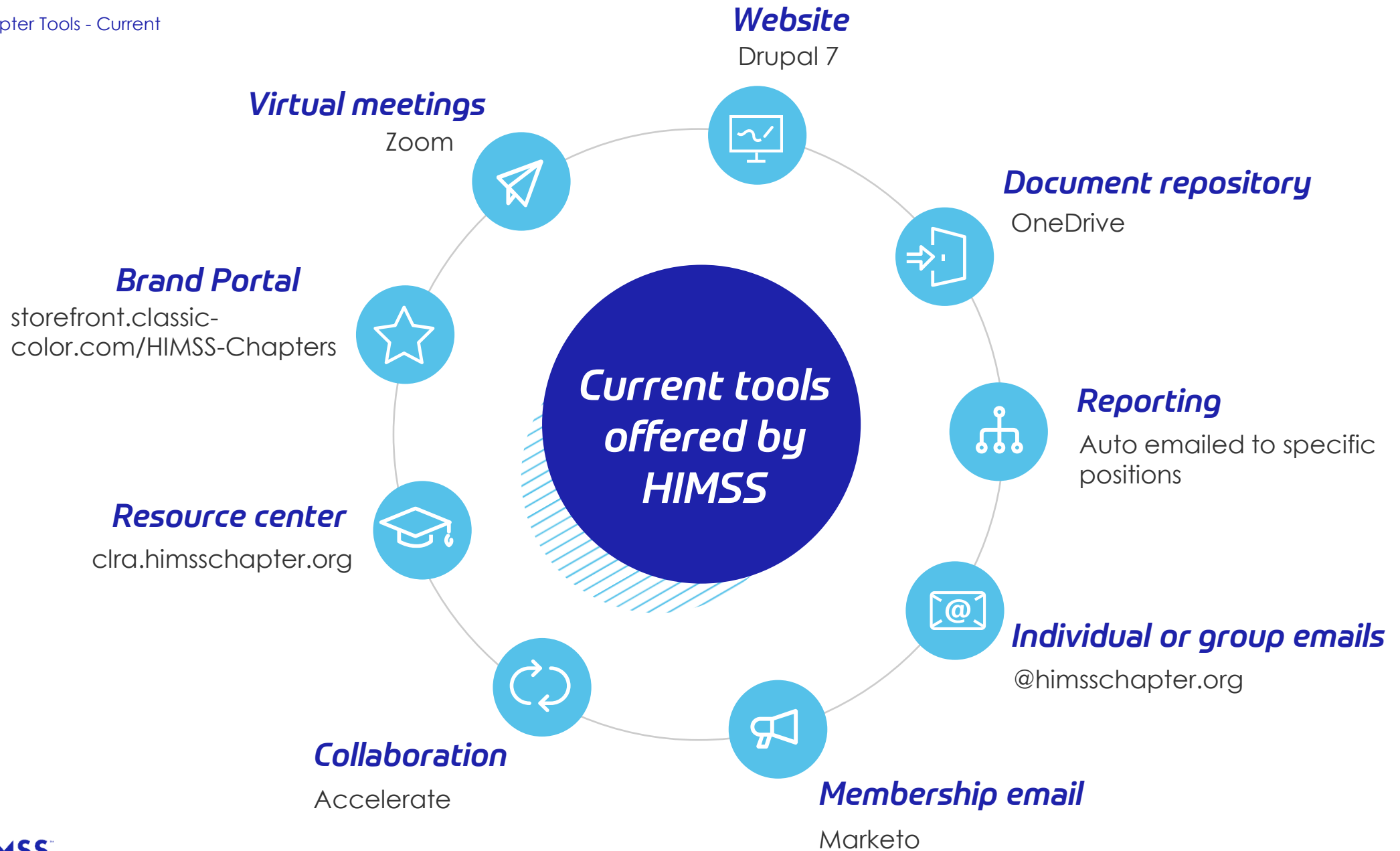


# *Chapter Tools Refresher*

December 8, 2022



# Chapter Leader Resource Area

- Upcoming events
- Quick links
- Staff contacts
- Position specific resources

The screenshot shows the Chapter Leader Resource Area website. At the top, there is a navigation menu with links: About, Events & Education, Get Involved, Professional Resources, Chapter Foundation Materials, Chapter Leadership Essentials, and Tech Tools. A search bar is located on the right side of the header. Below the navigation, there is a blue banner with a pattern of white dots. The main content area features a section titled "Chapter Leader Resource Area" with a sub-section "News You Can Use". Below this, there is a "Congratulations to our Award Recipients" section featuring a banner for "2021 Award Recipients" with two profiles: Amy Chacko, Chapter Leader of the New England Chapter, and Ian Slade, Chapter Leader of the Southern California Chapter. On the right side, there is a sidebar with a calendar showing dates 8 Dec, 11 Jan, and 17 Apr, each with a corresponding event: (Webinar) Chapter Tools Refresher, (Webinar) HIMSS23 Overview, and HIMSS23. Below the calendar is a "Quick Links" section with a list of links: Chapter Calendar 2022-2023, Accountability Reporting, Chapter request form (collaboration, speaker, financial support), Marketing/branding material, Policy manual, Webinar recordings, and Advocacy & Public Policy.

<https://clra.himsschapter.org/>  
Login using your membership email

# Chapter Leader Resource Area



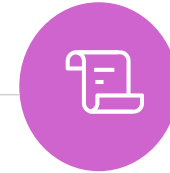
## *Events & Education*

- Past event materials
- Event planning
- Workforce Development Toolkit
- Global Health Conference



## *Get Involved*

- Chapters Task Force
- Volunteer Recognition
- Advocacy



## *Chapter Foundation Materials*

- Governance
- Accountability Reporting
- Policies & Procedures
- Elections

# *Chapter Leader Resource Area*



## *Chapter Leadership Essentials*

- Board Management
- Chapter Leader Development
- Marketing & Brand Materials
- Finance
- Membership Tools
- Sponsorship



## *Tech Tools*

- Overview of tools
- Member email tool
- Digital Experiences Initiative
- Tools and Resources



# Chapter Brand Portal

<https://storefront.classic-color.com/HIMSS-Chapters>  
Username [XXX.info@himsschapter.org](mailto:XXX.info@himsschapter.org) – one/chapter

- **Brand reminders and resources**
- **Logos & Templates**
  - Logo suite, email & milestone badges
  - PPT, Word, and email templates
  - Custom flyers & certificates
- **Swag**
  - Giveaways, clothes, booth materials

# Zoom

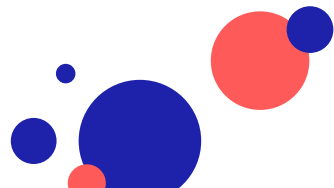
- **Zoom meetings and webinars**
- **Max of 1,000 attendees**
- **US and Canada call-in numbers included**
- **1 account per chapter – cost covered by HIMSS**
  - [Info.\[chapter\]@himsschapter.org](mailto:Info.[chapter]@himsschapter.org)
- **Additional accounts may be purchased**










# OneDrive

## Collaboration Tool & Document Repository

### *Temporary Solution*

- Email chapter manager to be given access
  - Will need separate account if you use OneDrive at work
  - When you receive access email to verify, select “keep me signed in”
- Bookmark chapter folder
- Determine folder structure – by activity or term
- Upload and edit documents



	Name ↑	Modified
	1_Archive	August 25, 2021
	2022 Board Retreat	Tuesday at 5:25 AM
	Board Material	August 25, 2021
	Committees	Wednesday at 9:47 PM
	Finance	July 9, 2021
	New Leader Orientation	May 18
	Strategic Planning	July 9, 2021
	Board Member & WG List.xlsx	September 29



# *Automated Chapter Reports*

***Sent out based on position as identified in the board roster***

- 1. Membership list – sent out on the 1<sup>st</sup> Friday of each month**
  - President, president-elect, membership chair, and communications chair
- 2. Rebate report – sent out on the 10<sup>th</sup> of each month**
  - President and treasurer
- 3. OA report – as needed**
  - Email your chapter manager (Angie or Carrie)
- 4. Google Analytics Report – sent out on the 1<sup>st</sup> of each month**
  - Chapter president email address ([president.chapter@himsschapter.org](mailto:president.chapter@himsschapter.org))
- 5. Email Metrics Reports – sent out on the 1<sup>st</sup> Monday of each month**
  - President and Communication Chairs



# Membership Report Tips

- **Tab 1 “Details” is all current chapter members. Key areas to sort by:**
  - **Type:** OA, Individual, CM, etc.
  - **Membership join date:** welcome new members
  - **Membership renewal date:** remind members to renew
  - **Chapter and membership join date:** determine membership length for board eligibility
- **Tab 2 “Demographic Summary” shows membership % by worksite, role, and membership type, example →**
- **Tab 3: “Membership Types” is a cheat sheet for what the membership types mean**

Worksite	Percentage
Academic Education Institution	4.08%
Academic Medical Center	11.74%
Ancillary Clinical Service Provider	.43%
Banks / Financial Services	.22%
Community Health Center Clinic	.38%
Critical Access Hospital	.43%
Entrepreneur, Startup, Disruptor	1.14%
Financial, Legal, Investment Firm	.33%
Government	1.03%
Government Health Provider	.11%
Healthcare Consulting Firm	5.76%
HIE Organization	.33%
Home Healthcare Org	.49%
Hospital, Multi-Hospital System, Integrated Delivery	54.57%



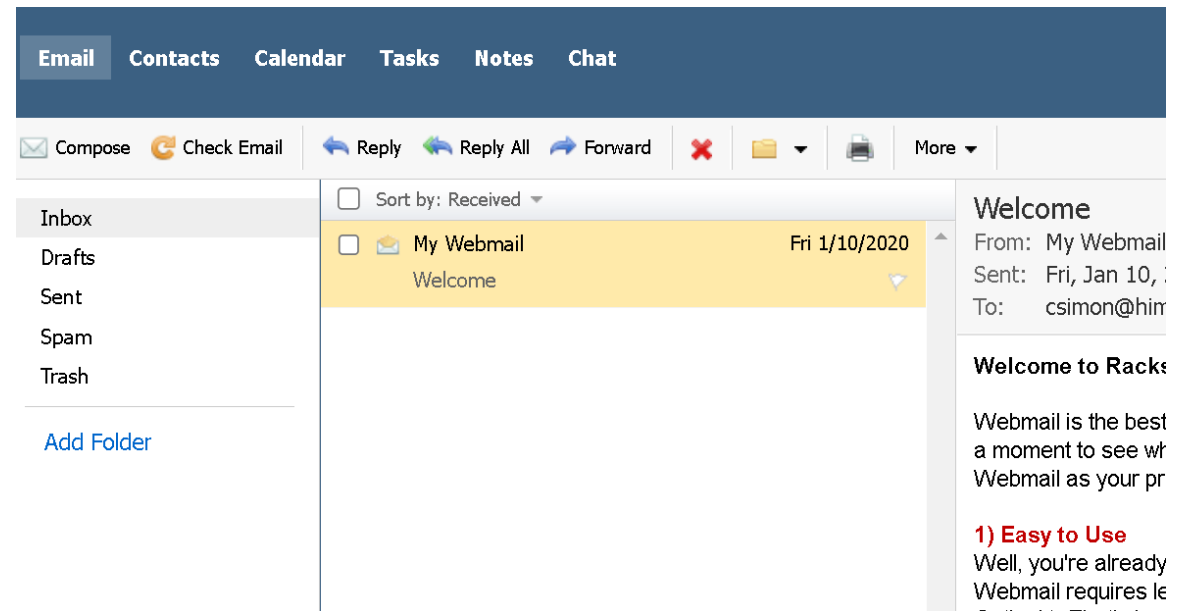
# Finance Report

- Tab 1: Summary of dues by membership type, example below
- Tab 2: Gives line-item details of all dues

	CHPTR	CORP	OA	REG	Total
ABC		\$23.00			
123	\$23.00			\$253.00	
XYZ		\$23.00			
8675409		\$23.00			
312		\$92.00			
Purple			\$524.58		
Total	\$23.00	\$161.00	\$524.58	\$253.00	\$961.58

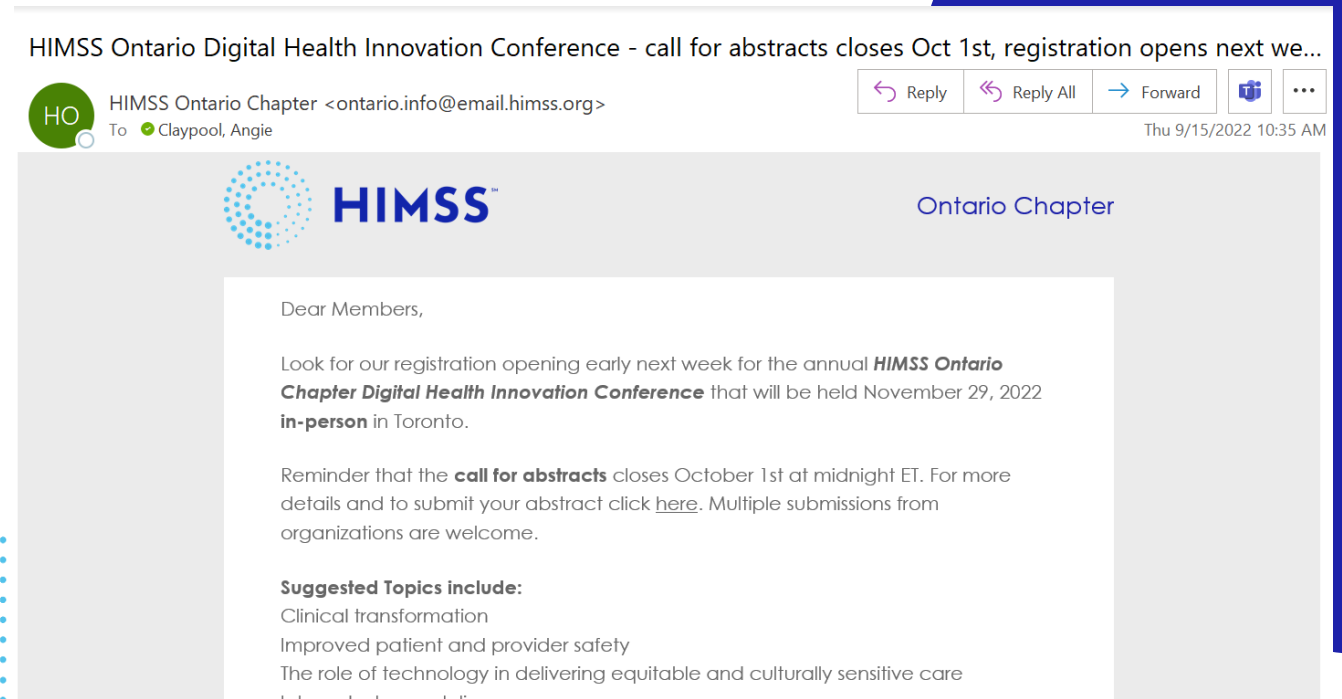
# Emails – Individual & Group List

- **Go to mail.himsschapter.org**
  - Username is the email address
  - Password is set by current owner
  - Multi-factor Authentication – reset during board transition, text message option recommended
- **Individual email**
  - President and Info email address provided
  - Add additional accounts for \$15/year
  - Forward to up to 4 leaders
- **Group email**
  - Each board can create one group distribution list
  - Presidents – Specific lists to connect chapter presidents



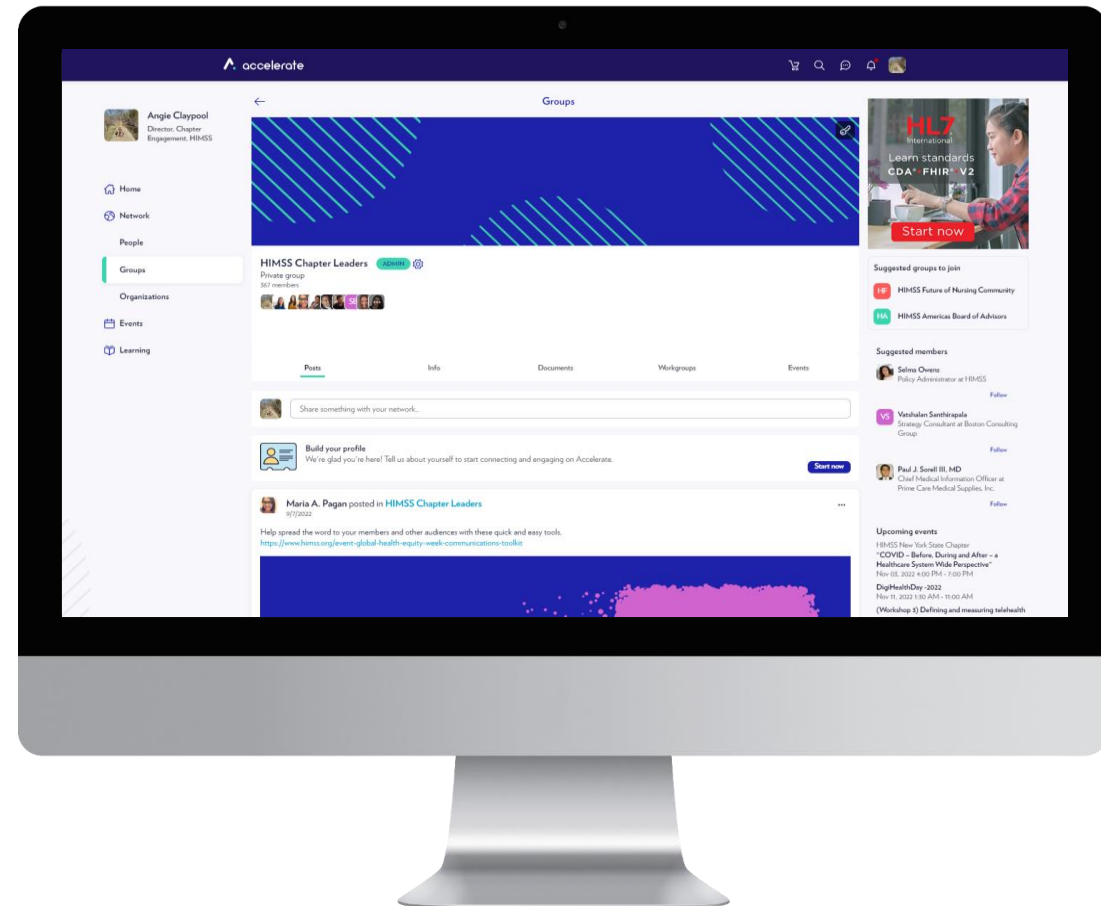
# Emails – All Chapter Members

- **Marketo: Connected to the backend of the chapter's website**
- **Send emails to members and segments (government or student)**
- **HIMSS branded template built into tool**



# Accelerate

- Connect with chapter leader peers through the Chapter Leader Group
- Join workgroups to connect by chapter position



# *Chapters Task Force | Tech Tools Focus*

## *Thank you!*

### **Roles:**

- Provide feedback, as needed, to HIMSS staff around the tech tools provided to chapters
- Test new tools and provide usability feedback
- Support training tool users
- Collaborate on supporting material
- Additional tasks as assigned by HIMSS staff

<b>Name</b>	<b>Chapter</b>
Sepi Browning – Chair	Georgia
Rob Gottlieb – Vice Chair	Indiana
Brigitte Mettler	British Columbia
Joseph Painter	Dallas-Fort Worth
Viraj Patwardhan	Delaware Valley
Kathy Contratto	New Jersey
Donald Cox	North Carolina
Jen Jones	Oklahoma
Shalini Chauhan	South Florida
Amy Chacko	New England
Bridget Burke	Northern California
Chris Jasen	Wisconsin

# *Digital Experiences Initiative*

## **Website**

- We have successfully created a local instance of a Drupal 8 Chapter website and are now working on migrating that to an online environment.
- This represents the first step into providing newly enhanced websites for Chapters.
- Work has also begun on the Demo / Sandbox site which we'll use for testing enhancements to new chapter sites.

## **Storage Solution**

- Discussions underway on a more permanent solution for Chapters.

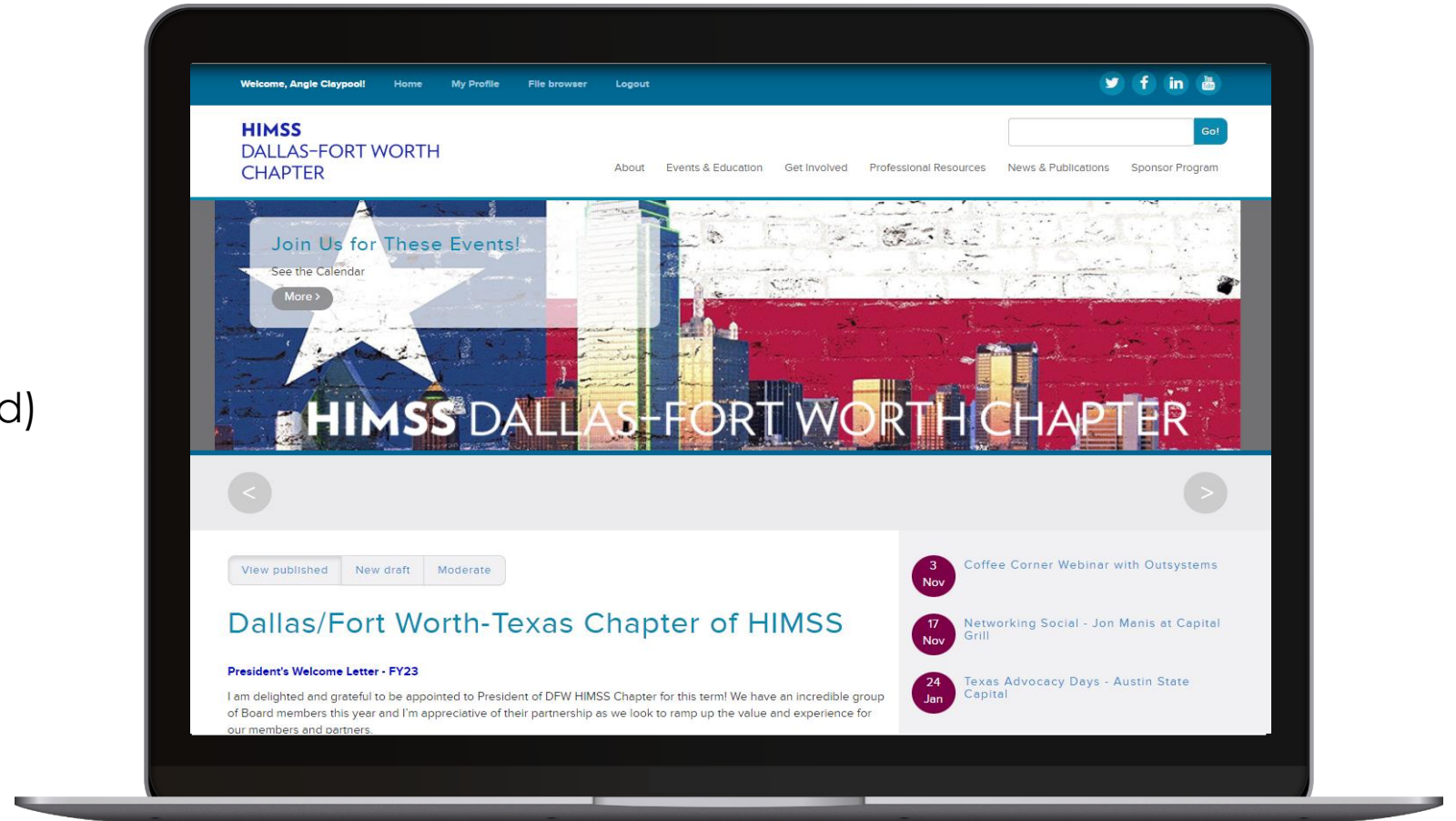
## **Email Tool**

- Discussions on enhancements to Marketo are underway to provide chapters with additional functionality and control of their audiences.



# Website

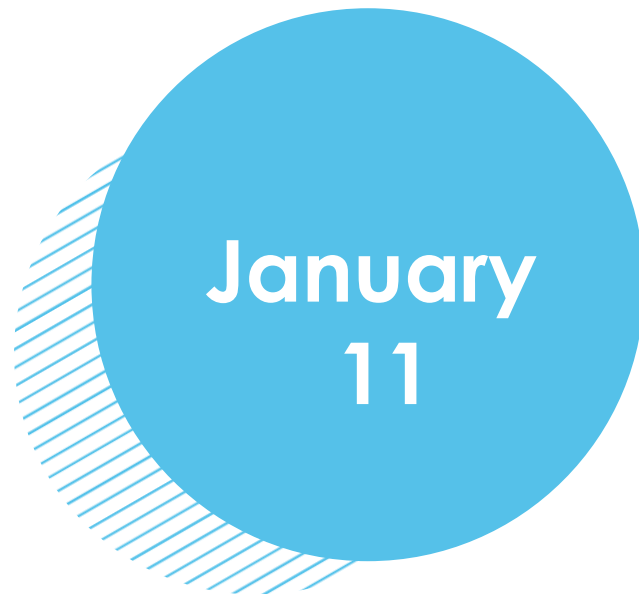
- **Current Platform:** Drupal 7
- **Future Platform:**
  - Drupal 8 (January, February 2023)
  - Drupal 9 (March 2023 + Beyond)
- **Future Changes:** Apply enhanced design to align with new HIMSS branding.
- **Additional enhancements to come in 2023 and beyond**



Let's take a look at the some of the new changes we're working on!

*Questions?*

# *Save the Date: HIMSS23 Overview*



All you need to know about the can't-miss health information and technology event of the year! Get a preview of HIMSS education, networking, and exhibits. Learn about engagement opportunities with other chapters.

<https://clra.himsschapter.org/Events/index.aspx>