

## Appendix VIII: How-to Utilize Hospital Medicine Exchange (HMX) and Submit Meeting Notification/Meeting Report Forms.

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SHM requires that all chapters maintain an active SHM membership at all times. An active membership will ensure Chapter leaders have access to chapter HMX communities, chapter leader forms and resources.

Access for Chapter Community Admins, Chapter Leaders, members and non-members.

**There are 4 classifications of access to Chapter Communities in HMX: SHM active members, Chapter Leaders, Group Admins (also a chapter leader) and non-members. Below please find descriptions of access levels for each:**

**(Active) Members of the Chapter Community can:**

1. Bookmark your chapter community page. You will be able to log in using your SHM username and password to view the discussions among chapter members. Your login to HMX is identical to your login on [www.hospitalmedicine.org](http://www.hospitalmedicine.org).
2. Complete your profile. Share some information about yourself – job title, company name, work address, work/personal email, license specialty and Twitter account– and upload your photo to make it easier to connect with other members.
3. Events. All upcoming chapter events will be listed under the “Events” tab on the community page. Within the event description you can click the link to RSVP and also download the event to your calendar.
4. Post a message. Do you have a question or something you’d like to share with other members locally? Click “New Topic” to post a message in the forum.
5. Share. You can share a document within a post in HMX by using the paper clip icon in the message menu. Or, you can upload a document or other resource to the shared file gallery, accessible under the “File” tab in the community menu. Check out news updates from your chapter’s past meetings, attached to this post and available in the community files.
6. Network. Find your colleagues in the community via the "Members" menu by clicking “Member Search.” Or, click “Browse Members” to see who has been recently active on HMX. You can also view your chapter’s leaders on the home page of the community.

**Chapter Leaders (in addition to everything an active SHM member can access):**

1. Submit/review chapter meeting notification/report forms (see instructions below).
2. View member lists by clicking on the members tab within your chapter’s community.
3. Access the [Chapter Leaders Community](#) to communicate with other chapter leaders, view updates and access resources.

**Group Admins (in addition to everything an active SHM member and chapter leader can access):**

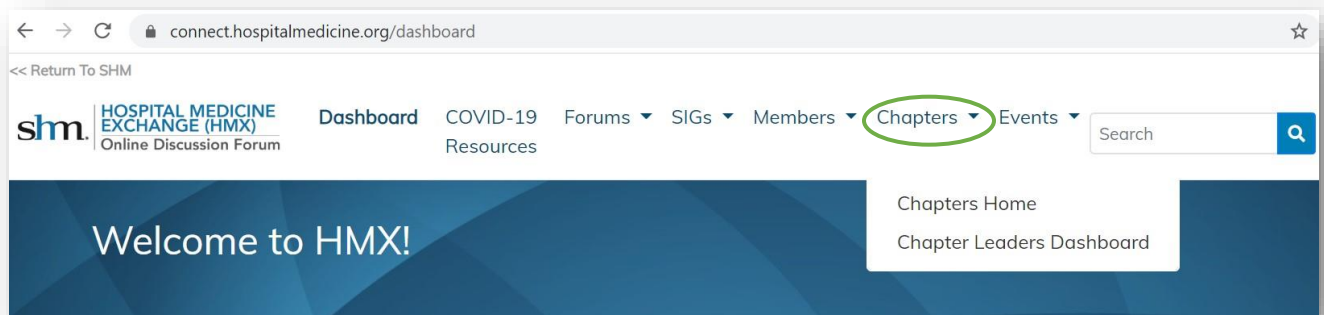
1. Create and Moderate Discussions:
  - a. On the chapter community homepage or within the Discussion tab you can click to add “Start a new Discussion” or “+New topic.”
  - b. You can open an existing discussion and respond or edit another member’s post.
2. Add/Delete Photos:
  - a. Under the Photos tab you can click to add new photos from your chapter meetings.
3. Add/Delete Files:
  - a. Keep files organized by creating folders within the Files tab.
  - b. Add documents relative to your chapter members (staff can assist with adding SHM created meeting flyers, newsletters, and etc. Please remember that to protect the new SHM brand flyers should be created by Staff).

**Non-members of SHM/general public can access:**

1. Chapter group information.
2. Chapter Leadership Listing and Excellence Awards.
3. The topic of discussion posts listed on the group page (they cannot access the discussion tab).
4. Event information.

“Chapters” Navigation Tab

1. [Log on](#) to SHM’s Hospital Medicine Exchange (HMX) online discussion forum.
2. Within the HMX **Dashboard**, click on the “**Chapters**” drop-down arrow.



3. Click the first link under the chapter’s dropdown “[Chapters Home.](#)”  
This page includes:
  - a. Upcoming Chapter Events (list connected to Eventzilla).
  - b. My Chapter (click to access your chapter’s community).
  - c. Browse Chapters (all chapter communities from A-Z).
  - d. Elections Timeline.
4. Click the second link under the chapter’s dropdown “[Chapter Leaders Dashboard.](#)”  
This page includes information important to chapter leaders, such as:

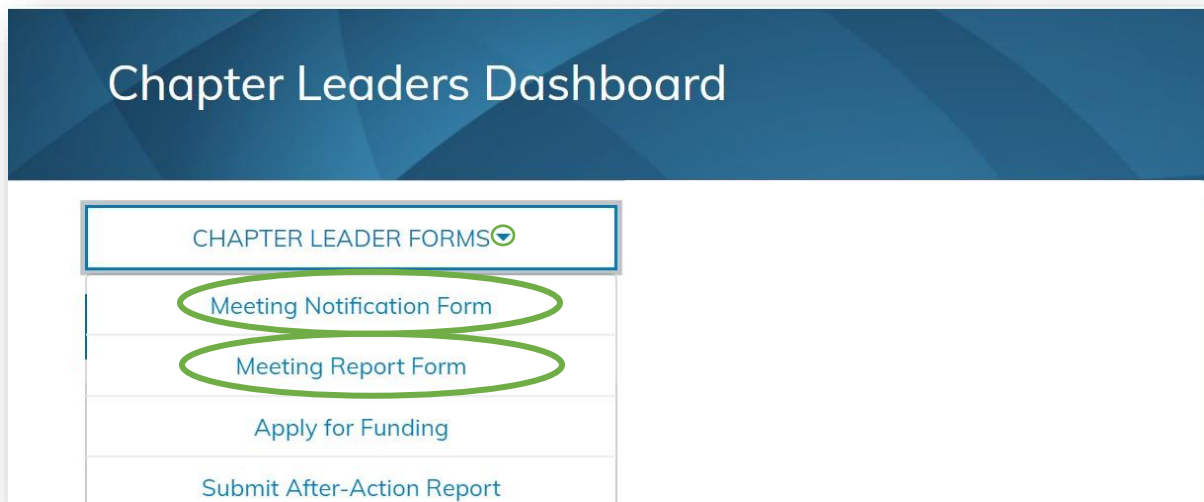
- a. Chapter Leader Forms drop-down (Meeting Notification Form, Meeting Report Form, Chapter Initiative Fund Application, After-Action Report).
- b. The link to the Chapter Leaders Community Page.
- c. Edit/review your submitted meeting forms (both complete and incomplete).
- d. Access to the Chapter Handbook.
- e. Upcoming District Events.

### Chapter Meeting Forms

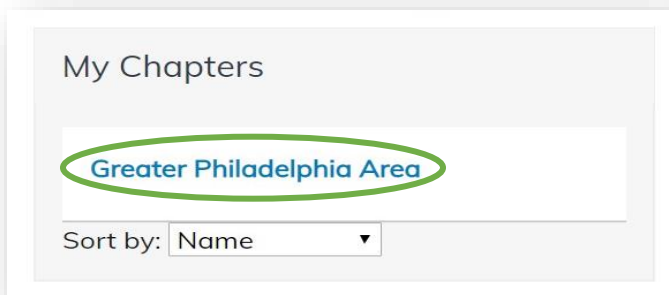
#### **How to find the Meeting Notification Form and Meeting Report Form:**

*The submission of both forms is required to maintain chapter status.*

- The Meeting Notification Form and Meeting Report Form are located in several places on HMX:
  1. On the **Chapter Leaders Dashboard** under Chapter Leader Forms (found under the Chapters in the main navigation)



2. On your chapter's HMX community page



**Completing the Meeting Notification Form:**

Please provide as much detail as possible about your event so SHM Staff can assist with the planning and promotion. You may edit the form at a later date if needed by going to the [Chapter Leader Dashboard](#) and selecting the form from “Review/Edit Your Forms” list.

Chapter tab: Chapter, full name, email address, SAVE.

Chapter	Meeting Info	Date, Time, Location	Budget/Agreement	Agenda	RSVP	CME
Meeting Promotion	Exhibitors	Other				

**Chapter Name \***

**Your Name \***

**Your Email \***

**Save**

Meeting Info tab: Estimated number of attendees, meeting type, who is invited, in-person/virtual, SAVE.

Chapter	<b>Meeting Info</b>	Date, Time, Location	Budget/Agreement	Agenda	RSVP	CME	Meeting Promotion	Exhibitors
Other								

**Estimated Number of Attendees \***

**Describe the type of meeting you are planning by selecting one or multiple options below. \***

- Educational dinner meeting
- Educational one-day meeting
- Educational multi-day meeting
- Abstract/poster competition
- Non-educational event
- Webinar only
- Other

**If you selected other in the question above, please describe your event.**

**Who is invited to the meeting? \***

- SHM members only
- Members and non-members (to expose them to SHM and the benefits of being a member)
- We would like to advertise our meeting to members first, and then advertise to non-members closer to the meeting date

**Select all that apply to your meeting. \***

- Meeting will be in-person
- Meeting will be held at multiple locations
- Meeting will be broadcasted for attendees to participate virtually

**Save**

Date, Time, Location tab: Complete with valid date/time/address, SAVE.

If you are holding your meeting at more than one location, please complete the additional fields with valid addresses.

Chapter	Meeting Info	<b>Date, Time, Location</b>	Budget/Agreement	Agenda	RSVP	CME	Meeting Promotion	Exhibitors
Other								
<b>Date &amp; Time *</b>								
<input type="text" value="06/10/2020"/>								
<input type="text" value="6:00pm"/>								
<b>Meeting Venue Name *</b>								
<input type="text" value="Maggiano's Little Italy"/>								
<b>Meeting Location *</b>								
Line 1								
<input type="text" value="205 Mall Blvd"/>								
Line 2								
<input type="text"/>								
City				Postal Code				
<input type="text" value="King of Prussia"/>				<input type="text" value="19406"/>				
State				Country				
<input type="text" value="Pennsylvania"/>				<input type="text" value="United States"/>				
<b>Meeting Venue Name #2</b>								
<input type="text"/>								
<b>Address</b>								
Line 1								
<input type="text"/>								

**Budget/Agreement tab:** Estimated meeting budget, associated meeting costs, venue contract/banquet event order, venue credit card form, event coordinator contact info, SAVE.

Chapter	Meeting Info	Date, Time, Location	<b>Budget/Agreement</b>	Agenda	RSVP	CME	Meeting Promotion	Exhibitors
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Other

**Meeting Budget**

Please estimate the total cost for your meeting. This includes: venue/catering, audio/visual, speaker honorarium and speaker travel.


\$3000

**Please select all that are applicable to your meeting costs.**

- Food and beverage provided by the venue
- Food and beverage provided by an outside caterer
- Alcohol (beer and wine, 2 drinks per person)
- Meeting supplies (A/V, equipment, poster boards, etc)
- Speaker honorarium

**I have a hotel contract, banquet event order (BEO), event estimate, or invoice from the venue that I would like to upload now.**

All contracts need be signed by a SHM staff member. If you do not have one to upload at this time, please be sure to send it to a staff member to secure your meeting space for the event.

 **Maggiano's Contract and BEO** Maggiano's Contract and BEO 25.67 KB

Remove File

**I have a credit card authorization form from the venue that I would like to upload now.**

Please upload the venue's credit card authorization form if you have it available. If not, an SHM staff member will reach out to the venue to provide payment.

**File Name**

Maggiano's Credit Card Authorization

**File Description**

Maggiano's Credit Card Authorization

**File**

Maggianos Cre...orization.pdf

**Please enter a contact name and email for the venue for payment to be sent.**

John Smith jsmith@maggianoscatering.com

**Notes for SHM Staff**

**Agenda tab:** Detailed agenda, poster competition upload (if applicable), topic(s), speaker(s), contact info, additional speaker info, headshot upload, SAVE.



Please complete all fields with detailed meeting information (see example below of topic, speaker and schedule as it should be written)

Chapter	Meeting Info	Date, Time, Location	Budget/Agreement	Agenda	RSVP	CME	Meeting Promotion	Exhibitors
Other								

**Meeting Agenda \***  
 (ex: 6:00 – 7:00 p.m. Networking, 7:00 – 8:00 p.m. "Updates in HM")

6:00-7:00 PM Networking  
 7:00-8:00 PM Updates in Hospital Medicine  
 8:00-8:15 PM Q&A and Meeting Wrap-up

102/1000

**Meeting Agenda/Poster Competition Information**  
 If you prefer to upload your agenda or poster competition details in a Word document, please do so below.

**File Name**

**File Description**

**File**  
 No file chosen

**Topic(s) \***

---

**Speaker(s) Name**

**Speaker(s) Email Address**

**Additional speaker or meeting information I would like included in promotional emails.**

**Speaker Headshot**  
 If you have a speaker headshot you would like to be included, please upload a photo below:

**File Name**

**File Description**

**File**  
 headshot.JPG headshot.JPG

**RSVP tab:** Chapter Leader email to access list in Eventzilla/Go-To Webinar, meeting fees (if any), additional RSVP requests (if any), venue capacity, Eventzilla training by staff (if needed), SAVE.

Chapter	Meeting Info	Date, Time, Location	Budget/Agreement	Agenda	RSVP	CME	Meeting Promotion	Exhibitors
Other								

Upon submission of this form, SHM Staff will create a RSVP/Registration link for your meeting. Most RSVP forms will be created in the SHM EventZilla account. Staff will create a RSVP link and provide the email below with access to view the RSVP list.

If your meeting is being broadcasted through GoToWebinar/GoToMeeting, your RSVP link will be created in this platform.

If there are registration fees being charged, the registration link will be created in SHM's Membership Database so payment can be collected.

**Email Address for RSVP List Access \***

**The meeting will be...**

- Free to both members and non-members (if applicable)
- Free to members, nominal fee for non-members
- Discounted for members. Non-members will be charged a slightly higher fee. If you select this option, SHM Staff will reach out to confirm a registration fee structure.

**If you would like specific questions asked in the RSVP form, please list them below.**

Standard questions that will be included are name, email, hospital name, and member type.

**Venue Capacity / Registration Limit**

Please specify any registration limits or waitlist requests. If your chapter has a high no-show percentage, consider reaching out to those that have RSVP'd to confirm their attendance. Consider charging a nominal fee to decrease the number of no-shows at events.

**EventZilla Sign-In at Meeting**

If you would like staff to provide training on how to use the EventZilla app to check-in attendees at the meeting, please indicate who staff should reach out to below. This will require a chapter leader to download the app on a phone or tablet, or have a computer handy.

CME tab: CME (Y/N), SAVE.

Check yes/no. If you checked off no, then hit SAVE and continue to the next tab. If yes, please right-click on **“Apply online here”** and hit **“open link in new tab”** to complete CME application. Since it is opened in a new tab, you can feel free to complete this application after the Meeting Notification Form is done. Hit SAVE to continue to the next tab. Teresa Caponiti, SHM Education Project Manager, will reach out after completion of online application.

Chapter	Meeting Info	Date, Time, Location	Budget/Agreement	Agenda	RSVP	CME	Meeting Promotion	Exhibitors
Other								

Chapter Leaders can apply for CME through SHM’s Education Department for Chapter Meetings for an administrative fee of \$500/event (no limit on credits). Applications should be submitted 4 weeks in advance of your meeting to ensure enough time for application review and COI form collection which is needed prior to the promotion of your event.

[Apply online here.](#)

**This meeting will have CME \***

Yes  
 No

**If you will be receiving CME from outside SHM, please specify the institution:**

**Save**

**Meeting Promotion tab:** Additional promotion info, Facebook (optional), meeting flyer (optional), SAVE.

Utilize the Email Promotion to add any additional details you want included in the body of the chapter email (if any). Facebook: If you would like to advertise on Facebook using chapter funds, please refer to minimum fee on the form. Meeting flyer should only be selected if you plan to print and distribute these before an event.

Chapter	Meeting Info	Date, Time, Location	Budget/Agreement	Agenda	RSVP	CME	Meeting Promotion	Exhibitors
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Other

**Email Promotion**

**Chapter emails are scheduled on Wednesdays for the following Saturday's email distribution.** All chapter emails are scheduled for 10:00 a.m. on Saturday in your chapter's time zone. All emails will be created by staff in the SHM chapter email template utilizing the details listed in this form. If there are any additional details that should be listed in your chapter's email, please specify them below.

Emails are sent to all members and prospective non-members (if applicable) in your chapter's geography.

n/a

3/1000

**Chapter Online Community**  
 Staff will create your event in your chapter's online community in Hospital Medicine Exchange (HMX). Invite people to attend utilizing the email feature in your community.

**Facebook**

Chapters can utilize their reserve funding to sponsor Facebook posts (advertisements) from SHM's Facebook page, targeted specifically to their chapter geography. The suggested spend for sponsored Facebook posts is a minimum of \$50 and a maximum of \$200.

**Meeting Flyers for Printed Advertising**

If you would like to download and print a flyer to advertise your chapter meeting, please select yes below to have a SHM-branded flyer created. If you select yes, SHM staff will create the flyer and email it as a PDF to be printed and distributed by your chapter's leadership. If you are not planning to utilize a printed flyer, please select no.

Yes  
 No

Save

**Exhibitors tab:** Exhibitors, # of exhibitors, National Contracts, confirmed exhibitor information, SAVE.

Indicate whether you plan to have exhibitors at your chapter meeting. SHM Staff will assist chapters in securing exhibitors for your meeting. Please provide representative contact information for each company you are interested in having display. SHM Staff will solicit their attendance and provide them with an exhibitor agreement to be signed and returned with payment.

Chapter	Meeting Info	Date, Time, Location	Budget/Agreement	Agenda	RSVP	CME	Meeting Promotion	Exhibitors
Other								

SHM Staff will assist chapters in securing exhibitors for your meeting. Please provide representative contact information for each company you are interested in having display. SHM Staff will solicit their attendance and provide them with an exhibitor agreement to be signed and returned with payment.

**Are you having exhibitors at your meeting? \***

Yes  
 No

**How many exhibitors do you have confirmed/looking to confirm?**  
 (Reference meeting budget)

2

**Would you like to use a prepaid exhibitor package via the National Contracts?**  
 If you select yes, Staff will contact each company to try to confirm an exhibitor for your meeting via the contract. Staff cannot guarantee the confirmation of any exhibit.

Yes  
 No

**CONFIRMED EXHIBITOR #1**

LIST COMPANY NAME, REPRESENTATIVE NAME, EMAIL, AND THE EXHIBIT FEE

Portola Pharmaceuticals Inc  
 John Smith  
 jsmith@portola.com  
 \$1,500

64/500

**CONFIRMED EXHIBITOR #2**

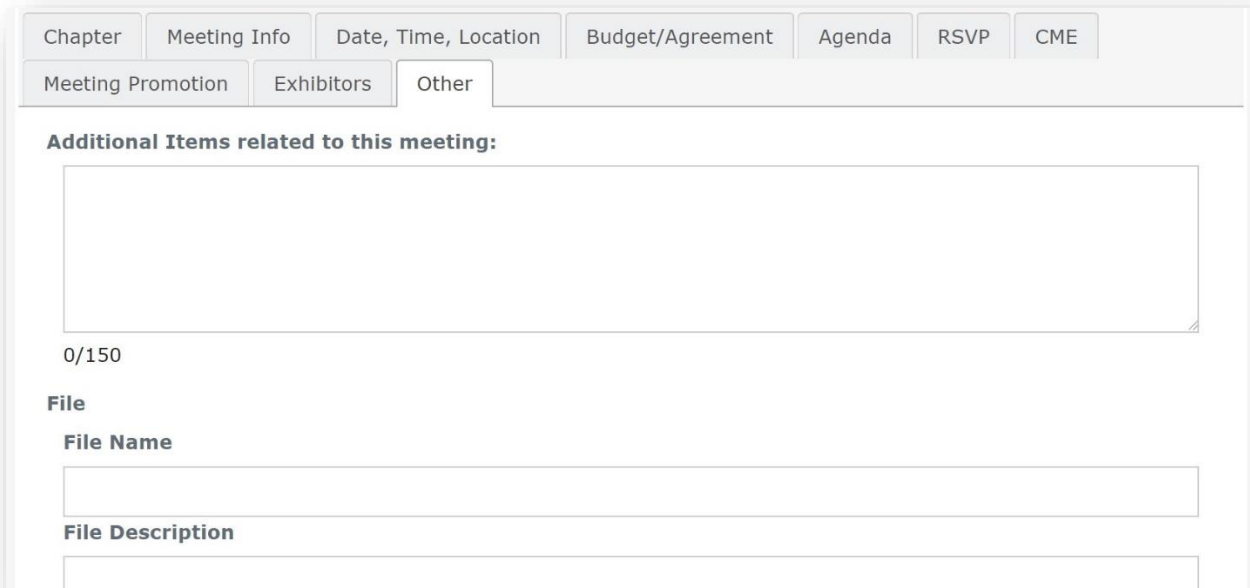
LIST COMPANY NAME, REPRESENTATIVE NAME, EMAIL, AND THE EXHIBIT FEE

Janssen Pharmaceuticals, Inc.  
 Johnny Smitha  
 jsmitha@its-jnj.com  
 \$1,500

70/500

Other tab: Additional items, SAVE.

If you have any additional items related to this meeting (e.g. PDF/Word Doc) please fill this section out and add attachment. If not, hit SAVE to complete the Meeting Notification Form.



Chapter Meeting Info Date, Time, Location Budget/Agreement Agenda RSVP CME

Meeting Promotion Exhibitors **Other**

**Additional Items related to this meeting:**

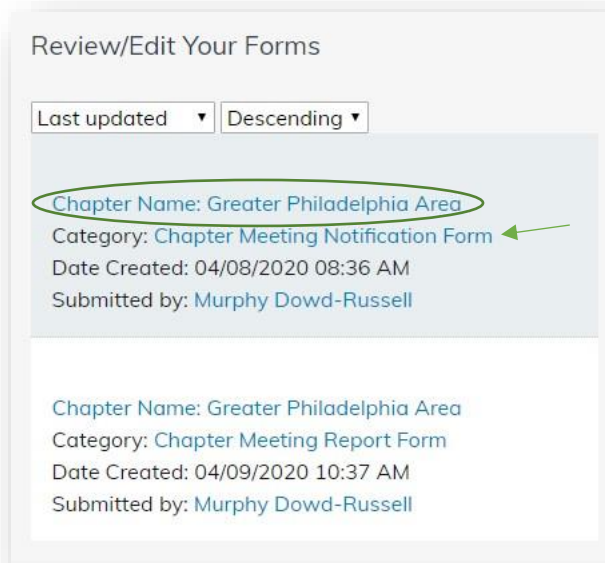
0/150

**File**

**File Name**

**File Description**

**\*\*The Meeting Notification Form will save under “Review/Edit Your Forms” on the Chapter Leaders Dashboard. This is helpful if any updated meeting materials or details need to be added to the form after submission. Click on your chapters name to get back into it \*\***



Review/Edit Your Forms

Last updated ▾ Descending ▾

Chapter Name: Greater Philadelphia Area  
 Category: Chapter Meeting Notification Form  
 Date Created: 04/08/2020 08:36 AM  
 Submitted by: Murphy Dowd-Russell

Chapter Name: Greater Philadelphia Area  
 Category: Chapter Meeting Report Form  
 Date Created: 04/09/2020 10:37 AM  
 Submitted by: Murphy Dowd-Russell

After submission of this form, SHM Staff will begin creating the promotional items for this event (registration link, email, HMX event in chapter community, digital flyer – if requested).

**Completing the Meeting Report Form:**

Report on each chapter meeting by letting SHM Staff know how your meeting went and who attended. Submission of this form is required after every chapter meeting.

Chapter tab: Chapter, your name, email address, meeting date, SAVE.

Chapter | RSVP-Attendance | Exhibitors | Meeting | Meeting Summary

**Chapter Name \***  
Greater Philadelphia Area

**Your Name \***  
Lauren Mendelsohn

**Email Address \***  
lmendelsohn@hospitalmedicine.org

**Meeting Date \***  
06/10/2020

Save

RSVP-Attendance tab: Total # of attendees, # of HM groups, completed sign-in sheet upload, membership forms, RSVP/attendee comments (if any), SAVE.

Please give an accurate final count of number of attendees and the number of HM groups that were represented there. Please then upload your sign-in sheet(s) from the meeting.

You will be able to select more than one file if you have multiple sign-in sheets. Please scroll to the bottom and read every field carefully before you hit save and continue with the form.

Chapter
RSVP-Attendance
Exhibitors
Meeting
Meeting Summary

**Total Number of Attendees \***

**Number of HM Groups Represented at Your Meeting \***

**Please upload your sign-in sheet in an Excel Document \***

**File Name**

**File Description**

**File**

Choose File
Eventzilla \_ I...Z-PP-1036.pdf

---

**Total Number of Attendees \***

**Number of HM Groups Represented at Your Meeting \***

**Please upload your sign-in sheet in an Excel Document \***

**File Name**

**File Description**

**File**

Choose File
Eventzilla \_ I...Z-PP-1036.pdf

**Correct sign-in sheet methods (please choose one of the following- option 1 recommended):**

**Option 1:** Download the EventZilla app on your phone/tablet and check people in. You can search their name, click it, and it registers their attendance immediately. (If this option is chosen, we recommend you print out a blank template for those who did not RSVP electronically).

**Option 2:** Print out the list of people that RSVP'd on EventZilla and have them sign next to their name. Anyone who did not RSVP electronically can sign-in on the template attached.

**Option 3:** Have everyone sign in on the blank sign in template (must be legible hand-writing/and complete contact information) - **\*\*All sign in sheets should have the following information whether it is hand-written in the template or exported from EventZilla:** first name/last name, designation, hospital name/affiliation, valid email address and primary address.



Incorrect sign-in sheet methods (please avoid):

- Sign-in sheet with incomplete attendee information (see listed above with required information).
- Listing names in a word document.
- Leaving the “attended” column blank (if exported from EventZilla).
- Sending sheets to a staff member via email rather than upload them into the report form.
- None at all! 😞

Exhibitors tab: List of exhibitors present at meeting, SAVE.

Chapter | RSVP-Attendance | **Exhibitors** | Meeting | Meeting Summary

**Please list all exhibitors present \***

Janssen; Portola

Save

Meeting tab: Rate quality of speaker, topic, location, experience with exhibitors, SHM support, attendance, overall experience, SAVE.

If you had an issue with the speaker, venue, exhibitor, attendance, etc., please let us know in the comment section.

Chapter | RSVP-Attendance | Exhibitors | **Meeting** | Meeting Summary

Please rate each of the following on a scale of 1-5 (1=poor, 5=excellent)

**Quality of Speaker \***

1  
 2  
 3  
 4  
 5

**Comments**

0/150

Meeting summary tab: Read text and hit SAVE.

The screenshot shows a navigation bar with tabs: Chapter, RSVP-Attendance, Exhibitors, Meeting, and Meeting Summary. Below the tabs is a text box with instructions: "After submission of this form, please go to your chapter's community in HMX and click to add a discussion and post a summary for your recent meeting. Chapter members will receive an update to read your discussion post on the community page." At the bottom left of the text box is a blue "Save" button.

**\*\*Like the Meeting notification form, you can find a completed report form on the "Chapter Leaders Dashboard" under "Review/Edit Your Forms". Click on your chapters name to get back into it\*\***

The screenshot shows the "Review/Edit Your Forms" page. At the top, there are two dropdown menus: "Last updated" and "Descending". Below these are two form entries. The first entry has the following details: Chapter Name: Greater Philadelphia Area, Category: Chapter Meeting Notification Form, Date Created: 04/08/2020 08:36 AM, Submitted by: Murphy Dowd-Russell. The second entry has: Chapter Name: Greater Philadelphia Area (circled in green), Category: Chapter Meeting Report Form (with a green arrow pointing to it), Date Created: 04/09/2020 10:37 AM, Submitted by: Murphy Dowd-Russell.

After submission of the Meeting Report Form, please go to your chapter's community in HMX to post a summary for your recent meeting. Chapter members will receive an update to read your discussion post through their daily digest. You will be able to view/edit (if needed).

Photos: If you have photos from your meeting, you can both attached them to your post and add them in the Photo Gallery in your chapter community by going to the "Photos" tab in the community navigation.

Once discussion is posted, chapter members will receive an update to read your discussion post on the community page. They will be able to comment or ask questions directly to your post.

**How to post a new discussion:**

- Go to your Chapter's Community.
- Click on "Discussions" in the community navigation menu.
- Click "New Topic."

**Please see example below of what your meeting summary post could look like:**

\*Subject

XXX Chapter Meeting Summary-6.10.2020

\*Message

On Wednesday, June 10, 2020, the (your chapter name) held a meeting at Maggiano's Little Italy in King of Prussia, PA. There were approximately 45 attendees present from 10 different Hospital Medicine groups.

Speaker, Lauren Mendelsohn, MD, SFHM, gave an interactive and engaging presentation on Updates in Hospital Medicine. Following the presentation was Q&A for 10-15 minutes. We had a great meeting and we are looking forward to planning our next. Stay tuned for details to come!