**CCTS Virtual Event SOP Checklist**

**Three Weeks before Event or Program** (*Six weeks for events being promoted beyond the list included in list 1A – listed on page 2.*)

* 1. Secure format details for event (If needed, CCTS Comms can help determine which is the most appropriate platform/host).
  + Personal Zoom Room
  + CCTS Zoom
  + UAB SOM Zoom Webinar
* 2. Set up Zoom registration using the following guidelines:
  + **Registration should capture the following information at a minimum:**
    - First Name
    - Last Name
    - Email Address
    - Career Level
    - Institution
    - College/School
    - Department
    - How did you hear about this event?
      * website, digest, twitter, email invitation, word of mouth, other
* 2. Determine the following:
  + Who will launch the event?
  + Will the event be recorded? If so, who will be responsible for recording the event?
  + Who will moderate questions and the chat (if virtual)?
  + Remember CCTS Zoom best practices:
    - 1. Password protected
    - 2. No waiting room
    - 3. Zoom registration must be in place
    - 4. Automatic email to Zoom registrants, customized with details.
* 3. Fill out the [CCTS Communications Virtual Event Request Form](ttps://uab.co1.qualtrics.com/jfe/form/SV_bkoMpo6aG7cJ2VU).

**One Week Prior to Event:**

* If event requires additional registration beyond Zoom, Event Lead sends a reminder email to the cohort or registration list unless a Marketing Cloud send has been requested from CCTS Comms.

**Day of Event:**

* If event requires additional registration beyond Zoom, Event Lead sends a reminder email to the cohort or registration list, unless a Marketing Cloud send has been requested from CCTS Comms.

**During Event**

* Launch Event at least 15 minutes before start time
* Use CCTS welcome template slide while awaiting event’s start
* Event Lead will coordinate with Jamye Hester to request that she the monitor CCTS inbox for people who can’t get in during the event
* Make sure there's an official welcome (especially helps when trimming down videos).
* If event is being recorded, start the recording!

**Immediately Following Event**

* Send attendee list to CCTS Communications with copy to Ronda Smith
* Send video channel eLearning details to CCTS Communications (to provide greater detail for the video description, if different than what was used for advertising).
  + *CCTS Comms will post video within 2 business days.*
* Upload event recording to Box for CCTS Communications to upload on CCTS Video Channel (alert CCTS Comms to the upload and any edits needed) Box folder: <https://uab.box.com/s/o5edgc2tbyk10y92h7fduf0se2x3bxy2>
* Event Lead to send thank you email to participants including a link to the video recording and an invitation to join other events by visiting the CCTS Upcoming Events page.

***List 1A, Event Automatic Listing Locations:***

CCTS Upcoming Event Page

UAB Campus Calendar of Events

CCTS Digest Event Listing

CCTS Master Calendar (Internal)

***List 2A: Additional Promotional Opportunities:***

Targeted CCTS Email Invitation

UAB SOM Newsletter

Research Matters (UAB Audience)

Get a Handle Newsletter (UAB SOPH)

CLIC (CTSA Audience)

CCTS Site Leads

Trending in Trials Newsletter (UAB Investigators and Teams conducting clinical trials)

Other?