

NAEH STANDARD OPERATING PROCEDURE (SOP)

Confirming Your Speaker in Civi (Marking Your Speaker in CiviCRM as “Speaker-Confirmed”)

NOTE: This process is NOT the same as registration. The Meetings & Events team will follow up with speakers with proper registration instructions once you confirm speakers in Civi.

Full Video Instructions: <https://youtu.be/TRegryByies?si=MsV8PxT3QTm53LIX>

Timestamps:

[00:07](#) Logging into Civi

[00:25](#) Searching for your speaker

[00:57](#) If you find more than one record for a speaker

[01:26](#) Creating a record for a new speaker

[01:54](#) Confirming your speaker

[04:04](#) Cancelling your speaker

1. CHECK FOR AN EXISTING RECORD FOR YOUR SPEAKER

- Login to **CiviCRM**: <https://help.endhomelessness.org/wp-login.php>
- and **search to see whether your speaker has an existing record.**
 - *If you forgot your Civi password, use your NAEH email and select “Lost your password?” to reset it*

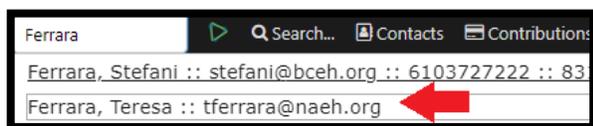
- Select the Civi icon on the left,  then click the search icon in the upper left-hand corner.



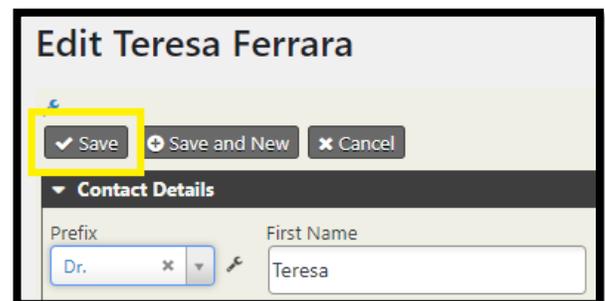
First search by *email*, then try *last name*.

Try searching by any information you may have. **Do not jump to creating a new record without searching first.** Duplicate records cause a lot of confusion. Do your due diligence to find your speaker.

If you find your speaker, select their record and ensure their information is up to date as best you can.



If you need to edit any information, do so at this time by clicking *Edit*. **Be sure to save your changes.**

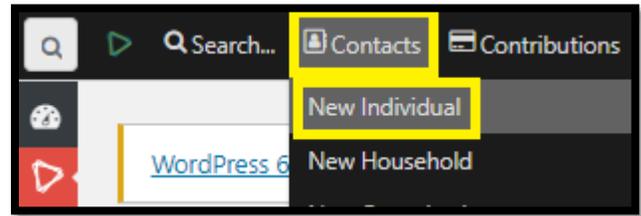


After making any necessary edits (or if you do not need to make edits), skip to Step 3.

If you cannot find your speaker, go to step 2.

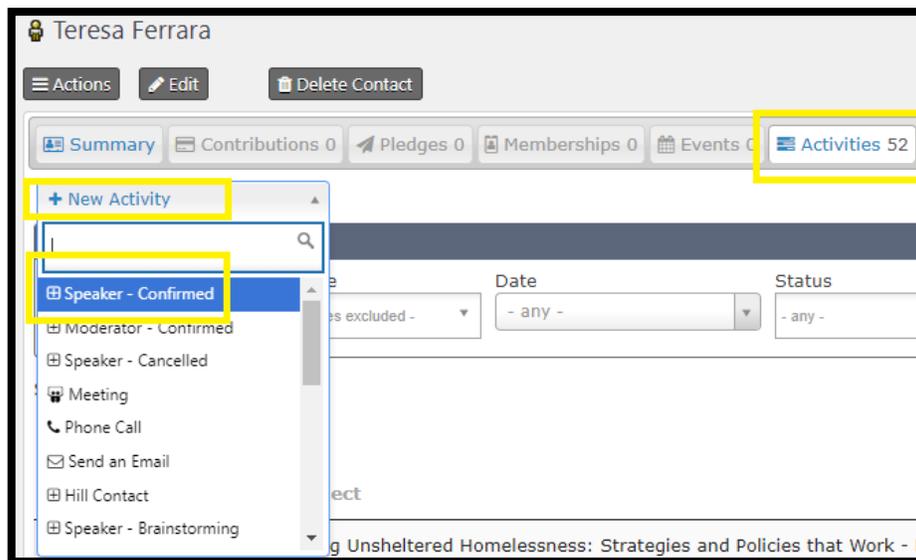
2. CREATE A RECORD FOR YOUR SPEAKER

- **Only if you cannot find an existing record!**
Click *Contacts > New Individual*.
- a. Input as much information as you have. At the very least, their full name and email address.
- b. Click *Save*.



3. CONFIRM YOUR SPEAKER IN CIVI

- Once you're in the speaker's record, click *Activities > New Activity > Speaker – Confirmed*.
(Or, a shortcut is to click *Actions > Speaker – Confirmed*)
 - **If this speaker is acting as a moderator** (solely, or in addition to their speaker duties), please click *Moderator – Confirmed* instead.



- A new window will open. Under *Subject*, fill in the **workshop number and title**, just as it will be listed on the agenda. **Do not use the word “workshop” and remember the “S” before the # if the session is a Spotlight.** NEVER FORGET TO LIST THE **NUMBER**, so even if the title changes, the Meetings & Events Team will list your speaker for the correct workshop.

- **Do not change the date!** Keep it as the current date.

- Click *Save*.

The screenshot shows a CiviCRM form for adding an activity. The title is "Ms. Teresa Ferrara - Speaker - Confirmed". The form contains the following fields and values:

- Added by ***: Ferrara, Teresa
- With Contact**: Ferrara, Teresa
- Assigned to**: - select Contact -
- Subject**: 1.01 Title
- Location**: (empty)
- Date ***: 04/21/2025, 10:16AM
- Duration**: (empty) minutes
- Activity Status ***: Scheduled

A green box highlights the "Subject" field, and another green box highlights the "Save" button at the bottom right. A red box highlights the "Date" field. A note at the top right says "A copy of this activity will be emailed to each Assignee."

NOTE: To **CANCEL** a speaker you’ve already confirmed, do not edit Civi. Just email the events team to let them know. They will update Civi accordingly.

That’s it! But you can also use Civi to search for prospective speakers based on who has spoken on specific topics in the past. [Click here for PDF instructions.](#)