



AMERICAN ASSOCIATION
OF MEDICAL ASSISTANTS®

Chapter Management Guide

(Revised 3/25)

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INITIALISMS

<u>INITIALISM</u>	<u>DESCRIPTION</u>
AAFP	American Academy of Family Physicians
AAMA	American Association of Medical Assistants
AAMAE	American Association of Medical Assistants Endowment
AAMC	Association of American Medical Colleges
AAPC	American Academy of Professional Coders
ABHES	Accrediting Bureau of Health Education Schools
ACS	American Cancer Society
ACCSC	Accrediting Commission of Career Schools and Colleges
ACICS	Accrediting Council for Independent Colleges and Schools
ADA	American Dental Association
ADAA	American Dental Assistants Association
AFC	Association Forum of Chicagoland
AHDI	Association for Healthcare Documentation Integrity
AHIMA	American Health Information Management Association
AMA	American Medical Association
AMT	American Medical Technologists
ASAE	American Society of Association Executives
ASMT	American Society of Medical Technicians
BOT	Board of Trustees
CAAHEP	Commission on Accreditation of Allied Health Education Programs
CASAT	Center for the Application of Substance Abuse Technologies
CB	Certifying Board (AAMA)
CCETF	Conference Continuing Education Task Force (CEB)
CEB	Continuing Education Board (AAMA)
CEU	Continuing Education Unit
CMA (AAMA)	Certified Medical Assistant (AAMA)
CMA-A (AAMA)	Certified Medical Assistant (AAMA) – Administrative
CMA-C (AAMA)	Certified Medical Assistant (AAMA) – Clinical
CMA-P (AAMA)	Certified Medical Assistant (AAMA) – Pediatric
CPC	AAPC-Certified Professional Coder
DOE	United States Department of Education
FSMB	Federation of State Medical Boards
HOSA	Health Occupations Students of America
HPN	Health Professions Network
I.C.E.	Institute for Credentialing Excellence
LEAP	Leaders in Education and Practice
MAERB	Medical Assistant Education Review Board
MARWeek	Medical Assistants Recognition Week
MSC	Management Steering Committee
MWSC	Maxine Williams Scholarship Committee
NACCLS	National Accrediting Agency for Clinical Laboratory Sciences
NCSBN	National Council of State Boards of Nursing
NCCA	National Commission for Certifying Agencies
NCCRT	National Colorectal Cancer Round Table
PMTF	Practice Managers Task Force (CEB)
PSI	PSI Services LLC
RMA(AMT)	AMT Registered Medical Assistant
SACS	Southern Association of Colleges and Schools
SIP	Strategic Issues Planning
SOPPs	Society of Past Presidents
TFTC	Task Force for Test Construction
TPO	Terminal Performance Objective
VLPD	Volunteer Leadership Position Descriptions
WASC	Western Association of Schools and Colleges

GENERAL INFORMATION

The basic organization of AAMA is the local chapter. In densely populated areas, there may be more than one chapter in an area. In sparsely populated areas, local chapters may draw members from more than one county/area.

In conducting business of a local chapter, a copy of all official correspondence should be sent to the chapter president and any other appropriate officer, committee chair, or committee member.

After the election of officers and the selection of committee chairs, a list of their names, addresses, and phone numbers should be promptly sent to the state president and to the AAMA Executive Office. *This is extremely important.* Keeping mailing lists up to date is the only way of maintaining effective communication.

The Order of Business as given in the official parliamentary authority, or the bylaws should be followed at a regular meeting. However, the order of business may be changed to accommodate the program speaker.

Presiding officers should conscientiously request that all state and national communications be read at the next meeting following receipt of such correspondence.

THE FORMATION OF A NEW CHAPTER

Before an organizational meeting can be set up, you must have people who are interested and willing to work on establishing the new chapter. They can be secured by word of mouth, email, or letter (*see sample form letter*). The Membership Department at the executive office in Chicago can provide the organizational committee with the names of AAMA members-at-large, email addresses, mailing labels, AAMA bylaws, a chapter management guide, AAMA fact sheet, organizational chart, membership, and certification materials.

When preparing for an organizational meeting a motivational letter (sample follows) should be sent to medical offices throughout the county or area. The letter should be routed to the medical assistants of the office. One-week later telephone calls to the same offices should be made using the points to cover that have been provided.

After talking to prospective members and ascertaining their interest, arrangements can then be made for a preliminary meeting between interested parties and representatives of the state society and/or AAMA.

I. Preliminary Meeting

- A. Discuss the objectives and benefits of the AAMA.
- B. Give the details of what will be expected at the organizational meeting (*see "II. Organizational Meeting"*).
- C. Decide on a date for the organizational meeting. It should be within two weeks of the preliminary meeting.

- D. Publicize the organizational meeting.
 - 1. Request that the medical society notify the physicians in the area.
 - 2. Send out letters to interested medical assistants and area schools that have medical assisting programs.
- E. Elect a temporary chair and secretary from among the assembly to lead the organizational meeting.
- F. Appoint a committee to draft tentative bylaws which will be voted upon at the organizational meeting (*see sample bylaws*).
- G. Appoint a nominating committee to prepare a slate of officers to be elected at the organizational meeting.
- H. Get a key group to begin making a list of possible projects for the new chapter to undertake that will attract and challenge new members.

II. Organizational Meeting

- A. The temporary chair is the presiding officer and calls the meeting to order, explains the objectives and purpose, and gives a brief history of the AAMA.
- B. A poll should be taken to determine how many present are interested in affiliation with the AAMA.
- C. The appointed committee will now present the proposed bylaws, making sure that everyone has a copy. Each section should be gone over and discussed with the group.
- D. After discussion, a vote is taken to adopt the bylaws.
- E. After the bylaws are adopted, a recess is called for the purpose of enrolling members on a permanent record sheet. By signing this permanent record sheet, members agree to abide by the bylaws and pay dues promptly. These members will be the charter members of the new chapter.
- F. Following the bylaws just adopted and *Robert's Rules of Order, Newly Revised* (or the most current edition), the election of officers is the next order of business. The voting body is made up of the charter members.
- G. The nominating committee presents its slate of candidates, and the presiding officer calls for nominations from the floor.
- H. Voting should be by ballot as outlined in the bylaws. Three tellers should be appointed to count these ballots.
- I. The head teller hands the report to the presiding officer after reading it to the membership. The presiding officer declares the results and steps aside to allow the newly elected president to become the presiding officer.

- J. The new president presents possible goals, plans, and projects the group may wish to consider.
- K. The treasurer should start a new account in the chapter's name at a local bank and begin keeping accurate records of income and expenses.
- L. Before adjourning, the assembly should vote on the next and future meeting dates if this was not provided by the bylaws.

III. Board Meeting

- A. Shortly after the organizational meeting (preferably within two weeks), the president should call a board meeting of the officers and chairs of all committees that they have appointed.
- B. The president should present each officer and chair with an outline of duties and instruct each to report progress to date at all board meetings.
- C. Special emphasis should be placed on the responsibilities of the Program Committee because its job is to develop programs that fall within the Role Delineation Study or the advanced practice of Medical Assisting Document and will qualify for CEUs.

IV. Legalities

To secure the approval of the state society, it will be necessary to contact the current state president regarding the proper procedure. Usually the procedure includes:

- A. A letter requesting affiliation with the state society addressed to the president.
- B. Copies of chapter bylaws are sent to the
 - 1. State president, along with a letter requesting state affiliation
 - 2. State recording secretary (for file)
 - 3. State bylaws chair and members
- C. Some state societies may request a letter of support from the county or local medical society.

The state society will notify the chapter when its bylaws have been accepted. If there are areas of conflict with sections of the state or national bylaws, the local chapter may be given provisional approval, with the understanding that the chapter must bring those areas into compliance. The state society will then notify the AAMA Executive Office of the official name of the new chapter. The state will prepare a charter for the new chapter and will notify the chapter when the charter will be presented to the new chapter.

V. Installation

After the election of officers, an installation should be planned. The president of the state society or their representative is an ideal choice to install the new chapter officers. Presentation of the charter may be made at this installation, though many states and chapters prefer the presentation to take place at the next state convention when greater recognition can be given to the new chapter.

THE FORMATION OF A NEW CHAPTER WITHIN AN ORGANIZED COUNTY/AREA

In large cities and counties, it is sometimes an advantage to have more than one chapter in the county/area. The same procedure is followed in organizing a second, third, or fourth chapter within a county/area with some additional considerations: make sure there is no regulation in the state bylaws that prohibits multiple chapters within a given area; and make sure there are no stipulations in the state bylaws that would immediately cause the new chapter to be in conflict with a higher authority.

The organizing chapter should keep the state president informed of organizational progress. The formation of a new chapter may affect other chapters in the area, and a courteous, straightforward approach is essential.

In an organized county, a member may transfer to a new chapter if it is more conveniently located to home or employment. Members of one chapter might assist in organizing an additional chapter in an area where it would promote membership and activity in medical assistant organizations.

OBTAINING A CHARTER FOR A LOCAL CHAPTER

Most states present a charter to new local chapters after all requirements for state and national recognition have been met. This state charter is a certificate affirming the affiliation of this chapter with the state society and the AAMA. The charter is usually presented at the annual meeting of the state or at the first installation of permanent officers of the new chapter.

Any chapter wishing to incorporate as a not-for-profit association should write to the office of the Secretary of State in that state for the exact procedure.

THE LOSS OF A STATE ASSOCIATION CHARTER

A local chapter may lose its charter because of failure to comply with state and/or national bylaws requirements. If a local chapter becomes inactive for a time, all official papers including the charter are to be returned to the state president or recording secretary and retained in the permanent files.

Only one charter is issued to a local chapter by a state association. If a local chapter loses its charter by revocation, resignation, or inactive status, it is no longer entitled to be represented in the delegation at the state annual meeting. However, an individual member may request to continue as a member-at-large of the state society.

State bylaws will usually contain the procedure for revoking the charter of a local chapter.

SAMPLE LETTER TO MEDICAL ASSISTANTS

For Those Who Might Be Interested in Establishing a New Chapter

Dear Medical Assistant,

We are writing you in the hope of getting your support for the establishment of a new chapter in our area of the American Association of Medical Assistants® (AAMA). This premier organization for medical assistants is dedicated to providing continuing education for its members.

You are no doubt successful at your job and dedicated to your profession. However, if you are like other medical assistants, you feel the need to improve yourself in your diversified profession.

You may have had some formal training as a medical assistant, but there is a great likelihood that your training is a combination of formal education, experience, and independent study. Just as the physician must constantly study to keep up with the progress in medicine, you, too, must keep up to date in your administrative and clinical techniques.

If you are a CMA (AAMA)®, then you know that in order to remain current you must recertify every five years by continuing education or re-examination. The formation of a new chapter will allow you ready access to AAMA-approved continuing education units making recertification a much easier process.

The AAMA benefits from the close cooperation and support of the American Medical Association and its component state and county medical societies. Ours is the only medical assistants organization to have been granted official observer status by the AMA House of Delegates.

When we succeed in forming this new chapter, your AAMA membership will provide you with the opportunity and stimulation you will need for your professional growth and job satisfaction, make you a more valuable employee, and make you of greater service to your community. Membership will also provide you with networking opportunities with other dedicated professionals, such as yourself, throughout our area, state and even across the nation.

DON'T PUT THIS LETTER ASIDE! Do something about joining now. Call or write the address above today! We are scheduling an organizational meeting and we would like to have access to your skills and knowledge in forming this new chapter.

Sincerely,

POINTS TO COVER WHEN MAKING TELEPHONE RECRUITMENT CALLS

Introduce yourself and explain that you are calling about starting a new chapter of medical assistants in your area. Ask if they received the letter that was sent to their office.

1. Explain the purpose of the AAMA.

- a. Promotion of the medical assisting profession through certification and education
 - b. Protection of the medical assistants' right to practice
 - c. Networking opportunities available with other medical assistants in your area
2. Give date, time, and place for organizational meeting.
 3. Ask for an email address or fax number to send a flyer with all the meeting details.

SAMPLE LETTER TO PHYSICIANS

Dear Dr. _____,

This letter is about the American Association of Medical Assistants® (AAMA). The AAMA is the professional organization for medical assistants—your office employees, both administrative and clinical. It is organized on a national, state, and local basis, just like the American Medical Association and its state and county affiliates.

As a physician, you are aware of how important continuing education is in the constantly changing field of health care. The main purpose of the AAMA is to provide and encourage educational opportunities for medical assistants so that they can grow professionally, become more skilled and valued employees, and have greater job satisfaction.

The AAMA also sponsors and supports the CMA (AAMA)®, which is a professional credential awarded to medical assistants who have successfully passed the CMA (AAMA) Certification Exam. These medical assistants have graduated from medical assisting programs accredited through CAAHEP or ABHES. PSI Services LLC serves as test consultant for the examination.

An application form for membership for your medical assistants in the AAMA is enclosed. It may be photocopied for more than one employee and is also available on the AAMA website (www.aama-ntl.org.) Members joining online between July 1 and October 31 (midnight) are offered an additional dues discount with membership for the remainder of the current and all of the following year. Employers find that paying AAMA membership dues for their employees is a very cost-effective way of insuring that they have medical assistants who have ready access to educational opportunities that will enhance their value as employees.

An organizational meeting for a new local chapter of the AAMA is being planned in your area. A separate mailing has been sent to the medical assistants you employ.

Please encourage your medical assistants to learn more about the AAMA by attending the organizational meeting. You won't regret it!

Sincerely,

CHAPTER PRESIDENT

The president presides at all meetings of the general membership and board of directors, appoints all committees except the nominating committee, and is an ex-officio member of all committees except the nominating committee. The president also represents the chapter at all state and other functions.

They should be familiar with parliamentary procedure and *Robert's Rules of Order Newly Revised*, most current edition, and be comfortable asking for guidance from the parliamentary advisor. The president, however, does make the final ruling.

They appoint a parliamentary advisor and any other appointed officers in accordance with the bylaws and with the approval of the board of directors and fills all vacancies of committee chairs and all board members except the president-elect or vice president. Should the office of president-elect or vice president become vacant, a special election may be held, or the office remains vacant until the next annual meeting in accordance with the bylaws.

The president appoints all committee chairs as outlined in the bylaws and any special committees as directed by the general membership with the approval of the board of directors.

They may attend committee meetings as an ex officio member, except the nominating committee, but is not required to attend. However, the committee should keep the president informed of its activities and progress on all projects.

They prepare a packet of general information for the members of the board of directors at the beginning of the year. This packet should contain the names, addresses, and contact information of each officer and committee chair. It should also contain an outline of the duties of each officer/committee chair to assist the member in fulfilling these duties. A copy of the chapter bylaws and policy manual should be included.

The president should send copies of all appropriate correspondence to the officers so they will be informed of all activities involving the chapter.

They should prepare an agenda for each meeting. Ideally, a copy of the agenda should be available to all members attending the meeting. If this is not possible, copies of the agenda should be given to all officers and the parliamentary advisor.

The president should attend the chapter presidents' meeting at the state meeting, if held, and, if possible, attend the state board of directors meetings so they will be fully informed about the state activities.

The president should prepare a calendar of events and deadlines for the year and keep all officers and committee chairs informed of all activities.

They should be able to co-sign all checks for the chapter.

They should transmit a list of officers to the state and AAMA Executive Office at the close of the meeting at which officers are elected.

The president should verify that an audit of the chapter financial records has been done and will be presented at the next meeting following the close of the fiscal year. The president should verify that all tax returns required by the IRS (if any) have been filed on time.

They appoint tellers for the meeting at which elections are held.

They submit a report of chapter activities to the state at least annually and verifies that all other officers and committee chairs have also prepared their reports and forwarded them to the state by the deadline set by the state (optional according to state bylaws).

The president also verifies that the bonding of the president and treasurer has been obtained and paid.

They establish procedures to build and maintain the chapter through membership recruitment and strategic planning.

SAMPLE AGENDA

_____ CHAPTER OF MEDICAL ASSISTANTS

Place:

Date:

CALL TO ORDER Time

INVOCATION

ESTABLISHMENT OF A QUORUM

READING AND APPROVAL OF MINUTES

CORRESPONDENCE

TREASURER'S REPORT

OFFICER REPORTS

 President

 President-Elect

 Vice President

 Secretary

 Treasurer

 Immediate Past President

STANDING COMMITTEE REPORTS *(placed in alphabetic order)*

 Budget and Finance

 Bylaws

 Certification

Education

Membership

Program

Publicity

Public Policy

Ways and Means

SPECIAL COMMITTEE REPORTS

UNFINISHED BUSINESS

NEW BUSINESS

ANNOUNCEMENTS

ADJOURNMENT Time:

SAMPLE SCRIPT FOR THE CHAIR

Call to Order: Rap the gavel one time. “The meeting of the _____ Chapter of Medical Assistants will please come to order.”

Invocation: Recognize the Chaplain or designated individual to give the invocation.

Medical Assistant Creed: Recognize the individual assigned to lead the reading of the creed by the body present.

Quorum: After verifying with the secretary or credentials chair, announces that a quorum is present. If a quorum is not present, the president announces that no business can be conducted and adjourns the meeting unless bylaws provide another option.

Reading and Approval of Minutes: “The secretary will now read the minutes of the last meeting.” The secretary then reads the minutes unless the minutes were distributed to the membership, in which case the president says, “The minutes of the last meeting were provided to the membership. Are there any corrections to the minutes?” After a pause, “May I have a motion to approve the minutes as presented (corrected)? Is there a second? Are you ready for the question? All those in favor say aye, opposed nay. The minutes are approved as read (or circulated) or as corrected.”

Correspondence: “Will the secretary please read any correspondence?” The name of the author is read before the body of the correspondence. The entire document does not need to be read but may be summarized. Any correspondence that requires action of the membership will be addressed under new business.

Treasurer’s Report: “The treasurer will now give the financial report. [The treasurer reads the beginning balance on hand, total income, total expenses/distributions, and current balance on hand only]. Are there questions of the treasurer? This report will be filed for audit.” It is appropriate at this time to ask for any non-budgeted bills to be presented for approval. “The following bills have been submitted for approval. The chair will entertain a motion regarding these bills.” A member should then move to either pay or deny payment of the bills. Any budgeted item does not have to be brought before the membership and payment can be approved by the president.

Officer and Committee Reports: The chair calls for the officer and committee reports. Each officer, including the secretary, should report their activities since the last meeting. The minutes are not the report of the secretary but represent the events and business of the meeting. After each report, the chair states, “The report of the _____ will be filed for reference.”

Unfinished Business: This is no longer referred to as “old” business. The president does not call for unfinished business since they will know from the minutes of the last meeting any items that were not completed. The chair states, “The next item of business is _____.”

New Business: After the chair addresses any new business on the agenda, they then asks the membership, “Is there other new business to come before the membership?”

Announcements: The chair now makes all announcements of which they has knowledge then asks the membership, “Are there any other announcements?”

Adjournment: A motion to adjourn is not necessary but a member may move to adjourn. This motion requires a second and a majority vote and is not debatable. The chair, however, may state “If there is no further business and no objection, the meeting will adjourn.” After a pause, the chair then states, “This meeting is adjourned.”

TIPS FOR A SUCCESSFUL MEETING

There are some basic requirements for conducting a successful meeting:

- Begin and end the meeting on time.
- Prepare and distribute an agenda.
- Be familiar with and have present current copies of the chapter, state, and AAMA bylaws.
- Be familiar with and have presented a copy of *Robert’s Rules of Order, Newly Revised* (or the most current edition) or some other appropriate parliamentary reference book.

Beginning and ending the meeting on time will do more for the general morale of the members than can be measured. If the agenda is prepared in advance, the items will be in the correct order and the members will know which items are scheduled for discussion and will be prepared to express their views in a more orderly manner. It is imperative to be familiar with the bylaws of all three levels of the AAMA and have them available for reference during a meeting. While it is important for the presiding officer to have a

working knowledge of parliamentary procedure, it is far more important that the meeting be conducted with fairness to all members.

It is the responsibility of the presiding officer to keep the discussion focused on the agenda item being considered. If an item of business cannot be resolved in a reasonable length of time, it should be referred to a committee for further consideration and brought back to the next meeting.

The president may prepare a script for their use at the meeting if this would assist him/her in conducting a successful meeting.

CHAPTER PRESIDENT-ELECT/VICE PRESIDENT

Not all chapters have a president-elect, so the duties of this offices with the vice president are usually interchangeable or defined by the chapter bylaws.

If the chapter does have a president-elect, this officer will automatically assume the presidency at the close of the last meeting of the chapter year if the bylaws so provide. If there is no president-elect, the bylaws usually provide that the vice president will automatically assume the presidency at the close of the last meeting of the chapter year. The reason for this automatic assumption of presidential duties is to provide for continuity of chapter activities, ideals, and goals. Their year will be a period of training and preparation and should be used wisely. This officer should attend all general membership and board meetings as part of the preparation for the upcoming year. They may ask to attend by invitation all committee meetings except the nominating committee. Remember that the vice president must be ready to assume the office of the president should an emergency or vacancy arises so they must be as knowledgeable as the president of all chapter activities.

Duties (as defined by your bylaws) may include being the chair of the program committee and appointing the parliamentary advisor, any other appointed officers, and committee chairs for the upcoming year.

This officer should become familiar with chapter bylaws, parliamentary procedure, and *Robert's Rules of Order, Newly Revised* (or the most current edition).

If the bylaws provide, they shall accompany the president as the official chapter representative at the state's annual meeting.

They select the location for the installation of officers, the theme of the installation, and the installing officer, and prepare an orientation of the new board members for a smooth transition of leadership (optional according to chapter policy).

RECORDING SECRETARY

The recording secretary should have a good knowledge of correct grammar, punctuation, and spelling. They should also have a working knowledge of parliamentary procedure to ensure that the minutes do record the business of the chapter as its history.

The recording secretary should attend all meetings of the chapter and board of directors. The minutes of these meetings shall be kept in separate record books. They should be the custodian of all record books and papers belonging to the chapter.

If they are unable to attend a meeting, they should notify the president as soon as possible so the president can make arrangements for a secretary pro tem. The recording secretary should obtain the minutes of the missed meeting and present them to the general membership and/or board of directors at the next regular meeting. These minutes are to be maintained in the permanent record of the chapter.

The minutes should include the headings listed on the agenda; include all motions and results of action taken. Minutes should be as brief, and sentences should be concise. Each subject matter should be typed into a separate paragraph. The secretary's opinion is never recorded in the minutes. Minutes are a recording of the business conducted during the meeting, not decisions made after the adjournment of the meeting such as a change to a future meeting date.

The recording secretary should send the minutes of the previous meeting to the board for review prior to submission to the membership or for publication in accordance with the bylaws and make any corrections necessary. After the approval/correction, the date should be entered at the end of the minutes and the minutes are then filed in the permanent record of the chapter.

The minutes should be sent to the president within the period stated in the chapter's policy manual. If there is no policy manual, the usual time is ten (10) working days after the meeting. Ideally, the minutes should be sent to all members of the executive board. Minutes of the chapter meetings should be sent to all members of the chapter.

In some instances, the minutes contain the names of the people present for the meeting. However, the more common method is for the recording secretary or credentials chair to maintain a roll book or a sign-in log as a record of those in attendance. This also eliminates the necessity of listing those in attendance in the minutes. The roll book/sign-in log should become a part of the permanent record of the chapter.

If the president and vice president are absent at a meeting, the recording secretary calls the meeting to order and presides at the election of a chair pro tem for the meeting.

Corrections to the minutes are noted in the margin, initialed, and dated at the time changes are made.

It is suggested that the Secretary be provided a copy of the AAMA Guidelines for Chapter/State Secretary which includes general information about minutes and samples of formats for minutes.

CORRESPONDING SECRETARY

(Optional)

In very large chapters, it is sometimes necessary to have a corresponding secretary. The duties of this position are to assist the president and other officers with handling the chapter's correspondence.

The corresponding secretary reports briefly on the correspondence sent in the name of the chapter and reads any correspondence received that requires action by the chapter. It is not necessary that every piece of correspondence be read but only a brief summary of the correspondence is reported.

All correspondence sent on behalf of the chapter is typed on official chapter letterhead using proper sentence structure and form. The correspondence should not contain any misspelled words or other errors since it is a reflection on the chapter itself. The corresponding secretary may sign letters with their title, indicating they have written on behalf of the chapter. The president may wish to sign these letters themselves. Personal comments should not be included in letters written on behalf of the chapter.

Copies of all correspondence should be sent to the members of the executive board and chairs of any committees mentioned in the correspondence.

A permanent file of all correspondence should be maintained.

The corresponding secretary usually writes the official thank-you from the chapter to all speakers at the general membership meeting.

If there is no need for a separate corresponding secretary, the recording secretary performs these duties.

If appointed, the corresponding secretary serves without a vote at all executive board meetings.

TREASURER

The treasurer has an important role in the chapter. They are required to keep accurate financial records of income and disbursements of all monies in the chapter's name. They should, therefore, be adept in bookkeeping and knowledgeable of the federal and state tax regulations of non-profit organizations, especially if the chapter is incorporated.

It is recommended that a bond be purchased by the chapter for the chapter treasurer. This bond should cover all persons authorized to sign checks. The authorized persons bonded should be stipulated in the bylaws and/or policy manual.

They should attend all meetings of the general membership and board of directors and may also serve on the budget and finance committee. In some chapters, the treasurer serves as the chair of the budget and finance committee. The bylaws should state the treasurer's position on the budget and finance committee.

The treasurer will receive and deposit all monies of the chapter and pay all invoices by chapter check or credit card upon approval of the president and/or board of directors. They should not pay any invoice that is not budgeted until the invoice has been approved by the membership for payment. Payment should only be issued after submission of expense voucher and receipt for budgeted and non-budgeted expenses.

They should present a financial report at the monthly meeting of both the board of directors and the general membership. This report should be copied to all members of the board of directors. Financial records should be kept current and available for audit according to chapter bylaws and/or policy manual.

Verbal reports should only include beginning balance on hand, total income, total expenses/distributions, and current balance on hand.

The treasurer should be prepared to work on the books regularly so these records will be both accurate and current. The bank statement must be reconciled monthly.

All tax returns (if any) must be filed by the specified deadline as necessary.

Other tips include:

1. Never use correction fluid to correct errors. Instead draw a single line through the error and write the correction above.
2. Always use ink.
3. Never make checks payable to cash.
4. Do not use a miscellaneous category.
5. Try not to void checks.
6. Be sure to number and title pages and entries in the ledger book.

After the installation of the new officers, be sure the books have been audited before accepting them from the previous treasurer. The treasurer should be present at the audit to provide information only.

One of the first functions of a new chapter treasurer is to secure a checking and/or savings account for the chapter. This should be done following the election of officers so there will not be a delay in depositing checks and in paying chapter debts. Should the chapter wish to continue using the same checking account, the bank would require a resolution stating which date the new officers were elected and their names. Signature cards signed by the officers entitled to sign checks should be given to the bank promptly. A copy of the signature cards be maintained in the treasurer's files.

Each chapter should secure a federal tax identification number and not use the state society number or social security number of any member. Form SS4 from the Internal Revenue Service (IRS) can be obtained from the bank or the IRS and is simple to complete. After filing with the IRS, the chapter will receive an identification number that should be used on all its bank accounts. This notification should become part of the permanent record of the treasurer.

The accounts which best serve the chapter's interest should be opened with the chapter's approval. The minutes should reflect the type of accounts authorized, the number of accounts authorized, the number of signatures required for withdrawals, the number of persons authorized to sign, the officer who will usually sign for withdrawals, and who may sign during the unavailability of the usual signatures.

The following types of checks are usually available to non-profit organizations:

1. One-signature check which can be signed by the treasurer or the president. In this case, a voucher system should be used so that approval is obtained first from an officer other than the one signing the check before the check is issued.

2. Two-signature check which is signed by two out of three or four officers authorized to sign checks. This is usually the president and the treasurer. Under no circumstances should one person sign one or more blank checks leaving the second person to fill in the payee, amount, etc. If this is done, the check becomes a one-signature check and the purpose of having two signatures is negated.

A bank will usually require the federal tax identification number, a copy of the bylaws, the resolution authorizing the opening of the account, etc., and signature cards to open a new account.

It is recommended that a blanket or individual bond be purchased by the chapter for, at least, the chapter treasurer. It is also a good idea to have the bond cover all persons authorized to sign checks. The cost for a bond is usually reasonable and may be purchased for all officers as managers of the chapter funds.

This should not be construed to imply any dishonesty but as a recognition that monies can be stolen enroute to the bank, get lost in the mail, or through some other human error, the chapter needs protection and usually the ones who are covered under the bond will feel better because of this insurance coverage.

The treasurer should be bonded as well as any other person authorized to sign checks in the chapter's behalf. The number of authorized persons should be stipulated in the bylaws and/or policy manual.

The amount of insurance coverage should reflect the amount of annual cash flow, not just the average bank balance. Monies from things such as dues, seminars, and fund-raising projects reflect some of this annual cash flow. If the bond covers individuals, then the insurance company needs to be notified annually of the names and addresses of those authorized to sign checks and/or withdraw money from the bank. If the bond covers the position, the insurance company does not need to be notified when officers change. There may be a premium discount if the bond is purchased for a multiple year period.

It is suggested that the Treasurer be provided a copy of the AAMA Guidelines for Chapter/State Treasurer, which includes information about reports and budget preparation.

PARLIAMENTARY ADVISOR

The parliamentary advisor should be knowledgeable about the general principles of *Robert's Rules of Order, Newly Revised* (or the most current edition) and the chapter bylaws. They are an advisor to the president and the members on points of parliamentary procedure.

They give clarification on parliamentary matters when requested by the president or members, but the final decision rests with the president.

They serve, without vote, at the general membership meeting, board of directors and executive board meetings.

They are available for assistance and instructions to the election tellers and monitors the vote tally.

IMMEDIATE PAST PRESIDENT

The immediate past president is a member of the executive board and the board of directors and acts as an advisor to the president.

They may be assigned various duties in the bylaws but the most common are parliamentary advisor, coordinator of installation banquet, bylaws, historian, or program director.

CHAPLAIN

(Optional)

The chaplain is appointed by the president and is responsible for delivering invocations and benedictions, usually at the opening and closing of meetings, banquets, and other events. He/she may also be asked to deliver a memorial for a member who has died. Other duties may include phone calls, cards, flowers, etc., at the discretion of the president and/or policy manual.

HISTORIAN

The historian is appointed by the president for the purpose of keeping a pictorial and narrative history of the chapter's activities. Most chapters have more than one history book so one may be presented to the president at the end of their year, one presented to the state society for its records, and one kept for the chapter as a permanent record. In some cases, the state society will request that only clippings, pictures, etc., be sent to the state historian to be included in its history book. In this case, the chapter historian should comply with the state's wishes and would not need to maintain a third history book for presentation to the state at the end of the year. Some state societies present an award at the annual meeting to the chapter with the best history book.

The history book includes newspaper clippings, invitations to chapter functions, pictures, programs from chapter events and installation of officers, etc.

A budget should be set by the chapter for the history book and the historian should submit vouchers for covered expenses as well as a final report of expenses at the end of the year.

An alternate should be appointed for the historian in case of an illness or emergency.

FINANCIAL AUDIT COMMITTEE

A yearly audit of financial records is essential for good business practice in any organization to see that the chapter finances are in order.

The audit committee is appointed by the president and should consist of no less than three (3) people. The president and treasurer should not be members of this committee.

The books should be audited, and the audit complete within 30 days of the chapter's fiscal year end.

The committee must have access to the checkbook register, all cancelled checks, bank statements, income and expense ledgers, all receipts for interest paid on investments and all financial statements for the year to be audited.

1. Bank deposits must total the same as the income recorded in the ledger.
2. Checks written must total the amounts shown as expenses in the ledger.
3. All voided checks must be accounted for.
4. The beginning balance plus deposits minus checks written should equal an ending balance that coincides with the balances shown on the financial reports.
5. Bank charges and interest income must be accounted for.

It is recommended that each committee member do an independent audit and then meet to finalize its findings and complete the audit report together. A written report and a final financial report should be prepared with the results of the audit and any recommendations and/or suggestions. All discrepancies must be explained and resolved. This report is presented to the general membership for adoption.

The incoming chapter president and treasurer should not accept the signature cards and the books until the audit report is finalized and, ideally, accepted by the executive committee of the board of directors.

The audit committee should indicate the areas where the budgeted amounts were not met or were exceeded.

Be sure that the books are closed on the last day of the chapter's fiscal year and that no deposits were made, or checks written after this date.

SAMPLE AUDIT REPORT

INCOME:

Dues	250.00
Ways and Means	1000.00
Donations	100.00
Interest Earned	75.00
Seminars	<u>1500.00</u>

Total Income	\$2925.00
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EXPENSES:

Postage	200.00
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Ways and Means Projects	750.00
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Delegates Expenses	425.00
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Gifts	75.00
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Stationery	250.00
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Printing	250.00
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Educational Materials	500.00
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Publication	400.00
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Bank Charges	<u>50.00</u>
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Total Expenses	2900.00
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Difference between Revenue and Expenses	25.00
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Fund Balance Beginning of Year	2000.00
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Fund Balance End of Year	2025.00
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Investment	5000.00
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Total Cash Available as of last day of fiscal year	\$7075.00
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BUDGET PREPARATION

Each chapter must have an operating budget in order to ensure that monies are spent for the benefit of all members. The budget should be approved at the beginning of each chapter's fiscal year. The general membership should have the opportunity for input into the raising and spending of chapter monies with a majority vote determining these issues.

The treasurer should be the chair of the budget committee. The committee should consist of no less than three (3) members. The previous treasurer, as well as previous budget committee members, should be asked for input. The budget committee should begin to meet and formulate a budget for the upcoming year at least 2–3 months before the beginning of the new fiscal year. In preparing the new budget, members should have available to them previous year's records which should include the audited treasurer's books as well as reports of all fundraising activities (cost vs. revenue) and all expenses of the chapter for the previous year. The committee needs to have available all projected costs for the upcoming year to determine the actual amount of monies needed to keep the chapter fiscally secure.

The budget committee needs to keep a realistic viewpoint in determining the monies that will permit the officers to pay expenses for chapter functions throughout the year. Not all chapters will require the same amount of funds to operate. This will be determined by the chapter bylaws which direct the expenses for which the chapter is responsible.

Once the budget has been prepared, it is presented to the Board of Directors and membership for review. The time period for review before approval by vote should be specified in the bylaws. After final approval of the chapter members, the business of the chapter should be able to be conducted without returning to the membership for expenditure approval. The budget can be amended during the year by a majority vote of the membership should a fiscal shortage occur or a special expenditure not in the budget need approval.

Part of the responsibility of the chapter treasurer is to keep the chapter officers updated at all times on the bank balances, income and expenses compared to the budgeted amounts. This will allow for adjustments as they are necessary and keep the chapter fiscally sound. This information should be reported by the treasurer as a part of their report at the regular meetings of the membership. The treasurer should be able to produce a copy of the budget, a copy of all bills that have been presented and paid and any other information necessary to substantiate any income or expense that affects the chapter budget should the executive board or general membership have a question.

A sample budget format follows. Remember this is just a guideline since all chapters will differ in their income and expense items. It is important to remember when using this format that revenues and expenses are determined by chapter locations, community support and resources. Not included on this sample is reserve fund amount. Some chapters do designate a specific amount (\$100–\$200) for reserve. This amount is then listed on the treasurer's report as a reserve amount and would not be used except in cases of extreme necessity.

Chapter officer expenses and chapter committee expenses should be minimal, with the exception of the publication/social media or website, membership and public relations committees. These will require monies for postage, printing, and special recruitment activities. Stationery needs (e.g., letterhead, envelopes) should be a chapter expense and all officers and committee chairs should be supplied from this one expense. Expenses for travel and accommodations for officers should be dictated by the chapter bylaws. Not all chapters are financially able to reimburse for total expenditure but make allowances for partial reimbursement. Each chapter will need to determine its fiscal ability and then determine what requirements/reimbursement will be allowed for its officers.

It is a good idea to review the finances of the chapter for the last three years to serve as a guide for averaging income and expenses. Consider the following carefully during the preparation:

Income

- What has the average income from dues been over the past three years? Or what do you anticipate the dues income to be? Has there been a yearly increase, decrease or stabilization?
- If there are donations, are the amounts about the same and consistent?
- Do you have successful ways and means projects that bring in revenue every year?
- Do you have an interest-bearing checking account?

Expenses

- Average cost of general expenses, supplies, postage, gifts.
- Costs for educational sessions, speakers, and materials.
- Publication expense.
- Bank check charges and/or service charges.
- Delegate expense.

SAMPLE BUDGET

INCOME:

Dues	250.00
Ways and Means Project	1800.00
Donations	100.00
Interest Earned	<u>25.00</u>
Total Income	\$2175.00

EXPENSES:

Postage	200.00
Publication	625.00
Ways and Means Project	200.00

Membership	200.00
Stationery	200.00
Printing	200.00
Delegates Expenses	400.00
Public Relations	<u>150.00</u>
Total Expenses	\$2175.00

BYLAWS

Bylaws are the guidelines by which the organization operates. Chapter bylaws must be in compliance with the bylaws of the constituent society, and both must be in compliance with AAMA bylaws.

The required articles to be included in any bylaws are name of the organization, objective, members, officers, executive board, committees, meetings, and parliamentary authority. Additional AAMA mandated articles are affiliation, purpose, organizational policy, membership privileges, dues, reciprocity, dissolution, and—for state societies only—representation in the AAMA House of Delegates.

Bylaws contain the rights and privileges of members and are so important that they cannot be changed without prior notice to the members and usually require 2/3 vote of the voting body for adoption.

Bylaws should be clear and concise and should not be restrictive. The chapter may develop a policy manual or standing rules document to outline specific duties and policies that can be changed with a majority vote at any meeting.

Your state society should be able to provide you with a copy of chapter bylaws that have been approved for you to use as a guide in formulating your own chapter bylaws. Sample chapter bylaws are available on the AAMA website and from the AAMA Executive Office for the convenience of a chapter developing or updating its bylaws.

Bylaws should be sent to the state society's bylaws committee for review after they are adopted by the chapter. Any recommendations made by the state for compliance with state and/or AAMA bylaws are incorporated in the chapter bylaws without vote of the membership but are distributed to the membership as information.

The chapter president should appoint a bylaws committee each year to review the bylaws.

A policy manual or standing rules manual may also be developed to outline more specific duties of officers and committees, reimbursement policies, guidelines for correspondence, banquet protocol, etc. Either of these documents may be amended by a majority vote at any meeting. They are intended to expand on the bylaws and may not conflict with them.

CERTIFICATION

The CMA (AAMA)[®] designates a medical assistant who is credentialed through the Certifying Board (CB) of the American Association of Medical Assistants. The CMA (AAMA) credential is awarded by the CB to candidates who pass the CMA (AAMA) Certification Exam and meet all established eligibility requirements. The exam is built to assess the medical assistants' knowledge of entry level medical assisting competencies and ensures that only those candidates competent in the knowledge to perform entry level duties earn the CMA (AAMA) credential.

To be eligible for the CMA (AAMA) Certification Exam, a candidate must be about to complete or have successfully completed a medical assisting program accredited by the Commission on Accreditation of Allied Health Education Programs (CAAHEP) or the Accrediting Bureau of Health Education Schools (ABHES). Visit the eligibility page of the AAMA website for more information: <https://www.aama-ntl.org/certification/eligibility>.

The CMA (AAMA) credential is current for a period of 60 months after initial certification or after recertification. If the credential is not renewed by continuing education or by taking and passing the CMA (AAMA) Certification Exam on or by the last day of the 60-month certification period, the credential is no longer current.

Each candidate achieving certification shall be awarded a CMA (AAMA) digital badge containing links to a printable wallet card and certificate bearing the signatures of the current AAMA President and the current CB Chair with the official seal of the AAMA.

Chapters may wish to form study groups to assist those preparing for the examination. Various study materials are provided on the "Prepare" page of the AAMA website: <https://www.aama-ntl.org/certification/prepare>.

RECERTIFICATION

The CMA (AAMA) credential must be recertified every 60 months to better ensure current competency and knowledge, and thus better protect patients. All CMAs (AAMA) employed or seeking employment must have current certified status to use the CMA (AAMA) credential. Failure to recertify will result in an *expired* status.

A CMA (AAMA) may recertify by obtaining recertification points. Recertification points must address current medical assisting practice and are accepted only for topics and competencies listed on the current *Content Outline for the CMA (AAMA) Certification Exam*, *CMA (AAMA) Occupational Analysis of the CMA (AAMA)*, and/or the *Advanced Educational Topics for Medical Assisting*.

Points are awarded in the general, administrative, and clinical content categories. If a program covers several topics, the points can be divided among the content categories.

Recertification by CE requires a total of sixty (60) points in a sixty (60) calendar month period. The CMA (AAMA) must accumulate points by content category as follows:

- General: 10 points minimum
- Administrative: 10 points minimum
- Clinical: 10 points minimum
- Any combination of the three: 30 points minimum

A minimum of thirty (30) points from the total sixty (60) points must be AAMA-approved CEUs. These AAMA-approved thirty (30) credits can be distributed in any of the three categories. While all sixty (60) recertification points may be AAMA CEUs, a maximum of thirty (30) recertification points may be accumulated from sources other than AAMA CEUs.

AAMA-Approved CEUs

AAMA affiliates (local chapters and state societies) are eligible to submit continuing education programs for AAMA-approved CEUs without a fee by following the instructions found in the *AAMA Program Planners Guide*. Medical assisting directors of schools with CAAHEP- and ABHES-accredited medical assisting programs and other sponsors are eligible to submit continuing education programs for AAMA-approved CEUs for a fee by following the instructions found in the *AAMA Program Planners Guide*.

Non-AAMA Credits

The non-AAMA credit category is designed for educational programs conducted by institutions and organizations who have not received AAMA CEU approval. This category includes contact hours from commercial firms, colleges or universities, medical centers, private contractors and other associations or organizations. These non-AAMA credits must meet the standards for approvable continuing education as outlined in the *AAMA Program Planners Guide* in terms of content and the practice of medical assisting. The recertificant is responsible for submitting appropriate supportive documentation when claiming non-AAMA credits.

A CMA (AAMA) may also recertify by taking the CMA (AAMA) Certification Exam. This method is available for the CMA (AAMA) credential only. Candidates who successfully recertify their credential will receive a digital badge reflecting the new expiration date.

MEMBERSHIP

Every chapter needs to make the new members feel welcome and make them a part of the chapter's activities. If the member does not feel they are an important part of the chapter, they will probably not be motivated to become active on the chapter, state, or national level—so three levels lose. The most important responsibility of the membership committee is promotion of tri-level membership benefits to all members, new and returning, and encouraging them to maintain membership in the AAMA. In order

to do this, the committee must be knowledgeable of these benefits and enthusiastic in promoting membership.

Suggestions

1. Develop a membership brochure for the chapter/state to distribute to prospective members and physicians' offices including:
 - a. Dates and times of meetings
 - b. Promotion of educational programs
 - c. Benefits of certification/recertification
 - d. Availability of insurance (health, accident, disability, malpractice) coverage through the AAMA
 - e. Professional development and recognition as a member of our professional organization
2. Develop a letter to physicians briefly describing the AAMA and the benefits to the members and employers; possibly have this signed by a physician advisor as a sign of support.
3. Contact new CMAs in the area and invite them to meetings (a list is available from the AAMA Executive Office, sent to state president after exam results become available)
4. Order an ample supply of membership brochures and applications.
5. Follow up on all referrals.
6. Assign a veteran, active member to a new member or someone who has become less active.
7. Avoid cliques, which exclude other members—they can be very destructive to the growth of the chapter.

Retention

Membership retention is sometimes harder than recruiting new members. Communication is an important element in understanding the needs of members, meeting those needs and keeping members interested in the organization.

Suggestions

1. Survey members each year to determine needs; include questions pertinent to your chapter/state, topics of interest for CEU credit, meeting times, leadership training, mentoring, etc.
2. Analyze survey results and determine areas for improvement.
3. Support a chapter newsletter.

4. Develop and distribute a membership roster that lists members' addresses, employers, birthdays, etc.
5. Consider recognition awards for professional achievement, long-term membership, etc.
6. Distribute information from the state and national levels.

Obtain the *AAMA Membership Manual* available from the AAMA by calling 800/ACT-AAMA or from the AAMA website.

CHAPTER COMMITTEES

Nominating Committee

The nominating committee is elected by the membership at a society's annual meeting or as designated in the bylaws. This committee usually consists of a chair and two or three members.

The president *cannot* serve on this committee in any capacity.

The duties of this committee are to solicit candidates for the offices of president-elect, vice president, recording secretary, treasurer and any other positions designated in the bylaws. The committee also verifies that each nominee meets the qualifications for office as outlined in the bylaws. It should also be noted that the persons considered for candidacy should be those who possess proven leadership qualities and commitment to the society's goals.

The committee submits a written report to be presented to the membership. It is recommended that the slate of nominees with their qualifications be sent to all society members prior to the election. This gives the members an opportunity to review the candidates and decide on those which will best meet the needs of the society.

A member of the nominating committee may be selected as a candidate for office provided they meet all the qualifications listed in the bylaws.

The president or speaker of the house will ask the chair to read the report to the members and then call for nominations from the floor before the election is held.

Public Policy Committee

The duties of this committee are to keep the membership informed on any proposed legislation, regulations, and court decisions pertaining to the medical assisting and allied health professions.

This committee usually consists of a chair and two members and maintains communication with the legislative state public policy committee chair for the legislative issues.

If there is any significant development affecting medical assistants and other allied health professionals, a report should be given at the state meeting. If necessary, a newsletter may be sent to the general membership.

This committee may also contact AAMA CEO and Legal Counsel Donald Balasa, JD, MBA, at 800/ACT-AAMA with any questions or issues regarding public policy that will have an impact on medical assistants.

Publicity/Public Service Committee

The purpose of this committee is to communicate to the general public the activities of the society, the medical assisting profession, and the benefits of belonging to all three levels of AAMA. Good publicity builds recognition for the organization, educates the general public, and promotes membership. This committee should coordinate publicity efforts with the website and social media committee.

Suggestions for this committee are to advertise the state society conferences and seminars, educational programs, and activities especially during Medical Assistants Recognition Week.

The committee should develop and maintain contacts with the news media, be truthful in the information that is distributed, be positive in the comments given to the press, remain cool and calm when being questioned by the press, and invite members of the press to attend meetings or workshops.

If asked to appear on radio or television, be sure that the AAMA is mentioned in the comments, know the focus of the story and rehearse several times before the appearance, forget the cameras, look at the interviewer, and appear confident and relaxed.

Public service announcements (PSAs) should be sent to the local media outlets and should be free of charge. Always submit AAMA fact sheets with the news releases. Releases should be factual, follow email guidelines or typed, double-spaced, and sent in duplicate. Send a thank you letter after the release is published or posted.

The AAMA Marketing and Communications (MarCom) Department has a variety of resources available to help this committee and they can be contacted by calling 800/ACT-AAMA or emailing MarCom@aama-ntl.org.

Ways and Means Committee

The ways and means committee is responsible for developing and implementing money-making projects throughout the chapter's year in order to supplement the chapter's working capital.

This committee is appointed by the president with the approval of the board of directors and usually consists of a chair and three members.

New projects must have the approval of the board of directors prior to their implementation.

The efforts of the ways and means, education and membership committees should be coordinated so their projects will not interfere but will complement each other.

The most appropriate and professional way for a chapter to raise money is to sponsor a well-organized, well-publicized seminar or workshop. The registration fee should be appropriate for members and higher for nonmembers and should usually generate sufficient income for the chapter for the year.

A full-day seminar or workshop, offering 6 to 7 CEUs will usually cost \$100 for nonmembers and \$50–\$60 for members. The registration fee usually includes the CEU registration fee for nonmembers. Professional profit-making organizations charge more than \$100 per day and are continuing to do good business. Who better to sponsor a seminar for medical assistants than the local AAMA chapter?

Not only can a seminar bring a good monetary reward for the chapter, but it can help recruit members. One way is to offer prospective members the opportunity to join at a reduced rate by applying part of the seminar fee to the membership dues if the balance of the dues is paid within 10 days of the seminar.

Other projects are suggested by this committee for approval by the board of directors. A budget for the project should be presented to the board at the time of presentation. Some suggestions for other projects include the sale of T-shirts, sweatshirts, key chains, cookbooks, raffles (if allowed by your particular state and local laws), and white elephant sales.

IDEAS TO PROMOTE MEDICAL ASSISTANTS RECOGNITION WEEK

Below are suggestions that have been used successfully by other chapters to promote Medical Assistants Recognition Week (MARWeek).

- Blood pressure checks held at shopping malls or other public locations where AAMA members provide free readings. **Note:** Please check with the AAMA Legal Counsel Don Balasa, JD, MBA, at the AAMA Executive Office before making final preparation for blood pressure clinics. In some areas, it may be necessary to obtain a disclaimer for distribution to each person whose blood pressure is checked.
- Have proclamations signed by the mayor. Short press releases along with a photocopy of the proclamation may be used in the newspaper.
- Broadcast spot announcements on local radio stations.
- Submit an article to the county medical society for publication in its newsletter.
- Promote the AAMA's certification program by honoring new CMAs and inviting the press to cover this event.
- Contact companies about including a message on their reader boards.
- Sponsor an open house at a local hospital for nonmembers.

CONFERENCES AND SEMINARS

It is the custom in most state societies to allow the chapters to bid as host of the annual conference and educational seminars. State educational seminars are usually held in the fall and winter. The state will award the hosting of this event to a chapter after a majority vote. The state society will be able to provide you with guidelines for hosting these events. Any questions you may have regarding these guidelines or hosting these events should be referred to the state society President. Often the hosting chapter is allowed

to keep a portion of the profits of the convention or seminars making these functions ideal ways to raise funds for your chapter.

DELEGATES AND ALTERNATES TO THE STATE HOUSE OF DELEGATES

In states where a House of Delegates is held at the annual meeting, chapters will send delegates to represent the members in their local chapter or district.

1. Delegates are elected for a period of one year and must be familiar with the bylaws of the state society and the AAMA.
2. Delegates should review the material presented in delegates packets (mailed or emailed).
3. Delegates should discuss the material with the chapter membership.
4. Delegates need to be familiar with parliamentary procedure as it pertains to the election of officers, amendments to bylaws, the presentation of resolutions and other new business in the House of Delegates.
5. Alternate delegates should be as well prepared as the delegates since they may need to assume the duties of the delegates at any time.
6. Delegates and alternate delegates may be called upon at any time during the annual meeting for any business; therefore, they should be prepared to forego other activities.
7. Delegates represent their chapters when voting at their annual meeting. Decisions should be made based upon the general welfare of AAMA, the state society, and the chapter. Delegates should use their judgment when voting on issues presented.
8. The chapter president and president-elect/vice president are usually the first two delegates. Chapters vote for the additional delegates and alternate delegates.
9. Delegates are expected to attend all reference committee meetings (if held), all business meetings (including the House of Delegates), meeting the candidates and any other meetings, as directed by their chapter.
10. Delegates should report the proceedings of the annual meeting to their chapter at their first chapter meeting following the convention.
11. If an alternate delegate must replace a delegate, the parties involved should contact the Speaker of the House and the credentials committee immediately.
12. If a delegate/alternate is unable to fulfill the responsibilities of the office, they shall reimburse the chapter for any monies given for this assignment.

LEGAL ISSUES OF RELEVANCE TO STATE SOCIETIES AND LOCAL CHAPTERS

Employer Identification Number

To open a checking account or transact other business, a state society or local chapter will often be required to furnish an employer identification number (EIN), also known as a *taxpayer identification number* (TIN). Aside from the practical necessity of having an EIN, the AAMA recommends that each affiliated state society and local chapter obtain an EIN.

An entity need not have employees to obtain an EIN. (The term TIN is therefore more accurate than EIN). A state society may not and should not use the EIN of the AAMA or social security number of a member for any purpose. Similarly, a local chapter should not use a member's social security number or the EIN of its state society.

An EIN can be obtained quickly and easily by filling out and submitting Form SS-4. This federal form can be obtained from an IRS office or website, Social Security office, bank, library, or from certain state or local government offices. Form SS-4 is not difficult to complete, and there is no fee for submitting the form. An EIN can also be obtained via an 800 number and the internet. If there are any questions about how to complete the form, please call CEO and Legal Counsel Balasa at the AAMA Executive Office or email DBalasa@aama-ntl.org.

Federal Income Tax Exemption

The AAMA is exempt from federal income tax according to Section 501(c)(6) of the Internal Revenue Code. The section accords an exemption to professional associations that demonstrate compliance with the organizational and operational requirements of the law.

The AAMA does not have a group exemption which covers its state societies and local chapters.

Therefore, any AAMA affiliate must file for its own exemption from federal income tax if it so desires.

IRS Form 1024 is used for applying for an exemption under Section 501(c)(6). Unlike Form SS-4, Form 1024 is rather long and difficult to complete. Although some state societies and local organizations have obtained an exemption letter from the IRS, there are many factors which must be considered when deciding on the wisdom of seeking federal income tax exemption. Please contact AAMA CEO and Legal Counsel Balasa at 800/ACT-AAMA or email DBalasa@aama-ntl.org if you have questions about whether to, and how to, apply for this exemption.

Incorporation

Incorporation is a process whereby a state society or local chapter is recognized as a formal legal entity. Incorporation is governed by the laws of each state rather than by federal law. As a result, a department

of the state office of the Secretary of State (or similar state office) usually has jurisdiction over the incorporation of not-for-profit entities.

Incorporation offers some benefits for state societies and local chapters, the primary one being the limitation of liability to the assets of the society or chapter if a civil action is successfully brought against the society/chapter. However, because state and local affiliates vary in the degree of potential legal liability, the prudence of incorporation should be decided on a case-by-case basis.

The cost and complexity of incorporating varies from state to state, but it is usually not an expensive or difficult process. Nevertheless, there are legal and practical factors which should be examined thoroughly before embarking upon the process of incorporating. CEO and Legal Counsel Balasa is available to assist states and local chapters in determining whether incorporation is advisable.

Exemption from State Sales Tax and Other State Taxes

It is important to distinguish between exemption from federal income tax and exemption from state sales tax. In virtually every state, professional associations exempt from federal income tax on the basis of 501(c)(6) of the Internal Revenue Code are *not* eligible for exemption from state tax (or other similar state levies) when purchasing products at stores, renting space at hotels or motels, or entering into contracts for the purchase of services. Only charitable, religious, and similar entities are eligible for any special sales tax exemption.

Obtaining federal income tax exemption or incorporating as a not-for-profit entity under the laws of a state, usually have nothing to do with procuring an exemption from state (and sometimes local) sales and use tax. There may be reasons for obtaining an income tax exemption letter from the IRS and a certificate of incorporation from the Secretary of State but attempting to secure an exemption from state sales tax is not one of the reasons. The AAMA and its state and local affiliates are almost never eligible for state sales tax exemption and should not think that submitting Form 1024 to the IRS or filing articles of incorporation with the Secretary of State will have any effect on becoming exempt from state sales tax.

A state society or local chapter will not get into trouble if it accumulates money in a savings account, money market fund, or other investment vehicle.

Generally, state societies and local chapters will not get into trouble with federal or state authorities and not jeopardize their tax-exempt status or their not-for-profit incorporation if the interest earned on investments is intended to be used to further the professional purposes of the society or the chapter.

Usually, there is cause for concern only if the society or chapter has accumulated an enormous reserve dollar amount, and the society/chapter is not operating in a manner consistent with its purpose of “promoting the professional identity and stature of its members and the medical assisting profession through education and credentialing.”

It is a good economic practice to have on reserve one year’s expenditures so that if unexpected expenses occur it will keep the society “in the black.”

APPENDIX A

STATE AND CHAPTER OFFICER ELECTION NOTIFICATION FORM

Please visit the AAMA website at www.aama-ntl.org or call 800/228-2262 to request the form.

APPENDIX B

NEW CHAPTER CHECKLIST

Local chapters are chartered by and directly affiliated with a state society. State societies are chartered by and directly affiliated with the AAMA. When a state has chartered a new chapter, they notify the AAMA Executive Office in Chicago so that the new chapter can be created in the database. *The Executive Office must be notified in writing by the current state society president.* Documents may be submitted by U.S. mail or email. When the Executive Office receives all the information about the name, location, officers, and members for the new chapter they are given a chapter code. At that point members can be assigned to that chapter and dues will be collected for and rebated to that chapter. Below is a checklist of information that the Membership Department needs to complete the entry for a new chapter.

Letter from the State Society President

- The letter must be on state society letterhead.
- The letter should be addressed to:

AAMA Membership Director
20 N. Wacker Drive, Suite 3720
Chicago, IL 60606-2903

Membership@aama-ntl.org

- The letter should notify the Executive Office of the newly affiliated/chartered chapter.
- The letter should give the official name of the chapter and the charter/affiliation date.

The information below should be attached to, or contained in, the letter from the state president:

Geographic Boundaries of the Local Chapter

Send a listing of zip codes included within the geographic boundary of the chapter. The Membership Department will transfer this information onto the chapter database that is used to assign members to local chapters.

Chapter Officers

- Chapter officers must all be AAMA members.

- Use the “Chapter Officer Election Notification Form” if possible.
- Please include the president, president elect or vice president, treasurer, and a membership chair/contact person.

☐ List of Current Members That Should Be Changed to the New Chapter

The Membership Department can provide you with a list of at-large members residing in the area of the new chapter. At-large members are those that are not assigned to a local chapter. Please provide a zip code range for the Membership Department to use when searching the database for members in the new chapter area. These members will not have paid local chapter dues and will not be billed for chapter dues by the Executive Office until the next dues billing cycle in September.

The Membership Department will print new membership identification cards for the members of the new chapter. If you have any questions, please call the AAMA Membership Department at 800/228-2262.

APPENDIX C

STATE SOCIETY DISBANDMENT

How It Will Affect Members and Local Chapters

Individual Members

Members in states without an affiliated state society are considered national members-at-large. These members only pay national dues and have all the national benefits of AAMA membership that they currently enjoy (e.g., *Medical Assisting Today*, discounts on products and services, group insurance). They will not be receiving any benefits from an affiliated state society. If a state society disbands, the AAMA Membership Department will change the state codes for the members and issue them new membership cards that reflect the change to member-at-large on the state and local chapter level.

Local Chapters

Local chapters are chartered by and directly affiliated with the state society that is affiliated with AAMA. If there is no state society for the local chapter to be affiliated with, then the link of affiliation to the AAMA is broken and the local chapter will cease being affiliated with the AAMA. This will have the following effect on local chapters:

- **Dues collection.** New members sending dues to the Executive Office will only pay national dues and be assigned as a “member-at-large” with no state society or local chapter affiliation.
- **Continuing education program approval.** AAMA CEU program approval processing for affiliated state societies, and local chapters affiliated with those state societies, is provided free of charge. A program submitted for AAMA CEU credit approval that is not sponsored or co-sponsored by an affiliated state society, an affiliated state society’s local chapter, or a CAAHEP-accredited medical assisting program must have an approved sponsor. Non-affiliated organizations may apply for Independent Sponsor status. The annual fee for Independent

Sponsorship is \$500.

- **Mailing labels.** Member information for creation of mailing labels for membership promotion purposes or continuing education programs are available on the AAMA website (www.aama-ntl.org). The AAMA also provides labels free of charge to local chapters that are affiliated with an AAMA affiliated state society.

If you have any questions about this information, please call the AAMA Membership Department toll-free at 800/228-2262 or email Membership@aama-ntl.org.