

2010 PAHCOM



Chapter Handbook

Revision B
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2010 PAHCOM Chapter Handbook

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Welcome

PAHCOM Chapter Officer!

Congratulations and thank you for your desire to improve the profession of health care management in your local community. We commend you for efforts to provide support and leadership to the PAHCOM members in your area. The stronger and more active each chapter becomes, the greater the chapter networking system grows. You are actively contributing to the PAHCOM goal of “sharing knowledge”.

This handbook explains the purpose and the procedures of managing a PAHCOM chapter. Instructions and forms are included to ease the administrative burden of managing your chapter. The Professional Association of Health Care Office Management will not be held liable for any activities conducted on a local level, by any chapter. Feel free to call the Chapter Coordinator at the National Office with questions at anytime.

Role of PAHCOM Chapters

PAHCOM chapters exist to help accomplish the Association’s goals and objectives:

- Establish and maintain professional, ethical, and educational standards.
- Provide a national certification and credentialing process.
- Support the national and local membership by providing educational products and opportunities.
- Promote national recognition and awareness of the profession of medical practice management.

PAHCOM chapters should provide an opportunity on a local level for members to:

- Meet regularly with other physician practice managers to share common concerns, interests, questions, and information.
- Prepare for the PAHCOM certification examination
- Sit for the PAHCOM certification examination
- Earn CEUs by receiving educational information through meeting attendance.

Chapter Contact at the National Office

General Questions

Email: chapters@pahcom.com

Chapter Coordinator:

Richard Blanchette; email – chapters@pahcom.com,
New chapters, handbook updates, reimbursements, problems,
complaints, general support.

Professional Development
Coordinator:

Richard Blanchette; email – chapters@pahcom.com,
Certification examination scheduling, CEU approval.



Section 1: Notify the National Office that elections have been held.

When a PAHCOM chapter holds elections, whether for a new or for an existing chapter, a new agreement to lead a PAHCOM chapter must be submitted to the Chapter Coordinator at the National Office. All officers must be current national members of PAHCOM. The president must be a Certified Medical Manager (CMM). In order for a chapter to receive and/or maintain its status as a “chapter in good standing” the chapter president must submit the following forms annually:

- 1. The Agreement to Lead a Chapter** documents the goals and purposes of the PAHCOM chapter and the obligation of the President to abide by the rules.
- 2. The Results of Election** form lists the names and contact information of the newly elected officers, and the city and state where the meetings will be held. Unless permission is expressly withheld, contact information for all chapter officers will be posted on the national web site. All information is extracted directly from the PAHCOM database. It is important that all information on chapter officers be kept as current as possible.

Current forms must be on file with the National Office in order for CEUs to be approved, examination dates scheduled, and rebates processed.



Section 2: New Chapter Officers

Chapter officers may volunteer or be appointed to serve as officers of a newly organized PAHCOM chapter. An existing chapter must hold elections each year in September or October. The following functions are recommended to be conducted as soon as possible after elections.

1. Hold a meeting of the new chapter officers. Become familiar with the purposes and goals of the PAHCOM national organization.
2. Understand the following:
 - a. No monetary compensation is paid to chapter officers or members for their voluntary services.
 - b. Any officer may be removed for just cause by a majority vote of the chapter officers or membership.
 - c. Each officer is entitled to one vote.
 - d. In the event of death, removal, or resignation of an officer, the chapter officers shall appoint a successor to serve through the remainder of the year.
3. Review the “Responsibilities of PAHCOM Chapter Officers”. This document suggests an even distribution of all responsibilities of the chapter officers. (Appendix D)
4. Chapter officers are encouraged to network with other chapter officers from around the country.
5. In the event of a change of officer in the middle of the term, submit the new information to the National Office on the Results of Election Form. The resigning officer should send a resignation notice to the National Office.
6. Anytime a chapter officer has a change in name, address, phone, fax, or email, notify the Chapter Coordinator at the PAHCOM National Office via email at chapters@pahcom.com.



Section 3: Chapter Funds

Funds collected by the chapter are deposited into the chapter checking account.

1. The signatures of both the chapter president and treasurer are required on the account. A letter from the National Office will be provided upon request, authorizing the president and treasurer to open any bank accounts necessary. For your protection, it is good practice to have your checking account audited on an annual basis by a neutral person that is familiar with general accounting principles.
2. All funds collected by the chapter shall be deposited into the chapter checking account.
3. At the end of the year, all chapter funds must be accounted for and reported to the PAHCOM National Office on the Treasurer's Report, due January 15th of the following year (Appendix H). As a PAHCOM chapter, you do not need to file a tax return; it is done in conjunction with the national organization's corporate return provided you submit Appendix H as required.
4. Chapters are encouraged not to collect local dues. However, if chapter officers feel it is necessary to charge dues, chapter members should be given an opportunity to vote on the amount. Chapters will collect these additional monies with no involvement from the national organization. See Appendix I for ideas on chapter funding.
5. Chapter members should vote on the use of chapter funds. Chapter funds may be used for chapter business only. Actual expenses for conducting chapter business are authorized by the chapter officers. A treasurer report should be given quarterly to the membership at chapter meetings.



Section 4: Chapter Meetings

Health care professionals in the area may be invited to the chapter meetings. Membership with the national organization entitles members to attend chapter meetings. All chapter attendees must be members of the national organization. Non-members are allowed to attend three meetings as a guest. They must then join the National Association in order to continue participation in chapter events and meetings.

The purpose of chapter meetings is to network with other medical professionals in order to educate and support each other. Members of PAHCOM must refrain from selling or promoting products or and/or services for personal gain.

Chapters should hold meetings wherein CEUs are offered, at least every other month. A PAHCOM chapter meeting must be organized and conducted by the PAHCOM chapter. All PAHCOM members must be invited to attend. Where chapter meetings are not held consecutively in a four-month period, the chapter will automatically be removed from the PAHCOM chapter list.

1. Keep members informed of the chapter meetings schedule:

- Obtain a list of local PAHCOM members by emailing the National Office at chapters@pahcom.com.
- Upcoming chapter meetings and seminars will be submitted to National to be published in the Chapter section of the PAHCOM website www.pahcom.com whenever possible.
- When approved for CEUs, chapter seminars will also be published on the PAHCOM National website.

2. Offer CEUs:

- CEUs may be offered for chapter meetings when the objective of the meeting is to provide physician office management related information.
- Approval of CEUs for chapter educational events is now conducted by the Chapter Secretary. For complete information on offering CEUs, see Section 5.
- When scheduling meetings be aware that each speaker is responsible for the content of his/her presentation. PAHCOM will not be held responsible. The PAHCOM Chapter Speaker Agreement form may be used (Appendix G). The form is provided for your convenience and should not be sent to the National Office.

3. Maintain Chapter meeting records:

- The local secretary maintains records of the chapter meetings and list of attendees.



Section 5: CEUs

PAHCOM members may earn Continuing Education Units (CEUs) by attending chapter meetings and seminars. The Chapter Secretary should issue CEU Certificates for chapter educational meetings. The National Office has delegated CEU approval of chapter educational programs to the Chapter Secretary.

CEU Certificates

1. The Chapter CEU Certificate template is provided as Appendix F. In completing the CEU Certificate be aware of the following information:
 - a. Each PAHCOM Chapter has a Chapter Number. The first two digits are alpha characters and represent the State in which the chapter is located. The second two digits are numeric and consist of a sequential number that is assigned by the National Office. Chapter numbers are listed in Appendix L.
 - b. The Catalog Number of the educational program consists of the Chapter Number followed by a sequential alpha character assigned by the Chapter Secretary. The sequence is from a to z and will comprise the first 26 educational programs conducted by the chapter. If the chapter conducts more than 26 educational programs in a calendar year, the sequence will continue with the use of double alpha characters (aa to zz).
2. One Certificate of Attendance CEU Credits form should be awarded to each person attending the chapter meeting.
 - a. Use the master copy of Appendix F to make as many copies as needed.
 - b. Appendix F is available in Word format at the same location as the Chapter Handbook.



Section 6: Seminars

1. The chapter secretary approves the PAHCOM Chapter Seminars for the chapter using the following criteria:
 - Seminars are four hours or longer.
 - No more than eight CEUs per day may be earned.
 - Generally, one CEU will be awarded for each hour of instruction.
 - It is important that CEUs be approved by the Chapter Secretary before brochures and advertisements are printed and distributed.
 - Only one catalog number will be assigned for the entire seminar.
 - CEUs will not be given for lunch or breaks.
2. Each attendee at the seminar should be provided a certificate of attendance.
 - Provide each attendee with the certificate of attendance CEU credits certificate. It is the same certificate used at chapter meetings.
 - When distributing CEU certificates, it is the responsibility of the chapter leadership to determine whether the attendee will receive full or partial CEU credit reflecting attendance at each class.
3. Information should be submitted to the National Office at least two months in advance of the seminar in order to be published on the national website.



Section 7: PAHCOM Chapter Assistance Program

The Chapter Assistance Program was initiated to help chapters in sustaining a viable Chapter Growth Program. Funds are provided by the National Office that may be used for general operation of PAHCOM chapters. The purpose is to motivate chapter members to attend chapter meetings and to stimulate chapter efforts in proctoring the Certified Medical Manager (CMM) examination.

Meeting Attendance:

Meeting attendance assistance is based on member attendance at chapter meetings. The chapter will be paid at the rate of one dollar per member, per meeting attended. Submit the Meeting Attendance Record form (Appendix E) to the National Office at the end of each calendar quarter to receive the funding.

1. The PAHCOM chapter secretary must submit the attendance sheets and the Rebate Request Form to the PAHCOM National Office at the end of each calendar quarter. Forms not received by the 30th of the following month cannot be honored.
2. Assistance checks will be made payable to the chapter and mailed to the chapter treasurer.
 - There is no credit for non-members.
 - Credit is based on meeting attendance of current members.
 - Submit all attendance sheets for the 4th quarter by the end of the calendar year.

Proctor Program:

Chapters are provided funding for proctoring PAHCOM certification examinations. Utilize the following procedure to receive proctor assistance funding:

1. On the day of the examination, the proctors must have each examinee sign in on the Examination Sign-In Sheet. The form is included with the proctor instructions and the examinations.
2. At the conclusion of the examination, place the sign-in sheet with the completed examinations and return them to the PAHCOM National Office.
3. PAHCOM will provide the chapter with \$10 for every examinee.
4. Checks will be made payable to the chapter and mailed to the chapter treasurer.



Section 8: Chapter of the Year

The Chapter of the Year Award is won by the chapter with the most points earned from September 1 through July 31 of each year. The winning chapter will receive a cash award of One Thousand Dollars and will be honored as special guests at the next PAHCOM Annual Conference Awards Dinner.

A status report will be provided to each chapter meeting the eligibility requirements on January 31st, May 30th, and August 31st. Chapters may request an interim status check on their individual chapter by email to chapters@pahcom.com.

To be eligible to compete in the Chapter of the Year competition, each chapter must:

- Hold chapter meetings where CEUs are offered six times per year or more.
- Provide annual reports to the National Office that includes:
 - Election Results Report (Appendix B)
 - Treasurer's Report (Appendix H)

In addition, points are earned according to the following schedule:

Activity	Points
All following year meeting(s) scheduled before January 15 th	10
Submit the Treasurer's Report by January 15 th	25
Chapter meetings and seminars where CEUs are awarded (each hour)	2
Conduct a chapter-wide "New Member" Drive	10
Each New Member recruited by a chapter	2
Each examination proctored (irrespective of the number of candidates)	100
Conduct a CMM review course (with scheduled exam; each instructed hour)	5
Chapter Booth at a local health fair/seminar	25
Chapter involvement in community service project (logo visible)	10
Chapter Newsletter sent to National for chapter web page (each issue)	10
Provide "Chapter News" for the PAHCOM Journal (each issue)	10
Each chapter member that attends the PAHCOM Annual Conference	5

Contact the Chapter Coordinator chapters@pahcom.com with any questions.



Section 9: Elections

Chapter officers include President, Vice-President, Secretary, Treasurer, and Membership Director. All officers must be current members of the national organization. The President must be a CMM. Chapter officer terms of service extend for one year, from January through December. The current President may be re-elected to serve another term as President if the chapter membership so votes.

1. The current vice-president should begin preparing early for chapter elections. The vice-president coordinates with the president to plan a date for the election.
 - Each member of the chapter must receive notification at least 30 days in advance that elections will be held on that particular date.
 - Chapter members who are unable to be in attendance should be given an option of voting with an absentee ballot. Student members cannot hold office and cannot vote.
2. Elections will be held for president, vice-president, secretary, treasurer, and membership director. There should be no other chapter officers. Additional chapter assistance should be structured as sub-committees. All nominees must be active PAHCOM members. Corporate members cannot hold office and cannot vote.
3. Once new officers are elected, the incoming president submits the Results of Election Report (Appendix B) and the Agreement to Lead a PAHCOM Chapter (Appendix A) to the PAHCOM National Office.
4. After submitting required paperwork, newly elected officers should begin planning and scheduling future chapter events, such as meetings, seminars and examinations.
5. The current year chapter handbook is available on the PAHCOM web site at <ftp://www.pahcom.com>. All chapter officers should download and become familiar with the Chapter Handbook.



Appendix A

Agreement to Lead a PAHCOM Chapter

Name _____

Address _____

City _____ State _____ Zip _____

Email _____ Work Phone # _____

I am a currently certified member of the Professional Association of Health Care Office Management. I hereby apply to lead a chapter of the association.

1. As the principal contact person for my chapter, I understand that I am expected to promote PAHCOM on a local level. I will provide an opportunity for networking, education, and support for medical practice personnel in my area by:
 - holding regular meetings where CEUs are offered every other month or more.
 - proctoring the certification examination once per year or more.
 - communicating regularly with the PAHCOM National Office.
2. To assist me in the operation of the chapter, the National Office may provide lists of local PAHCOM members for networking purposes. I understand that no part of any lists furnished by the National Office may be reproduced or used by chapter members for promotional or personal gain and that any use of the lists for reasons other than those mentioned herein is strictly prohibited.
3. I understand and agree to abide by the rules of the PAHCOM Chapter Logo Agreement. **(Appendix C)**
4. I grant PAHCOM permission to post my name, phone number, and email address on the national web site.
5. I agree to abide by the conditions set forth in this application. I understand that failure to follow the conditions outlined herein may result in my removal as Chapter President.

Signed: _____

Member Number _____

Chapter (City, State) _____

Chapter ID # _____

Date: _____

New Chapter _____

Existing Chapter _____

Email or Fax to:
Professional Association of Health Care Office Management
Email: chapters@pahcom.com
Fax: 407-386-7006



Appendix B

Chapter Election Results Report

The following PAHCOM members will serve as our chapter officers for the next calendar year. Signatures below provide the PAHCOM National Office permission to display their information on the PAHCOM web site. (If there is a change during the year, resubmit this form with the updated information.)

PAHCOM Chapter Name _____ Date _____

Chapter (City, State) _____ Chapter ID # _____

President _____ PAHCOM Mbr # _____

Direct Phone # _____

Contact Email # _____

Signature _____

Vice-President _____ PAHCOM Mbr # _____

Direct Phone # _____

Contact Email # _____

Signature _____

Secretary _____ PAHCOM Mbr # _____

Direct Phone # _____

Contact Email # _____

Signature _____

Treasurer _____ PAHCOM Mbr # _____

Direct Phone # _____

Contact Email # _____

Signature _____

Membership Director _____ PAHCOM Mbr # _____

Direct Phone # _____

Contact Email # _____

Signature _____

Email or Fax to:
Professional Association of Health Care Office Management
Email: chapters@pahcom.com
Fax: 407-386-7006



Appendix C

PAHCOM Chapter Logo Agreement

1. Inasmuch as the establishment of a PAHCOM chapter carries an obligation to utilize the name and logo of the Professional Association of Health Care Office Management solely for education and networking purposes, I agree to refrain from selling or promoting any products or consulting services for personal gain in any way, at any time, during a PAHCOM chapter meeting.
2. I assume liability for all content of printed material generated by the chapter, including, but not limited to, press releases, advertisements, letters, etc., and will defend and hold the PAHCOM harmless from any claims made against it arising there from.
3. I acknowledge and agree that PAHCOM at any time may and does reserve the right to refuse the use of the PAHCOM chapter logo by any chapter/individual.
4. I agree that the chapter logo should be used in conjunction with the chapter name.
5. I acknowledge and agree that the **PAHCOM National Logo** may not be used by a chapter except for items provided by National.



Appendix D

Responsibilities of PAHCOM Chapter Officers

President

- Serve as liaison to the National Office.
- Serve as the initial contact person for those interested in chapter membership.
- Coordinate the planning of regular chapter meetings including arranging for guest speakers and locations, dates and times of meetings.
- Conduct chapter meetings.
- Ensure certification examinations are administered in accordance with the Certification Handbook.
- Be one of the two signature signers for the chapter checking account.
- Submit the following forms to the National Office:
 1. Agreement to Lead a Chapter
 2. Results of Election

Vice-President

- Assist president in determining needs of chapter members.
- Assist president in coordinating the planning of regular chapter meetings.
- Hold elections near the end of the term of service.

Secretary

- Maintain a list of attendees to include email & postal addresses, phone numbers, and member status.
- Prepare and distribute meeting notices.
- Maintain the following information on the Chapter:
 - Chapter CEU programs conducted
 - Records of chapter meetings including guest speakers, subject matter, and group discussion topics.
 - Cross reference/confirm status of attendees

Treasurer

- Maintain chapter funds, specifically the checking account.
- Sign on chapter checking account.
- Request a chapter rebate from the National Office by submitting the Chapter Meeting Attendance Record on a quarterly basis. (Appendix E)
- Provide quarterly report on chapter funds to the chapter membership at chapter meetings.
- Submit the Treasurer's Report (Appendix H) to the PAHCOM National Office by January 15th of the following year.

Membership Director

- Maintain supply of information materials (brochures/flyers) for distribution at meetings.
- Contact local health care organizations and promote membership in PAHCOM.
- Recruit new members.

Appendix F



Professional Association of Health Care Office Management

CERTIFICATE OF ATTENDANCE

CEU Credits

Awarded to

Name _____

Chapter _____ Catalog # _____

Speaker _____ Topic _____

Meeting Date _____ Length _____

Chapter Officer Signature _____

This program meets the PAHCOM requirements for _____ Continuing Education Units.

One Continuing Education Unit (CEU) is earned for each hour of participation in an organized learning experience.
This certificate is to be used for PAHCOM Chapter conducted Meetings and Seminars.



Appendix G

Chapter Speaker Agreement

As speaker for the _____ PAHCOM Chapter, I understand that neither the chapter nor the Professional Association of Health Care Office Management National Office is responsible or liable for the content of my presentation on the subject of _____ given at the chapter meeting/seminar on the date of _____.

Speaker

Date



Appendix H

**Treasurer's Report
PAHCOM Chapter**

January 1, 20 ____ through December 31, 20 ____

Beginning Cash Balance January 1, 20 ____ \$ _____

Monies received:

Events (meetings, seminars, etc.) _____

Fundraisers _____

Interest on savings* _____

National Office Rebates _____

Other _____

Total Monies Received: \$ _____

Expenses:

Food _____

Room charges _____

Speaker reimbursements _____

Newsletters, mailings _____

Bank charges, etc. _____

Other _____

Total Expenses (\$ _____)

Net Income for the Year \$ _____

Ending Cash Balance as of December 31, 20 ____ \$ _____

Chapter (City, State)

Federal Tax I.D. Used

Chapter ID#

Submitted by

Date

*If the bank account earned interest during the year, attach a copy of the 1099-INT provided by the bank

**Email or Fax to:
Professional Association of Health Care Office Management
Email: chapters@pahcom.com
Fax: 407-386-7006**



Appendix I

PAHCOM Chapter Funding Considerations

Individuals must pay the annual membership fee to join PAHCOM. That entitles them to all of the many benefits provided by the national association. Whether an individual chooses to join a chapter is entirely an individual choice. To participate in events at the local level, an individual national member must belong to a local chapter.

Local chapters are self-sustaining. In order to provide CEUs, they have to be very creative with their dollars.

First Model - Some chapters choose to charge local dues and use those proceeds to provide chapter events.

Second Model - Others choose not to charge dues at all. Instead, they charge a fee for each chapter event.

Third Model - Still others seek sponsors to cover the expenses for all events and do not charge their members any dues or fees.

Hybrid Model - Finally, some chapters use a combination of all of the above--charging dues, charging fees, and utilizing sponsor support.

All methods work, but figuring out which one will work for your chapter is the challenge.

Here's how one chapter made that choice.

They felt that the first model was too limiting as you need a broad base of members and a lot of community support. They also felt that dues would have to be high enough to cover expenses (food, facility, printing, equipment rental, marketing, speaker fees, etc). Reaching that level would make most practices flinch. Unfortunately, as a new association with an unproven track record, convincing physicians' offices to accept the high price tag seemed unlikely. They didn't feel that they could attract enough new members to support the kind of education they wanted to provide until they had built a reputation for themselves. If they made dues too low, they would never collect enough money to offer the level of quality programs they felt were important to the endeavor. There was also the unfair perception that if the cost of joining is too low, the value of the membership is also minimal.

The second model also has drawbacks. No one likes to be "nickel and dimed" each time they want to attend a CEU or networking event. The bookkeeping is tedious, and you always deal with folks who promise to pay at the door, and then don't. It creates an awkward situation—do you let them stay, or send them away? Not good Public Relations if you send them away, but a waste of your time if you have to call them endlessly to remind them they owe money. Again, the perception of value is not there if members think that they're covering their lunch expense and not the CEU expense.

The chapter members also rejected the third model. Too much sponsor involvement creates a sense of obligation to the sponsor. There's also the difficulty dealing with the implied endorsement that aligns some parties and excludes others by becoming too dependent upon sponsorship. It allows sponsors to get the upper hand and direct the activities of the chapter. Not a good situation.

They opted for the hybrid model combination of sponsorship, fees, and dues. This is what they said in a recent report.

Sponsors are very willing to help...especially if it gives them access to members who may become customers. We maintain control by limiting the number of sponsors to a ratio of roughly 2 members for every one sponsor. Our

sponsors pay an annual fee to associate with our chapter. Depending on the level of sponsorship they choose, their annual fee would be about \$300-\$600 per year. Additionally, they may provide other resources to the chapter that keeps our costs quite low for most meetings.

We do our best to utilize local or regional speakers who do not charge large fees for presentations throughout the year. That way we don't have to charge fees for members to attend. Non-members, however, always pay a fee to attend these presentations. Our registration flyers always show the benefits of membership clearly—chapter members don't have to pay to attend. New members are born of non-members, so eventually, they get tired of paying the fees, and join.

Once a year, and sometimes twice each year, we bring a national speaker to our local chapter. These events can cost several thousands of dollars. We get sponsor involvement to help with costs, and we charge our members fees for attending these events. These event fees are two-tiered. The lowest fee we can charge for the event based on expenses becomes the chapter member fee. That fee is usually doubled for non-members to attend. If the topic is "hot" and the speaker well-respected, we frequently have a number of non-members attend. Their non-member fees often come close to covering most of our expenses for these events. Of note, national members who are not affiliated with our chapter are not considered chapter members. We state that throughout our marketing material. However, it's very rare that we've ever had a national member unaffiliated with our chapter attend one of these events. When it has occurred, we've opted to give them the member rate once, but with the caution that they will have to join the chapter for the member rate to continue for future events since these are chapter, and not national expenses.

Finally, we charge annual dues for chapter members. Our chapter dues are \$125 per year. We started charging this fee from the very beginning, and have not changed it since. (Our chapter's competition for members is MGMA, and their annual dues are closer to \$400/year.) Too little gives the impression that there is little value in the association and people don't show up or take us seriously. Dues that are too high scare away potential members.

We prorate dues when necessary, and time our dues assessment to coincide with the member's national dues. If for instance, you join our chapter in November, but your national membership renews in April, we will prorate local dues until April, then assess annual dues so that the following year, both will occur during the same month. We send an invoice for chapter dues 60 days in advance, and offer a 10% discount for renewing prior to the first of the month the dues are to be paid. If someone has not renewed by the end of the month following their renewal month, they are dropped from membership. We reserve the option of charging a penalty for late renewals, but have never had reason to exercise the option.

Members can also earn another 10% discount on their next year's renewal if someone they've introduced to PAHCOM decides to join both the national association and the local chapter. This discount will repeat as often as the member brings new members into the chapter—5 new members, 50% off next year's renewal. We do the same for our sponsors when they introduce a manager who subsequently joins both national and local PAHCOM. (We don't offer sponsor renewal discounts when they introduce us to a new sponsor—it's only available for new member referrals.) We find that many of our new members join both national and local PAHCOM at the same time, usually in response to one of our chapter events involving a national speaker. When that happens, we have them register and send both sets of dues to our treasurer. She then forwards payment and membership information on to the National Office.

By collecting sponsor fees and controlling our costs through their extra efforts to help, by minimizing our speaker fees, by charging higher non-member fees and minimal member fees where appropriate, and by setting our local dues at a level that implies value, yet is still affordable, we keep enough in our chapter's bank account to provide everything we feel we need to support our members. After expenses, our chapter maintains adequate funds to offer scholarships to members who would otherwise be unable to attend the annual conference.



Appendix J

Sample PAHCOM Chapter By-Laws

ARTICLE I – PURPOSE

The Professional Association of Health Care Office Management (PAHCOM) is a nationwide organization dedicated to developing and maintaining a strong professional network of health care office managers. The goal of PAHCOM is to help its members become more effective in their daily professional responsibilities, to enhance productivity and efficiency through increased knowledge of basic health care management principles and through sharing of learning experiences.

The registered trademark logo and the registered name ‘Professional Association of Health Care Office Management and its acronym ‘PAHCOM’ is protected under federal copyright laws and is authorized for use only by chapters that continue to be chartered by the national organization. Chapters are non-profit organizations under Internal Revenue Statute 501 9c0960 as ‘Trade Associations’ engaged in advancing the professionalism of health care office managers as a category, rather than any one individual or group of individuals.

The _____ Chapter is a chartered extension of PAHCOM and is designed to increase understanding of the health care field and provide networking opportunities on a local level. Establishment of this chapter of PAHCOM carries with it a legal obligation to utilize the name and logo of PAHCOM solely for the purposes delineated above.

ARTICLE II – MEMBERSHIP

1. QUALIFICATIONS FOR MEMBERSHIP

To qualify for membership in this chapter the individual must:

- a. Be a current member in good standing with the national association.

2. QUALIFICATIONS FOR SPONSORSHIP

Sponsorships are available as a means to provide additional financing for chapter activities. Sponsors are not designated as Active Members and as such do not have voting rights. Acceptance as a sponsor shall not be construed as an endorsement unless the Chapter Executive Committee states otherwise. All hospitals in the chapter area will be encouraged to become sponsors to promote unity throughout the region.

- a. Hospital Sponsors – To qualify as a hospital sponsor of this chapter the hospital must:
 1. Serve the physicians of the Chapter area,
 2. Provide complimentary meeting space for the chapter meetings or seminars.
 3. Support the chapter in publicizing chapter activities.
- b. Corporate Sponsors – To qualify as a corporate sponsor of this chapter the corporation must:
 1. Market products or services to chapter members in the Chapter area.
 2. Support the chapter in publicizing chapter activities.

GOLD SPONSOR \$500

Listing in Brochure

Attend Meetings Bi-Monthly

Presentation of Product at one meeting

Listing on the Chapter Website

Membership Roster

SILVER SPONSOR \$250.00

Listing in Brochure

Attend one Bi-Monthly Meeting

Presentation of Product at one meeting

3. QUALIFICATIONS FOR STUDENT MEMBERSHIP

Student Members, like Sponsor Members do not have voting rights and cannot run for office. To qualify for Student Membership in this chapter, the individual must:

- a. Be a continuous student member of the national association.
- b. Enrolled in an academic program relative to health care office management and carrying a ¾ workload,
or
- c. A full-time educational instructor in the health care office management field who does not otherwise qualify for active or corporate/sponsor membership.

4. MEMBERSHIP MEETINGS

Regular meetings shall be scheduled and coordinated by the chapter executive committee to maximize participation by the greatest number of chapter members possible. Non-members may attend three chapter meetings before being required to join.

The annual membership meeting, for the purpose of election of officers for the chapter, shall be held in November of each year at a site designated by the chapter Executive Committee. Election of officers shall be held at the annual meeting.

5. SPECIAL MEETINGS

Special meetings of the chapter may be called by a majority vote of the executive committee. The secretary shall provide notice of such meetings to all members at least two weeks before the scheduled date of such meeting. Such notice shall state the date, time, place, and purpose of the meeting.

6. MEMBERSHIP DUES

- a. The executive committee determines the annual dues payable to the chapter by members. The annual dues will be in the amount of \$xx.00 and are due and payable not later than March 31 of that year. (Optional)
- b. When any member shall be in default in the payment of dues, for a period of thirty days after the due date, the executive committee may thereupon terminate chapter membership.
- c. New membership dues will be prorated to \$xx.00 for members joining after June 30. (optional)

ARTICLE III – COMMITTEES

1. EXECUTIVE COMMITTEE

The affairs and business of the chapter shall be managed and its powers exercised by an executive committee of five (5) officers consisting of the President, Vice-president, Secretary, Treasurer, and the Membership Director.

2. NOTICE OF MEETINGS OF THE EXECUTIVE COMMITTEE

Regular meetings of the executive committee may be held without notice at such a time and place determined by the executive committee. Special meetings of the executive committee shall be held upon notice to the officers and may be called by the President upon three (3) days notice to each officer either personally or by mail, e-mail or by fax. Special meetings may also be called by the President or by the Secretary in a like manner on written request of three officers. At least three (3) members of the committee must be present to attain a quorum.

The executive committee may ask other members (i.e. Program Coordinator) as needed, to attend the executive committee meeting as a non-voting participant.

3. VOTING

At every meeting of the executive committee each officer shall be entitled to vote in person. Each officer of the chapter shall be entitled to one (1) vote. Except as otherwise provided in these By-Laws, all matters voted upon shall be decided by a majority vote of the officers present. Proxy votes of officers are specifically prohibited.

4. OTHER COMMITTEES

PAHCOM chapters and its membership shall appoint various sub-committees to accomplish certain functions. The sub-committees report directly to the chapter executive committee and all sub-committee actions are subject to final approval by the executive committee.

The sub-committee chairperson and no less than two-thirds of the subcommittee members must be active chapter members in good standing. Non-chapter members may be utilized in an ad hoc capacity to contribute their experience and expertise.

5. COMPENSATION

There shall be no monetary compensation to officers or members for their services. The chapter executive committee may authorize reimbursement for actual expenses in conducting chapter business.

ARTICLE IV – OFFICERS

1. OFFICERS, ELECTION AND TERM

- a. The membership shall elect by majority vote of those present at an annual or special meeting a president, a vice-president, a secretary, a treasurer, a membership director, and such other officers as it may determine, who shall have such duties and powers as hereinafter provided.
- b. A nominating committee composed of at least three (3), but no more than six members, will recommend a slate of officers and distribute the slate to all members no less than two weeks prior to the meeting. At the meeting, nominations from the floor will be in order.
- c. All officers shall be elected or appointed to hold office for a period of one year or until their successors have been elected or appointed and qualified. All vacancies occurring in the position of Vice-President shall be filled by the election of the general membership.

2. REMOVAL, RESIGNATION, OF OFFICERS AND MEMBERS

- a. Any officer elected or appointed may be removed for cause.
- b. In the event of death, resignation, or removal of an officer, within the term of five months or less remaining in office, the executive committee shall appoint a successor to fill the unexpired term. If the term of office is more than five months, the position shall be filled by election of the general membership.
- c. The same person may hold no more than one office.
- d. Any member may be removed for cause from the chapter roster, by vote of three-fifths of the executive committee,

3. PRESIDENT

The president shall be the chief executive officer of the chapter and shall have the general powers and duties of supervisor and management usually vested in the office of president. However, the National Office shall approve all chapter seals, logos, and stationary letterheads, etc. to ensure conformity with national standards and the professional stature of association members.

4. VICE-PRESIDENT

During the absence or disability of the president, the vice-president shall have all the powers and functions of the president. The vice-president shall perform such other duties, as the executive committee shall prescribe. In the event that the vice-president becomes ineligible to hold the office of president, a nominating committee will recommend at least three candidates for the office to a special meeting of the general membership.

5. SECRETARY

The secretary shall attend all meetings of the executive committee, record all votes and minutes of all proceedings in a book to be kept for that purpose, give, or cause to be given, notice of all regular or special meetings of the executive committee, keep in safe custody the seal of the chapter and affix it to any instrument when authorized by the executive committee, keep all the documents and records of the chapter in a proper and safe manner, and perform such other duties as may be prescribed by the executive committee or assigned by the president.

The secretary will submit minutes to the National PAHCOM Chapter Coordinator. The report will include a brief summary of the chapter activities of the past quarter and plans for future activities. The reports will be used to coordinate involvement, develop suggestions and improve the operations of other chapters. The report will include a listing of chapter officers and active members as of the end of March, June, September, and December.

6. TREASURER

The treasurer shall have the custody of the chapter funds and securities, keep full and accurate accounts of receipts and disbursements in the chapter books, deposits all money and other valuables in the name and to the credit of the chapter books, deposit all money and other valuables in the name and to the credit of the chapter in such depositories as may be designated by the executive committee. The treasurer shall disburse the funds of the chapter as may be ordered or authorized by the executive committee and preserve proper vouchers for such disbursements, collect organization dues, render to the president and executive committee at the regular meetings of the executive committee, or whenever required, an account of all transactions as treasurer and of the financial condition of the chapter, and render a full financial report.

Upon request of the treasurer all chapter officers and agents will provide the treasurer with such reports and statements as may be required to document all financial transactions of the chapter. The treasurer shall perform

such other duties as are given by these By-Laws or as from time to time are assigned by the executive committee or the president.

7. MEMBERSHIP DIRECTOR

The membership director shall develop and implement programs for the recruitment and retention of chapter members.

ARTICLE V – EXECUTION OF INSTRUMENTS

All chapter instruments and documents shall be signed and countersigned, executed, verified, or acknowledged by such officer or officers or other persons as designated by the executive committee.

The Treasurer, President, or Vice-president shall sign all checks, drafts, or other orders for the payment of money, notes or other evidence of indebtedness, issued in the name of the chapter.

ARTICLE VI – AMENDMENTS

Any member may suggest an amendment or amendments at any chapter meeting to the executive committee. The executive committee will formalize the proposed amendment and schedule it for a vote at the next annual meeting. The proposed amendment(s) must be voted on and be approved by at least two-thirds membership of the chapter present and voting at a general membership meeting. Proposed By-Law modifications will be forwarded to the National Office for review of conformity with the national standards prior to implementation.

Original By-Laws were adopted by a majority of the membership: Date -

Amendments were adopted by a majority of the membership: Date -

Amendments were adopted by a majority of the membership on Date -



Appendix K

PAHCOM Chapter Officer Installation Ceremony May be modified as desired

All Outgoing and Incoming Chapter Officers assemble in front of the Chapter Membership.

Outgoing Chapter President to announce "Members of the _____ Chapter of PAHCOM, the officers-elect have been presented for installation. With your approval the Installation Ceremony will proceed."

Outgoing Membership Director (OMD) will you now administer the Oath of Office to the Incoming Membership Director (IMD).

OMD: "*First Name of IMD*, you have been elected by the _____ Chapter membership of PAHCOM to serve as the Membership Director of the Chapter. Your specific duties include making recommendations to the Executive Committee for the development and implementation of programs for the recruitment and retention of Chapter members. Repeat after me; "I, *Full Name of IMD* do solemnly promise that I will faithfully and to the best of my ability perform the duties of the Membership Director of the _____ Chapter of the Professional Association of Health Care Office Management."

Congratulations in the manner of a handshake or hug. Then both principals return to their place in line.

Chapter President says "Outgoing Treasurer (OT) will you now administer the Oath of Office to Incoming Treasurer (IT).

OT: "Name of IT, you have been elected by the general membership of PAHCOM to serve as the Treasurer of the _____ Chapter. Your specific duties include monitoring the financial operations of the _____ Chapter, and making recommendations to the Executive Committee for Chapter funding. Repeat after me; "I, *Full Name of IT*, do solemnly promise that I will faithfully and to the best of my ability perform the duties of the Treasurer of the _____ Chapter of the Professional Association of Health Care Office Management."

Congratulations in the manner of a handshake or hug. Then both principals return to their place in line.

Chapter President says "Outgoing Secretary (OS) will you now administer the Oath of Office to Incoming Secretary (IS)".

OS: "*First Name of IS*, you have been elected by the _____ Chapter membership of PAHCOM to serve as the Secretary of the _____ Chapter. Your specific duties include recording all votes and minutes of all proceedings of the Executive Committee and providing notice of all regular and special meetings of the Executive Committee. Repeat after me; "I, *Full Name of IS*, do solemnly promise that I will faithfully and to the best of my ability perform the duties of the Secretary of the _____ Chapter of the Professional Association of Health Care Office Management."

Congratulations in the manner of a handshake or hug. Then both principals return to their place in line.

Chapter President Says: Vice-president (OVP) will you now administer the Oath of Office to the Incoming Vice-president (IVP).

OPE: "*First Name of IVP*, you have been elected by the general membership of PAHCOM to serve as the Vice-president of the _____ Chapter. Your specific duties include being ever vigilant and ready to assume the duties of the President of the _____ Chapter should the need arise.

Repeat after me; "I, *Full Name of IVP*, do solemnly promise that I will faithfully and to the best of my ability perform the duties of the Vice-president of the _____ Chapter of the Professional Association of Health Care Office Management."

Congratulations in the manner of a handshake or hug. Then both principals return to their place in line.

Outgoing President Says: "*First Name* of Incoming President (IP), you have been duly elected by the general membership to serve as the President of the _____ Chapter. Your duties require you to coordinate all of the functions of the chapter and to preside over all meetings of the Chapter Executive Committee in its obligation to provide guidance for the administration of the _____ Chapter.

Repeat after me; "I, *Full Name* of IP, do solemnly promise that I will faithfully and to the best of my ability perform the duties of the President of the _____ Chapter of the Professional Association of Health Care Office Management."

Congratulations in the manner of a handshake or hug.

The Outgoing President then calls for a round of applause for all.

Appendix L

Chapter Identification Numbers

ID #	Chapter Name
AZ01	Greater Phoenix
CA01	Ventura County
CO01	Pikes Peak
FL01	Pensacola
FL02	Gulf Coast
FL03	Nature Coast
FL06	Greater Orlando
FL07	Polk County
IL01	Greater Chicagoland
MD01	Antietam
NC01	Metrolina
NE01	Heartland
NJ01	Atlantic/Cape
NJ02	Central Jersey
OH01	Dayton Area
OH03	Akron
OH05	Greater Cincinnati
PA01	Delco
PA02	Lehigh Valley
PA03	Montgomery Bucks
TX01	Travis County
TX02	Victoria Crossroads
TX03	Williamson County
TX04	Corpus Christi

