

# 2020

## AAPC Local Chapter Handbook



Effective January 1, 2020–December 31, 2020

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## CHAPTER 1

### WELCOME TO THE AAPC CHAPTER ASSOCIATION (AAPCCA)

#### 1.1 Introduction

- 1.1.1 Local chapters of AAPC are essential in setting the standard of professionalism and higher education, while developing personal improvement and strong networking opportunities.

#### 1.2 AAPCCA Mission Statement

- 1.2.1 The AAPCCA, the Governing Board for AAPC Local Chapters, was established to create, maintain and sustain the infrastructure, through approachable and accountable representation, necessary to empower local chapters to function in support of AAPC's mission of "Upholding a Higher Standard."

#### 1.3 AAPC Mission Statement

- 1.3.1 Our mission is to advance the business of healthcare by providing professional training, industry-standard certifications, and comprehensive solutions to individuals and organizations across medical coding, billing, auditing, compliance, and practice management.
- 1.3.2 Support the national and local membership by providing educational products and opportunities to network.
- 1.3.3 Increase and promote national recognition and awareness of healthcare business professionals.

#### 1.4 AAPC Local Chapters

- 1.4.1 Members benefit from meeting regularly to share common interests, questions, information and concerns. Local chapters allow members in geographic areas to get together to promote the business of healthcare and ultimately to promote AAPC's mission of "Upholding a Higher Standard."
  - 1.4.1.1 Local chapter meetings are held in groups, in person, and where at least a majority of the current officers are in attendance.

1.5 Mission of AAPC Local Chapters: Advance the careers of AAPC's Healthcare Professionals by:

Providing a networking platform – through physical monthly/quarterly meetings; Facebook groups (only Officer group currently); Forums (for local chapters and officers)

Delivering affordable CEUs – through physical monthly/quarterly free or low-cost educational events

Encouraging personal development – recognition of achievement, and leadership opportunities for growth

Facilitating certification – with testing sites, review classes, and moral support

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## CHAPTER 2

### LOCAL CHAPTERS

#### 2.1 AAPC Chapter Association

- 2.1.1 Each local chapter of AAPC is a part of the AAPC Chapter Association (AAPCCA), a non-profit corporation. Local chapters are formed under the operational direction of AAPC and are operated by the local chapter officers under the direction of AAPCCA's Board of Directors, in accordance with the requirements set forth in this handbook. The local chapter exists to extend the benefits of AAPC membership to its local members.

#### 2.2 Local Chapter Tax Status

- 2.2.1 The local chapters are not tax exempt; we are not a 501-C3 and sales tax must be paid on purchases made by the local chapter.

#### 2.3 Creation of New Local Chapters

- 2.3.1 Formation of new local chapters is based on the needs of AAPC members in a specific geographic area.
- 2.3.1.1 The member(s) making the request must be certified and in good standing with AAPC.
- 2.3.2 AAPC's Local Chapter Department will be responsible for coordinating the research; and based on their assessment of the members' needs, will make a recommendation.
- 2.3.3 New chapters will be considered for formation by consulting with 1) existing chapter(s) in that area, 2) AAPCCA's Board members representing that region.
- 2.3.4 A local member will be invited to serve as the contact person for the new chapter.
- 2.3.5 Generally, the criteria for a new chapter might include mileage, commute patterns, remoteness, accessibility and other issues based on the area, All new local chapters are formed under the discretion of the AAPC Local Chapter team.
- 2.3.6 Once formed, the local chapter shall be called after the name of its city and state. If there are two chapters in a city, then there will be a north/south or east/west or other regional identifier added to the city name. Chapters already in existence shall retain their current name.
- 2.3.6.1 Once a chapter is assigned a name, this cannot be changed without the approval of the local chapter department.



- 2.3.7 Should a chapter be created midyear, the officers agree to serve through the end of the next calendar year. For example, Westwood Chapter is created in June 2020. There will be no election of new officers in October 2020. Officers will remain in their position through December 2021 with election of new officers in October 2021.
- 2.3.8 AAPC and the AAPCCA Board of Directors may give new local chapters seed money while they organize and get established.

## 2.4 Local Chapter Officers

- 2.4.1 Local chapter officers agree to abide by the requirements set forth in the Local Chapter Handbook. The Local Chapter Handbook is available on AAPC's website for all members. The local chapter officers will agree to review a current version of the handbook by accepting the terms listed in the Chapter Officer Agreement.
  - 2.4.1.1 All changes to the handbook for the current year will be posted in red (bold, italic) type. These changes will be effective on January 1 of each year.
  - 2.4.1.2 If changes are necessary during the year, AAPC will notify all members through email, or other electronic notification.
  - 2.4.1.3 Chapter officers are required to read the handbook again when changes are made in **January** of each year. A current year handbook should be printed by the vice president of the chapter to have at each meeting.
- 2.4.2 Officer requirements include:
  - 2.4.2.1 Submission of all required paperwork and agreements.
  - 2.4.2.2 Filling all officer positions.
  - 2.4.2.3 Holding required number of meetings and exams.
  - 2.4.2.4 Complying with all financial obligations, including the submission of the Profit & Loss information and uploading the monthly bank statement.
- 2.4.3 When local chapters are in compliance with the requirements set forth by the AAPCCA, they receive support from AAPC and AAPCCA.
  - 2.4.3.1 If a local chapter does not comply with the expectations set forth in this handbook, AAPC, co-operatively with the AAPCCA, may suspend the local chapter. The process is described in the Summary of Infractions/Consequences. Refer to Appendix B.

- 2.4.3.2 A suspended chapter will be ineligible for 1) approval of CEUs for chapter meetings, 2) proctoring examinations, 3) any AAPC reimbursement, 4) use of AAPC's name and/or logo. Refer to Appendix B for Summary of Infractions/ Consequences.

## 2.5 Expectations of Local Chapter Officers

### 2.5.1 Local chapter officers agree to abide by the following expectations:

- 2.5.1.1 Promote AAPC and its mission on a local level.
- 2.5.1.2 Communicate all local concerns with AAPC in a timely manner.
- 2.5.1.3 Submit the online Election Verification Information within 10 days of elections or no later than November 30, whichever comes first. Refer to Appendix B for consequences of failure to submit Election Verification Information.
  - 2.5.1.3.1 Required information includes the names of the newly elected officers, with city, state and contact information.
  - 2.5.1.3.2 All chapter officers must agree to the terms in the Chapter Officer Agreement stating they agree to serve as officers for a one-year period, understand the expectations set forth in this handbook (and all revisions made throughout the year), and agree to abide by the guidance herein.
  - 2.5.1.3.3 Agreeing to the terms gives AAPC permission to post the officers' names and contact information, including phone numbers and email addresses, on AAPC's website.
- 2.5.1.4 Hold at least six approved chapter educational events per year where little to no cost CEUs are offered.
  - 2.5.1.4.1 Chapters are required to hold 4 in person meetings per year. One per quarter.
- 2.5.4.2 In addition to in person meetings, officers may opt to hold 2 chapter seminars and/or 2 virtual meetings. See chapter 7.
- 2.5.1.5 Schedule and proctor at least four certification examinations per year; an exam is recommended to be scheduled at least once per quarter.
  - 2.5.1.5.1 At least two of the exams must be scheduled to accept ADA accommodations.

- 2.5.1.6 Abide by the rules and guidelines regarding examinations and proctoring found in chapter 8 of this handbook.
- 2.5.1.7 Ensure appropriate use of chapter funds as outlined in the handbook.
- 2.5.1.8 Submit Profit and Loss numbers and upload Bank Statements monthly.
- 2.5.1.9 Ensure that local chapter membership lists are used expressly for local chapter activities/business. It is recommended that officers not forward emails, such as job openings, to their members. This information should be communicated at a chapter meeting, through the chapter newsletter or on your individual AAPC local chapter forum or through social media. (See [Best Practices](#) — Newsletter.)
- 2.5.1.9.1 The use of social media by the AAPC chapter officers and its members must always be in accordance with the mission and goals of AAPC. Social media can be used by officers to assist in:
- Promoting AAPC local chapters
  - Promoting AAPC-sponsored and local chapter events
  - Creating networking opportunities for members
  - Posting job opportunities for members
  - Posting chapter related business for members
- Use of social media in the following ways will not be tolerated:
- Live-streaming of chapter meetings
  - CEU distribution
  - Self-promotion of anyone, officers or members
  - Trolling (definition: make a deliberately offensive or provocative online post with the aim of upsetting someone or eliciting an angry response from them)
  - Unapproved personal sales i.e., AAPC material, classes, etc.
  - Lewd photos or memes
  - Profanity
- Failure to follow this policy could result in officer or member review by the Local Chapter Issues Committee.
- 2.5.1.10 Encourage use of AAPC forums and social media pages such as Face book for networking purposes between chapter members.

- 2.5.1.11 Provide opportunities for networking among AAPC members.
- 2.5.1.12 Provide opportunities for less experienced members to be mentored by those members with more experience.
- 2.5.1.13 Provide members the opportunity to participate in local chapter meetings.
- 2.5.1.14 Ensure the members' privacy, by adding chapter members' email addresses to the blind copy (bcc) line for any group email. The local chapter membership list is available to chapter officers on AAPC's website and can be downloaded, copied and pasted into an email document.
- 2.5.1.15 Comply with all requirements as outlined in, but not limited to, the Local Chapter Handbook.
- 2.5.2 All local chapter officers serve at the will and pleasure of AAPC and the AAPCCA and may be dismissed for due cause, as indicated below.
  - 2.5.2.1 If AAPC or the AAPCCA receives multiple complaints from members or other officers concerning officer conduct, the officer may be removed.
    - 2.5.2.1.1 All decisions are at the discretion of the AAPCCA and the AAPC Local Chapter team.
  - 2.5.2.2 If an officer is unresponsive to AAPC staff, AAPCCA representative, fellow officers or chapter members within a reasonable time (48 hours) AAPC reserves the right to remove the officer immediately.
- 2.6 Officer Contact Information
  - 2.6.1 Contact information for all local chapter officers will be posted on AAPC's website and listed on the local chapter calendar of events. All information comes directly from AAPC's database. It is the responsibility of the local chapter officers to keep their contact information current. AAPC bears no responsibility in the event a chapter officer fails to do so.
- 2.7 Officer Meetings
  - 2.7.1 The local chapter officers are encouraged to hold officers' meetings for the purpose of planning and coordinating chapter business. These meetings may be held by conference calls, email or text if necessary. Minutes of these meetings should be distributed to current chapter officers. Officer meeting minutes should be kept as official record, and retained as per section 9 of chapter 5.

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## CHAPTER 3

### LOCAL CHAPTER OFFICERS

#### 3.1 Officers in a Local Chapter

3.1.1 Each local chapter shall have the following officers: president, vice president, secretary, and treasurer.

3.1.2 Where available chapters are encouraged to elect an education officer and a member development officer in addition to the four required positions.

#### 3.2 Benefits for Local Chapter Officers

3.2.1 Each officer from local chapters that qualify will receive a discount to AAPC's annual or regional conferences offered during the year following their term in office.

3.2.1.1 To qualify, chapters must:

- a) Host at least six approved chapter educational events per year where little to no cost CEU's are offered or four approved chapter meetings and two approved live virtual meetings and/or two approved seminars,
- b) schedule and proctor at least four certification examinations per year,
- c) each officer must proctor a minimum of one exam per year,
- d) mark attendance online within 30 days from the date of the meeting,
- e) upload profit and loss information monthly as well as upload the bank statement monthly,
- f) each officer must actively participate and fulfill the roles and responsibilities of their respective office.

3.2.1.1.1 If a scheduled exam is cancelled by AAPC, the officers will receive credit for holding that exam.

3.2.1.2 The discount is based upon adherence to the expectations of local chapter officers (see chapter 5) and it is non-transferable.

3.2.2 The discount options for eligible chapter officers include 1) a discount on the registration fee for AAPC's national conference, or 2) a discount on the registration fee for AAPC's regional conference.

3.2.3 No financial compensation is paid to local chapter officers or members for their voluntary services.

## CHAPTER 4

### REQUIREMENTS OF ALL LOCAL CHAPTER OFFICERS

#### 4.1 Expectations of All Local Chapter Officers

- 4.1.1 Local chapter officers must abide by the guidelines outlined in this Local Chapter Handbook, the Local Chapter Code of Conduct, and AAPC's Code of Ethics. Officers who do not comply with these guidelines will be ineligible to serve and may cause the chapter to be disenfranchised.
- 4.1.2 All officers must understand the following:
  - 4.1.2.1 Officers must maintain current AAPC membership.
  - 4.1.2.2 President, vice president and education officer must hold an AAPC credential.
  - 4.1.2.3 It is strongly encouraged that the president has previous officer experience in a local chapter. Should the chapter be newly formed an exception to this recommendation shall be made.
  - 4.1.2.4 Other chapter officers are encouraged to obtain AAPC certification by the beginning of their term or during their term in office. This is not mandatory to serve as an officer.
  - 4.1.2.5 All officers are to be present at all chapter sponsored events. In the event an officer cannot attend, after making every effort possible to be present, they must communicate (prior to the meeting) with the presiding officer and be formally excused, while ensuring all their duties and responsibilities are covered by a fellow officer.
    - 4.1.2.5.1 Officers with repeated excused absences, or officers with two unexcused absences (including no notification to fellow officers of absence) should be reported to AAPC. Refer to Appendix B for consequences of failure of an officer to attend chapter meetings.
    - 4.1.2.5.2 Officers who fail to respond in a timely manner (48 hours) to emails, phone calls or other types of communication from other officers or chapter members should be reported to AAPC.
  - 4.1.2.6 When a meeting is cancelled for any reason, all officers should be notified prior to the communication with AAPC and prior to notification being sent to members.

4.1.3 Local Chapter Officers agree to:

- 4.1.3.1 Promote AAPC and its mission on a local level.
- 4.1.3.2 Ensure at least six approved chapter educational events per year are held where little to no cost CEUs are offered.
  - 4.1.3.2.1 Instead of six approved chapter meetings, officers may opt to sponsor four approved chapter meetings and 2 seminars or 2 live virtual meetings per year.
- 4.1.3.3 Ensure at least four certification examinations are scheduled and proctored per year; an exam is recommended to be scheduled at least once per quarter.
  - 4.1.3.3.1 At least two of the exams must be scheduled to accept ADA accommodations.
- 4.1.3.4 Ensure appropriate use of chapter funds as outlined in the handbook.
- 4.1.3.5 Encourage networking among members, in person and through use of AAPC forums or social media pages.
- 4.1.3.6 Ensure the chapter members' privacy by always utilizing blind carbon copy (bcc) for email communications.
- 4.1.3.7 Communicate all local concerns with AAPC in a timely manner.
- 4.1.3.8 Ensure order is maintained during all chapter activities and officers are empowered to remove unruly members or visitors.
- 4.1.3.9 Ensure that a true hour of learning is being provided for each awarded CEU. One hour is equal to 60 minutes. Increments of 15 minutes are acceptable. Example: the educational presentation at a chapter meeting lasted one hour and 45 minutes. The meeting would be eligible for 1.75 CEUs.
- 4.1.3.10 Ensure all spending of chapter funds over \$200 and chapter activities are presented to and voted on by the chapter members as outlined in the handbook.
- 4.1.3.11 Perform the duties specific to their position. If unable to perform those duties, the officer will step down, allowing another qualified chapter member to assume this position.

- 4.1.3.12 Retain all financial and non-financial chapter records and documents as outlined in 5.9.1.
- 4.1.3.13 Proctor at least one exam.
- 4.1.3.14 Monitor the forum and social media pages.
- 4.1.3.15 Actively participate with other chapter officers to ensure the chapter is moving forward.
- 4.1.4 Local chapter officers serve voluntarily and should understand that they represent their chapter members and AAPC, and should thus act ethically and with the utmost integrity.
  - 4.1.4.1 AAPC reserves the right to remove an officer at any time as is deemed necessary, in the interest of maintaining the integrity of the chapter.



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## CHAPTER 5

### RESPONSIBILITIES OF LOCAL CHAPTER OFFICERS

#### 5.1 Conduct of Officers

5.1.1 Acceptance of a leadership role in the local chapter requires an individual to conduct themselves in a professional manner that is supportive of AAPC and its mission.

5.1.1.1 Any blatant disregard of AAPC's rules or direction from the AAPC local chapter staff or AAPCCA Board of Directors may result in removal from office.

5.1.1.1.1 Use of the local chapter for personal gain, such as promoting a private business, is strictly prohibited. See Appendix B Infractions.

5.1.1.2 Chapter officers must also be respectful and considerate of fellow local chapter officers and members.

5.1.1.3 If conflicts occur, what are you willing to do to come to the middle? We are looking to you to seek resolution.

#### 5.2 Duties and Responsibilities of All Officers

5.2.1 In order for the chapter to operate efficiently and meet the needs of the local membership, specific duties and responsibilities have been delegated and assigned to each chapter officer. The AAPCCA strongly encourages current officers to involve as many members as possible in the planning and operation of the chapter.

5.2.1.1 While all officers are responsible for their respective duties, it is the president's responsibility to ensure the local chapter remains in good standing per AAPC Local Chapter Handbook requirements.

5.2.2 Each local chapter is required to have the following officers: president, vice president, secretary, and treasurer or secretary/treasurer.

5.2.2.1 Chapters with average attendance at local chapter meetings of more than 40 members are strongly encouraged to elect an education officer and a member development officer, in addition to the four required positions. Chapters with less than an average of 40 attendees are welcome to have these positions.

- 5.2.3 Immediately following the October election of new officers, current and newly-elected officers should work together to ensure chapter meetings and exams are scheduled for the first part of the year.
- 5.2.4 Officers should be willing to meet regularly to ensure there is effective communication between themselves and the chapter members. These officer meetings may be held by conference call, email or text if necessary.
- 5.2.5 All officers should be included in the planning of events such as May MAYnia, chapter seminars/conferences, or other events. Inclusion of chapter members through committee participation is encouraged.
- 5.2.6 Officers are encouraged to share information with chapter members about current and upcoming AAPC events including information about the AAPCCA Hardship Fund.
- 5.2.7 The president and treasurer will be required to complete the signature card requirements for the chapter bank account. Requirements include providing banking institutions with social security numbers of both signers on the account, as well as, providing any other information required by the chapter's banking institution.
- 5.2.8 All officers will ensure the chapter:
  - 5.2.8.1 Holds at least six approved chapter educational events per year or four approved chapter education events and two approved seminars and/or two live virtual meetings.
  - 5.2.8.2 Schedules and proctors at least four certification examinations per year; an exam is recommended to be scheduled at least once per quarter.
    - 5.2.8.2.1 At least two of the exams must be scheduled to accept ADA accommodations.
  - 5.2.8.3 Completes and submits all required online uploads monthly.
  - 5.2.8.4 Promotes and expands the business of healthcare.
  - 5.2.8.5 Provides opportunities for networking among AAPC members.
  - 5.2.8.6 Provides opportunities for mentoring less experienced members by those members with more experience.
  - 5.2.8.7 Provides members the opportunity to participate in local chapter meetings.

- 5.2.8.8 Follows all regulations established by AAPC for local chapters as per this handbook (including any revisions made throughout the year) and other official reference documents and practices.
- 5.2.8.9 Actively participate with other chapter officers to ensure the chapter is moving forward in a positive and professional manner.

### 5.3 President Duties

The president is primarily responsible for the overall well-being of the chapter (including events and exams) and ensures all members are treated in a professional manner.

- 5.3.1 Serve as a leader to the chapter officers and members, encouraging all officers as they fulfill their respective responsibilities and encouraging members as they network.
  - 5.3.1.1 Work with officers to determine needs of chapter members. Plan events, dates and locations, based upon the needs of the chapter members.
    - 3.1.1.1 Officers may need to conduct a survey of the members.
- 5.3.2 Serve as liaison with AAPC and AAPCCA.
- 5.3.3 Serve as contact person for those interested in attending local chapter events.
- 5.3.4 Conduct local chapter events.
  - 5.3.4.1 In order for meetings to run smoothly and efficiently, it is recommended that the president develop and utilize a written agenda for monthly local chapter meetings. (See [Best Practices](#) — Meeting Agenda.)
- 5.3.5 Ensure certification examinations are administered correctly by following the rules and regulations found in chapter 8 of this handbook. Refer to Appendix B for consequences of failure to hold at least four certification examinations per year and of improper proctoring/misconduct of examination.
  - 5.3.5.1 Submit online request for approval to administer AAPC certification exams at least eight weeks prior to the examination date. For information on scheduling exam dates refer to chapter 8.
  - 5.3.5.2 Ensure that chapter officers serving as proctors understand the rules to be followed during examinations, as outlined in chapter 8 of this handbook.
- 5.3.6 Sign on local chapter bank account.

- 5.3.6.1 If the chapter utilizes a debit card, provide a check and balance with the treasurer by reviewing the activity of the card monthly.
- 5.3.6.2 Ensures the bank signature card is correct in January and at any time during the year if there are changes in officer positions.
- 5.3.7 Oversee secretary and treasurer (or secretary/treasurer).
  - 5.3.7.1 The president works closely and meets monthly with the treasurer and is aware of all financial activity including the upload of bank statements monthly.***
- 5.3.8 In the event a local chapter has no education and/or member development officer, the president, along with the vice president, ensures these duties are performed.
- 5.3.9 Communicate regularly with chapter officers, whether by email, text or telephone.
- 5.3.10 Serve as moderator for and respond to the local chapter forum and/or social media pages.
  - 5.3.10.1 Moderators have the ability to edit and delete posts, remove threads, and perform other actions. See FAQs under AAPC Forum.
- 5.3.11 Be responsible for the chapter's original attendance sheets through 2017.
  - 5.3.11.1 Assist members by providing lost CEU certificate(s), upon request from member, and after validating attendance at event per review of the attendance sheets kept through 2017.
- 5.3.12 In the event of the resignation of the treasurer, the president ensures that the treasurer's name is removed as a signer on the account. If the president is the resigning officer, this becomes the responsibility of the treasurer.

#### 5.4 Vice President Duties

The vice president is primarily responsible for assisting the president with the overall running of the chapter and conducting the nominations and elections.

- 5.4.1 Assist president with chapter activities as necessary.
  - 5.4.1.1 Preside over local chapter meetings in the absence of the chapter president.
  - 5.4.1.2 In the unlikely event that the current president is unable to fulfill the full year in office, the vice president will assume the role of president for the time remaining in the current term.

5.4.2 Participate in the planning of chapter meetings.

5.4.2.1 Actively participate with other chapter officers to ensure the chapter is moving forward in a positive and professional manner.

5.4.3 It is recommended that elections for next year's officers be held in October.

5.4.3.1 Manage the annual nomination and election process.

5.4.4 Maintain a current copy of the Local Chapter Handbook at each meeting and/or chapter activity.

5.4.4.1 Ensure current handbook includes updates effective January of each year.

5.4.5 Oversee education officer and member development officer.

5.4.5.1 In the event a local chapter has no education officer and/or member development officer, the vice president, along with the president, ensures the duties of these positions are performed.

5.4.6 Responsible for Distribution of CEU certificates.

5.4.6.1 If the chapter desires to distribute CEU certificates, the vice president, in the absence of an education officer, will complete and distribute the CEU certificates (See Best Practices Distributing CEU Certificates.)

5.4.7 Chair promotion of the AAPCCA Hardship Fund if chapter chooses to participate.

5.5 Secretary Duties

The secretary is primarily responsible for maintaining a list of active chapter members, and publishing the chapter meeting minutes. Refer to Appendix B for consequences of misuse of local chapter membership list.

5.5.1 Working with the member development officer, maintain a local chapter membership list of all active chapter members, noting member participation.

5.5.1.1 Encourage members to update contact information on AAPC's website.

5.5.1.2 Refer to the local chapter membership list of AAPC members assigned to the chapter as provided on AAPC's website.

5.5.2 Tracks attendance at all chapter educational events.

5.5.3 Prepare local chapter meeting minutes. Minutes can be made available to chapter members by posting on your own local chapter's section on AAPC's forum or Social media page.

5.5.3.1 Minutes may be submitted online at [www.aapc.com](http://www.aapc.com). Minutes may include information about the speaker, subject matter and length of education. For information on uploading minutes refer to chapter 7.

5.5.4 Should assistance be needed, upon request, the secretary can rely on the president for guidance and help.

## 5.6 Treasurer Duties

The treasurer is primarily responsible for the maintenance and accountability of all chapter funds including all incoming and outgoing monies from the local chapter's bank account. Refer to Appendix B for consequences of misuse of chapter funds and failure to utilize the AAPCCA's tax identification number for local chapter bank account.

5.6.1 Maintain chapter funds, including activity within the bank account such as checks written, transactions with the debit card, and deposits made.

5.6.1.1 Reconcile bank statements monthly and report on status of chapter finances at each chapter meeting or upon request. Uploads required monthly bank statement.

5.6.1.2 Issue checks for reimbursement for chapter expenses.

5.6.1.2.1 Ensure receipts are provided for all requested reimbursement. No chapter funds shall be released to any person or agency without first having valid receipts or invoices documenting the amount, the date of purchase, the description of services or items, and how these were used. (See [Best Practices](#) — Expense Reimbursement Request Form.)

5.6.1.3 In the event the chapter closes, the treasurer is responsible for requesting a cashiers check for the remainder of the chapter funds before closing the account and submitting the check along with the final bank statement to AAPC.

5.6.1.3.1 This should be completed within 14 days of the chapter's closing.

- 5.6.2 Be the primary signer on the chapter bank account.
  - 5.6.2.1 The treasurer must understand that most banking institutions require the social security number of all signers on an account, and agrees to provide any required information to the chapter's banking institution.
  - 5.6.2.2 Verifies each January with bank that all banking account information (tax ID number, account name, signature card) is accurate.
  - 5.6.2.3 In the event of the resignation of the president the treasurer ensures that the president's name is removed as a signer on the account. If the treasurer is the resigning officer, it becomes the responsibility of the president.
  - 5.6.2.4 If a chapter utilizes a debit card attached to the chapter bank account, the debit card is the property of AAPCCA and is entrusted to the president and treasurer during their term in office. (See chapter 12 for additional information.)
    - 5.6.2.4.1 If the bank allows, a chapter may be in possession of two (2) debit cards, one entrusted to the president, the second entrusted to the treasurer.
  - 5.6.2.5 Use of the chapter debit card is subject to all other chapter transactions (see chapter 12), and may require membership approval.
  - 5.6.2.6 All debit card transactions will be reported monthly. A debit voucher (see [Best Practices](#)) may be used to document debit card charges.
- 5.6.3 Provides timely documentation for quarterly reimbursements from AAPC for the chapter.
  - 5.6.3.1 Reimbursements are requested by marking attendance online for chapter meetings. Attendance must be marked within thirty (30) days from the date of the meeting. ***Bank statements must be uploaded monthly to ensure reimbursement.***
    - 5.6.3.1.1 The treasurer, along with the other officers, will mark attendance at the meeting.
    - 5.6.3.1.2 If unable to mark attendance on line or by using the MyAAPCapp at the chapter meeting, chapters may use a paper sign in and later complete the marking of attendance on line within 30 days from the date of the meeting.

- 5.6.3.2 To ensure reimbursement is received, bank statements must be uploaded monthly and marking of the attendees must be completed within 30 (thirty) days from the date of the chapter meeting. Refer to Appendix B for consequences of failure to submit information by due date.
- 5.6.4 A financial statement must be prepared monthly and made available to the membership at each meeting. The statement is located on AAPC's website under Forms.
  - 5.6.4.1 AAPCCA reserves the right to conduct random audits of chapter financial records.
- 5.6.5 Be prepared to promptly respond to reasonable requests for financial information from chapter members, AAPC, or AAPCCA.
- 5.6.6 Input the Profit and Loss numbers and upload bank statements monthly. For information on submitting the Profit and Loss Statement, refer to chapter 12. Refer to Appendix B for consequences of failure to input Profit and Loss numbers and uploading the bank statement monthly.
- 5.6.7 Retain financial and non-financial records as per section 9 of this chapter.
- 5.6.8 Should assistance be needed, upon request, the treasurer can rely on the president for guidance and help. The treasurer may also contact the AAPC Local Chapter team.

Note: When the secretary and treasurer positions are combined, the responsibilities shall be as described above for each individual office.

## 5.7 Education Officer Duties

The education officer is primarily responsible for securing chapter meeting education, applying for CEU approval, issuing CEUs to attendees and attesting to all information contained on the CEU form.

- 5.7.1 Coordinate the educational content of regular chapter events (at least six per year or four meetings and two live virtual meetings or two seminars) and arrange for educational guest speakers and locations; dates and times of events as determined by the chapter officers. Refer to Appendix B for consequences of not holding at least four chapter events or two live virtual meetings or two seminars.
  - 5.7.1.1 Topics and speakers should be relevant to AAPC and members.
    - 5.7.1.1.1 AAPC strongly discourages paying speakers to present local chapter meetings, seminars, conferences, etc.  
(See [Best Practices](#)— Finding Speakers for Local Chapter Events.)



- 5.7.1.2 Established dates and times of chapter events should not be changed without the majority of member approval.
- 5.7.2 Submit online requests for approval of CEUs for chapter meetings, seminars, and review classes. For information on requesting approval for CEUs refer to chapter 7.
  - 5.7.2.1 Should the speaker end prior to the CEU awarded time, the education officer shall be prepared to provide additional education to cover the remaining educational time or officer shall adjust the number of CEU awarded to members. Refer to Appendix B for consequences of misrepresentation of CEUs.
    - 5.7.2.1.1 The CEU Vendor Department must be notified immediately when the meeting ends early in order for the catalogue number for the CEUs to be updated.
- 5.7.3 Complete and distribute Certificate of Attendance/CEU Credits form with an AAPC-assigned catalogue number and correct CEU value. (See [Best Practices](#) — Distributing CEU Certificates.)
  - 5.7.3.1 CEU certificates are not required for chapter meetings, however, the chapter has the option to provide them.
  - 5.7.3.2 Any officer may sign the CEU certificates when provided.
  - 5.7.3.3 Although all chapter officers are able to apply for CEUs, the assigned responsibility for this task lies with the education officer. When the education officer receives the CEU approval, he or she is responsible for communicating this to all officers prior to the chapter event.
- 5.7.4 Encourage participation by inviting members to suggest speakers and topics.
  - 5.7.4.1 Use chapter members as speakers when possible.
- 5.7.5 Should assistance be needed, upon request, the education officer can rely on the vice president for guidance and help.

## 5.8 Member Development Officer Duties

The member development officer is primarily responsible for ensuring all chapter meeting attendees are welcomed, providing networking opportunities between members and guests; and reaching out into the community to encourage new members.

- 5.8.1 Serve as mentor to all members attending chapter meetings, encouraging members to network and invite others to attend monthly chapter events.

- 5.8.1.1 Ensure members and visitors are greeted and welcomed at local chapter events.
- 5.8.1.2 Ensure new members and/or newly certified members are contacted, welcomed and/or congratulated.
- 5.8.1.3 Obtain contact information on all visitors, guests and students who attend chapter events. Provide information on the benefits of being a member and encourage membership.
  - 5.8.1.3.1 Keep a record of the number of events a non-member attends. After the third visit, the attendee is required to join AAPC.
- 5.8.2 Establish relationships with local PMCC instructors with the intent to involve their students in the local chapter.
- 5.8.3 Should assistance be needed, upon request, the member development officer can rely on vice president for guidance and help.
- 5.9 Record Retention
  - 5.9.1 Both financial and non-financial documents are considered records and property of each local chapter, and must be kept for seven years. Examples of financial documents include but are not limited to bank statements, expense receipts, checkbook register and deposit slips (any document that supports monies received and/or distributed by the local chapter). Examples of non-financial documents include but are not limited to chapter event attendance sheets and minutes.
    - 5.9.1.1 It is recommended that each local chapter maintain these documents in an electronic format, such as a flash drive or like device. Storing local chapter documents in this manner allows for easy access between officers and easy transferring of materials.
      - 5.9.1.1.1 It is strongly recommended that records be stored in two formats such as 2 flash drives/chapter computer and flash drive/paper and flash drive etc. In the event one form is lost or breaks.
    - 5.9.1.2 All documents, electronic or paper, are to be passed to the new local chapter president no later than December 31.
      - 5.9.1.2.1 Failure of a local chapter to comply with the information in 5.9.1.2 could result in disciplinary action as outlined in Appendix B.
    - 5.9.1.3 In the event of a chapter closing the chapter officers will contact AAPC's Local Chapter Department for the procedure to be followed.

## 5.10 Leadership Training

- 5.10.1 AAPC provides training for all elected officers via live virtual trainings, in-person meetings, webinars, and teleconferences or with the local chapter staff at AAPC. It is strongly suggested that all officers participate in at least one (1) AAPC sponsored training event on an annual basis. Failure to attend this training could result in the consequences listed in Appendix B.
- 5.10.2 AAPC may offer leadership training for all local chapter officers in conjunction with AAPC's annual and regional conferences for all local chapter officers. Training includes leadership characteristics, running an effective local chapter, recruitment of members, and other subjects.

## 5.11 Change/Resignation of Officers

- 5.11.1 In the event of a change or resignation of an officer, the current officers should contact the runner-up to see if he or she is willing to fill the role. If only one person ran for that officer role the officers should put a "call" out to all members asking for a volunteer to fill this officer role. If no volunteers step forward, the current officers may appoint a new officer.
- 5.11.1.1 The resigning officer should send a resignation letter to AAPC and to the local chapter president.
- 5.11.1.2 Once confirmed the new officer must login to AAPC's website and accept the Chapter Officer Agreement within 10 days.
- 5.11.2 The president or the vice president should obtain the proper signature of the newly appointed officer and submit a Change of Officers form to AAPC within 10 days of the acceptance.
- 5.11.3 If the resigning officer is a signer on the chapter bank account, the current chapter officers (treasurer or president) must ensure the resigning officer's signature is removed and the new officer's signature is added.
- 5.11.4 When a member is voted in as an officer and agrees to take on that role in the local chapter, there must be a level of commitment and professionalism, even in a volunteer position. Officers will not be allowed to resign from a chapter officer position because of conflict and then start or hold a position as a new officer in another chapter, for the remainder of that year.

## 5.12 Communication with AAPC

5.12.1 Inasmuch as officers' names and contact information are posted on AAPC's website and members are referred to their local officers for information, it is essential all contact information be kept current. It is the responsibility of the officers to maintain current information with the Local Chapter Department of AAPC. Failure to do so may result in removal of the officer from the leadership role.

## 5.13 Removal of an Officer

5.13.1 A local chapter may take action to remove a chapter officer by contacting AAPC's Local Chapter Department and the AAPCCA. Any possible removal of an officer will be decided by the AAPC Local Chapter Team.

## CHAPTER 6 ELECTIONS

### 6.1 Importance of Elections

- 6.1.1 Chapter officers are a very important part of every local chapter. Without members volunteering their time and leadership, local chapters would be unable to function. Chapter elections offer all members the opportunity to serve and encourage participation within the local chapter.
- 6.1.2 The vice president facilitates and is responsible for the integrity of the election and balloting process.
- 6.1.3 If officers are not in place by December 30<sup>th</sup>, the chapter will be closed.

### 6.2 Preparing for Elections

- 6.2.1 The vice president works with the president to plan a date for the election. The election must be completed by October 30; therefore, it is recommended that the vice president holds the call for nominations no later than September. For chapters that don't hold meetings in October, elections may be held in September. In that case, the call for nominations should be held in August. (See [Best Practices](#) — Call for Nominations.)
  - 6.2.1.1 During this time the secretary should encourage all members to ensure their contact information is correct on AAPC's website.
  - 6.2.1.2 The vice president will ensure that all candidates are active members of the chapter and are eligible to run for office.
    - 6.2.1.2.1 Any member who is currently involved in an AAPCCA Issues Committee or AAPC Ethics Committee investigation is ineligible to run.
- 6.2.2 The vice president should form and chair an elections committee to organize and conduct the nominations.
  - 6.2.2.1 The committee should be comprised of at least two additional members who are not current officers or running for an office.
    - 6.2.2.1.1 If the vice president is running for an office, the other members of the committee must conduct the voting and counting of ballots.

6.2.3 Once the date of the election is determined, each member of the chapter must receive notification at least 30 days in advance of the date the elections will be held.

6.2.3.1 While it is not necessary to personally contact all members, acceptable means of notification are 1) AAPC forum or Social media posting and 2) email to all members, as per local chapter membership list available on AAPC's website.

6.2.4 The vice president should print the local chapter membership list as provided on AAPC's website and make it available at the election meeting. Only members currently assigned to the chapter are eligible to vote in the election.

6.2.5 Elections are to be held for the upcoming year only, and never for more than that year.

### 6.3 Nominee Qualifications

6.3.1 Strength of character, leadership, professionalism, communication skills, and the ability to volunteer time and service should be considered when nominating local chapter officers. It is imperative that the nominees uphold high standards, be ethical, maintain integrity, and are interested in the success of AAPC and the local chapter.

6.3.1.1 Nominees must reside in the same geographical area of the local chapter, or within a reasonable vicinity thereof, to be readily accessible to members and other local chapter officers.

6.3.1.2 Nominees must currently be an active chapter member or demonstrate commitment to regular attendance if elected. Examples of active attendance include but are not limited to regular meeting attendance, participation in the growth of the chapter, volunteer for committees and other chapter activities, participates in meetings, etc.

6.3.1.3 Nominees must be assigned to the chapter in which they seek election.

6.3.1.4 If elected, officers may not concurrently hold office in more than one AAPC local chapter, nor in another organization offering core coding credentials.

6.3.1.5 When a member is voted in as an officer and accepts that role in the local chapter, there must be a level of commitment and professionalism. Officers will not be allowed to resign from a chapter officer position because of conflict and then start or hold a position as a new officer in another chapter, for the remainder of that year.

## 6.4 Nominations

- 6.4.1 A call for nominations must be made by the vice president at least one month prior to the election date at the local chapter meeting. If necessary, an additional call for nominations can be sent through any form of communication routinely used by the local chapter to its membership.
  - 6.4.1.1 All nominees shall have the opportunity to accept/decline the nomination prior to elections.
  - 6.4.1.2 Nominees must meet the qualifications of the office for which they are being nominated, be in good standing with AAPC, attend local chapter meetings regularly, and be assigned to the chapter in which they are nominated.
    - 6.4.1.2.1 The vice president is responsible for verifying that the nominated member is assigned to the chapter and that the member holds the required credentials for that office.
  - 6.4.1.3 It is recommended that officers represent diversity in skill sets, knowledge, background, and employment status, including representation of various employers in the area. It is highly recommended that officers are not employed by the same company.
- 6.4.2 Members may self-nominate.
- 6.4.3 A member can only accept the nomination for one officer position.
- 6.4.4 Nominations should be held for the offices of president, vice president, secretary, and treasurer (or secretary/treasurer). An education officer and member development officer are not required positions but are strongly recommended and encouraged.
- 6.4.5 Multiple members may not share one officer position.
  - 6.4.5.1 One member may not hold two offices at the same time, with the exception of the secretary/treasurer combined position.
- 6.4.6 Nominations must be made prior to the meeting where elections will take place.
  - 6.4.6.1 In the event that there are no nominations for a required officer position(s), a member may volunteer on the spot at elections. The member's name should be written in with a yes/no vote noted.

6.4.6.1.1 If a chapter fails to receive nominations/volunteers to serve in the three required officer positions, the chapter officers may inform the members that the chapter will be at risk of closing.

6.4.6.1.1.1 The AAPC Local Chapter Department will contact the chapter members to seek volunteers to serve and explain the consequences for the chapter if there are no officers.

## 6.5 Term Limits for Chapter Officers

6.5.1 Local chapter officers are elected for a term of one year (January through December).

6.5.1.2 If the current president is unable to serve the full year in office, the vice president should assume the role of the president for the remainder of that term.

6.5.2 All officers who continue to meet the requirements of an officer as per chapter 4 of this handbook may be nominated and, if elected, serve a second term in the same office.

6.5.2.1 These officers should not serve more than two consecutive years in the same office.

6.5.2.2 After serving as a chapter officer (in different capacities) for four consecutive years, an officer may not be elected to an office for at least one year.

6.5.3 Approval from AAPC's Local Chapter Department must be obtained for any variation to the term limits described above.

## 6.6 Ballots/Voting

6.6.1 Voting is private and must be conducted using a private ballot at a local chapter meeting. Voting should not be conducted at a seminar or review class. Chapters will not use a show of hands, verbal voting, or any other form of voting when electing chapter officers. (See [Best Practices](#) — Ballot.)

6.6.1.1 A member that is unable to attend the chapter meeting may request an absentee ballot from the officer in charge of the election.

6.6.1.1.1 Absentee ballots are not sent to all chapter members, but are sent by request only.



- 6.6.1.1.2 Absentee ballots must be returned to the officer in charge no later than 24 hours in advance of the scheduled election.
- 6.6.2 Ballots should be created in such a way as to require a yes or no vote for nominees who run unopposed.
- 6.6.3 Only AAPC members assigned to the local chapter, as reflected on the local chapter membership list provided by AAPC online, may vote.
- 6.6.4 Before the close of the chapter meeting, the elections committee will count all valid ballots, including absentee ballots, verify the results, and announce the winners at the meeting. (See [Best Practices](#) — Vote Count Sheet.)
- 6.6.5 The nominee receiving the majority of votes will fulfill the responsibility of that office for one complete calendar year.
  - 6.6.5.1 If the voting results in a tie after the initial count, all ballots will be recounted by the election committee and any members or current chapter officers that are not running on the ballot. If the tie still stands after the recount, the committee either asks the nominees if they would like to concede or holds another vote. If the issue is still not resolved, the officers should consult with the Local Chapter Department for further guidance.
- 6.6.6 Any unethical actions or mishandling of the election process by any officer, or member of the elections committee, will be reviewed by the AAPCCA Board of Directors and the AAPC Local Chapter Department. Improprieties found may result in the resignation and/or disqualification of all involved.
  - 6.6.6.1 Anyone sanctioned for mishandling of the election process will be prohibited from running for a local chapter officer position for up to five years or longer, as deemed appropriate by the AAPCCA Board of Directors and the AAPC Local Chapter Department.
- 6.7 Election Verification Information
  - 6.7.1 Within 10 days of the election, but no later than November 30, the current vice president will complete the [Election Verification](#) Information on AAPC's website.
    - 6.7.1.1 If a newly elected officer is not in good standing with AAPC, the Local Chapter Department will contact the current vice president within 30 days following the submission of the Election Verification Information.

- 6.7.2 Once confirmed, the new officer must log in to AAPC's website and accept the Chapter Officer Agreement within 10 days.
- 6.7.3 Delay in completion of the Election Verification Form results in the inability for the upcoming officers to be informed of future events which are important to their role as an officer such as officer training, newsletters, etc. Until the Election Verification Form is submitted and the officers accept their positions, exams, meetings and review classes cannot be scheduled and CEUs cannot be obtained for chapter educational events.

## 6.8 Current Officers and Newly Elected Officers

- 6.8.1 It is strongly recommended that the current officers mentor the newly elected officers for the remainder of the current year.
- 6.8.2 The newly elected officers are strongly encouraged to meet together shortly after elected and begin planning for the chapter's future.
  - 6.8.2.1 Discussions should include events, such as chapter meetings and exams, chapter finances, securing speakers, planning workshops, surveying the members for their input and increasing membership attendance and participation for the following term. It is imperative that the newly elected officers determine and set the course for the coming year.
  - 6.8.2.2 Current officers are encouraged, but not required, to be included in these discussions.
  - 6.8.2.3 It is acceptable for former officers to be used on an advisory basis as officers may learn from the past while continuing to move your chapter forward.
  - 6.8.2.4 Current officers must transfer all chapter records and documentation to the new officers by December 31.
- 6.8.3 Events can be scheduled by the new officers as soon as the Chapter Officer Agreement has been completed online.
- 6.8.4 New officers should refer to the Local Chapter Handbook, their AAPCCA Regional Representative, or the Local Chapter Department at AAPC for any questions regarding their position or concerns in their local chapter.

- 6.8.4.1 Officers should always verify and confirm their responsibilities through one of the official sources listed above. It is not acceptable for an officer to perform their responsibilities solely on the information received from current and/or past officers.
- 6.8.4.2 Officers should read the most current Local Chapter Handbook available, keeping in mind that the new version comes out in January each year.

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## CHAPTER 7

### LOCAL CHAPTER MEETINGS AND OTHER CHAPTER SPONSORED EVENTS

#### 7.1 Attendance at Local Chapter Meetings

##### 7.1.1 Membership with AAPC entitles members to attend local chapter meetings.

7.1.1.1 The amount charged to a member to attend a chapter meeting should only be the amount needed to cover the costs generated by the chapter for the meeting. No “dues” or other such charges should ever be required from the member to attend a local chapter meeting.

##### 7.1.2 It is not necessary to be certified in order to attend a local chapter meeting.

7.1.2.1 All attendees, including speakers, regardless of membership, should be marked as attending.

7.1.2.2 When possible, chapters should mark attendance online at the chapter meeting. The attendance information must be uploaded within 30 days from the date of the chapter meeting. See Best Practices.

7.1.2.2.1 This can be done through marking attendance on line or by using the MyAAPCapp.

##### 7.1.3 Non-AAPC members (visitors, guests, students) may attend up to three local chapter meetings before membership with AAPC is required. Please use wisdom if a nonmember attends more than three meetings.

7.1.3.1 See [Best Practices](#) for a letter that should be given to any nonmember who regularly attends local chapter meetings.

#### 7.2 Purpose of Chapter Events

7.2.1 The purpose of local chapter events is to provide education and networking opportunities with other healthcare professionals.

7.2.2 Active solicitation of any product or service is strictly prohibited at a chapter event.

#### 7.3 Conduct at Chapter-Sponsored Events

7.3.1 Chapter sponsored events shall be conducted in an orderly and professional manner. Local chapter officers are responsible to ensure order is maintained during all chapter activities and are, therefore, empowered to ask unruly attendees to leave a chapter event.

- 7.3.1.1 Members and officers alike are to be aware that when attending events or conducting chapter business, their words and actions represent the organization, each of the local chapters, and the individual members. With this in mind, it is expected that members and officers will conduct themselves accordingly, showing respect and professionalism to all.
- 7.3.2 No alcohol can be provided at chapter-sponsored events through the use of local chapter funds.
- 7.4 Chapter Event Requirements
  - 7.4.1 Local chapters are required to hold at least six approved chapter educational events per year where little to no cost CEUs are offered. Monthly events are encouraged, when possible.
    - 7.4.1.1 Chapters must hold 4 in person meetings (one per quarter). The other two educational events may be either a seminar or live virtual chapter meeting.
    - 7.4.1.2 A chapter meeting is defined as an educational session of 2 (two) hours or less. A seminar is defined as an educational session of 2 (two) hours and fifteen 15 minutes or more.
    - 7.4.1.3 Chapters who are non-compliant, who fail to hold at least six approved chapter educational events, may be placed on probation or closed.
  - 7.4.2 Meetings should be scheduled at least 30 days in advance, but can be submitted for approval as soon as the date, speaker, topic and length of education information are known. The more advanced notice your chapter members have to mark their calendars for the events, the higher the attendance will be at chapter events.
    - 7.4.2.1 Local chapter meetings are scheduled by the education officer or the president by going online at [www.aapc.com](http://www.aapc.com). Scroll over “My AAPC,” find “My Chapter,” click on “Events” and then “[Schedule New Event](#).”

### Steps to Follow When Sponsoring Virtual Meetings

***Step 1 - Email [localchaptervirtualmeetings@aapc.com](mailto:localchaptervirtualmeetings@aapc.com) to reserve a date for the virtual meeting. Include:***

***The name of the chapter***

***The name of the contact person***

***The date, time and length of the virtual meeting***

***The name of the meeting or topic being presented***

***The name of the speaker***

*You will receive a link that your chapter members can use to join the meeting.*

*You will need this link to submit the CEU request for the virtual meeting.*

*Be aware that there is no pre-registration. Attendees simply click on the link in order to participate.*

*Up to 150 members can participate in the meeting.*

***Step 2 - Apply for CEUs using AAPC's online approval process.***

*Use the "meeting" option*

*Complete these fields as follows:*

*Topic (or name of the meeting) = "Virtual Chapter Meeting - (name of topic)"*

*Ex: "Virtual Chapter Meeting – 2019 CPT Changes"*

*Location name = "Virtual Chapter Meeting"*

*Address = "See link below"*

*Directions = "Click here to join this virtual chapter meeting: (add link here)"*

*This is where you add the link received from AAPC. This link will appear online, and members can click there to join the meeting.*

*Those chapters not using AAPC's platform will add their own registration link here.*

*Be sure to queue the alerts to go out so all members assigned to the chapter will receive notifications of the meeting.*

***Step 3 – Be aware that:***

*Virtual meetings are being sponsored to specifically attract members who do not typically attend. This is your opportunity to "show off" the strengths of your chapter and what members can gain by attendance. Discuss as officers how you could take advantage of this. Virtual meetings are intended for home chapter members only.*

*Presidents should conduct the meeting, welcome the members, introduce the officers and introduce the speaker.*

*All officers should participate, with short messages.*

*This allows the members to meet and get to know the officers and demonstrates the duties officers fulfil.*

*Suggestions include introducing each officer, reading minutes from previous meetings, announcing upcoming meetings, announcing members that have recently passed exams, reading a treasurer's report, introducing new members, etc.*

*Officers should use webcams so they can be seen when participating.*

*Inform speakers they should use a webcam so attendees can see their faces.*

7.4.3 Once events and CEUs are approved by the CEU Vendor Department, the event information will appear on chapter members' calendars on the AAPC website as well as under the local chapter events section.

7.4.4 Local chapter officers should exercise good judgment in selecting an appropriate meeting place for local chapter meetings and other chapter-sponsored events.

7.4.4.1 All chapter-sponsored events must be held in a public place/building, conducive to the purpose of the event.

An individual's home is not an appropriate meeting place.

## 7.5 Informing Members of Chapter Events

7.5.1 Officers must keep the chapter's web event calendars current with dates, locations, time, speaker and topic information.

7.5.2 When applying for CEU approval online, officers may select the option to have AAPC notify members by email at specified intervals. If this option is chosen, all AAPC members assigned to the chapter will be invited to attend via e mail.

7.5.3 All chapter officers and members are responsible to view the website regularly for up to the minute event and chapter information.

7.5.4 Established dates and times of chapter events should not be changed without member approval.

7.5.4.1 Discussion can be conducted in an open forum process, where voting by raise of hands is acceptable.

7.5.5 Once an event has been scheduled and after speaker and location have been confirmed, the event should not be cancelled.

## 7.6 AAPC's website

7.6.1 AAPC's website ([www.aapc.com](http://www.aapc.com)) hosts the names of all current local chapters, their officers, and their contact information.

7.6.2 Each local chapter will have its own listing of events on the website. The listing of events will show dates of all upcoming chapter events along with additional information the chapter deems appropriate. From information provided by the local chapter, AAPC will populate the calendar with dates, and the chapter officers will have access to add additional information. Local chapters should not host private websites separately from AAPC.

## 7.7 Meeting Minutes

7.7.1 The chapter secretary or secretary/treasurer *may* upload meeting minutes. Minutes may be uploaded at [www.aapc.com](http://www.aapc.com).

7.7.1.1 To upload minutes the officer scrolls over “My AAPC,” find “My Chapter,” clicks on “Training & News,” selects Meeting Minutes, enters the month and year, clicks on “[Upload Minutes](#),” picks the appropriate meeting minutes file (PDF only), and then clicks “Upload Minutes.”

7.7.1.2 Chapter meeting minutes may include a treasurer’s report, names of special visitors, the speaker’s name, credentials and presentation topic, the attendance count, old and new business, the names of officers present and excused, the upcoming events and the number of CEUs given at the meeting.

## 7.8 Offering CEUs at Chapter-Sponsored Events

7.8.1 Certified members, including the presenting speaker(s), may earn CEUs for attendance in person at local chapter events where pre-approval from AAPC has been granted.

7.8.1.1 CEUs are not given to members who 1) attend via teleconference or 2) view or listen to recorded versions of chapter events.

7.8.1.1.1 With few exceptions, webinars produced by AAPC, including but not limited to On-Demand Virtual Webinars, other On-Demand Webinars, and chapter officer webinars are not eligible for CEUs for chapter meetings. Exceptions may be granted in the case of an emergency. Outside vendor provided webinars may be submitted for CEU approval, but are discouraged and should not be utilized repeatedly. Follow the CEU instructions on the AAPC website.

7.8.1.1.1.1 Speakers from the speakers bureau are allowed and may be virtual as long as your event for members is in person.

7.8.1.2 Chapters are not required to provide CEU certificates at chapter meetings. Following the marking of all in attendance at monthly meetings, the CEUs will be automatically added to each AAPC member’s account.

7.8.1.2.1 In order to receive CEU credit for event attendance, a member must be present for at least 50 percent of the educational session.



- 7.8.1.3 Chapter business discussions, meals and breaks do not count as educational time and should not be submitted for CEU approval.
- 7.8.2 All changes to an approved CEU event must be submitted to and approved again by the CEU Vendor Department.
  - 7.8.2.1 If changes to a pre-approved CEU event are needed more than one week prior to the event, the change may be made online at [www.aapc.com](http://www.aapc.com) by scrolling over “My AAPC”, finding “My Chapter”, clicking on “[Events](#),” clicking on the scheduled event and editing the event.
  - 7.8.2.2 If changes are needed within one week of an event, contact the CEU Vendor Department for assistance.
  - 7.8.2.3 If changes are needed to the number of CEUs assigned after the approved event has taken place, chapter officers should report the revised number of CEUs to the CEU Vendor Department (ie, in the case when a presentation runs significantly short).
- 7.8.3 Each speaker is responsible for the content of his/her presentation. AAPC will not be held responsible for incorrect information presented. Speakers should be requested to complete a Local Chapter Speaker Agreement form and the completed form should be kept on file with the local chapter for one year from the date of the meeting.
  - 7.8.3.1 AAPC strongly discourages paying a speaker fee to present at local chapter meetings, seminars, conferences, etc. However it recognizes that there may be an occasion where basic travel costs incurred by the speaker will be reimbursed by the local chapter (eg, airfare, hotel, mileage). Chapter officers should be resourceful and good stewards of chapter funds when securing speakers. (See Resources & Policies [Best Practices](#) — Finding Speakers for Local Chapter Events.)
  - 7.8.3.2 Speakers with honorariums totaling more than \$400 per year may be required to submit additional information as per IRS regulations.
- 7.9 Application for CEUs for Chapter Events
  - 7.9.1 To apply for CEU credits for chapter events, the education officer or president visits AAPC’s website at [www.aapc.com](http://www.aapc.com), scrolls over “My AAPC,” finds “My Chapter,” clicks on “Events” and then “[Schedule New Event](#).” Note: CEU approval will not be granted retrospectively due to untimely submission of the request.
    - 7.9.1.1 In the event a chapter officer does not have internet access, contact the Local Chapter Department for information on submitting in writing. (Approval will not be given over the telephone.)

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***Apply for CEUs using AAPC's online approval process.***

***Use the “meeting” option***

***Complete these fields as follows:***

***Topic (or name of the meeting) = “Virtual Chapter Meeting - (name of topic)”***

***Ex: “Virtual Chapter Meeting – 2019 CPT Changes”***

***Location name = “Virtual Chapter Meeting”***

***Address = “See link below”***

***Directions = “Click here to join this virtual chapter meeting: (add link here)”***

***This is where you add the registration link received from AAPC. This link will appear online, and members can click there to join the meeting.***

***Those chapters not using AAPC's for the meeting platform will add their own registration link here.***

***Be sure to queue the alerts to go out so all members assigned to the chapter will receive notifications of the meeting.***

- 7.9.2 Events are awarded one CEU per hour of healthcare business-related education.
- 7.9.3 Local chapter officers are responsible to ensure that a true hour of learning is being provided for each awarded CEU. Increments of 15 minutes are acceptable. Example: the educational presentation at a chapter event lasted one hour and 45 minutes. The meeting would be eligible for 1.75 CEUs.
- 7.9.4 The CEU Vendor Department approves the chapter events and assigns each event a separate catalog number.
- 7.9.5 Requests for CEUs submitted online are typically approved within two weeks.
- 7.9.6 CEUs will not be awarded retroactively.
- 7.9.7 Education curriculum must be comprised of core educational content. Core competency is defined as something that AAPC credentialed members do at the core of their day-to-day practice. Pre-approved core competency CEUs will be granted at 100 percent for education.
- 7.9.10 Certified AAPC members, excluding those holding the CPPM credential, may claim all of their CEUs from Curriculum A topics.
  - 7.9.10.1 Except for the CPPM, curriculum B topics can comprise up to six CEUs per year.

## 7.10 Certificate of Attendance/CEU Certificate

7.10.1 If the chapter chooses to provide CEU certificates for in person chapter meetings, the education officer is responsible for preparing the Certificate of Attendance form. Upon request, the education officer should prepare a Certificate of Attendance form. (See Resources & Policies, [Best Practices](#) — Distributing CEU Certificates.)

7.10.2 Non-certified AAPC members are not required to earn CEUs and do not need to collect Certificate of Attendance forms. However, non-certified attendees, including presenting speaker(s), may be given the CEU certificate for other certifications or professions.

7.10.3 Members are responsible for keeping CEU certificates.

7.10.3.1 Members who need to request a replacement of a CEU certificate(s), should send a request in writing to the current president and include the specific date(s) of the event.

7.10.3.1.1 For chapter events prior to January 2018, the president will assist members by validating the member's signature on the event attendance sheet(s) by reviewing records passed down from previous local chapter officers. After January 2018, the president may verify by checking the AAPC website.

7.10.3.1.2 The president should not be overly burdened but make a reasonable attempt to assist the member with the request to replace the lost CEU certificate(s). The president should only provide the lost CEU certificate after confirming the member's attendance at the event.

7.10.3.1.3 Due to record retention guidelines in this handbook and membership renewal policies of AAPC, officers should not have to look through more than two years of attendance sheets to validate CEU certificate(s).

## 7.11 CEU Policy for Certified AAPC Members

7.11.1 The CEU policy for certified AAPC members is found on AAPC's website under [CEU Information — Members](#).

## 7.12 Local Chapter Activities and Social Events

7.12.1 Anyone may attend local chapter activities. ***However, virtual meetings are open only to members in their home chapter.*** The local chapter will provide fair and reasonable accommodations for attendees with disabilities.

7.12.2 Local chapters may hold social events such as annual awards banquets, picnics, and other such social events. The cost of the event may be passed on to the attendees. CEUs are not awarded for social activities.

7.12.3 No alcohol can be provided at chapter-sponsored events through the use of local chapter funds.

### 7.13 Local Chapter Seminars

7.13.1 Local chapters may plan and conduct seminars. The purpose of these events is to provide extended educational opportunities for the local members beyond the regular chapter meetings, at a reasonable cost to members. AAPC is available to provide reference support.

7.13.2 Seminars are presented under the direction of the local chapter.

7.13.3 The local chapter is responsible for all seminar-related expenses. Any income generated from the seminar is retained by the local chapter for their use. Chapter officers should spend all excess profits by the end of the year to avoid being subject to a tax obligation to the chapter.

7.13.3.1 Sponsoring chapters with individual speaker honorariums totaling more than \$400 per year may be required to submit additional information as per IRS regulations.

7.13.3.2 Where two or more chapters work together to sponsor a seminar and profits are expected to be made, an additional bank account should be opened. At the end of the calendar year, a separate Profit and Loss Statement must be submitted for the additional account. (See [Best Practices](#) — Multi-chapter or State Conference.)

7.13.3.2.1 If chapters reconcile and divide the income and expenses immediately following the event, no separate account is needed.

7.13.3.3 No reimbursement is provided to chapters for seminars; ***however, you can mark attendance for seminars on the website.***

7.13.3.3.1 It is advisable to use and retain for 2 years a paper sign-in for seminar attendance in case an attendee requests a replacement certificate.

7.13.4 Registration fees should cover the cost of producing the event with a reasonable profit. Higher fees may be charged to non-AAPC members.

7.13.5 Companies may co-sponsor chapter seminars but the chapter must handle registration, collection of money, advertising, etc. Any promotion or benefit must be for the chapter.

7.13.5.1 Chapters may seek support from sponsors and/or exhibitors and may charge a participation fee to help offset costs of the seminar. It is up to the chapter's discretion on the appropriate fees.

#### 7.14 Application for CEUs for Chapter Seminars

7.14.1 To apply for CEU credits for a chapter seminar, the local education officer (or designated officer) accesses the website at [www.aapc.com](http://www.aapc.com), scrolls over "My AAPC," finds "My Chapter," clicks on "Events," and then "[Schedule New Event](#)."

7.14.1.1 In the event a chapter officer does not have internet access, contact the Local Chapter Department for information on submitting in writing. Approval will not be given over the telephone.

7.14.2 Request for CEUs must include a detailed agenda (including general and breakout sessions), speaker names and credentials, meals, and breaks.

7.14.3 One (1) CEU will be awarded for each hour of education.

7.14.4 CEUs should be requested at least 60 days in advance of seminar and CEUs must be approved before brochures and advertisements are printed and distributed.

7.14.5 CEU approval will be assigned for each separate educational session. Therefore, a seminar with multiple speakers and/or topics will have multiple CEU catalogue numbers.

7.14.6 Classes that are not related to the business of healthcare will not receive CEUs. CEUs will not be given for meals or breaks.

7.14.7 Attendees, including presenting speaker(s), must be provided with the Local Chapter Seminar Certificate of Attendance CEU Credits certificate.

7.14.8 When distributing CEU certificates, it is the responsibility of the local chapter leadership to determine whether the attendee receives full or partial CEU credit for attending each session.

7.14.8.1 Attendees should attend more than half the meeting to receive full CEU credit, otherwise no CEU credit will be given.

#### 7.15 Local Chapter Examination Review Classes

- 7.15.1 Local chapter officers may help members prepare for certification examinations by offering examination review classes. Review classes are not limited to non-certified members and are a good way for all certified members to refresh their coding knowledge.
  - 7.15.1.1 Review classes must be led by an AAPC certified member.
- 7.15.2 Attendees, including presenting speaker(s), are awarded CEUs for review classes. For review classes with multiple meeting dates, each date must be submitted as a separate request. Catalogue numbers will be issued for each date.
- 7.15.3 To schedule a chapter review class, the local officer visits AAPC's website at [www.aapc.com](http://www.aapc.com), scrolls over "My AAPC", finds "My Chapter," clicks on "Events," and then "[Schedule New Event](#)."
  - 7.15.3.1 Upon approval, examination review classes will be listed on AAPC's website. Examinees that contact AAPC about review classes will be directed to the local chapter.
  - 7.15.3.2 In the event a chapter officer does not have internet access, contact the Local Chapter Department for information on submitting in writing. Approval will not be given over the telephone.
- 7.15.4 The local chapter is responsible for handling the scheduling, instruction, and registration for examination review classes.
- 7.15.5 Local chapters are responsible for all fees associated with providing a review class. Fees should be reasonable. Higher fees may be charged to non-AAPC members.
- 7.15.6 Registration fees should cover the cost of producing the event with a reasonable profit going to the chapter.
- 7.15.7 Companies may co-sponsor chapter reviews but the chapter must handle registration, collection of money, advertising, etc. Any promotion or benefit must be for the chapter.
- 7.16 Review Class Curriculum
  - 7.16.1 Review classes must be led by an AAPC certified member.
  - 7.16.2 Curriculum for review classes should be based on AAPC's Study Guide for the certification (CPC®, COC™, or CPC-P®) and other appropriate study materials.
    - 7.16.2.1 The study guides may not be reproduced in any manner.

- 7.16.2.2 AAPC provides a CPC® review class outline to all local chapter officers as a resource for the review. This can be found on AAPC’s website under the Chapter Officers tab.

## CHAPTER 8

### AAPC CERTIFICATION EXAMINATIONS

#### PROCTORING GUIDELINES AND REQUIREMENTS

#### 8.1 General Proctoring Guidelines

- 8.1.1 Maintaining the integrity of AAPC's certification examinations is of utmost importance to all AAPC members. Effective proctoring of the examinations is essential since local chapters administer the certification exams under contract with AAPC. Local chapter officers play a key role in the certification process. The responsibility placed on the local chapter officers should be taken very seriously.
  - 8.1.2 It is the responsibility of the local chapter president to ensure that the proctors understand the [correct procedures](#) for administering the certification examinations.
    - 8.1.2.1 The president will instruct proctors to review the Proctor Instructions prior to the exam date.
    - 8.1.2.2 These instructions are found on AAPC's website at [www.aapc.com](http://www.aapc.com). Scroll over "My AAPC" and then "My Chapter." click the last tab "Event Resources", then "[Proctoring Information](#)."
  - 8.1.3 Local chapters may be asked to schedule additional exam dates at the request of PMCC instructors, or other vendors/coding schools, or organizations.
    - 8.1.3.1 The officers remain responsible for ensuring that the exams are administered as per AAPC requirements.
  - 8.1.4 Local chapter officers and members should not profit for administering the certification examinations.
    - 8.1.4.1 Local chapters may not charge examinees an additional fee to sit for the examination.
    - 8.1.4.2 AAPC strongly discourages the monetary payment of proctors.
- #### 8.2 Assigning Proctors for Exams
- 8.2.1 There must be two proctors assigned to administer every examination.
    - 8.2.1.1 The first proctor must be an AAPC certified local chapter officer who has previous proctoring experience.



- 8.2.1.2 The second proctor, and additional proctors (as needed), must be an AAPC member in good standing; however, they are not required to be certified.
  - 8.2.1.3 Best practice is that for exams hosting 40 or more examinees, the chapter provides 3 proctors.
- 8.2.2 It is ultimately the first proctor's responsibility to make certain the certification examination is administered correctly. This includes understanding the rules to be followed during the examination, and proper and timely return of exams to AAPC's Exam Department.
- 8.2.3 AAPC's Exam Department may contact chapter officers to request additional proctors for exam dates where the number of examinees exceeds what is deemed manageable by two proctors.
  - 8.2.3.1 Additional proctors may not be required to stay for the entire exam period, but at a minimum, their services are required during sign-in and book check.
- 8.3 Appropriate Exam Locations
  - 8.3.1 Local chapter officers should exercise good judgment in selecting appropriate exam sites.
    - 8.3.1.1 An examination may not be held in an individual's home or other location not conducive to test taking.
    - 8.3.1.2 The site must be able to accommodate a minimum of five examinees.
- 8.4 Scheduling Exams
  - 8.4.1 It is the local chapter officers responsibilities to ensure AAPC certification exams are available in their area and to schedule/proctor the certification examinations throughout the year.
    - 8.4.1.1 In order to remain in good standing, each local chapter must schedule and proctor at least four certification examinations per year.
    - 8.4.1.2 Each chapter must make accommodations available for a chapter-sponsored ADA exam site in either the first and third quarters, or the second and fourth quarters of each year.
    - 8.4.1.3 It is recommended that exams are offered quarterly. It is strongly encouraged that chapters schedule an exam in the month of December.

- 8.4.1.4 Newly-elected officers should schedule a first quarter exam immediately upon election and submit the request online as soon as reasonably possible.
- 8.4.1.5 In order for examinees to plan in advance, current officers should work together to ensure exams are scheduled for the entire year, no later than March 30.
- 8.4.1.6 Chapters that are non-compliant, by not scheduling the required minimum number of certification examinations per year, two of which offer ADA accommodations, may be placed on probation or closed the following year.
- 8.4.3 To schedule an AAPC certification exam, the president or officer accesses AAPC's website at [www.aapc.com](http://www.aapc.com), scrolls over "My AAPC," finds "My Chapter," clicks on "Events," and then "[Schedule New Event](#)."
- 8.4.4 Once the exam date request has been submitted online, if all information is in order, the proposed examination date will appear online immediately.
  - 8.4.4.1 Once an exam date has been scheduled online AND there are examinees registered for the exam, the date cannot be changed.
- 8.4.5 Each approved date will receive a separate examination index number that examinees must have to complete the Examination Application and Order Form.
- 8.5 Advertising Exam Dates
  - 8.5.1 Upon approval, examination dates will be posted on AAPC's website and made available to all AAPC members.
    - 8.5.1.1 Local chapter officers should announce examination dates to chapter members once the exam date has been scheduled.
    - 8.5.1.2 Examination dates should not be advertised until the exam has been scheduled on line.
- 8.6 Changes to Scheduled Exams
  - 8.6.1 Within four weeks of the exam, changes should not be made to the location or proctors unless absolutely necessary.
    - 8.6.1.1 Changes to the first proctor may be made online up to four weeks prior to the exam date.

- 8.6.1.1.1 If a change in the first proctor must be made within four weeks of the exam date, the first proctor, or the president, should contact AAPC's Local Chapter Department as soon as possible.
  - 8.6.1.2 Changes to the exam location may be made online up to four weeks prior to the exam date.
    - 8.6.1.2.1 If a change to the exam location must be made within four weeks of the exam date, contact AAPC's Local Chapter Department.
- 8.6.2 Examinations may not be cancelled due to a minimum number of examinees. Once scheduled, exam dates cannot be changed or cancelled. See proctor instructions for guidance due to forces of nature.
- 8.7 Proctor Responsibilities
  - 8.7.1 The proctors must ensure the certification examinations are administered accurately and fairly for all examinees.
  - 8.7.2 The proctors must conduct themselves in a professional manner at all times. Audible conversations or any other type of distraction is prohibited.
  - 8.7.3 The first proctor must be available to sign and receive the exam packet prior to the exam date.
  - 8.7.4 The first and second proctors should review the Proctor Instructions before the exam date. These instructions are found on AAPC's website at [www.aapc.com](http://www.aapc.com). Scroll over "My AAPC" then find "My Chapter" and click on "Events" then "Event Resources" then "Proctoring Information." Proctor instructions are also sent to the first proctor along with the exam packets, and should be reviewed each time as changes do occur periodically. The second proctor will also receive the proctor instructions.
  - 8.7.5 On the exam day, the proctors should arrive at the exam site well in advance of the starting time and ensure the room is set up adequately before the examinees arrive.
  - 8.7.6 The proctors should register examinees by checking their personal picture identification and conducting a thorough book check, per Proctor Instructions.
  - 8.7.7 Both proctors must be present during the entire examination, except for restroom breaks.

8.7.8 Both proctors must ensure the examinees receive the correct amount of time to complete the exam.

8.7.9 The first proctor must ensure the exams are adequately sealed and returned to AAPC within 24 hours of the exam date.

## 8.8 Information Provided by AAPC Examination Department

8.8.1 Approximately three weeks before the examination, the first proctor will receive a Proctor Confirmation letter via e mail from AAPC's Examination Department. Proctors should provide examinees with exam site address or directions, communicate the time the book check will begin, and provide contact information for both proctors.

8.8.1.1 The first proctor should contact AAPC's Examination Department with any questions or discrepancies.

8.8.2 Sealed examinations are sent from AAPC's Examination Department to the first proctor within two weeks of the examination date.

8.8.2.1 The first proctor is required to notify AAPC's Exam Department if examination packets are not received on time. The Exam Department will contact the first proctor via email to confirm delivery of examination packets.

8.8.2.2 All examination materials will be shipped in a manner that can be tracked and delivered to an address where the package can be signed for upon delivery.

8.8.2.2.1 A return shipping label will be included in the exam packet. This label is to be used to return all of the exams and collateral materials to AAPC at no additional cost to the local chapter.

8.8.2.3 Included with the examinations is additional information for both proctors to review prior to the exam. This information includes the name of an AAPC contact person in case of a problem the day of the exam; and also itemizes the steps the proctors will follow to administer and return completed exams.

8.8.3 AAPC is responsible for scoring the examinations and reporting the results to the examinees.

## 8.9 Proctoring Violations

- 8.9.1 AAPC conducts random inspection of proctors as necessary, and on a discretionary basis.
- 8.9.2 When possible violations are reported, the events will be investigated thoroughly and taken under serious consideration.
- 8.9.3 Failure to follow all rules and instructions as set forth by AAPC may result in forfeiture of proctor reimbursement to the local chapter.
- 8.9.4 Proctors agree not to abuse proctoring privileges, and understand that authority to proctor through the local chapter is discretionary and not a right.
- 8.9.5 If any of the above conditions are not met, the chapter's and/or proctors' capacity to proctor may be revoked, and the certification of the officers involved may be in jeopardy. Additionally, failure to follow all instructions could result in the disqualification of an examinee's examination.
- 8.9.6 See [Proctor Instructions](#) for complete details.

## CHAPTER 9

### AAPC CURRICULUM SITES AND LOCAL CHAPTERS

#### 9.1 Curriculum Sites

9.1.1 Chapters have the opportunity to build their membership and mentor beginning coders when relationships are established with the Professional Medical Coding Curriculum (PMCC) sites in their areas.

9.1.1.1 A list of all curriculum sites is available on AAPC's website.

9.1.2 Instructors at curriculum sites are also asked to encourage their students to attend AAPC's local chapter events.

9.1.2.1 When local chapters and curriculum sites support each other, the students receive additional opportunities to enhance their educations, and network with coding professionals in their areas.

#### 9.2 Developing Relationships

9.2.1 Member development officers can establish a relationship with PMCC instructors by:

9.2.1.1 Contacting all instructors in the area and introducing themselves.

9.2.1.2 Arranging a time to visit the class and meet the students.

9.2.1.3 Explaining the workings and the benefits of AAPC local chapters.

9.2.1.4 Inviting the students as well as the instructors to local chapter events.

9.2.1.5 Offering chapter resources to assist with proctoring certification examinations for PMCC instructors.

## CHAPTER 10

### CHAPTER OF THE YEAR AWARD

#### 10.1 Purpose

- 10.1.1 The purpose of the Chapter of the Year Award is to recognize and honor one local chapter that has complied with the Local Chapter Handbook and gone above and beyond what is expected. This award is presented once per year at AAPC's national conference.

***10.1.2 The Chapter of the Year is awarded for the prior year. For example, 2020 award is based upon the 2019 chapter year.***

#### 10.2 Eligibility

- 10.2.1 To be eligible for the Chapter of the Year Award, local chapter officers must complete the following during their term of service:

- 10.2.1.1 Host local chapter education events where CEUs are offered, at least six times per year (every other month is recommended). A minimum of 4 in person meetings is required.

10.2.1.1.1 Instead of six chapter educational events, officers may opt to sponsor four approved chapter meetings or two seminars or two live virtual chapter meeting.

- 10.2.1.2 Schedule and proctor the certification examination, at least four times per year (recommended quarterly and, if possible, in the month of December as well).

- 10.2.1.3 Submit the following information by the due dates, including:

10.2.1.3.1 Election Verification Information — Within 10 days of election.

10.2.1.3.2 Profit and Loss Statement — Entered each month.

***10.2.1.3.3 Required bank statements uploaded each month.***

10.2.1.3.4 Mark attendance of all attendees online within 30 days from the date of the meeting.

- 10.2.1.4 Participate in officer training for the current year.

- 10.2.1.5 Display positive and professional attitudes as outlined in the Local Chapter Code of Conduct and AAPC's Code of Ethics.

### 10.3 Other Considerations

10.3.1 Chapters are encouraged to use their own creativity in promoting and making their chapter successful throughout the year, and sharing this information with AAPC during the call for Chapter of the Year write-ups. If there are chapters in contention that are close, we will look into other areas such as chapter forum and social media use and officer forum social media and use, etc., to break the tie.

10.4 Please refer to the website for application and additional criteria concerning Chapter of the Year.

10.4.1 Deadline is February 15<sup>th</sup>.



## **CHAPTER 11**

### **MARKETING MATERIALS**

#### **11.1 AAPC Marketing**

11.1.1 Upon request, AAPC may provide electronic marketing materials and/or promotional items for use by local chapters, and may electronically distribute information about certain local chapter activities and events.

11.1.1.1 Chapter events may be promoted to AAPC members within a reasonable geographic proximity to the event.

11.1.1.2 Requests for promotional assistance and items should be submitted to AAPC's Local Chapter Department a minimum of four weeks prior to the event.

#### **11.2 AAPC Logo and AAPC Local Chapter Logo**

11.2.1 An AAPC local chapter logo is available for use, and may be generated on the AAPC website by going to My Chapter, Resources & Policies, Logo Generator. Enter Chapter City and State.

11.2.2 AAPC's logo is not available for use by local chapters.

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## CHAPTER 12

### FINANCIAL INFORMATION

#### 12.1 Local Chapter Funds

12.1.1 The mission of AAPC local chapters is to provide services to AAPC members. Chapters should not accumulate excess funds. Local chapters have funds available from a number of sources to be used for the general operation of the chapter.

12.1.2 The AAPCCA reserves the right to conduct random or targeted audits of local chapter accounts and to direct the use of local chapter funds.

***12.1.3 Chapters that make a profit at the end of the year will be liable for any applicable taxes owed.***

#### 12.2 Accounting

12.2.1 Local chapters may use chapter funds to cover expenses including, but not limited to, the payment of local event meeting rooms, speakers, handouts, refreshments, promotion of the local chapter, and other general chapter expenses.

12.2.1.1 AAPC strongly discourages paying a speaker fee to present at local chapter meetings, seminars, conferences, etc. However, it recognizes that there may be an occasion where basic travel costs incurred by the speaker will be reimbursed by the local chapter (eg, airfare, hotel, mileage). Chapter officers should be resourceful and good stewards of chapter funds when securing speakers. (See Resources & Policies, [Best Practices](#) — Finding Speakers for Local Chapter Events.)

12.2.2 Chapter funds may also be used as equitable incentives for all chapter members. Approved expenses include costs such as member registrations for AAPC national or regional conferences, AAPC workshops, and to purchase educational materials and products. Reimbursement for conference/workshop expenses such as air travel, hotel accommodations and/or meal costs are not recommended.

12.2.2.1 It is imperative that local chapter officers predetermine and design a fair and equitable means to determine who qualifies and receives the sponsorships for conference, workshop attendance, etc. All members should have an opportunity to earn these incentives.

12.2.2.2 Chapter funds cannot be used for expenses for conferences, registrations, workshops or membership in any organization for a vendor other than AAPC.

12.2.3 Expenditures for conducting chapter business are to be determined by the local chapter officers.

12.2.3.1 Chapter officers will discuss and come to an agreement on how chapter funds will be spent, with the support of the general membership.

12.2.3.1.1 Any chapter spending over \$200 for one item or over \$300 for a variety of items must be brought to the attention of the general membership.

12.2.3.1.2 If there are unresolved issues relating to spending, a chapter officer must notify the Local Chapter Department before continuing.

12.2.3.2 Chapter funds may be used to educate the membership and further the growth of the chapter. Examples of the use of chapter funds include scholarships, door prizes, audio conferences, membership drives, etc.

12.2.3.3 When local chapter funds are utilized to obtain items that will exist for local chapter use over a period to exceed one year, or a single item cost exceeding \$200, the Chapter Property Statement should be completed by the current chapter president or treasurer. (See Resources & Policies, [Best Practices](#) - Property Statement.)

12.2.3.3.1 All chapter property is to be documented in the Chapter Property Statement form. Other matters regarding assets of the local chapter can also be addressed, including specific responsibilities for chapter officers to maintain/protect the chapter property.

12.2.3.3.2 The chapter president and treasurer will be the officers responsible for maintaining/safeguarding the inventory items listed in the Chapter Property Statement. The original and current/updated Chapter Property Statement(s) should also be maintained. Transfer to the new officers should occur by December 31 each year.

12.2.4 Each chapter bank account is designated as a non-profit account; therefore, local chapters should refrain from stockpiling a great deal of money from year to year. All chapter funds are to be used for the general membership of the chapter.

12.2.4.1 The incoming president and treasurer should meet with current officers at the end of each year and decide how much money is required to be in the account to start the new year. For example, if your local chapter is holding a large event during the first few months of the year, you may need funds in the account.

12.2.4.1.1 Prior to completion of the final Profit and Loss statement, the incoming and outgoing presidents and treasurers should perform an audit of the chapter's finances.

12.2.4.2 Chapters with increased funds at year end may be financially responsible to AAPCCA for taxes owed to the IRS for the excess funds.

12.2.4.2.1 Any end of year increase in chapter funds can cumulatively result in AAPCCA owing taxes.

12.2.4.3 To help reduce the amount of money in the chapter bank account, chapter funds should be donated to the AAPCCA Hardship Fund no later than the end of November.

12.2.5 Officers may be given a gift of appreciation at the end of the year, but the monetary amount should not exceed \$50 each.

12.2.6 Chapters are strongly encouraged to have no more than \$10,000 in their checking account at the end of the year.

## 12.3 Financial Reports

12.3.1 The treasurer reports on chapter funds at all local chapter meetings and responds to reasonable requests for financial information from chapter members, AAPC, or the AAPCCA.

12.3.2 A financial statement must be prepared and made available at each chapter meeting.

12.3.2.1 AAPCCA reserves the right to conduct random audits of chapter financial records.

## 12.4 Bank Statement and Profit and Loss Statement

12.4.1 Total income and total expense for the Profit and Loss statement must be entered monthly.

12.4.1.1 The online form is available for all officers to view but only the chapter president and treasurer have access to submit the information.

12.4.1.2 A bank statement is required to be uploaded each month in order to receive your quarterly reimbursement.

12.4.2 Local chapters are not required to file a tax return; it is done in conjunction with the non-profit organization.

## 12.5 Reporting Speaker Honorarium

12.5.1 Local chapters paying any speaker an honorarium, whether for speaking at a meeting, seminar, or review class, must report the information to AAPC on a quarterly basis. Honorariums do not include speaker expenses.

12.5.2 Speaker honorariums will be reported online. (See [Events — Honorarium.](#))

12.5.2.1 Chapters paying individual speaker honorariums totaling more than \$400 per year may be required to submit additional information as per IRS regulations.

## 12.6 Chapter Bank Account

12.6.1 All funds received by the local chapter must be deposited into the local chapter bank account within three (3) business days of receipt.

12.6.2 Each local chapter bank account must be registered with AAPCCA's tax identification number (20-8526803). AAPCCA is a non-profit organization.

12.6.2.1 Local chapters may not use their own tax identification number.

12.6.2.2 Banks may require officers with bank account access to provide their Social Security Number to verify identity and ensure security of local chapter funds. This requirement is a banking function and is not enforced or regulated by AAPC or AAPCCA.

12.6.2.2.1 If a chapter officer declines to provide this required information, the officer must resign from their position as an officer.

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- 12.6.3 The name on the chapter bank account must match the chapter name (e.g., AAPC Mobile Alabama Local Chapter).
- 12.6.4 The signatures of the president and treasurer are *the only two* required on the bank account.
- 12.6.4.1 A letter from AAPC will be sent upon request, authorizing the president and treasurer to be signers on the chapters existing bank account.
- 12.6.5 The only signers on the local chapter bank account are the president and treasurer. Either officer may sign a check drawn on this account. Two signatures are not required. Exceptions must be approved by the Local Chapter Department.
- 12.6.5.1 A chapter may decide to utilize a debit card attached to the chapter bank account. The debit card is the property of AAPCCA and is entrusted to the treasurer *and* president during his/her term in office.
- 12.6.5.2 In the event a debit card is misused, the chapter officers must turn the debit card over to AAPC and must exclusively use checks until further notice.
- 12.6.6 It is the responsibility of the newly elected president and treasurer to verify that all banking account information, including the tax ID number, signature cards and account name are correct and in compliance with the guidelines in this section.
- 12.6.7 Reimbursements will be made through direct deposit into the local chapter bank account on a quarterly basis *if requirements are met*.
- 12.7 Covering Expenses of Local Chapter Meetings
- 12.7.1 In as much as membership with AAPC automatically entitles members to attend local chapter meetings/events, local chapters should not charge any type of membership dues. It is the AAPC mission to enable members to participate without significant cost. However, we recognize the need to cover meeting costs. Therefore, if local chapter officers feel it is necessary to assess a fee for individual events to help cover expenses such as meals, special speakers, copies, room rental, etc., then a nominal fee may be assessed.
- 12.7.1.1 This fee should be collected per meeting from each attendee.
- 12.7.1.2 Please be sensitive to members who may have financial hardship issues.
- 12.7.1.3 Higher fees may be charged to non-AAPC members. Local chapters will collect these additional monies with no involvement from AAPC.

12.7.2 Following are suggestions for collecting funds through the local chapter for meetings, events and other situations:

12.7.2.1 Treasurer will be the primary contact for the collection of all funds.

12.7.2.1.1 Should the treasurer not be available for an event where fund collection is required, the treasurer along with the president, will determine which officer(s) will cover these duties.

12.7.2.2 A receipt will be provided to any member or attendee requesting such, regardless of their form of payment.

12.7.2.3 Upon receipt, all checks will immediately be endorsed as 'For Deposit Only' and the chapter's proper name.

12.7.2.4 Immediately following any collection of funds, the treasurer will secure all cash and checks. With the president, all monies will be reconciled.

12.7.2.5 All funds will be deposited into the chapter bank account within three (3) business days of collection. All officers will be made aware of the amount deposited.

## 12.8 Local Chapter Reimbursement

12.8.1 There are two types of reimbursements available to the local chapters from AAPC, a reimbursement for proctoring the certification examinations and a reimbursement for AAPC member attendance at chapter meetings.

12.8.2 In order to qualify for these reimbursements, AAPC must receive the following information from the chapter:

12.8.2.1 A bank statement must be uploaded each month on line.

12.8.2.2 Marking of attendance on line within 30 days from the date of the meeting.

12.8.2.3 ***Election Verification Information.***

## 12.9 Deduction from Local Chapter Reimbursement

12.9.1 AAPCCA will deduct an annual assessment to cover operating expenses such as Board of Directors' insurance, communication costs, seed money for newly started chapters, and administrative expenditures.

12.9.1.1 This deduction will be taken from the fourth quarter reimbursement, which is deposited in the chapter account in the first quarter of the year.

***12.9.2. AAPCCA will deduct the amount owed if taxes are due.***

***12.9.2.1 The deduction will be made the following year from the third quarter reimbursement.***

**12.10 Proctor Reimbursement**

12.10.1 Proctor reimbursement is given to the local chapter for proctoring AAPC certification examinations.

12.10.1.1 Proctoring must have been provided appropriately and without any suspicions of wrongdoing or reimbursement will be withheld.

12.10.2 In order to receive these funds, the proctors must have the examinees sign on the Examination Time Sheet.

12.10.2.1 At the conclusion of the examination, return the attendance sheet with the completed examinations to AAPC.

12.10.2.2 AAPC reimburses \$10 for each examinee as documented on the exam sign in sheet.

12.10.2.3 For chapters holding more than five exams in any calendar year, AAPC will reimburse \$15 per examinee after the fifth (5<sup>th</sup>) exam.

12.10.3 Reimbursement checks will be made payable to the local chapter and be deposited into the local chapter bank account on a quarterly basis.

**12.11 Meeting Attendance Reimbursement**

12.11.1 The meeting attendance reimbursement is based on AAPC member attendance at local chapter meetings where approved CEUs are offered. AAPC reimburses \$2 per AAPC member, per meeting.

12.11.1.1 Reimbursements are based on meeting attendance of current AAPC members regardless of chapter affiliation. AAPC does not reimburse meeting attendance for non-AAPC members/guests.

***12.11.2 In order to receive these funds, the chapter treasurer, along with the other officers, will mark attendance for the attendees on the AAPC's website within 30 days from the meeting date.***

12.11.3 To insure reimbursement will be received, ***required bank statements must be uploaded monthly.***

12.11.4 Reimbursements are paid on a quarterly basis through direct deposit into the local chapter bank account.



## APPENDIX A

### SUBMITTING INFORMATION/SEEKING APPROVAL FOR EVENTS

Refer to the following links when submitting information or seeking approval for exams or CEUs:

[Election Verification Information](#) — Information should be submitted within 10 days of election. Link is available to current vice president.

[Schedule New Event](#) — Request CEUs for upcoming chapter meetings.

[Schedule New Event](#) — Request CEUs for upcoming chapter seminars.

[Schedule New Event](#) — Request CEUs for upcoming chapter review classes.

[Schedule New Event](#) — Request approval to proctor AAPC's certification examinations.

Submit the following by email, mail or fax:

[Resignation/Change of Officer Form](#)—Submit this form when an officer is added during the course of the year due to a vacant office or an officer's resignation. Form must be accompanied by the resignation letter of the former officer.

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## ADDITIONAL INFORMATION

[Seminar Certificate](#) — Complete this certificate and hand out to attendees at seminars where CEUs are pre-approved. Each session is listed separately and receives its own catalogue number.

[CEU Certificate](#) — Complete this certificate to hand out to attendees at review classes where CEUs are approved.

[Local Chapter Speaker Agreement](#) — Speakers agree to take responsibility of content of presentation by signing form. Chapter officers retain this form; do not submit it to AAPC.

[Chapter Financial Statement](#) (optional) — Use this form to provide information about the chapter finances to the chapter members at each chapter meeting.

[Best Practices](#) (Optional) — Take advantage of ideas and best practices submitted by former or current officers.

## APPENDIX B

### SUMMARY OF INFRACTIONS/CONSEQUENCES

This appendix summarizes the consequences to a chapter found in violation of the requirements established by AAPC. In an effort to avoid a breakdown in service to the local chapter members we encourage chapter officers to abide by AAPC's requirements. Violations will be handled in the following way.

	<b>Proven Deficiency or Infraction</b>	<b>Consequence</b>	<b>Remedy</b>
1	Failure to submit Election Verification Information by December 30	Chapter will be closed	Complete election verification information by November 30 <sup>th</sup>
2	Failure to mark attendance online within 30 days from the date of the meeting.	Reimbursements will be forfeited.	Going forward, mark meeting attendance within 30 days of the meeting
3	Failure to submit required monthly bank statement.	Reimbursement will be forfeited. (This is held on a quarterly basis)  <b>Example:</b>  Failure to upload bank statement for Jan, Feb, Mar results in the loss of the first quarter reimbursement.	Upload required monthly bank statement on line.
4	Misuse of local chapter membership list.	Possible removal of officer at the discretion of the AAPC National Local Chapter Team and the AAPCCA Board of Directors.	Current officers may appoint a new officer.

	<b>Proven Deficiency or Infraction</b>	<b>Consequence</b>	<b>Remedy</b>
5	Failure to schedule correct amount of meetings.	Possible closure of chapter for non-compliance at the discretion of the AAPC National Local Chapter Team and the AAPCCA Board of Directors.	Schedule a minimum of six (6) meeting or four (4) meetings and two (2) seminars and/or two (2) live virtual meetings per calendar year where little to no cost CEU's are offered. (This may be pro-rated if a new chapter is formed in any month other than January.
6	Failure of officer to attend local chapter meetings two times without notification to fellow officers of absence.	Possible removal of officer at the discretion of the AAPC National Local Chapter Team and the AAPCCA Board of Directors.	Current officers may appoint a new officer.
7	Misuse of chapter funds. Examples include but are not limited to mismanagement or improper spending, overdrawing bank account, embezzlement, using funds for personal use, etc.	Removal from officer position, unable to serve for 3-5 years or more, depending on infraction	Current officers may appoint a new officer, if applicable. All funds must be returned to reconcile with AAPC and/or local chapter.
8	Intent to swing the election	Possible officer removal and inability to serve in the future	Elections will be handled by AAPC

	<b>Proven Deficiency or Infraction</b>	<b>Consequence</b>	<b>Remedy</b>
9	Misrepresentation of CEU value for a chapter event	Adjust CEU credit to accurately reflect the time of the education. If a pattern emerges, this could result in officers losing AAPC credential(s). At the first offense, the chapter is warned. At the second offense, the chapter is suspended and officers' names are given to the Issues Committee for review.	Request CEU credit to accurately reflect actual education time, excluding business meeting time, meals, breaks, etc., as these elements DO NOT COUNT as education time.
10	Gross misconduct or deliberately using the chapter for personal gain	Officer removal and possible inability to serve in the future	
11	Failure to schedule at least four certification exams, two of which are ADA-approved, by September 30 <sup>th</sup>	The 3 <sup>rd</sup> quarter reimbursement will be forfeited	Schedule and proctor at least four certification exams, two of which are ADA accommodation exams, per year. (Pro-rated if a new chapter is formed in any month other than January.)
12	Failure to adhere to all proctoring guidelines and instructions found in the Local Chapter Handbook, AAPC's website, and AAPC exam protocols.	All proctoring infractions may include, but are not limited to, possible removal of officer and loss of credential(s).	Adhere to all proctoring guidelines and instructions.
13	Improper proctoring/ misconduct of examination.	Possible removal of officer, and loss of credential(s) with AAPC.	Current officers may appoint a new officer.

The AAPCCA Board of Directors and the AAPC staff reserve the right to review each case individually. Consequences may differ based upon individual details. Offending officers may lose officer privileges for up to five years or indefinitely.



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