Tennessee Medical Group Management Association

Local Chapter Leader Orientation

January 30, 2013
Stephen Dickens, JD, FACMPE

What have I gotten myself into?

• Identify components of Local Chapter Leaders Resource Manual
• Understand legal requirements
  • Affiliation agreement
  • Logo usage
  • Incorporation
  • Insurance
  • Tax status
• Identify and tap into state resources
  • TMGMA
  • Other chapters

Leadership Notebook

• Legal Documents
• Financial
• Leadership
• Membership
• Meeting Information
• TMGMA/MGMA-ACMPE
• Other Local Chapters
Legal Documents

- Affiliation agreement
  - Grants use of name and logo
  - Does not grant TMGMA or MGMA-ACMPE membership
- Incorporation documents
  - State of Tennessee
  - Separate legal entity
- Bylaws
- Operating rules
- Tax ID
- Insurance
  - Required under Affiliation Agreement
  - Protects national, state and local MGMA-ACMPE
  - Board of Director coverage

Logo Usage

- Licensed & used by permission of MGMA-ACMPE
- Must follow guidelines
  - Colors
  - White Space-Proportion
  - Alterations
  - Size 25% increments
- Must provide examples of use
- Local logos

Financial

- Bank account information
  - Authorized signatures
- Financial statements
- Audit reports
  - Get an accountant
  - Annually
- Reimbursement policies
  - Internal controls
- Expense report
- Post Office Box Information
Tax Status

- Incorporation
- Not for profit v. non-profit
- Application for recognition of exemption
  - Form 1023
- IRS-Tax ID Number
  - Form SS4
  - Complete online
  - Obtain ID number
  - Retain written notice
- Annual tax return - 990

Leadership

- Leadership contact information
- Job descriptions
- Election forms
- Board minutes
- Checklist for leadership transition

Membership

- Membership roster
  - Regular
  - Affiliate
- Membership applications
  - Regular
  - Affiliate
- Correspondence
Meeting Information

- Calendar
- Speaker/topic listing
- Chapter conference information
- Venue information
- Meeting announcements
- ACMPE credit info
- Name badge info

TMGMA/MGMA

- TMGMA/MGMA contact info
- Benefits of TMGMA membership
- Website instructions for updating chapter page
- Newsletter-instructions for article submission, deadlines, etc.
- Logo usage guidelines

Other Local Chapters

- Contact info
- Local chapter survey results-dues, membership, etc.
- Samples-print materials, brochures, newsletters, etc.
Leadership Responsibilities

- Prepared
- Responsive
- Timely
- Accessible to leadership and members
- No individual powers not enumerated in By Laws or expressly given by Board
- Fiduciary
- Ethically above reproach

A Successful Transition

- Transfer all documents and chapter property
  - Notebook
  - Bylaws
  - Legal documents, incorporation, affiliation & logo materials
  - Financial records including any passwords
  - Membership roster – regular and affiliate members
  - Document/newsletter templates
  - Discs, flash drives

- Update
  - Bank accounts
  - Passwords
  - Audit
  - By-laws
  - Membership lists
  - Contracts – speakers, vendors, meeting venues
  - Post Office Box
  - Contact information – TMGMA!
  - Website
A Successful Transition

- Officer transition
- Installation of new
- Thanks to retiring
- Strategic plan
- Committees, chairs
- Meetings
- Speakers
- Conferences
- Membership surveys
- Transfer
- Files
- Stationery
- Post Office Box Keys
- Nametags
- Supplies

Questions

- Melissa Wilson, TMGMA Executive Director
  - melissawilson@comcast.net
  - 615.579.6253
- Steve Dickens
  - steved@svmic.com
  - 800.342.2239

SVMIC Office Staff Seminars 2012

“Why Can’t We All Just Get Along?”
Dealing with Difficult Patients and Coworkers

- Schedule attached under separate cover
- Please advertise at your local chapter functions
- Program and registration materials will be sent to all SVMIC policyholders in late February/early March
- Schedule and online registration available at www.svmic.com in late February/early March
- Stephen Dickens, JD, FACMPE will present all sessions
- CE applied for through Tennessee Nurses Association
- Qualifies for ACMPE credit