

2024

AAPC Local Chapter Handbook



Effective January 1, 2024–December 31, 2024

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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 through a community setting, while developing personal improvement and strong networking opportunities.

1.2 AAPCCA Mission Statement

1.2.1 The AAPCCA was established to create, maintain and sustain the infrastructure of AAPC's Local Chapters through approachable and accountable representation, necessary to empower local chapters to function in support of AAPC's mission.

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

1.4.2 Providing a networking platform – through physical and virtual monthly/quarterly meetings; Facebook groups Forums (for local chapters and officers)

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

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

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

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). Local chapters are formed under the operational direction of AAPC and are operated by the local chapter officers under the direction of AAPC, in accordance with the requirements set forth in this handbook. The local chapters exist 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; chapters do not have 501-C3 tax status. Sales tax must be paid on purchases made by the local chapters.

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.

Members making a request to start a chapter must be certified with AAPC and in good standing.

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 A local member will be invited to serve as the contact person for the new chapter.

2.3.4 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.

2.3.5 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 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 2023. There will be no election of new officers in October 2024. Officers will remain in their position through December 2025 with election of new officers in October 2025.

2.3.7 AAPC and the AAPCCA Chapter Advisory Board 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 Chapter officers are encouraged to read the handbook again when changes are made in January of each year. A current year handbook should be made available by the vice president at each meeting.

2.4.2 Officer requirements include:

2.4.2.1 Submission of all required paperwork.

2.4.2.2 Filling all officer positions.

2.4.2.3 Holding required number of meetings.

2.4.2.4 Complying with all financial obligations, including the submission of the Profit & Loss information and uploading the required monthly bank statement.

2.4.3 When local chapters are in compliance with the requirements set forth by the AAPC, they are considered in good standing.

2.4.3.1 If a local chapter does not comply with the expectations set forth in this handbook, AAPC may close the local chapter.

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 15th, 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 and contact information of the newly elected officers.

- 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 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 2 in person meetings, two virtual meetings and two additional meetings of their choice.
- 2.5.1.5 In addition to these six events, chapters are required to sponsor either a Review class or a Seminar.
- 2.5.1.6 Ensure appropriate use of chapter funds as outlined in the handbook.
- 2.5.1.7 Submit Profit and Loss numbers and upload required Bank Statements monthly.
- 2.5.1.8 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.
 - 2.5.1.8.1 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
 - Creating networking opportunities for members
 - Posting job opportunities for members
 - Posting chapter related business for members

2.5.1.8.2 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

2.5.1.8.3 Failure to follow this policy could result in officer or member review by the Local Chapter Issues Committee.

2.5.1.9 Encourage use of AAPC forums and social media pages such as Facebook for networking purposes between chapter members.

2.5.1.10 Provide opportunities for networking among AAPC members.

2.5.1.11 Provide opportunities for less experienced members to be mentored by those members with more experience.

2.5.1.12 Provide members the opportunity to participate in local chapter meetings.

2.5.1.13 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.

2.5.1.14 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 may be dismissed for due cause, as indicated below.

2.5.2.1 If AAPC or the AAPCCA receives 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 AAPC and the AAPC Local Chapter team.

2.5.2.2 If an officer is unresponsive to AAPC staff, CAB 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.

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/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 may purchase registration for AAPC's annual or regional conferences at a discounted price during their year of service.

3.2.2 AAPC provides no financial compensation to local chapter officers or members for their voluntary services.

3.2.3 In the case where funds allow, officers may reward themselves.

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 close.

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 president and be formally excused, while ensuring all their duties and responsibilities are covered by a fellow officer.

4.1.2.5.1 Officers with two unexcused absences (including no notification to the president) 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.

4.1.2.5.3 If an officer moves out of the area during the term of service, the officer should consider resigning if the distance is too far from where the meetings are being held. Officers are required to be at all meetings, whether in person or virtual.

- 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 Chapters will sponsor two in person meetings, two virtual meetings and two meetings of your choice. In addition to these six events, chapters must sponsor either a Review class or a Seminar.
 - 4.1.3.3 Ensure appropriate use of chapter funds as outlined in the handbook.
 - 4.1.3.4 Encourage networking among members, in person, virtually and through use of AAPC forums or social media pages.
 - 4.1.3.5 Ensure the chapter members' privacy by always utilizing blind carbon copy (bcc) for email communications.
 - 4.1.3.6 Communicate all local concerns with AAPC in a timely manner.
 - 4.1.3.7 Ensure order is maintained during all chapter activities and officers are empowered to remove unruly members or visitors.
 - 4.1.3.8 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.
 - 4.1.3.9 Ensure transparency in all spending of chapter funds.
 - 4.1.3.10 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.
 - 4.1.3.11 Retain all financial and non-financial chapter records and documents for seven years.
 - 4.1.3.12 Monitor the forum and social media pages.

4.1.3.13 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 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.

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 Chapter Advisory Board 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 AAPC 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/treasurer.

5.2.3 Immediately following the October election of new officers, their names and contact information should be entered in the Election Verification section on the website and 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, virtually, email or text if necessary.
- 5.2.5 All officers should be included in the planning of events such as MAYnia, Fall Back Together, 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 two in person meetings, two virtual meetings and two meetings of your choice. In addition to these six events, chapters are required to sponsor either a Review class or a Seminar.
 - 5.2.8.2 Completes and the profit and loss and uploads the required bank statements monthly.
 - 5.2.8.3 Provides opportunities for networking among AAPC members.
 - 5.2.8.4 Provides opportunities for mentoring less experienced members by those members with more experience.
 - 5.2.8.5 Follows all regulations established by AAPC for local chapters as per this handbook.

5.3 President Duties

The president is primarily responsible for the overall well-being of the chapter 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.
 - 5.3.1.1.1 Officers may need to conduct a survey of the members.
- 5.3.2 Serve as liaison with AAPC and Chapter Advisory Board, (CAB).
- 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.
- 5.3.5 Sign on local chapter bank account.
 - 5.3.5.1 If the chapter utilizes a debit card, provide a check and balance with the treasurer by reviewing the activity of the card monthly.
 - 5.3.5.2 Ensures the bank signature card is correct in January and at any time during the year if there are changes in the treasurer or president.
- 5.3.6 Oversee secretary/treasurer.
 - 5.3.6.1 The president works closely and meets monthly with the secretary/treasurer and is aware of all financial activity including the upload of required bank statements monthly.
- 5.3.7 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.
- 5.3.8 Communicate regularly with chapter officers, whether by email, virtually, text or phone.
- 5.3.9 Serve as moderator for and respond to the local chapter forum and/or social media pages.
 - 5.3.9.1 Moderators have the ability to edit and delete posts, remove threads, and perform other actions.
- 5.3.10 Assist members by providing index numbers upon request.

5.3.11 In the event of the resignation of the secretary/treasurer, the president ensures that the secretary/treasurer's name is removed as a signer on the account. If the president is the resigning officer, this becomes the responsibility of the secretary/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 Elections may be held in person or may be conducted online throughout the month of October.

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

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.

5.5 Secretary Duties

The secretary is primarily responsible for maintaining a list of active chapter members, and publishing the chapter meeting minutes. Membership list should not be used for personal gain.

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

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 may 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 stored online at www.aapc.com. Minutes may include information about the speaker, subject matter and length of education.

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.

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. Upload the 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 reimbursements. 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.

5.6.1.3 In the event the chapter closes, the treasurer is responsible for requesting a cashier's check for the remainder of the chapter funds before closing the account and submitting the check to AAPC.

5.6.1.3.1 Make check payable to AAPCCA and mail to Local Chapters c/o AAPC, 2233 Presidents drive, Suite F, SLC, Utah 84120

- 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 A chapter may be in possession of two (2) debit cards, one entrusted to the president, the second entrusted to the treasurer.
- 5.6.3 Provides required monthly bank statements.

Mark attendance within 30 days of the date of the event.

All officers may mark attendance.
- 5.6.4 A financial statement must be prepared monthly and made available to membership at each meeting.
 - 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 and AAPC.
- 5.6.6 Retain financial and non-financial records for seven years.
- 5.6.7 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 and arrange for educational guest speakers and locations; dates and times of events as determined by the chapter officers.
 - 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 at local chapter meetings.
- 5.7.2 Submit online requests for approval of CEUs for chapter meetings, seminars, and review classes.
 - 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.
- 5.7.3 Upon request from a visitor a certificate should be provided.
 - 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.
- 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 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).

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.

5.9.1.2 All documents, electronic or paper, are to be passed to the new local chapter treasurer no later than December 31.

5.10 Leadership Training

5.10.1 AAPC provides training for all elected officers. All officers, whether new or returning, are strongly encouraged to attend officer training.

5.11 Change/Resignation of Officers

5.11.1 In the event of a change or resignation of an officer, the chapter president 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.

5.11.2 If the resigning officer is a signer on the chapter bank account, the current treasurer or president must ensure the resigning officer’s signature is removed and the new officer’s signature is added.

5.11.3 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 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.

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 and promptly submits the new officers' contact information in the Election Verification tool.
- 6.1.3 If officers are not in place by December 15th, the chapter will be closed.

6.2 Preparing for Elections

- 6.2.1 Elections may be held in person or may be conducted online throughout the month of October.
 - 6.2.1.1 Officers should dedicate time in the August or September meeting to introduce chapter members who have expressed an interest in serving as officers. This will allow members to be informed when it comes to voting in October.
 - 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.
- 6.2.2 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.
- 6.2.3. 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. Only members currently assigned to the chapter are eligible.
- 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, volunteering for committees and participating 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 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 month of October. 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, 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, and 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 It is ideal if nominations are made prior to October, however, nominations should be accepted up until the time of voting.

6.4.6.1 Voting will be in place for the entire month of October.

6.4.6.1.1 If a chapter fails to receive nominations/volunteers to serve in the three required officer positions, the chapter officers should 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 may be nominated.
 - 6.5.2.1 These officers should not serve more than two consecutive years in same office. However, treasurers may serve more than two years.
 - 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 Voting

- 6.6.1 Elections may be in person or conducted online throughout the month of October.
- 6.6.2 Only AAPC members assigned to the local chapter, as reflected on the local chapter membership list provided by AAPC online, may vote.
- 6.6.3 The nominee receiving the majority of votes will fulfill the responsibility of that office for one complete calendar year.
- 6.6.4 Any unethical actions or mishandling of the election process by any officer, or member of the elections committee, will be reviewed by the AAPC Local Chapter Department. Improprieties found may result in the resignation and/or disqualification of all involved.
 - 6.6.4.1 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 AAPC Local Chapter Department.

6.7 Election Verification Information

- 6.7.1 The newly elected officers will be submitted using the Election Verification tool no later than November 10th, 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, meetings and review classes cannot be scheduled and CEUs cannot be obtained for chapter educational events.
 - 6.7.4 Officers only have permission to schedule events in the year they serve.
- 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 allowing a smooth transition for new officers.
 - 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, 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.
 - 6.8.2.3 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 for the upcoming year can only 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 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.
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- 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.

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 Officers should entice their chapter members to attend their own chapter meetings before looking to other chapters for education by doing the following:

- * Publishing the meeting dates and topics at the first of the year so chapter members can plan to attend.

- * Being in touch with your members' specialties and needs so meetings can be tailored to their needs.

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.

7.1.2.2.1 This can be done through marking attendance online 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.

7.2 Purpose of Chapter Events

7.2.1 The purpose of local chapter events is to provide networking opportunities, education, and other activities relevant to the healthcare profession.

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 sponsor at least two in person meetings, two virtual meetings and two meetings of your choice. In addition to these six events, chapters are required to sponsor either a Review class or a Seminar.

7.4.1.1.1 Hybrid meetings are those held with virtual and in person attendees. A hybrid meeting is considered a virtual meeting and is paid as a virtual meeting.

7.4.1.2 A chapter meeting is defined as an educational session lasting no more than 2 hours and 15 minutes. A seminar is defined as an educational session of 2 and a half hours 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.

7.5 Hosting a Virtual Meeting

- 7.5.1 Because chapters are required to hold two virtual meetings, it is highly recommended chapters purchase their own platform, however, the AAPC platform may be requested.
- 7.5.2 Vendor platforms may not be used.
- 7.5.3 Presidents should conduct the meeting, welcome the members, introduce the officers and introduce the speaker.
- 7.5.4 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.
- 7.5.5 Officers should be on camera so they can be seen when participating.
 - Inform speakers they should be on camera so attendees can see their faces.
- 7.5.6 Once events and CEUs are approved by the CEU Vendor Department, the event information will appear on under “My Chapter”, “Events”, “Upcoming Event”.
- 7.5.7 Local chapter officers should exercise good judgment in selecting an appropriate meeting place for local chapter meetings and other chapter-sponsored events.
 - 7.5.7.1 All chapter-sponsored events must be held in a public place/building, conducive to the purpose of the event.
- 7.5.8 An individual’s home is not an appropriate meeting place.

7.6 Informing Members of Chapter Events

- 7.6.1 In order for events to appear on AAPC website, officers must submit event for CEU approval.
- 7.6.2 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 receive notification by email.
- 7.6.3 All chapter officers and members are responsible to view the website regularly for up to the minute event and chapter information.

7.7 AAPC's website

- 7.7.1 AAPC's website (www.aapc.com) hosts the names of all current local chapters, their officers, and their contact information.
- 7.7.2 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 website.

7.8 Meeting Minutes

- 7.8.1 The chapter secretary or secretary/treasurer may upload meeting minutes, although it is not a requirement to upload them. Minutes may be uploaded at www.aapc.com.
 - 7.8.1.1 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.

7.9 Offering CEUs at Chapter-Sponsored Events

- 7.9.1 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.
 - 7.9.1.1 CEUs are not given to members who cannot see and hear the presentation. Recordings of chapter meetings are not allowed.
 - 7.9.1.2 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. 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.
 - 7.9.1.3 Suggestions for speakers may be found on the website under Resources & Policies.
- 7.9.2 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 chapter member's account.

- 7.9.2.1 In order to receive CEU credit for event attendance, a member must be present for at least 50 percent of the educational session.
- 7.9.3 Chapter business discussions, meals and breaks do not count as educational time and should not be submitted for CEU approval.
- 7.9.4 All changes to an approved CEU event must be submitted to and approved again by the CEU Vendor Department.
 - 7.9.4.1 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).
- 7.9.5 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.
 - 7.9.5.1 AAPC strongly discourages paying a speaker fee to present at local chapter meetings. 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.
 - 7.9.5.2 Speakers with honorariums totaling more than \$400 per year may be required to submit additional information as per IRS regulations.
- 7.10 Apply for CEUs Online for Chapter Events
 - 7.10.1 Events are awarded one CEU per hour of healthcare business-related education.
 - 7.10.2 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.
 - 7.10.3 The CEU Vendor Department approves the chapter events and assigns each event a separate index number.
 - 7.10.4 Requests for CEUs submitted online are typically approved within two weeks.
 - 7.10.5 CEUs will not be awarded retroactively.

7.10.6 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.

7.11 Local Chapter Activities and Social Events

7.11.1 The local chapter will provide fair and reasonable accommodations for attendees with disabilities.

7.11.2 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.

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

7.12 Local Chapter Seminars

7.12.1 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.

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

7.12.3 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.

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

7.12.3.2 Where two or more chapters work together to sponsor a seminar and profits are expected to be made only one chapter should be in charge of funds, keeping accurate records so as to report and disperse funds with chapters involved.

7.12.3.2.1 Chapters should reconcile and divide the income and expenses immediately following the event.

7.12.3.3 No reimbursement is provided to chapters for seminars; however, AAPC is tracking seminar attendance so you should mark attendance on the website.

- 7.12.4 Registration fees should cover the cost of producing the event with a reasonable profit. Higher fees may be charged to non-AAPC members.
- 7.12.5 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.
 - 7.12.5.1 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.
- 7.13 Apply for CEUs Online for Chapter Seminars
 - 7.13.1 One (1) CEU will be awarded for each hour of education.
 - 7.13.2 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.
 - 7.13.3 CEU approval will be assigned for each separate educational session. Therefore, a seminar with multiple speakers and/or topics will have multiple CEU index numbers.
 - 7.13.4 Classes that are not related to the business of healthcare will not receive CEUs. CEUs will not be given for meals or breaks.
 - 7.13.4.1 Attendees should attend more than half the meeting to receive full CEU credit, otherwise no CEU credit will be given.
- 7.14 Local Chapter Examination Review Classes
 - 7.14.1 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.
 - 7.14.1.1 Review classes must be led by an AAPC certified member.
 - 7.14.2 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. Index numbers will be issued for each date.
 - 7.14.2.1 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.

7.14.3 The local chapter is responsible for handling the scheduling, instruction, and registration for examination review classes.

7.14.4 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.

7.14.5 Registration fees should cover the cost of producing the event with a reasonable profit going to the chapter.

7.15 Review Class Curriculum

7.15.1 Review classes must be led by an AAPC approved instructor or AAPC approved facilitator.

7.15.2 Curriculum for review classes should be based on AAPC's Study Guide for the certification and other appropriate study materials.

7.15.2.1 The study guides may not be reproduced in any manner.

CHAPTER 8

AAPC Educational/CURRICULUM SITES AND LOCAL CHAPTERS

8.1 Educational/Curriculum Sites

8.1.1 Chapters have the opportunity to build their membership and mentor beginning coders when relationships are established with schools and AAPC approved instructors in their areas.

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

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

8.1.2.1 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.

8.2 Developing Relationships

8.2.1 Member development officers can establish a relationship with AAPC approved instructors by:

8.2.1.1 Contacting all instructors in the area and introducing themselves.

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

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

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

CHAPTER 9 CHAPTER OF THE YEAR AWARD

9.1 Purpose

9.1.1 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.

9.1.2 The Chapter of the Year is awarded for the prior year. For example, 2024 award is based upon the 2023 chapter year.

9.2 Eligibility

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

9.2.1.1 Host local chapter education events where CEUs are offered, at least six times per year (every other month is recommended). Adhere to the minimum number of required in-person and virtual meetings

9.2.1.2 Submit the following information by the due dates, including:

9.2.1.2.1 Election Verification Information — Entered on or before November 15th.

9.2.1.2.2 Profit and Loss Statement — Entered each month.

9.2.1.2.3 Required bank statements uploaded each month.

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

9.2.1.3 Participate in officer training.

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

9.3 Other Considerations

9.3.1 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 to break the tie.

- 9.3.2 Please submit a picture of your chapter members and/or a picture of your officers along with the application.
- 9.4 Please refer to the website for application and additional criteria concerning Chapter of the Year.
 - 9.4.1 Deadline is February 1st.

CHAPTER 10
MARKETING MATERIALS

10.1 AAPC Marketing

10.1.1 AAPC posts information about its local chapters' upcoming events and activities.

10.2 AAPC Logo and AAPC Local Chapter Logo

10.2.1 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.

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

CHAPTER 11

FINANCIAL INFORMATION

11.1 Local Chapter Funds

- 11.1.1 The mission of AAPC local chapters is to provide services to AAPC members. Chapters should not accumulate excess funds over \$5000.00. Local chapters have funds available from a number of sources to be used for the general operation of the chapter.
- 11.1.2 The AAPC reserves the right to conduct random or targeted audits of local chapter accounts and to direct the use of local chapter funds.
- 11.1.3 Chapters that make a profit at the end of the year may be liable for any applicable taxes owed.

11.2 Accounting

- 11.2.1 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.
 - 11.2.1.1 AAPC strongly discourages paying a speaker to present at local chapter meetings. 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.
- 11.2.2 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.
 - 11.2.2.1 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.
 - 11.2.2.2 Chapter funds cannot be used for expenses for conferences, registrations, workshops or membership in any organization other than AAPC.

- 11.2.3 Expenditures for conducting chapter business are to be determined by the local chapter officers.
 - 11.2.3.1 Chapter officers will discuss and come to an agreement on how chapter funds will be spent, with the support of the general membership.
 - 11.2.3.2 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, conferences, membership dues, etc.
 - 11.2.3.3 Chapter funds may be used to contribute in part or in full to the payment of officers' membership dues (or other forms of compensation, as deemed appropriate.)
 - 11.2.3.4 An incentive program for members may be provided as well.
 - 11.2.3.5 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.
 - 11.2.3.5.1 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.
- 11.2.4 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.
 - 11.2.4.1 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.
 - 11.2.4.1.1 Prior to completion of the final Profit and Loss statement, the incoming and outgoing presidents and treasurers should review the chapter's finances.
 - 11.2.4.2 Chapters with greatly increased funds at year end may be financially responsible to AAPCCA for taxes owed to the IRS for the excess funds.

11.2.4.3 To help reduce the amount of money in the chapter bank account, chapter funds could be donated to the AAPCCA Hardship Fund no later than December 15th.

11.2.4.4 Officers are encouraged to spend excess funds on their members.

11.2.5 Officers may be given a gift of appreciation at the end of the year.

11.2.6 Chapters are strongly encouraged to have no more than \$5000.00 in their checking account at the end of the year.

11.2.7 Members should be made aware of all and any perks available to officers and members alike.

11.3 Financial Reports

11.3.1 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.

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

11.3.2.1 AAPC reserves the right to conduct random audits of chapter financial records.

11.4 Bank Statement and Profit and Loss Statement

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

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

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

11.4.2 Local chapters are not required to file a tax return.

11.5 Reporting Speaker Honorarium

11.5.1 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.

11.5.2 Speaker honorariums will be reported online.

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

11.6 Chapter Bank Account

- 11.6.1 All funds received by the local chapter must be deposited into the local chapter bank account within three (3) business days of receipt.
- 11.6.2 Each local chapter bank account must be registered with AAPCCA's tax identification number (20-8526803).
 - 11.6.2.1 Local chapters may not use their own tax identification number.
 - 11.6.2.2 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.
 - 11.6.2.2.1 If a chapter officer declines to provide this required information, the officer must resign from their position as an officer.
- 11.6.3 The name on the chapter bank account must match the chapter name (e.g., AAPC Mobile Alabama Local Chapter).
- 11.6.4 The signatures of the president and treasurer are the only two required on the bank account.
 - 11.6.4.1 A statement from AAPC will be sent upon request, authorizing the president and treasurer to be signers on the chapter's existing bank account.
- 11.6.5 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.
 - 11.6.5.1 A chapter may decide to utilize a debit card attached to the chapter bank account.
 - 11.6.5.2 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.

11.6.6 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.

11.6.7 Reimbursements will be made through direct deposit into the local chapter bank account on a quarterly basis if requirements are met.

11.7 Covering Expenses of Local Chapter Meetings

11.7.1 Inasmuch 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.

11.7.1.1 Please be sensitive to members who may have financial hardship issues.

11.7.1.2 Higher fees may be charged to non-AAPC members. Local chapters will collect these additional monies with no involvement from AAPC.

11.7.2 Important things to remember. If collecting funds for Review classes and Seminars:

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

11.7.2.1.1 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.

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

11.7.2.3 Upon receipt, all checks will immediately be endorsed as 'For Deposit Only' and the chapters' proper name.

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

11.7.2.5 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.

11.8 Local Chapter Reimbursement

11.8.1 AAPC pays chapters for sponsoring meetings, whether in person or virtual.

11.8.1.1 The reimbursement for in person meetings is \$225.00 or \$6 per member attendee, whichever is greater. This applies to the first two meetings of the year. For every meeting after that, the reimbursement is \$6 per member attendee.

11.8.1.2 The reimbursement for meetings held virtually is \$1 per member attendee.

11.8.1.3 If more than one virtual meeting is held in a month, AAPC will pay for the first meeting only.

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

11.8.2.1 A bank statement must be uploaded each month online.

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

11.8.2.3 Election Verification Information.

11.9 Deduction from Local Chapter Reimbursement

11.9.1 AAPCCA will deduct an annual assessment to cover operating expenses such as communication costs, seed money for newly started chapters, and administrative expenditures.

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

11.10 Reimbursement will be direct deposited into the local chapter bank account on a quarterly basis.

11.11 Meeting Attendance Reimbursement

11.11.1 The meeting attendance reimbursement is based on AAPC member attendance at local chapter meetings where approved CEUs are offered.

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



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- 11.11.2 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.
 - 11.11.3 To insure reimbursement will be received, required bank statements must be uploaded monthly.
 - 11.11.4 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 on or before November 15. 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.

Submit the following by 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.

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.

	Proven Deficiency or Infraction	Consequence	Remedy
1	Failure to submit Election Verification Information by December 15 th	Chapter will be closed.	Complete election verification information.
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 paid on a quarterly basis) Example: Failure to upload bank statement for Jan, Feb, Mar results in the loss of the first quarter reimbursement.	Upload required monthly bank statement online.
4	Misuse of local chapter membership list.	Possible removal of officer.	Current officers may appoint a new officer.
5	Failure to schedule required amount of meetings.	Possible closure of chapter.	Schedule a minimum of six (6) educational events 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.

	Proven Deficiency or Infraction	Consequence	Remedy
6	Failure of officer to attend local chapter meetings two times without notification to the chapter president.	Possible removal of officer.	After consulting with AAPC 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 again.	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
9	Misrepresentation of CEU value for a chapter event.	Possibly removal of officer.	Request CEU credit to accurately reflect actual education time.
10	Gross misconduct or deliberately using the chapter for personal gain.	Officer removal and possible inability to serve in the future.	Current officers may appoint a new officer.



The AAPC 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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