

HFMA – Wisconsin Chapter

**Board of Directors
POLICIES & PROCEDURES**

Policy Title: Chapter Guidelines for Mailing List	Policy #: D-05	Page: 1 of 3
Policy and Procedure Manual Chapter: Membership	Director Responsible: Membership Chair	
Approval Date: 03/11/2016 Revision Date: 11/09/2017	Effective Date: 03/11/2016	

A. PURPOSE

To provide guidance for the use of chapter member information.

B. GUIDELINES

This policy outlines the following:

1. General Mailing List and Database Use / Guidelines
2. Co-Sponsored Event Guidelines
3. Requests by HFMA Chapters or Regions

C. POLICY

1. Rights and Obligations – The rights and obligations of HFMA chapters are specified in the HFMA Chapter By-laws. In addition, the National HFMA Board of Directors has adopted the following guidelines to further define the chapter’s use of chapter mailing lists or member databases.
2. Business Use – Chapters may use the chapter mailing or member database solely to conduct the business of the Chapter and HFMA National. Examples of chapter business usage may include:
 - a. Distribution of member communications as defined by the Davis Chapter Management System (newsletters, bulletins, etc....)
 - b. Distribution of ballots for elections of chapter officers or bylaws changes
 - c. Notification of chapter meetings to carry out the business of the chapter
 - d. Notification of chapter educational events
 - e. In the instance of co-sponsored educational events, with non-HFMA organizations, chapters may provide a limited or one-time use to co-sponsoring organization. Additionally, the promotional material must include the chapter name (i.e., HFMA Wisconsin Chapter) and if a logo is used, it must be the Chapter logo (not to be mistaken for the HFMA National only logo).
3. Sponsorship – Chapters may not offer the chapter mailing list or database of members as part of any chapter sponsorship package. Rather, chapters may provide a list of pre and post registered program attendees as part of a chapter sponsorship package. This information MUST exclude email addresses and contact information of

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HFMA members who have specifically requested “no outside usage” on their HFMA member profile.

4. **E-Mail Communication** – When communicating with chapter members via mass e-mail distribution, chapters are charged with protecting the privacy of chapter member e-mail addresses by ensuring that the e-mail addresses are not displayed in a manner that makes them vulnerable to being copied, pasted and misused by the recipient. Placing e-mail addresses in the BCC (Blind Carbon Copy) section of the e-mail form fosters e-mail address privacy. Chapters are charged to be cognizant and mindful of the overuse concerning e-mail communication.
5. **Co-Sponsored Events** – Whenever an HFMA chapter and/or region enters into an arrangement with a non-HFMA organization for the purpose of providing education to HFMA members, the chapter is required to obtain and keep on file an HFMA Chapter/Region Education Event Agreement (See Attachment 1).
 - a. **One-Time Only Use of Mailing Lists and Other Member Information** – Whenever a non-HFMA organization provides program registration services for an education event, the non-HFMA organization may use the information collected from members registered for the event for one time only use of the HFMA member information collected through the registration process. This one-time use applies to both Significant Involvement Co-sponsored Educational Programs ^{1(a)} and Limited Involvement Promotion of Educational Programs.^(b)
 - b. **No Use of HFMA Name or Logo for Limited Involvement Promotion of Educational Programs** – The non-HFMA organization is prohibited from using the name and/or logo of HFMA, its chapters, or its regions, either in print or electronic form, in any promotional materials that may be distributed about the event.
6. **Requests made by HFMA Chapters or Regions** – From time to time HFMA chapters or HFMA Regions may request use of the WI Chapter’s membership list in order to invite members to their education events. The WI Chapter President (or any chapter officer, should the President be unavailable) may approve, at his/her discretion, use of the chapter’s membership list for one-time distribution if the event is greater than two weeks from a WI-chapter educational program. In the event that Chapter

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Officers, Directors or Committee Chairs receive a request, it should be forwarded to the President for review and approval. See Permission Form attachment. If approved, a copy of the membership roster should be attached to the request. The approval should clearly state that use is FOR ONE TIME USE ONLY. The membership information provided should be limited to only the information required to either mail or email chapter members (See Attachment 2 – Permission Form).

D. REFERENCES

E. DOCUMENT HISTORY

Created Date: September 2006
Revised Date: November 2013
March 2016
November 2017

^{1 (a)} A significant involvement co-sponsored educational program is one where the HFMA chapter is significantly involved in the planning, development, implementation, and marketing of the educational program along with the outside organization. Chapters receive full DCMS credit for member attendees and half-credit for non-member attendees.

^(b) Limited Involvement Promotion of Educational Programs are those situations when a chapter's involvement with an outside organization's educational program is limited in nature. There are times when an outside organization asks an HFMA chapter to promote the outside organization's upcoming educational program to the HFMA chapter membership. The chapter is not involved in the planning, development, or implementation of the program in any way other than marketing the program to its members; however, the program is of educational value and would be beneficial to the membership.