

# County Medical Society Playbook

*Your Guide to  
Running a Strong  
Society*



Physicians Caring for Texans

2018





Physicians Caring for Texans

# In Appreciation

Congratulations on your election as a county medical society leader! TMA understands this is a volunteer role, and we appreciate your willingness to serve. We want you to know you don't have to go it alone and you don't have to reinvent the wheel. This guide is meant to be a resource in navigating your role and responsibilities as a county medical society leader. We think you will be pleased to find information on requirements, bylaws, dues, and helpful resources. If you cannot find what you need, just give us a call.

County medical societies are the foundation of organized medicine in Texas. Without strong leadership at the county level, TMA would not have the solid reputation it has for providing the best in services to our members, including representation before the Texas Legislature, Congress, and regulatory bodies. All of this could not be done if we did not have your dedication to organized medicine through the gifts of your time and talents as a county medical society leader.

All communication from TMA is directed to the medical society staff of record. If the society does not have staff, all communications are directed to its president and/or other elected officers. The medical society is asked to update TMA anytime there is a change in staff or leader contact information.

Again, thank you for your service to your county medical society and the Texas Medical Association. If you have questions or need assistance, don't hesitate to contact one of us directly or TMA Knowledge Center at:

Toll Free: (800) 880-7955  
[www.knowledge@texmed.org](mailto:www.knowledge@texmed.org)

Sincerely,

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PS: Additional resources and more in-depth information are available at [www.texmed.org/CMSresources](http://www.texmed.org/CMSresources).

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# I. County Medical Society Function and Requirements

## 1. The Relationship Between County Medical Societies and TMA

This section explains how county medical societies and TMA are organized and the function and requirements of a county medical society.

County medical societies and TMA work together in meeting the needs of physicians. TMA strives to provide county societies information and support to be effective. The association regularly seeks county medical society feedback on member needs and local issues — through councilor representation, surveys, visits, and other contact. County medical society involvement is essential in the creation and successful implementation of effective programs and services.

The Texas Medical Association is composed of 112 county medical societies that are component organizations chartered by the association. **Therefore, membership in TMA requires membership in the county medical society unless the physician resides or works in a county where no county society charter exists.** A physician may choose to join the county society in which he or she either lives or works. Every county medical society is required to (1) meet at least once a year; (2) have a president, secretary-treasurer, and three-member board of censors; and (3) have a public grievance committee. This information can be found in the model bylaws to which all county medical societies must adhere. To read the model bylaws or TMA Constitution and Bylaws in their entirety, visit [www.texmed.org/cmsresources](http://www.texmed.org/cmsresources). For a hard copy of TMA's Constitution and Bylaws, call TMA Knowledge Center at (800) 880-7955 or email [knowledge@texmed.org](mailto:knowledge@texmed.org).

### Chapter 1 TMA Bylaws

1.19 Requisite memberships. No physician or medical student may become a member of a county medical society without also maintaining membership in the Texas Medical Association, as the county medical society is a component organization chartered by the association.

Chapters 12 and 13 of the TMA Bylaws, shown below, describes the functions and requirements of a county medical society.

To read the model bylaws or TMA Constitution and Bylaws in their entirety, visit [www.texmed.org/cmsresources](http://www.texmed.org/cmsresources).

For a hard copy of TMA's Constitution and Bylaws, call **TMA Knowledge Center** at **(800) 880-7955** or email [knowledge@texmed.org](mailto:knowledge@texmed.org).



## 2. Chapters 12 and 13 of the TMA Bylaws

### CHAPTER 12. COUNTY SOCIETIES

#### 12.10 Organization

12.101 Definition. County medical societies shall be the component organizations of the association as provided in Article III and shall encompass each of the counties of the State of Texas. A county society may be composed of one or more counties, but only one county society shall be formed within any county; however, branch societies may be formed as provided in 12.108.

12.102 Charters. County societies shall be chartered as components of the association by the Board of Councilors as provided in 5.103. Charters previously granted may be revoked by the Board of Councilors as provided in 5.104. All charters shall be signed by the TMA president and executive vice president and shall bear the seal of the association.

12.103 Names of county societies. The charter issued to a county society shall include the names of counties embraced by that society, but a shorter name of geographical or historical association may be adopted by the county society if approved by the Board of Councilors.

12.104 Membership. Ten members are required to form or maintain a county society. County societies with less than 10 members may be maintained at the discretion of the Board of Councilors.

12.105 Division of multi-county societies. Members of a chartered multi-county society may apply to the Board of Councilors for division into two or more component county societies as provided in 5.105.

12.106 Realignment of multi-county societies. Members of one or more of the counties composing a chartered multi-county society may apply to the Board of Councilors for separation from the multi-county society to which they are joined and for inclusion within an adjacent county society as provided in 5.106.

12.107 Consolidation of county societies. The Board of Councilors may consolidate two or more county societies as provided in 5.107.

12.108 Branch societies. Component county societies may be permitted to establish branch societies as provided in 5.108, subject to the following provisions.

- (1) The county society shall have a minimum of 100 members;
- (2) The county society shall establish to the satisfaction of the Board of Councilors that geographical, communication, or transportation barriers, or inadequate access to common professional relationships, exist within a portion of the county society to the degree that the creation of a branch society will benefit the members of the society, the profession, and the association;
- (3) Eighty percent of the members practicing in that portion of the area of jurisdiction of the county society isolated by the provisions of (2) above must petition the parent society for establishment of a branch society;

- (4) A minimum of 25 members practicing or residing in the area of jurisdiction of the proposed branch society shall be required in order to form or maintain a branch society;
- (5) Approval by the parent county society of the petition to establish a branch society shall be by a two-thirds majority;
- (6) The parent society, through its district councilor, must apply to the Board of Councilors for permission to establish a branch society; the application shall be accompanied by a detailed plan of operation and the necessary changes in the constitution and bylaws of the parent society; and approval shall be by a two-thirds majority vote of the Board of Councilors meeting in regular session;
- (7) Only a member of the parent society may be a member of a branch society, and disciplinary jurisdiction shall remain with the parent society; and
- (8) The parent county society retains the right, with the approval of the Board of Councilors, to abolish a branch of its society as provided in 5.108.

## **12.20 Constitution and Bylaws**

Each component county society shall adopt a constitution or, if incorporated, articles of incorporation, and bylaws in keeping with those of the association. These documents thus adopted and all subsequent amendments thereto shall be approved by the Board of Councilors as provided in 5.109 before they shall be effective. No part of a county society constitution, articles of incorporation, bylaws, or amendments thereto shall contravene any portion of the Constitution and Bylaws of the association.

Documents that are not approved by the Board of Councilors shall be returned for reconsideration and amendment.

Failure of a county society to rectify the objections of the Board of Councilors may result in revocation of its charter as provided in 5.104.

## **12.30 Incorporation**

12.31 Authority. Component county societies shall have the authority to incorporate under the laws of the State of Texas, and to conduct their affairs in accordance with those laws and the Constitution and Bylaws of the association.

12.32 Boards of directors. An incorporated county society is required by the laws of the State of Texas to transact its business through a board of directors. Such boards of directors shall be coincident with the executive board of the society as provided in 12.41.

## **12.40 Structure**

12.41 Executive board. Component county societies with 50 or more members may, and incorporated societies shall, form an executive board.



12.411 Duties. The executive board shall:

- (1) Transact the routine business of the society;
- (2) Receive and act upon applications for membership;
- (3) Conduct disciplinary hearings as prescribed by the *Hearings Procedures Manual* of the Board of Councilors and render a decision;
- (4) Refer to the county society questions of policy;
- (5) Perform such other duties as may be required by the county society constitution and bylaws; and
- (6) Conduct all meetings, in the absence of provisions to the contrary, under the procedures of Sturgis' *The Standard Code of Parliamentary Procedure*.

12.412 Composition. The executive board shall include the president, the secretary/treasurer, and such other members as the county society so determines, or as are required of incorporated county societies by the laws of the State of Texas.

12.413 Elections. Officer members of the executive board shall be elected as provided in 12.45. Other members may be appointed or elected in the manner and for such terms and tenure as required by the county society constitution and bylaws, the laws of the State of Texas, or as provided in 12.42.

12.414 Appeal. Appeal from any decision of the executive board may be made through the councilor of the district to the Board of Councilors of the association as provided in 5.114. Decisions of the Board of Councilors shall be final.

12.42 Officers.

12.421 Definition. Officers shall be a president, a secretary/treasurer, and the members of the board of censors as set forth in 12.431 and 12.432. No member shall hold more than one office at the same time. Other officers may be elected as required including the members of the executive board in incorporated county societies. Officers shall be elected by the county society membership.

12.422 Term of office. The term of office for all officers, except the members of the board of censors, shall be one year. The term of the office of secretary/treasurer may be extended to two or three years.

12.423 Duties of the president. The president shall preside at meetings of the county society and shall serve as chair of the executive board. The president may perform such other duties as required by the county society constitution and bylaws.

12.424 Duties of the secretary/treasurer. The secretary/treasurer of a component county society shall:

- (1) Maintain custody of the books, papers, and records of the society including its charter and articles of incorporation.
- (2) Maintain membership records.
- (3) Receive, give receipt for, and make record of all monies and property coming into the possession of the county society and supervise the expenditure of funds as authorized by the society or its executive board.
- (4) Forward to the executive vice president of the association the names and annual dues of society members as provided in 12.55.

- (5) Promptly provide written notice to the association's executive vice president of the relief of any disqualification of membership suffered by any society member. The executive vice president shall acknowledge receipt of such notice and inform the secretary/treasurer of the steps to correct the member's record.
- (6) File an annual report, on forms the executive vice president provides, showing the officers, delegates, and members of the society as of Dec. 31 of the previous year. The report shall be transmitted to the executive vice president no later than Feb. 1 of each year.
- (7) Serve as the authorized representative for the purposes of the National Practitioner Data Bank.
- (8) Upon notification of a vacant vice councilor position, shall give written notice to the membership of the vacancy; describe the duties, term, and tenure of the vice councilor position; and ask for nominees to be submitted within two weeks. He or she shall then submit the name(s) to the district councilor. (The district councilor shall then conduct the election process by the delegates from the respective district.)
- (9) Perform such other duties as the society may require.

12.43 Board of censors.

12.431 Composition and election. Each component county society shall form a board of censors of those members elected as provided in 12.42.

12.432 Term of office.

12.4321 Societies with fewer than 200 members. In those county societies with fewer than 200 members, the board of censors shall be composed of three members. The term of office of the censors shall be three years, and they shall be so elected that only one vacancy normally occurs each year.

12.4322 Societies with more than 200 members. In those county societies with more than 200 members, the board of censors shall be composed of at least three but not more than seven members, with no more than three members elected in any one year. However, in the first year that a society elects to increase the size of the board, the terms of the additional members shall be so modified that they do not conflict with the terms of future members elected in the manner described in 12.4321.

12.433 Duties. The board of censors shall:

- (1) Supervise the ethical deportment of society members and counsel individual members when circumstances warrant;
- (2) Examine applicants for membership as provided in 1.14;
- (3) Receive and investigate charges of unethical conduct made against members of the society by another member;
- (4) Serve as the county medical society's public grievance committee, if the county medical society has chosen to not have a separate such committee pursuant to section 12.461;
- (5) Review the findings of the county society public grievance committee and make proper disposition of each case, if the county society has a separate such committee; and
- (6) Investigate, on its own initiative, suspected violations of conduct and refer charges when indicated after thorough investigation.



12.44 Delegates to the association.

12.441 Authority and election. Each county society shall have the authority to elect delegates to serve in the House of Delegates as provided in 3.21. An alternate delegate may be elected for each delegate and may serve as provided in 3.32. Small county medical societies may be entitled to several alternate delegates for each delegate elected, but only one alternate may be seated for each delegate at sessions of the house as provided in 3.32.

12.442 Term of office. The term of office of delegates and alternate delegates shall be two years. Elections shall be so arranged that no more than half the vacancies occur in any one year.

12.443 Credentials. Credentials certifying their right to membership in the House of Delegates shall be issued to all delegates. An alternate delegate may serve in the place of a delegate by presenting verification to the Credentials Committee as provided in 3.32.

12.45 Election and vacancies. All officers and delegates to the association shall be elected annually by the county society membership. Vacancies in the offices referred to in this chapter shall be filled by the county society president until the next annual election, unless otherwise specified by the county society bylaws.

12.46 Committees.

12.461 Public grievance. Each component county society shall determine whether to maintain a separate public grievance committee or allow its Board of Censors to serve as the public grievance committee. The public grievance committee receives complaints from the public against members of the society as provided in the Board of Councilors' *Hearings Procedures Manual*. When a separate public grievance committee exists, the committee shall consist of three or more members appointed by the president of the county society for three-year terms with, when possible, one-third of the members being named each year. The committee shall elect a chair and a secretary.

12.462 Medical legislation and public relations. Each component county society may form a standing committee on medical legislation and public relations that shall cooperate with the association on legal issues and matters of public health, legislation, and public relations. The committee shall perform such other duties required of it by the county society. County societies may divide these duties between a committee on medical legislation and a committee on public relations, or otherwise provide for these functions.

**12.50 Finance**

12.51 Official dues year. The official dues year for county societies shall be Jan. 1 to Dec. 31, both dates inclusive.

12.52 Authority to levy dues.

12.521 Authority to levy dues. County societies shall have the authority to levy dues against their members sufficient to cover the dues established for membership classifications of the association and to defray the expenses of their own organizations.

12.522 Collection of dues on an installment basis. Dues may be collected from physicians on a prorated installment basis and collected no less than monthly.

12.53 Deadline for dues payment. Annual dues shall be due and payable on Jan. 1, and for those members paying dues on an installment basis, dues shall be due and payable no later than the first business day of the month payment is due.

12.54 Delinquent dues.

12.541 Date of delinquency. Members who pay on an annual basis and have not paid dues by Feb. 1 shall automatically be considered delinquent. Members who pay dues on an installment basis and have not paid an installment payment by the last business day of the month the payment is payable shall automatically be considered delinquent.

12.542 Loss of privileges. A delinquent member shall not have the privileges of voting, holding office, or attending the annual session.

12.543 Reinstatement. A delinquent member who pays dues on an annual basis may be reinstated as a member in good standing upon payment of dues, provided payment is made before March 1 of the same calendar year in which the delinquency occurred. A delinquent member who pays dues on an installment basis may be reinstated as a member in good standing upon the payment of all installment payments in arrears, provided payment is made within 60 days of the member becoming delinquent.

12.544 Automatic dropping from membership. A delinquent member who pays on an annual basis and who has not been reinstated by March 1 shall automatically be dropped from membership. A delinquent member who pays on an installment basis and who has not been reinstated as provided in 12.543 shall automatically be dropped from membership. A former member who thus forfeits membership may be reinstated as a member in good standing at any time during the same calendar year upon full payment of current year dues.

12.55 Transmittal of association dues. County society secretary/treasurers shall forward to the executive vice president of the association the names and remittances of members as soon as practicable following their receipt. Remittances shall be made monthly. The completed roster is due March 1.

## **CHAPTER 13. MEMBERSHIP DUES AND SPECIAL ASSESSMENTS**

### **13.10 Association year**

The association year shall be from Jan. 1 to Dec. 31, both dates inclusive. Membership shall be for the association year.

### **13.20 Authority to establish dues amounts**

The House of Delegates shall establish annual association dues for each classification of membership.



### **13.30 Collection and transmittal**

Association or component county society secretaries or treasurers shall collect dues and forward them monthly to the association office, and the executive vice president shall duly receive therefor.

### **13.40 Annual dues amounts**

13.401 Active. Annual dues shall be as established by the House of Delegates.

13.402 At-large. At-large members shall pay annual dues in the same amount as required of active members. At-large members may also pay an at-large member fee as determined by the Board of Trustees.

13.403 Emeritus. Emeritus members shall pay no dues.

13.404 Honorary. Honorary members shall pay no dues. However, at the time of election to honorary membership, a physician may choose to continue to pay annual dues in order to retain membership rights enumerated in 1.204.

13.405 Life. Life members shall pay no dues.

13.406 Retired. Retired members shall pay no dues.

13.407 Military. Military members shall pay annual dues of \$50.

13.408 Resident. Resident members shall pay annual dues of \$20.

13.409 Medical student. Medical student members shall pay no dues.

13.410 Associate. Associate members shall pay one-half of annual dues charged to active members.

13.411 Leave of absence. Physicians granted a leave of absence shall pay annual dues of \$30; residents or students granted a leave of absence shall pay no dues (see 1.53).

13.412 Affiliate. Affiliate members shall pay one-half of annual dues charged to active members.

13.413 Special. Special members shall pay annual dues in the same amount as required of active members.

### **13.50 Reduced dues**

Members joining component county societies after July 1 shall pay one-half of annual dues charged to active members for that year.

A physician entering practice and joining the association for the first time as an active member in the same year that medical school, residency, or fellowship training or active military service is completed, shall pay one-fourth annual dues for the balance of that year and one-half of the annual dues during the next full calendar year. Medical student and resident physician members who are elevated to another membership category at mid-year will not be assessed additional dues for that membership year.

### **13.60 Temporary waiver/reduction of dues**

County societies may grant a temporary waiver or reduction of county society and association dues for physicians who the society believes are deserving due to financial hardship or disability. The waiver or reduction will apply only to a single annual dues period; additional waivers or

reductions may be granted only after complete review. The association must be notified of each action, and the county society shall provide such information as required by the Committee on Membership.

**13.70 Special assessments**

The House of Delegates may levy such per-capita special assessments as the house deems necessary to defray specific association expenses. Such special assessments shall be collected and paid by component county medical societies in the same manner as dues and shall carry the same penalty for nonpayment.

# II. Resources for County Medical Societies

## 1. Lend a Hand Program

Recognizing that county medical society leaders often spend their free time on the critical task of membership processing, the TMA Membership Department, in conjunction with the TMA Committee on Membership, has developed the Lend a Hand Program. This program for county medical societies with 100 or fewer members helps county medical societies with the membership application approval process.

**TMA Membership Department will provide the following services free of charge:**

- Disseminate membership applications to potential members,
- Collect completed applications and appropriate dues,
- Verify that the applicant has met the licensure requirement for membership eligibility (verification of any other application information required by the county society will need to be completed by its officers), and
- Send the application to the county society for review and approval by its board of censors and executive board.

Final approval of membership will continue to be determined at the county medical society level, in accordance with the TMA Bylaws.

Circulation of the names of applicants to society members is at the discretion of the local county medical society. Societies that choose to have the names of applicants circulated by TMA will be charged for related printing and postage costs.

To be eligible to participate in the Lend a Hand Program, a county medical society must:

- Have 100 or fewer members, including medical students and residents, and
- Agree that the only information on the application form to be verified by TMA is the status of the applicant's Texas license. The officers of the county medical society must complete the verification of any other information that is required by the county medical society.

## 2. TMA Local-Level Support

Grassroots activity has been the cornerstone of TMA's success throughout the years. Key to this success are the local viability, presence, and services at the county medical society level. TMA offers a wide variety of services to help county medical societies show value locally. They range from marketing and membership support to technology, business, and administrative support.



### Lend a Hand

This program for county medical societies with 100 or fewer members (including medical students and residents) helps county medical societies with the membership application approval process.



Please feel free to give us a call to discuss any of your specific needs (even those not on this list). TMA staff stand ready to assist you in any way that we can.

### **Administrative Support**

**TMA Contact:** Michael Hebert, Associate Vice President of Membership Operations, (512) 370-1430 or michael.hebert@texmed.org

- Dues collection and processing
- Membership application processing
- Data requests
- Demographic updates
- Maintaining membership database
- Custom report writing
- Onsite and remote training and support
- iMIS association management database
- Custom reports
- Custom software and reporting solutions
- Creation, hosting, and technical support for county society websites
- Implementation of new technologies

### **Financial and Business Support**

**TMA Contact:** Steve Davis, Director of Finance, (512) 370-1490 or steve.davis@texmed.org

- Review financials
- Review QuickBooks entries and assist with complex accounting issues
- Reconcile bank and investment accounts on a monthly basis or as requested
- Assist with payroll and filing of required taxes
- Present financial information to county society board as requested

### **Marketing Support**

**TMA Contact:** Sylvia Salazar, Associate Vice President of Membership Development, (512) 370-1433 or sylvia.salazar@texmed.org

- Strategic planning assistance
- Recruitment/Retention campaign help
- Speakers and continuing medical education (CME) for local events
- Cobranded targeted and mass-marketing campaigns
- TMA staff presence at county society functions and events
- Identification of newly licensed physicians
- Identification of key market segments (members and nonmembers)
- Assistance in identifying topical issues for recruitment of key segments
- Promotional giveaways
- Marketing and mailing services
- Print marketing materials
- Prepopulated membership applications
- Monitoring and reporting campaign results
- Design and graphics assistance

### 3. TMA Ambassador Outreach Program

# TMA Ambassador Program

## Resources for Running a Successful County Medical Society

- **TMA staff speakers.** TMA staff experts in all areas of health care, health law, practice management, medical economics, public health, and more are available to speak to your members. (See reverse for a list of prepared topics and CME options). Don't see your topic of interest? No worries; with some advance notice, TMA staff can work to get you the right speaker.
- **County Medical Society Leadership Forum.** This comprehensive one-day program for society presidents, presidents-elect, and staff is held with TMA's Winter Conference to discuss issues, share expertise, and get updates on state activities and resources. Join other local physician volunteers to develop or refine leadership skills, create supportive relationships, and learn about best practices and innovative programs sponsored by other societies.
- **Short-term and long-range strategic planning.** We offer practical, hands-on help in developing long-range goals and objectives for local county medical societies.
- **Membership recruitment, marketing, and retention assistance.** The Membership Development Department helps societies develop society-specific recruitment campaigns, tracks and reports results, provides lists of members and nonmembers, offers meeting and marketing assistance, and can provide promotional materials and prepopulated membership applications.
- **Website template.** TMA will build and maintain your local society website, including "Find a Physician."
- **Help in complying with nonprofit association policies.** TMA can help societies establish/update bylaws and set up an appropriate leadership structure that will meet state and federal law requirements as they initiate volunteer activities in their communities. TMA can also help guide efforts to ensure you are meeting fiscal and legal reporting requirements.
- **Administrative, financial, and business service support.** TMA provides various services and tools designed to enhance society management practices and strengthen county medical society operations. They include dues collection and processing, data requests, custom report writing, on-site and remote technology training and support, and financial technical assistance.
- **County Medical Society Playbook.** This basic "how-to" manual for society leadership includes board responsibilities, membership dues, and TMA resources. The *Playbook* has nuts-and-bolts information to help leaders and societies be successful.  
[www.texmed.org/CMSmanual](http://www.texmed.org/CMSmanual)
- **County medical society resources webpage.** TMA staff continues to develop a webpage of resources, tools, information, and other ideas to facilitate sharing between societies, including best practices, activities, and programs. Visit [www.texmed.org/CMSresources](http://www.texmed.org/CMSresources) for more.

Whatever your needs, TMA staff will work with you to get the job done. If you're new to county society leadership ... or if it's been a while since you checked out all our services ... we encourage you to contact us directly. **If we can help you in any way, please contact Karen Kollar, at (800) 880-1300, ext. 1448, or [karen.kollar@texmed.org](mailto:karen.kollar@texmed.org).** Or contact TMA Knowledge Center at (800) 880-7955 or [knowledge@texmed.org](mailto:knowledge@texmed.org).



Physicians Caring for Texans

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# TMA Ambassador Program Speakers

## Medical Economics

Presentation	CME Credit
Economic Survival – Financial Success for Your Practice	1 hr. CME
Reimbursement, Coding, and Claims	None

## Managing Your Practice

Presentation	CME Credit
E-Prescribing	1 hr. CME with Ethics
Medical Records and the Texas Medical Board	1 hr. CME with Ethics
Managed Care Contracts	1 hr. CME with Ethics
Billing Changes, Updates, Reminders, and Education	1 hr. CME with Ethics
Improving Patient Care With Health Information Exchange	1 hr. CME with Ethics
HIPAA: Principles for a Healthy Practice	1 hr. CME with Ethics
Medicare Now and Tomorrow	1 hr. CME with Ethics

## Professional Development

Presentation	CME Credit
To Be or Not To Be Employed	1 hr. CME with Ethics
Preparing for the Unexpected – Practice Transitions	Up to 2 hrs. CME with Ethics
Hi-Tech Patient Engagement	1 hr. CME with Ethics
Protect Your Online Reputation	1 hr. CME with Ethics

## Advocacy and Legislative Affairs

Presentation	CME Credit
Strength in Numbers: TMA's Legislative Update	1 hr. CME with Ethics

TMA's Ambassador Program will bring expert speakers and any of the following presentations to you and your colleagues for free (unless otherwise noted).

**TMA's Ambassador Program Contact:**  
Karen Kollar, (512) 370-1448, or karen.kollar@texmed.org.

### Need More CME Options?

TMA's Education Center offers one-stop access to the continuing medical education (CME) Texas physicians need. Visit [www.texmed.org/Education](http://www.texmed.org/Education) for a complete list.

### Specific Programs:

- **30-Minute Billing Cure:** Schedule a free half-hour consultation with TMA experts at your local CMEs, tailored to your reimbursement, billing, and/or coding issues. Visit [www.texmed.org/Mini-Consult](http://www.texmed.org/Mini-Consult) or contact Genevieve Davis at TMA at (800) 880-1300 ext. 1416.
- **TMA's Committee on Physician Health and Wellness (PHW):\*** PHW offers courses that address physician drug or alcohol addiction, depression, cognitive impairment, and other problems that can disrupt lives. Contact Annette Bonner at TMA at (800) 880-1300, ext. 1608, or annette.bonner@texmed.org.
- **TMLT Risk Management CME Courses:**\* Policyholders who complete a 2.5-hour risk management CME activity may be eligible for a 3-percent premium discount that will be applied to their next eligible policy period. To request a customized CME program for your group, contact Natalie Gilmore at the Texas Medical Liability Trust at (512) 425-5800 or natalie.gilmore@tmlt.org.
- **TMA Outreach Programs:**\* TMA's Hard Hats for Little Heads bicycle helmet giveaway program, Be Wise — Immunize<sup>SM</sup>, and Walk With a Doc Texas are easy ways for physicians and local societies to give back. Find out how you can put these programs to work in your community by contacting Tammy Wishard at TMA at (800) 880-1300, ext. 1470, or tammywishard@texmed.org. (Be Wise, Hard Hats) or Debra Heater at (800) 880-1300, ext. 1390, or debra.heater@texmed.org (Walk With a Doc).

\* Fees may be involved. Call for details.

### Already Have a Speaker, But Need CME?

Contact Paige Green at TMA at least 60 days in advance at (800) 880-1300, ext. 1447, or [paige.green@texmed.org](mailto:paige.green@texmed.org) to obtain your CME.



Physicians Caring for Texans

Be Wise — Immunize is a registered service mark of the Texas Medical Association.



## 4. Outreach Flyer



# HELP BUILD HEALTHY COMMUNITIES

## Get Involved in TMA's Community Outreach Programs

### Be Wise — Immunize

Works to improve vaccination rates across Texas. Be Wise — Immunize<sup>SM</sup> has given more than 315,000 shots to Texas children, adolescents, and adults.

### Walk With a Doc Texas

Promotes healthy physical activity through physician-led walks in Texas communities. Physicians are walking the talk, logging nearly 70,000 miles with their patients since 2013.

### Hard Hats for Little Heads

Provides helmets to keep kids safe while staying active on bikes, skateboards, rollerblades, and scooters. More than 260,000 Texas kids have received a free helmet — and had it properly fitted — through Hard Hats for Little Heads.



Physicians Caring for Texans

[texmed.org/CommunityOutreach](http://texmed.org/CommunityOutreach)

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## 4. Outreach Flyer *(continued)*

# HOW YOU CAN GET INVOLVED

## Be Wise — Immunize

*Money for Your Vaccination Event*

Host a free or low-cost shot event or educate your community that vaccinations are important, safe, and effective. TMA provides all the tools you need to create a fun-filled event, including free promotional flyers, vaccination fact sheets, and infographics in English and Spanish; merchandise for kids and adults; and more.

Kick-start your vaccination clinic with seed money from TMA. The Be Wise — Immunize Local Impact Grants program offers funding of up to \$2,500 for vaccination events. Application deadlines are March 1, July 1, and Nov. 1.

Be Wise — Immunize is a joint initiative led by TMA physicians and medical students, and the TMA Alliance. It is funded in 2017 by TMA Foundation thanks to major gifts from H-E-B and TMF Health Quality Institute, along with generous contributions from physicians and their families.

Be Wise — Immunize is a service mark of the Texas Medical Association.

To learn more, call **Tammy Wishard** at **(512) 370-1470**, email **tammy.wishard@texmed.org**, or visit **www.texmed.org/bewise**.

## Hard Hats for Little Heads

*Free Helmets for Your Event*

Give away helmets to kids in your community with Hard Hats. TMA provides everything you need, from helmets to free promotional flyers, educational handouts, and bookmarks, to merchandise for kids, and more. Most materials are in English and Spanish.

TMA matches your helmet purchase on a sliding scale. For example, you purchase 50 helmets at the low cost of \$7.60 apiece (including shipping), then TMA gives you 50 more helmets FREE.

Hard Hats for Little Heads is supported in 2017 through a TMA Foundation grant thanks to top donors — Blue Cross and Blue Shield of Texas, an anonymous physician and spouse, TMAF Make-A-Difference donors, and the Baptist Health Foundation of San Antonio — and generous gifts from TMA and TMA Alliance members, and friends of medicine.

To learn more, call **Tammy Wishard** at **(512) 370-1470**, email **tammy.wishard@texmed.org**, or visit **www.texmed.org/hardhats**.

## Walk With a Doc Texas

*No-Cost, No Hassles*

Organize a monthly walk in your community. Invite your patients, their families, and community members to join you. Start the walk with a brief health talk, and answer questions while you walk.

Program start-up is FREE for TMA members (a more than \$4,000 value). Walk With a Doc provides marketing materials, liability insurance, administrative support, and more to ensure your event is a success.

Walk With a Doc Texas is funded by a grant from TMA Foundation with generous support from the TMA Insurance Trust and Prudential.

To learn more, call **Debra Heater** at **(512) 370-1390**, email **debra.heater@texmed.org**, or visit **www.texmed.org/WWAD**.



**Thanks to TMA Foundation for \$300,000 to fund these TMA programs, plus another \$300,000 for other TMA programs that improve the health of all Texans.**



Physicians Caring for Texans

302589.4/17

## 5. TMA Knowledge Center

Texas Medical Association Knowledge Center is your resource center, providing a vital link to the overwhelming growth of information in the field of medicine and health care. Knowledge center staff answer questions on a wide variety of topics such as HIPAA, medical records, general legal issues, TMA membership, CME, TMA meetings, publications, and so on.

Library services also are available in TMA Knowledge Center. The physician reading room includes two computers with Internet access and a printer. Information specialists can answer many questions, and a librarian is available to assist members and staff with research. The knowledge center maintains a core collection of clinical and health business textbooks and journals, and full-text online resources.

TMA Knowledge Center staff include a director; two information specialists; a librarian with a master's degree in library and information science; the TMA switchboard operator; and a special collections coordinator who maintains the History of Medicine collection, exhibits, and TMA Archives.

### Information Center

- Information specialists are available to take calls Monday through Friday, 8:15 am-5:15 pm CT at **(800) 880-7955**.
- Ask a question online at **knowledge@texmed.org**.
- Search Ask TMA for frequently asked questions at **www.texmed.org**.

### Reference Services

- Clinical and health business reference, research, and document delivery including interlibrary loan
- History of medicine and TMA
- Genealogy research
- TexShare cards that allow members to check out books from any public university or library in Texas

### Online Services

- Electronic resources including members-only databases of textbooks and journals
- Hot topics bibliographies
- Online catalog of books and journals
- Online order form for reference, interlibrary loan, and free knowledge alert service

### TMA Knowledge Center Contact Information

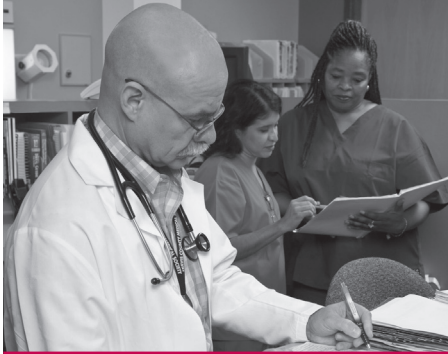
Texas Medical Association  
Knowledge Center  
401 W. 15th St.  
Austin, TX 78701-1680  
(800) 880-7955  
or (512) 370-1550

### Email:

**knowledge@texmed.org**  
**www.texmed.org**



## 6. Payment Advocacy



# Do You Ever Need Help Getting Claims Paid?

You already know that TMA works for you every day at the Capitol, in the courtroom, with the health plans. But did you know that TMA offers remedies for your payment hassles ... as a free member benefit?

TMA can help you get your claims paid, in a variety of ways convenient to you and your staff. We encourage you to take advantage of these free member benefits.

### Hassle Factor Log Program

The Hassle Factor Log program resolves claim-specific payment problems, and supports TMA's efforts to improve claims processing through ongoing meetings with third-party payers. In 2017, the program recovered more than \$2 million from incorrectly processed claims, lost or delayed Medicare enrollment applications, and other problem claims. *To use the Hassle Factor Log, download the form from the TMA website at [www.texmed.org/Hassle](http://www.texmed.org/Hassle).*

### Carrier Meetings

TMA staff meet with health plans to discuss TMA's payment policy, contracting, and regulatory concerns. This program continues to expand as health care payment plans and their many complexities challenge the financial stability of physician practices. *Carrier meeting agendas are based on information gathered from the Hassle Factor Log and the billing and coding hotline.*

### 30-Minute Billing Cure

Could you benefit from a detailed discussion with a TMA reimbursement specialist about your practice operations? TMA works with county medical societies to schedule virtual Billing Cure appointments, whereby physicians and their staff can arrange for a 30-minute phone consultation to discuss payment issues with the specialist, emphasizing practical solutions, education, and ways TMA may be able to help avoid future troubles. *To schedule a free 30-Minute Billing Cure, contact your county medical society about offering the program in your area or call the coding and billing hotline for assistance.*

### Coding and Billing Hotline

This hotline is a great resource for physicians and staff who need immediate access to coding and billing information, as well as help with identifying problems and finding solutions. Certified coding staff provide knowledgeable answers to coding and billing inquiries of all kinds. *Call the coding and billing hotline at (800) 880-1300, ext. 1414.*

### More Free Benefits at [www.texmed.org](http://www.texmed.org)

- **TMA Knowledge Center** information specialists are dedicated to answering questions on a wide variety of topics from TMA meetings to practice operations, and a librarian is available to assist members and staff with research. TMA Knowledge Center maintains a core collection of clinical and health business textbooks and journals, and full-text online resources such as MDConsult, Ebsco, and Stat!REF. Call (800) 880-7955 Monday through Friday, 8:15 am-5:15 pm (CT), or ask a question online at [knowledge@texmed.org](mailto:knowledge@texmed.org). [www.texmed.org](http://www.texmed.org)
- **Texas Medicine Today**, TMA's daily electronic member newsletter, presents timely information about legal, economic, regulatory, legislative, and practice management affairs that Texas physicians need to know. [www.texmed.org/TMT](http://www.texmed.org/TMT)
- **TMA Physician Survey** asks Texas physicians questions every two years about regulatory, socioeconomic, and political issues important to you. TMA uses the results to track the impact of practice and economic change, and to advocate for billing and payment policies that support physicians. You can help guide TMA policy by participating in the survey when it appears in your inbox. [www.texmed.org/Surveys](http://www.texmed.org/Surveys)
- **Free Continuing Medical Education** is part of TMA's fall and winter conferences and of the annual TexMed conference, where you can choose from more than 80 hours of programming. Many of these live presentations address not only ways to improve your practice but also how to work smarter and to get paid for your work. [www.texmed.org/CME](http://www.texmed.org/CME)

To learn more about any of these free member benefits, contact a reimbursement specialist at (800) 880-1300, ext. 1414, or [paymentadvocacy@texmed.org](mailto:paymentadvocacy@texmed.org).

 Follow us on Facebook at [www.facebook.com/TMAPaymentAdvocacy](https://www.facebook.com/TMAPaymentAdvocacy).



Practice Management Services



## 7. Board Responsibilities

# BOARD RESPONSIBILITIES

Serving on the Board of Directors is a rewarding and important responsibility. This guide informs volunteer leaders of the unique aspects associated with governing a not-for-profit organization.

**“The board governs ...  
... the staff manages.”**

**Leadership:** Volunteer leaders are responsible for the direction of the organization. The board governs, develops policy and sets a course for the future. Maintain focus on the mission and strategic goals --- avoid micro-managing the organization and staff. Functions (4):

- Governance
- Policy & Position Development
- Visionary – Future Focus
- Fiduciary

**Management:** Paid staff and contractors are responsible for the administration of the organization. Staff act as partners to the board, advancing the goals and strategies, while taking care of the daily administrative needs unique to nonprofit organizations.

### Unique Terminology

**Not-for-Profit** refers to the legal corporate status of the organization. (It does not imply an exemption from paying or collecting *state sales tax*.) **Nonprofit** is the casual reference to Not-for-Profit

**Exempt Organization** is a reference to the IRS designation exempting the organization from paying most federal income tax (with exception of **UBIT - Unrelated Business Income Tax**.)

**IRS 501(c)(3)** designation most often is referring to organizations with a religious, charitable, scientific or educational purpose.

**IRS 501(c)(6)** designation refers to trade associations, business leagues and professional societies.



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### Board Responsibilities

1. Determine and advance the organization's mission and purposes.
2. Select the chief paid executive (*not staff*) as well as CPA and attorney.
3. Support the chief executive and assess performance periodically – usually measured against the strategic plan.
4. Ensure effective organizational planning.
5. Ensure adequate resources (funds, time, volunteers, staff, technology, etc.)
6. Resource and financial oversight.
7. Determine, monitor and enhance programs and services.
8. Promote the organization's image.
9. Ensure legal and ethical integrity and maintain accountability.
10. Recruit and orient new board members, and assess board performance.

(Adapted from [Ten Responsibilities of Nonprofit Boards www.BoardSource.org](http://www.BoardSource.org).)

### Scrutiny of Nonprofits

In response to corporate scandals, government has increased scrutiny of boards of directors. Sarbanes Oxley (SOX) was adopted in 2002. In 2008 the SOX requirements were applied to nonprofits. Boards are expected to maintain their accountability, independence and transparency while governing. Policy questions in IRS Form 990 include:

- Audit and Audit Committee
- Whistleblower
- Compensation
- Document Destruction
- Conflict of Interest
- Public Records

### Insurance and Volunteer Immunity

State and federal governments afford certain protection to volunteer leaders. While the volunteer may have some protection, the organization is still open for legal suits. Insurance coverages add further protection for volunteers and organization.

**Directors and Officers (D&O) Liability** may cover legal defense for employment, copyright, and antitrust claims, for instance.

**General Liability** insurance covers property damages and injuries relating to the organization.

**Fidelity Bond** covers losses resulting from fraudulent or dishonest acts committed by an employee.

**Meeting Cancellation** covers the loss of revenue due to a cancellation, curtailment, postponement because of weather, strikes, etc.

(Contact legal and insurance counselors for assistance.)

### Legal Principles

**Duty of Care** requires leaders to use reasonable care and good judgement in making their decisions on behalf of the interests of the organization.

**Duty of Loyalty** requires leaders to be faithful to the organization, avoiding conflicts of interest.

**Duty of Obedience** requires leaders to comply with governing documents (i.e. bylaws, articles of incorporation, policies, etc.)

### Board Tools

Documents available to leaders (often in a **Leadership Manual**.)

- Statement of Purpose (Mission)
- Articles of Incorporation
- Bylaws
- Policy Manual
- Strategic Plan
- Financial Statement - Budget
- Meeting Minutes
- Organizational Charts
- IRS Forms
- Frequently Asked Questions

Treat all information with **confidentiality**.

**#1 lie --- “You won’t have to do anything when you get on the board!”**

# Board Responsibilities *(continued)*

## Rules of Order

**Agenda** ensures that important business is covered and discussions are on topic.

**Motions** are proposals for action, beginning with, "I move we....."

A **Second** is required for the motion to be discussed.

**Amendments** may be made to most motions if they improve the intent or clarify the original motion.

**Tabling** lays the motion aside.

**Calling the Question** refers to ending the discussion and voting on the motion.

**Voting** is the official action after discussion to adopt, amend, kill or table the motion.

**Minutes** protect the organization by recording the time and location of the meeting, participants, and the outcome of the motions. They are not a place to record conversations, assignments, reports, etc. (Including reports and discussions can incriminate.)

**Quorum** is number of directors required to conduct business.

Recommended: "ABC's of Parliamentary Procedure" 800-477-4776

## Committees

**"Committees recommend & board approves & staff and volunteers implement."**

Organizations are streamlining - eliminating all but essential committees and aligning committee work with strategic goals.

**Standing** - identified in the bylaws, appointed annually, on-going committee work.

**Ad Hoc** - formed for specific or immediate needs and disbanded upon completion of work (a.k.a. **Task Force**)



## High Performing Boards

**"Mission Driven – Member Focused"**

- *Accountable* and follow through for your commitments.
- Uphold *governing documents* and expectations.
- *Determine to be successful* – ENVISION success.
- Work as a *team* - no individual has an agenda more important than the whole.
- Value and *build relationships* and *respect diversity*.
- Focus on *outcomes* and the impact the organization can have.

## Common Sense

- Prepare for meetings; read, read, read!
- Respect the chairperson, agenda and rules of order.
- Bring a calendar, start and end on time.
- Know the mission and goals.
- Listen more than you speak.
- Check personal and political agendas at the door.
- Respect confidentiality.
- You don't speak for the organization without authority.
- Support the board; don't bad-mouth any action or person. (Dissenting votes may be noted in the minutes – not outside the meeting.)

## Strategic Planning

A strategic plan focuses the board on mission and goals for 3 to 5 years. It serves as a roadmap. *Great board members can think beyond their term of office and outside their area of expertise.*

**Environmental Scan** – review of external and internal influences on the organization, as well as strengths, weaknesses, opportunities and threats (*SWOT*).

**Mission** - statement about what the organization is; whom it serves; and the services it provides; short with PR value.

**Vision** – inspiring, long-term desired outcome; image of success.

**Values** – guiding principles of board and staff.

**Goals** - broad competencies to advance the mission. Usually just 3 to 7 so as not to exhaust resources, volunteers, staff.

**Strategies** – advance the goals; creative efforts to achieve the mission and serve stakeholders/members.

**Action Steps** - fit within the strategies; the actions, assignments, deadlines, etc. AKA annual "operating plan" or "business plan."

**Plan Champion** - the person (staff and/or volunteer) who keeps focus on the plan.

## Risk Management

Protect the organization. Be aware of fiduciary responsibility, contracts, audit results, insurance, IRS requirements, values and ethics, apparent authority, antitrust, etc.

**Public Records** requests for the organization's annual federal tax return (Form 990, 990-EZ) must be made available for the last three years. Significant fines occur for noncompliance.

**Antitrust Violations** occur when two or more persons from the same industry or profession discuss suppliers, processes, prices or operations. Remove yourself from any conversation that would change how business is conducted because of an agreement among competitors.

**Apparent Authority** arises when a board chair, though *not* granting actual authority, permits a committee or chapter to behave as if it had authority. Authority rests with the chairman and may not be assumed by others.

**Financial Audits** annually to protect board and staff; relying on an audit committee to select, oversee and report on the process.

**Conflicts of Interest** disclosed at the start of the term and throughout the year.

**Board Responsibilities** - Laminated \$12 ea. or \$9 ea. for 3 or more + s/h  
Order by e-mail [bob@rchcae.com](mailto:bob@rchcae.com)  
Phone 850/570-6000  
[www.nonprofitcenter.com](http://www.nonprofitcenter.com)  
335 Beard St., Tallahassee, FL 32303

### Publications and Seminars

*Association Self-Auditing Process*-\$39  
*Building an Association Mgmt Co.*- \$39  
*How to Write a Policy Manual* - \$39  
*The Perfect Board* by Cal Clemons -\$17

- Strategic Planning
- Board Development, Orientation
- Operational Audits; Systems
- Best Practices, Mgmt. Seminars

**Bob Harris, CAE**

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## **8. Meeting Agendas: Planning, Sample**

### **Plan Agenda Items With the Presiding Officer**

It's essential to provide guidance to the president or committee chair when planning business meeting items. Providing logical and practical suggestions on action items beforehand helps discussions to stay on track and prevents members from going off topic. It's best to prepare a draft agenda, then ask the president/chair to review it for finalization. You may need to provide a brief synopsis for each item so the president/chair fully understands the subject and whether or not action is required. Staff may wish to keep a running file of related current events and include any valuable informational items in meeting materials.

If you will have a guest speaker at the meeting, be sure to list his or her full name, title, and credentials on the agenda. Remind speakers what time to arrive so that they don't have to sit through the entire meeting if they have other business to attend.

At the discretion of the chair, other TMA members and guests may attend a meeting, especially if CME is being offered for a presentation. If someone not on the committee wants to attend a meeting, the chair must first approve that person's attendance. List all meeting attendees in the minutes.

### **Compile and Send Agenda Material**

Agendas should be finalized at least two weeks prior to a meeting. Send materials to committee members in ample time for their review. You can send agenda materials electronically, or via fax or mail. Always provide hard copies at the meeting. If you have any last-minute new business, make copies of the material to disseminate at the meeting.

**See a sample agenda on the next page.**

## Call to Order

### Welcome

### Approve Minutes of Past Meeting

ACTION

Action items from the last meeting

### Elections/Appointments

ACTION

1. New members
2. New appointments (committees, etc.)
3. Open officer positions (follow bylaws)

### Old Business

ACTION

1. From minutes
2. Unfinished or unresolved issues from past meetings

### New Business

1. Treasurer's report (record acceptance) ACTION
2. Committee reports ACTION
  - o Actions of executive committee (policy changes, spending projects, directions to delegate, or resolutions)
  - o Reports from committees
  - o Informational reports (can be filed with the minutes)
3. Report of the president
  - o Activities the president may have attended on behalf of the society
  - o Vision for future meetings, projects, policies, etc.
4. Report of the delegate to TMA
  - o Gather information from membership to take to TMA, ask for approval of resolutions to TMA or AMA
  - o Report on First Tuesdays at the Capitol, TMA House of Delegates meeting, and any other meeting held in the name of the society
  - o New or restated policies from TMA
  - o Vision

### Other Business

1. Report from the alliance
2. New projects or problems to be addressed
3. Awards, announcements
4. Executive session (discuss issues not for guests or nonmembers, i.e., censorship, hospital or others relations problems, Texas Medical Board actions)



## 9. Meeting Minutes: Drafting, Sample

Minutes are a record of all actions and proceedings but not a record of discussion. The objective of minutes is to state an issue or request and record decisions made during the meeting. **That is it!** Record ONLY what action (main motion[s]) occurs, not all of the background information leading up to it.

Minutes differ from notes. Details, background information, and discussion about the decisions and recommendations are important, and you may wish to record and keep this information for other purposes, but DO NOT include it in the minutes.

Be cautious if you need to include sensitive or controversial information in the minutes. Sensitive and confidential information might include (but is not limited to) information about business relationships, legislative strategies, or litigation theories.

Remember to record the following when drafting minutes:

1. Date and location of meeting;
2. Names of members present and those who were absent;
3. Whether or not a quorum was present;
4. Only what was done in the meeting (main motions, and whether or not they were approved), not what members said;
5. Each individual topic in separate paragraphs and in narrative form;
6. Name of guest speaker(s) and their subject presentation(s), but not a recap of their remarks (you may wish to include their handouts);
7. Handouts or documents referenced in minutes; and
8. President/Committee chair signature or initials with date the minutes were approved.

Remember, minutes remain a draft document until they are officially approved by a quorum at the next meeting.

Remember to leave out the following when drafting minutes:

1. Debate, opinions, interpretations, or comments;
2. Descriptive phrases or flowery language such as “a wonderful report” or “a heated discussion”;
3. Any motion that has not been seconded and restated by the presiding officer;
4. Criticism or praise of members (praise of a member or members can be recorded ONLY if in the form of an officially adopted commendation, for example, when an end-of-service plaque is given);
5. The name of the seconder of a motion or withdrawn motions;

**See sample minutes on page 27.**

6. Statements by a member who asserts he or she is “speaking for the record”; and
7. Reports or handouts; these may be attached if necessary but not included in the body of minutes.

From *Sturgis Standard Code of Parliamentary Procedure*, Fourth Edition, p. 198-202:

Meeting minutes should **ONLY** state the issue or request of the group, as well as the motions that were approved or disapproved. **That is ALL.**

Depending on whether your county medical society is a nonprofit corporation or an unincorporated nonprofit association, take note: State statute regarding meeting minutes for Texas corporations says that any member on written demand stating the purpose of the demand has the right to examine and copy the books and records relevant to that purpose at the expense of that member. Tex. Bus. Orgs. Code §22.351.

A nonprofit association shall keep correct and complete books and records of account for at least three years after the end of each fiscal year and shall make the books and records available on request to members of the association for inspection and copying. Tex. Bus. Orgs. Code §252.010



## Meeting Minutes

### Wharton County Medical Society Executive Board

Jan. 3, 2018

Wharton County Medical Society was called to order by Dr. AA, president, at 6:12 pm, Jan. 3, 2018, and a quorum was present. The minutes were approved with the following corrections:

1. One
2. Two

Two new members were recommended for membership by the Board of Censors and approved by the membership present. (List names +/- specialty, location.) Dr. BB retired from the Board of Censors, and Dr. CC was appointed by the president to finish the unexpired term.

**Old Business:** The second reading of the bylaws amendment was done, and the revisions were approved by the membership present. TMA lobbyist DD answered the question by phone that was raised at the previous meeting: The maximum donation to any congressional candidate is \$xxx.xx per election.

**New Business:** The attached treasurer report was approved, unanimously. The executive committee report was accepted after discussion of approval of \$xxx.xx to be spent for Hard Hats for Little Heads. There were no other action items in the reports of the president or the delegate to TMA. There was detailed discussion about health system reform, but no conclusions were reached, and TMA socioeconomic staff will be invited to the next meeting to provide more factual information. The resolution from Wharton County (*title*), attached, was approved for joint sponsorship with little discussion.

## 10. Recruitment Schedule

### Membership Development: Recruiting and Retaining Members

Without a doubt, membership development — recruitment and retention of active, involved members — is the lifeblood of your county medical society. With a strong, committed member base at both the county medical society and state levels, the Texas Medical Association can continue to represent medicine effectively and develop programs and services that meet member needs. Active, involved members provide:

- Increased revenue for your county medical society;
- A larger, unified voice for medicine's position in local and national legislative and regulatory issues;
- Better networking and support for all physicians; and
- Broader base of volunteers to support county medical society and national efforts on behalf of all physicians and the patients they serve.

**Members who join at the state level must also become members in their local county medical society unless the physician resides or works in a county where no county society charter exists.** Dual membership increases the return on both TMA and county medical society membership development efforts.

The following list shows the dues billing process throughout the year. If you have questions or concerns about this process, contact TMA's Membership Development Department at (800) 880-1300, ext. 1433.

#### October

- 1 First renewal invoice (email/letter) sent  
*Texas Medicine Today* message: "Watch for invoice." (TMA's *Texas Medicine Today* is emailed to members daily with timely news and information that affect physicians.)

Process credit card payments for annual auto-renew members

#### December

- 1 Second renewal invoice (email/letter) sent  
First statement sent inviting nonmembers physicians to join  
Nonmember student and resident letters sent
- 15 Email: Renew Your TMA Dues Before Year End!

#### January

- 8 Third renewal invoice (email/letter) sent

#### February

- 1 Nonrenewals considered delinquent
- 8 Fourth renewal invoice (email/letter) sent  
Nonrenewal campaign website launched; CMS should begin calling nonrenewals  
Second (and final) statement mailed to nonmember physicians  
*Texas Medicine Today* renewal message: "The next *Texas Medicine Today* will be the last one you receive."
- 21 Emails: versions targeted to nonrenewals with TMAIT or TMLT insurance and to nonrenewals with neither coverage



## March

- 1 Membership **drop date** for nonrenewal/delinquent members
- 8 First drop letter sent
- 21 Email to nonrenewals

## April

- 1 Graduation letter sent to nonmember students inviting them to join
- 14 Drop letter from TMA president to long-term members
- 21 Second drop letter sent

## May

- 21 Final invoice sent

## June

Student and resident orientations begin and run through summer. (TMA and county medical society work together to recruit these new members.)

- 1 Half-year dues schedule begins. Those who have never been a member or were not a member the previous year are eligible for half-year dues are. Nonrenewals are **not** eligible. **(See page 60.)**

## July

Final retention letter sent asking nonrenewals to rejoin  
Nonrenewal exit survey sent

Newly licensed lists from the Texas Medical Board arrive monthly. TMA sends the list to the county society executive of record for recruiting purposes. If TMA does not hear back from the society within a week, TMA will begin recruiting these physicians directly.

## 11. Overcoming Common Objections to Membership

Objection: **“I don’t have time to be a member.”**

Answer: Being a member is about more than attending meetings. We know your focus is taking care of your patients, which leaves little time to fight the battles that are facing your profession. That’s why TMA is relentlessly working for you and your patients. Whether it’s representing medicine in Austin and Washington, D.C., meeting with third-party payers to get you paid, developing practice management tools and seminars for you and your office staff, or creating programs to improve public health, TMA has long been a physicians’ best advocate. The more members we have, the more we can do on your behalf.

Objection: **“I can’t afford to join. It is too expensive.”**

Answer: TMA offers a wide variety of benefits and services no matter what stage of your career. On average, your county medical society and TMA dues are a great investment at about only \$2-3 per day. That’s less than a Starbucks coffee.” For example, we couldn’t have passed meaningful tort reform without the grassroots efforts and united voice

of our physician and medical student members, and the TMA Alliance. Installment options are available it that would be helpful to you.

Objection: **“My spouse is a member, and we can’t afford to pay double dues.”**

Answer: When you both are members, you’re guaranteed “double benefits.” Your TMA membership benefits only apply to you and do not extend to your nonmember spouse. And, unless both of you join, you are only giving half your support to your own cause.

Objection: **“I belong to too many associations already.”**

Answer: With more than 50,000 members, TMA is one of the most powerful and effective organizations representing Texas physicians. Although you may receive specific benefits from other associations, TMA is the only one that speaks for the profession of medicine as a whole and has the clout to be heard. TMA membership is the best investment you can make in your profession.

Objection: **“How can I make a difference? I’m just one person.”**

Answer: TMA prides itself on representing the interests of all Texas physicians and their patients. As a member, you have many opportunities to influence TMA’s policies and positions on important issues. As a member of a strong organization like TMA, you have clout with policymakers. As a nonmember, you really are just one lone voice.

Objection: **“I’m just not interested.”**

Answer: What projects could we work on to gain your interest?

Objection: **“I joined once, but dropped.”**

Answer: Why? (This will bring out an objection.)

Objection: **“I want to think it over.” OR “Can you just mail me some information?”**

(This is usually a delaying tactic. However, many people will not buy on the first call.)

Answer: I would be happy to send some information to you; however, let’s review the benefits you will receive from your membership and see if I can answer any questions you might have. We are continually looking for ways to enhance the value of TMA membership. Can you tell me why you have decided not to join TMA? Thank you for your input. I hope that you will consider joining TMA in the future.

Objection: **“There isn’t any reason for me to join — I will still receive the benefits TMA works for anyway.”**

Answer: Joining TMA is about strength in numbers and professional pride. TMA and its component county medical societies currently represent more than 50,000 Texas physicians and medical students. The more Texas

TMA Knowledge Center staff are dedicated to answering questions on a wide variety of topics such as HIPAA, medical records, general legal issues, TMA membership, CME, TMA meetings, publications, and so on.

**(800) 880-7955**

**Email: [knowledge@texmed.org](mailto:knowledge@texmed.org)**

physicians we represent, the more power we have as a group, and the more we can accomplish for each and every physician and the patients they serve. When you remain a potential member, you are actually joining the side against us. [Point out one or two specific members-only benefits that the person may not know about.]

Objection: **“I don’t agree with a lot of things TMA does.”**

Answer: TMA is a member-driven, democratic association, and no member will agree with the majority on every issue. TMA policy is determined by majority vote only after all sides of the issue have been considered and debated. Every member has a chance to voice an opinion through representative governance structures at every level of the association. As a member, you can take an active role in decision making — vote, hold office, and provide testimony on proposed TMA policy to your peers. If you don’t get involved, you can’t make a difference. Ultimately it is you who decides how active you want to be and where your interests lie.

Objection: **“Why can’t I join TMA and not my county medical society?” Or vice versa.**

Answer: We believe there are very tangible and intangible benefits provided by both TMA and its county medical societies. First, your local county medical society’s ability to mobilize grassroots efforts when needed, build relationships with key legislators, and respond to local issues on behalf of the profession are just a few examples. As a state organization it is often difficult for TMA to move as quickly as we would like due to geographic constraints, the sheer size of our membership, and the time it takes to hear about an issue or concern. Additionally, member benefits like the local membership directory for referrals and community-based, physician-led initiatives to improve wellness are most effective locally.



# III. County Medical Society Finances

## 1. Ensuring Fiscal Responsibility

County medical society finances must be among the chief concerns of society officers and executives. Society members entrust their leaders with the management and administration of the county medical society dues they pay. They want to see a return on their investments in the form of society activity and to know that county medical society funds are spent and managed wisely. Directors and managers may assume personal liability for actions taken on behalf of the county medical society — it is important that you have an understanding of the role you are undertaking regarding its finances.

***This section contains basic financial guidelines for county medical societies; it does not cover all the legal or accounting requirements the county medical society may need to meet.***

To ensure the county medical society is in compliance with all federal and state regulations, it is advisable to consult a local attorney or accountant who is knowledgeable in such rules and regulations. The offices of the secretary of state, state comptroller, and state treasurer also are valuable sources of information. These Internal Revenue Service (IRS) publications will offer helpful guidance as well:

- **Publication 557** (Tax-Exempt Status for your Organization),
- **Publication 525** (Taxable and Nontaxable Income),
- **Publication 598** (Tax on Unrelated Income of Exempt Organizations), and
- **Publication 1771** (Charitable Contributions — Substantiation and Disclosure Requirements).

## 2. Records, Financial Guidelines, and Taxes

County medical society leaders must focus on accurately tracking revenues and expenses. This requires maintaining important records, meeting filing requirements, adhering to bookkeeping procedures, and complying with tax laws.

If there is no county medical society office or other permanent location for the society's files, these records should be transferred smoothly from current officers to new officers when elected. The transfer of records can occur at the annual meeting when elections are held or in special meetings scheduled between incoming and outgoing officers. New

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officers would receive current files from the outgoing officers. All county medical society records, including copies of the charter, bylaws, and articles of incorporation, should be reasonably accessible to all society members. It may be advisable to scan important documents into an electronic file to expedite both access to and transfer of these records. You will need to ensure there are multiple copies to protect against loss.

If there are extensive records, the county medical society may choose to set up a formal filing system and record retention plan.

### **County Medical Society Records**

Permanent records and other important records must be stored in a safe place and kept current.

Permanent records include:

- County medical society articles of incorporation and related documents;
- Articles of incorporation for any related organizations, such as a foundation;
- Articles of association for any county medical society political action committee (PAC);
- Record of taxpayer identification number (TIN) or employer identification number (EIN);
- County medical society bylaws (current);
- TMA Bylaws;
- County medical society charter issued by TMA;
- Minutes of previous board and member meetings;
- All federal and state tax and information returns (including PAC reports);
- All payroll tax returns (if county medical society employs staff); and
- All audit reports, if any (including both certified public accountant reports and IRS audits).

Other important records include:

- Financial ledger books/records;
- Financial statements;
- Property rental/ownership records; and
- Significant contracts and agreements, including insurance policies.

These items should be kept/destroyed according to your retention/deletion policy:

- Pertinent correspondence;
- Bank statements, canceled checks, and reconciliations;
- Records of paid bills; and
- County medical society account statements.





### 3. Setting Financial Guidelines

County medical society treasurers and other officers serve two roles in dealing with the society's finances: a fiduciary role and a custodial role.

- The fiduciary responsibility ensures the safekeeping of county medical society assets, making sure funds are invested wisely and spent only on productive activities that support the society's exempt purposes.
- The custodial duties require oversight of the society's financial transactions. These custodial duties also include maintaining the society's important records, establishing financial policies and guidelines, and communicating the society's financial condition.

Before leaders can develop a budget or an accounting system, they must discuss and adopt a set of financial guidelines and controls that spell out acceptable policies and procedures. Give consideration to at least the following areas.

- **Fiscal Year.** TMA's fiscal year runs from Jan. 1 to Dec. 31. As all financial reports the association provides to county medical societies are based on this period, the county society may want to adopt the same dates for planning, budgeting, and reporting.
- **Fiscal Policies.** Before adopting policies, you need to answer these questions:
  - Who handles receipts and how?
  - Where is the money deposited?
  - Who approves expenditures and how?
  - What documentation is required for expenditures?
  - Who can sign checks? (Remember to have more than one authorized signer.)
  - Is it clear that county medical society monies must be in a separate account and not mixed with a member's personal or business account?
  - How often should financial reports be prepared and by whom?
  - Will the county medical society use cash or accrual accounting? (The accrual method is preferred.)
  - Will the county medical society defer dues revenue or recognize it as revenue when received?
  - How often (if at all) should the county medical society be audited?
  - How are members reimbursed for travel such as airfare and per diem?

#### **Cash Accountability and Check Handling Procedures**

The county medical society can create the proper checks and balances on the spending and accounting of funds with simple procedures. The complexity of these financial control procedures depends in part on the

dollar amounts the county medical society handles. Those whose annual revenue is \$500,000 will need more formal controls than those with annual revenue of \$50,000.

One of the simplest things the county medical society can do to monitor expenditures is to require two signatures on checks over a set amount from the society's account. Although cumbersome, this safeguard will guarantee that payments are reviewed. The amount set will depend on the medical society's budget, but consider \$1,000 or \$2,500 as possible benchmarks.

In larger county medical societies, and particularly in staffed societies with executive directors responsible for day-to-day office management, double signatures may be unnecessary. Checks can be written by the county medical society staff executive, with a timely review of bank and financial statements by a member of the board or finance committee.

### **Dealing With Banks**

The bank will need current signature authorization cards indicating who can sign checks on the county medical society account. The account authorization process varies from bank to bank but usually requires the formal approval of a bank resolution by the county medical society board on the bank's form. If two signatures are required on any county medical society checks, designate a minimum of three authorized signers (generally, the county medical society president or treasurer, or the staff executive, vice president, or other officer) in case of emergency, illness, or death. If only one signature is required on checks, two authorized signers may be sufficient (president, treasurer, county medical society staff executive). The county medical society may want to consider insurance for all officers and employees who have access to its funds.

### **Bookkeeping**

Keeping track of county medical society receipts and expenditures is necessary. If finances are complex, a formalized accounting system is helpful. Smaller societies may only need to maintain an accurate checkbook. Whatever method you choose, keep these records — and make sure they're transferred appropriately when a new treasurer is elected. Each treasurer must ensure an effective bookkeeping system is in place.

Accurate, timely, and understandable financial statements are an important tool to safeguard the county medical society's financial stability and integrity. Financial statements indicate how much money the county medical society received and spent during the reporting period. The statements should include enough detail to allow accurate review. The complexity of these statements will depend on the accounting system used and on the county medical society's decision to defer dues revenue or recognize it upon receipt.

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## Audits

TMA recommends that large, active county medical societies consider periodic outside audits or reviews. An outside audit firm reports directly to the board of directors on topics determined or requested by the board.

An audit may include:

- Internal control;
- Financial reports (investments, insurance, compensation, restricted funds, inventories); and
- Tax compliance.

**Audits can be expensive.** The scope of the audit as directed by the board will affect the amount of time required and the cost. The board should discuss its need for an audit, whether annual or periodic, with its advisors on legal and tax matters. Most small county medical societies will not need an audit if there are adequate control measures in place.

## 4. Audits/Reviews/Compilations

### Audits

- Involve the gathering of evidence to support the fair presentation of financial statements and related disclosures for the purpose of expressing a positive opinion
- Determine if the statements have been properly prepared within a framework of recognized accounting practices and applicable legislation
- Fairly present the financial position and results of the organization

### Reviews

- Involve performing inquiries and analytical procedures to support the fairness of financial statements and related disclosures for the purpose of expressing a negative opinion (i.e., nothing came to attention)
- Require a general knowledge of the entity — its business (organization, personnel, basic accounting records, operating characteristics, nature of assets, liabilities, revenues, and expenses) and industry
- Consist primarily of inquiries of the entity's personnel

### Compilations

- Involve the preparation of financial statements without giving any assurances
- Are limited to the presentation of financial information that is provided by the entity

## 5. Insurance

Depending on the scope of its activities, the county medical society may want to consider purchasing business insurance. Common coverage includes general and professional liability, directors' and officers' liability, and property policies — fire and extended liability coverage. Many medical societies also invest in dishonesty coverage (replaced fiduciary bonding from years past) for all officers and employees with access to county medical society funds.

## 6. Taxes

Probably the best source of advice about county medical society taxes is a qualified accountant knowledgeable in the affairs of tax-exempt organizations. Leaders should have a basic understanding of the various types of not-for-profit organizations and know the status of the organization they are working with. Even though a qualified accountant is the best source, leaders also need to know the basic compliance requirements of tax-exempt organizations.

### Tax-Exempt Status

To apply for recognition of tax-exempt status, the county medical society must send (at a minimum):

- **A completed Form 1024** (to file as a 501[c][6]) or **Form 1023** (to file as a 501[c][3]).
- **Form SS-4:** Application for Employer Identification Number. Caution: Use this form only if the county medical society does not already have an EIN.
- **Form 2848:** Power of attorney form to authorize the representative completing the application to work with the IRS. This form is needed only if the representative is not a county medical society officer.
- A conformed (attested) copy of the organizing document(s). This is usually the articles of incorporation.
- A copy of the most recently adopted county medical society bylaws.

The IRS may request additional information. In addition to any fees paid to an accountant or attorney who prepares the filing, the county society must pay filing fees to the IRS with the application.

### State and Local Reporting Requirements

State and local tax requirements vary from location to location, and what the county medical society and its affiliated organizations owe in federal/state/local taxes depends on the types of organizations involved and the amounts of revenue they generate. The information below outlines the general requirements. Be sure to consult an accountant or attorney who is familiar with local and state requirements.

### Individual and Organizational Penalties

If filing and other requirements are not met, the most severe penalty that may be assessed a tax-exempt organization is the revocation of its tax-exempt status. Care must be taken to ensure all filings are

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made accurately and timely. It is important to remember that not only is the organization subject to penalties for late filings and/or failure to file returns, but also the **individuals responsible for the filing may be subject to penalties**. Board members typically are considered responsible parties. Be sure to check the county medical society bylaws, job description(s), and financial policies to determine who is a “responsible” individual.

### **Federal Reporting Requirements**

- **Form 990** (Return for Organization Exempt from Income Tax). Form 990 must be filed by an organization exempt from income tax under section 501(a) (including an organization that has not applied for recognition of exemption) if it has either (1) gross receipts greater than or equal to \$200,000 or (2) total assets greater than or equal to \$500,000 at the end of the tax year (with exceptions for organizations eligible to submit Form 990-N and for certain specific types of organizations). 501(c)(3) organizations also must file a Schedule A to the Form 990. If the county medical society receives a form from the IRS, it is required to take action. Please contact the TMA Finance Department for assistance. Each county medical society should review the requirements and be sure it is collecting information that will facilitate timely filing of the return. The form is available at [www.irs.gov](http://www.irs.gov).
- **Form 990-N**. Most small tax-exempt organizations with gross receipts that are normally \$50,000 or less must file. This form must be filed electronically — no paper — and is referred to as the e-Postcard.
- **Form 990-EZ**. This is a short version of Form 990 that can be filed if:
  - There is less than \$200,000 in gross receipts, and
  - There is less than \$500,000 in assets at year end.
- **Form 990-T** (Exempt Organization Business Income Tax Return). Form 990-T is a tax return required by federal tax law from exempt organizations that have unrelated business income (UBI). UBI is generated by activities that are not substantially related to accomplishing the purpose for which the exempt status was granted. Examples include mailing label and novelty item sales, and commercial advertising. The first \$1,000 of UBI is not taxable. Only net amounts over \$1,000 create a tax liability.
- **Form 1120-POL** (U.S. Income Tax Return for Certain Political Organizations). Form 1120-POL must be filed for certain income on political activities and for certain taxable expenditures. See an accountant to determine if the county medical society is required to file this return. It may be required for both your PAC and your county medical society — be sure to check the instructions for this form.
- **Forms 8871 and 8872**. Every political organization treated as a tax-exempt political organization under section 527 of the Internal Revenue Code that (generally) has contributions of \$25,000 or more is required to file these forms. Form 8871 is filed once and is a “notice of status.” Form 8872 is an annual return that discloses contributors and expenditures. These forms are open to public inspection. Only organizations that file with the Federal Election Commission are exempt from filing these reports.



## **Withholding Tax/Reporting Requirements**

If the county medical society employs staff, check with an attorney and/or accountant to verify compliance with all payroll requirements.

- **Forms W-2** (wage and tax statement to IRS and employees);
- **Form W-3** (transmittal document for forms W2);
- **Form 941** (to report Social Security, Medicare, and federal income tax withholdings and liabilities);
- **Form 940** (to report federal unemployment tax); and
- **Forms 5500/5500-C/5500-R** (to report on qualified employee benefit plans).
- **Electronic Federal Tax Payment Service** (used when paying Social Security and federal income tax withholding to a federal depository). There are specific timing requirements for making these deposits after pay dates, based on the total dollar amounts to be deposited. Make sure the county medical society meets the applicable deposit deadline.

## **Nonstaff Service Payments**

All payments for services in excess of \$600 per year to nonemployees (i.e., not salary or wages) are subject to an Information Return filing in the 1099 series. The county medical society should require a Form W9 from the provider before making any payments. Form 1096 (transmittal document for Forms 1099) and Forms 1099-Misc (both to IRS and recipient) are required (there are some exceptions). The county medical society should identify all payments over \$600 (cumulative for year) and ensure required forms are filed timely.

# **7. Affiliated Organizations**

## **Foundations**

The rules and reporting requirements of foundations (which are normally 501(c)(3) organizations) are different from requirements for 501(c)(6) organizations. Some differences for 501(c)(3)s include:

- Testing to determine if the organization is a publicly supported charity or a private foundation,
- Different rules for public versus private charities, and
- A completed Schedule A required with the Form 990.

## **Political Action Committees**

There are different rules for political action committees and political activities of certain tax-exempt organizations. One such difference is the taxable treatment of interest income on funds used for contributions to candidates for federal offices. Each state establishes its own laws regarding state PACs. See IRS federal rules for political activities and certain tax-exempt organizations. The Texas Ethics Commission can provide information regarding administration and reporting for state PACs. Check with an accountant if the county medical society has an affiliated foundation or PAC.

## 8. Disclosure Requirements: Documents Required to Be Made Available

Since 1988, as explained in IRS Notice 88-120, all exempt organizations have been required to provide for public inspection at their principal office:

- Copies of **Form 990**, **Form 990-N**, or **Form 990-EZ** (information returns) for the three preceding years (Section 501c organizations: except for names and addresses of contributors. Section 527 organizations must disclose contributors);
- A copy of the **Application for Recognition of Exempt Status**;
- Any papers submitted in support of the above returns or application;
- A copy of the **IRS Determination Letter**;
- A copy of **Form 8871**; and
- A copy of **Form 8872** for the three preceding years.

In addition, 501(c)(3) organizations must make available for inspection Form 990-T.

### No Disclosure Required

The following tax returns/portions of return are not required to be made available for public inspection:

- **Form 990-T**, unless the organization is a 501(c)(3) (although this may change in the near future),
- **Form 990**: individual contributor name and amounts, and
- **Form 1120-POL**.

### Solicitation Disclosures

If soliciting contributions, political organizations and tax-exempt organizations that are not eligible to receive tax-deductible charitable contributions must disclose in conspicuous and easily recognizable formats statements declaring all fundraising solicitations after Jan. 31, 1988, are nondeductible as charitable contributions. For those items billed through TMA, disclosures are provided on the county medical society's behalf.

### Intermediate Sanctions

Included in the 1996 Taxpayer Bill of Rights 2 was the long-awaited concept of intermediate sanctions for exempt organizations. Prior to this legislation, the only remedial action available to the IRS was the revocation of exempt status. This legislation covers only 501(c)(3) nonprivate foundation charitable organizations and 501(c)(4) social welfare organizations.

The primary focus of this legislation is on “excess benefit transactions.” Such transactions are defined as any transaction in which an economic benefit is provided by an applicable tax-exempt organization for the benefit of a “disqualified person” if the economic value exceeds the value

The county medical society must provide the required written notification upon receipt of the dues payment if the percentage is not reflected on the dues billing. Failure to provide the required notification may incur penalties. Please consult your tax advisor for details that relate to your specific county medical society.

of the services performed by the disqualified person. Such transactions may include excessive or unreasonable compensation, unreasonable or unfair rental arrangements, provision of services to individuals, certain assumptions of liability, certain sales of assets, certain participation in partnerships, certain revenue sharing arrangements, and the like. A disqualified person is defined as any person who was, at any time during the five-year period ending on the date of the excess benefit transaction, in a position to exercise substantial influence over the affairs of the organization. The legislation provides substantial penalties for (1) the disqualified person(s), (2) the organization, and (3) organizational managers who participated in a transaction knowing that it was an excess benefit transaction.

### **Lobby Disclosure**

Compliance with the Omnibus Budget Reconciliation Act of 1993 requires that your county medical society members be notified as to the percentage of their dues that are not deductible for federal income tax purposes as a result of the lobbying activities of your society. This requirement became effective Jan. 1, 1994.

The county medical society must provide the required written notification upon receipt of the dues payment if the percentage is not reflected on the dues statement. Failure to provide the required notification may incur penalties. Please consult your tax advisor for details that relate to your specific county medical society.

TMA will be happy to assist your county medical society in fulfilling the member notification aspect of this requirement by printing the percentage of nondeductibility on the member renewal notice. This will alleviate the need for you to notify your members after they have paid their dues. If your county medical society wishes to use this method, please submit the county medical society Lobbying Estimate form to the TMA Membership Operations Department no later than Aug. 15 to be placed on the dues statements for the following calendar year.

## **9. Equity/Reserve Policies**

- Equity reserve: the net amount of income in excess of expense over the life of the organization. For the organization to be viable and have an expectation of continuing, this number must be positive over time.
- Cash reserve: the amount of cash or near cash funds available to the organization in excess of funds required for current operations.

It is important to remember that a large member equity balance is not the same as a large cash balance, as equity amounts may have been invested in fixed assets or other assets that are not cash. Also, a large cash balance may not be sufficient to meet unexpected needs if all available funds will be required for current operations.





### **Why should the county medical society have an equity policy?**

- **Unexpected Events.** A major shortfall in an activity that is expected to provide a high positive net revenue over expense in a fiscal year can severely impact the organization's ability to meet its current objectives. To the extent feasible, you can insure major events (such as an annual meeting) to replace such losses, and effective management of expenses related to anticipated shortfalls in revenue can help offset or reduce (but not remove) the need to build a reserve for potential shortfall areas. Consider — if the shortfall is experienced in the area of member dues, would the organization have additional time to deal with the related causes and to reduce expense? This additional time may be provided by receiving dues in advance of the period(s) that you incur the expense; however, these funds must be maintained in cash or near cash to be considered such a reserve. Determine what the organization needs to do to maintain a sufficient reserve to fund current operations.
- **Expected Events.** A second area to consider is the provision for future events and/or activities. Some of these can be anticipated and planned several years ahead (additional facility, computer upgrades), while some cannot be specifically anticipated but are required in order to serve your membership (new legislation, regulation, or lawsuit that requires immediate and significant expenditure). To the extent that needed cash outlays can be anticipated, an annual targeted provision should build adequate reserves to ensure these funds are available when required. As depreciable assets are placed into service, they become part of future periods' operating expense (as depreciation) and are appropriately considered in the budgeting process. In effect, they are "funded" in the operating cycle that they benefit.
- **Nonspecific Future Events.** A more difficult area is in nonspecific future events that may require significant cash outlays. A policy is needed to, at a minimum, provide funds to initiate required immediate actions while allowing a structured look at the potential need for obtaining contributions and/or member assessments in extremely pressing matters. Again this minimum reserve should be available in cash (or near cash).

### **What should the county medical society consider in an equity/reserve policy?**

Establishing policy(ies) regarding the use of accumulated equity and the accumulation of equity should be undertaken in conjunction with a focused look at the status and long-term objectives of the organization. The primary considerations in such a review are:

1. How to weigh the benefits of serving current member needs versus building a reserve to serve future and potentially different members' needs,
2. How to maintain an adequate cash reserve to provide for current operations in order to run the business soundly, and
3. How to determine to what extent investment income is desired to contribute to the operating budget each fiscal year.

Generally, the smaller an organization and the more subject the organization is to large swings in activity and/or income, the larger the desired reserve.

### **Set Policies**

Setting policies can be accomplished with various methods, including establishing different targets or requirements regarding:

- Equity balance,
- Annual contributions to equity, and
- Negative budget limitations (spending more than you bring in for the year).

Some of the options available include:

- A desired target of providing an equity reserve of XX percent of annual operating expense in members' equity (usually by X date),
- Required minimum annual contribution to equity,
- A requirement that a balanced budget be presented to the finance committee/board,
- Specific processes (restrictions) for large expenditures, and
- Budget modification limitations based on equity reserve requirements.

### **Keep This in Mind**

Don't establish a policy that prohibits the organization from using the reserves it has worked so hard to create.

The investment of reserve funds may contribute (significantly) to your annual operating revenue. Some organizations require that earnings from invested funds be added to the funds being invested rather than allowing these funds to be used in the annual operating budget. This policy might be appropriate if the organization is at or below a minimum equity requirement or should it fall below the required minimum.

## **10. Budgeting**

All county medical society officers have a fiduciary role in developing a budget. The budget should be a planning and control tool that helps measure actual results against projections. It assists in developing affordable CMS activities within the limits of revenues, and helps in understanding how to use revenues to develop programs to meet member needs and achieve county medical society goals.

### **Budget Type**

The county medical society's choice of accounting methods will determine whether the budget is developed according to:

1. A revenue and expense plan (sometimes called "line items" or "natural accounts"),
2. A per-project basis (sometimes called "functional reporting"), or
3. Both.



A county medical society's budget doesn't have to be complicated. It only needs to reflect the degree of complexity that is expected to be reported for actual results. Spending money where it will have the greatest effect is one way for the society to protect the future of medicine. The budgeting process helps identify these areas of opportunity, and it should always reflect the county medical society's priorities in accordance with its exempt purposes.

The budget process can be outlined as follows:

- Where are we now?
- Where do we want to be one year from now, and beyond?
- How can we reach our goals ... short-term and long-term?

### **Assess Income**

Begin the budgeting process with a realistic assessment of county medical society income at the present dues and nondues revenue levels. For most societies, there are two major sources of revenues: dues and educational meetings/nondues revenue. Evaluate the membership base. Is the county medical society membership stable — are there trends that may reduce or increase dues revenue? Some options for increasing revenue include grants and sponsorships from corporations, increasing charges for educational sessions or county medical society services, and selling advertising.

### **Compare Income With Costs**

Do member dues provide a sufficient working base to support these core activities? If the present revenue level cannot support planned projects and activities, explore ways of increasing revenue or reducing planned expenditures. Possibly the county medical society can reduce cost by:

1. Coordinating efforts with other county medical societies or organizations for joint ventures, or
2. Cutting some services or activities.

With a well-thought-out revenue projection (including proposals for increasing revenue) coupled with a projection for the year's expenses (including proposals for cost reductions), the county medical society can develop an effective, realistic budget.

### **Summary**

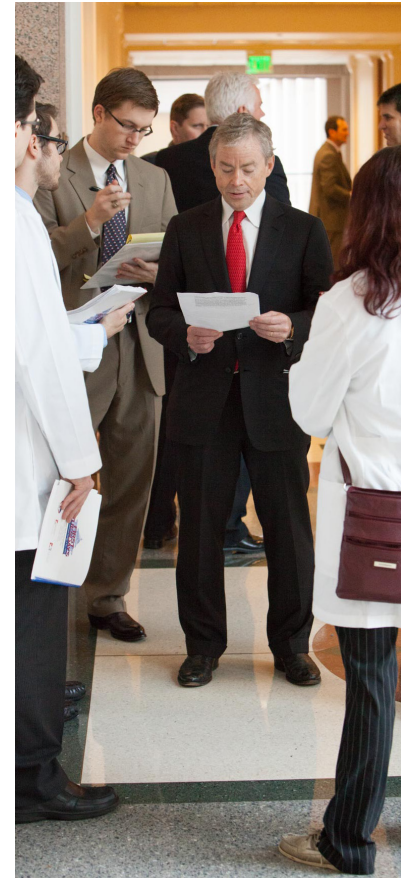
Effective financial management is one of the biggest challenges for a county medical society leader. For any questions not covered in this overview, call the TMA Finance Department at (800) 880-7955.

# IV. Membership Application Information

## 1. Who Is Eligible for Membership?

### **From the TMA Constitution, Article III, Sections 1-4:**

- Sec. 1. This association shall be composed of duly and constitutionally chartered county medical societies and the members thereof.
- Sec. 2. Those eligible for membership in the association are physicians holding the degree of Doctor of Medicine and/or Doctor of Osteopathy, and full-time students pursuing a course of study in a Texas medical school recognized by the Texas Medical Board that leads to the degree of Doctor of Medicine or Doctor of Osteopathy. Deans of these medical schools and presidents of health science centers of which these medical schools are component schools also shall be eligible for membership in the association provided they hold doctoral degrees.
- Sec. 3. All members shall subscribe to the Principles of Medical Ethics of the American Medical Association and shall not hold themselves out as practitioners of sectarian medicine.
- Sec. 4. All physician members shall be licensed to practice medicine in Texas; a temporary license, certificate, or permit shall not be deemed adequate. The exceptions to this licensure requirement for membership are:
- (1) House staff physicians serving in training programs approved by the Accreditation Council for Graduate Medical Education who hold institutional permits from the Texas Medical Board.
  - (2) Physicians who are military medical officers, employees of governmental entities, and those with academic and administrative appointments in medical schools who are not required to register under the Medical Practice Act of Texas, and who are residents of the State of Texas.
  - (3) Physicians who are fully retired from the practice of medicine.



All physician members shall be licensed to practice medicine in Texas; a temporary license, certificate, or permit shall not be deemed adequate.

## 2. Dues Classifications and Amounts

The association membership year runs from Jan. 1 to Dec. 31, both dates inclusive. Association or component county society secretaries or treasurers collect dues and forward them monthly to the association office. The TMA House of Delegates sets annual membership dues.

Below are TMA's annual dues classifications and amounts. See the individual classifications for details on requirements, and application procedures.

The association membership year runs from Jan. 1 to Dec. 31, both dates inclusive. Association or component county society secretaries or treasurers collect dues and forward them monthly to the association office.

TMA House of Delegates sets annual membership dues.

**A. Active**

Physicians in the active practice of medicine. TMA Active membership dues + county medical society dues.

**B. First Year in Practice**

Physicians in their first year of active practice after completion of residency. One-half TMA Active membership dues + county medical society dues.

**C. Retired**

Physicians who have retired from the active practice of medicine. Exempt from dues. Please contact TMA Membership Operations for questions regarding retired status.

**D. Leave of Absence**

Members granted leave-of-absence membership status. Physicians: \$30 annual dues. Residents and students: No dues.

**E. Affiliate**

Physician members who leave the state to practice but wish to retain membership in TMA. One-half of TMA Active membership dues.

**F. Associate**

Physicians who are members in a state and county society adjacent to where they are applying. One-half of TMA Active membership dues.

**G. Military**

Physicians serving in the armed forces of the United States of America within the geographical jurisdiction of a component county medical society. \$50 + county medical society dues.

**H. Resident**

Physicians serving internships, residencies, and fellowships in hospitals located within the geographical boundaries of a county society, who are not in private practice. \$20 + county medical society dues.

**I. Student**

Full-time students pursuing a course of study in a Texas medical school recognized by the Texas Medical Board leading to the degree of doctor of medicine or doctor of osteopathy. Medical student membership is complimentary.

**J. Membership in a Contiguous Society**

A component medical society may grant permission for a physician under its jurisdiction to apply for membership in a contiguous county medical society.

**K. At-Large**

Physicians who reside or work in a county where no county society charter exists. TMA Active membership dues + an at-large membership fee at the discretion of the Board of Directors.

### 3. Processing Membership Applications

The following pages give detailed instructions for processing new applications. Copies of forms are in the Application Forms section starting on page 65. After the applicant has been approved for membership, please send a copy of his or her application to the TMA Membership

Department. The application must be signed by a county society officer indicating the date the physician was accepted for membership. Dues for the current year should accompany the application.

## A. Active Membership

The acceptance of the privileges of Active membership carries with it the obligation to assume the duties of any office to which the member may be elected or appointed by the county medical society and the Texas Medical Association.

### Requirements

Active members must be licensed by the Texas Medical Board, with the exception of military medical officers, employees of governmental entities, and those with academic and administrative appointments in medical schools who are not registered to practice under the Medical Practice Act of Texas, and who are for the time bona fide residents of the State of Texas.

### Application Procedures

- a. The applicant completes an **Active Membership Application**. (See page 65.)
- b. The applicant forwards the completed application along with the appropriate dues for the county medical society and TMA.
- c. County medical societies are urged to forward TEXPAC contributions to TMA immediately upon receipt to comply with state regulations pertaining to political contributions.
- d. The society secretary or staff verify the information on the application.
- e. The secretary forwards the application to the board of censors for review.
  1. The board of censors has 60 days to review, sign, and forward the application to the society executive board (or other society officers if there is no executive board) with a recommendation for **approval** or **disapproval** of membership.
  2. An extension of time, not to exceed 90 days, may be granted to the board of censors by the executive board for good cause.
- f. Within 10 days of receipt of the application and board of censors' recommendation for **approval** of membership, or at the next regularly scheduled meeting, whichever comes first, the executive board (or other society officers if there is no executive board) shall declare the applicant a member.
- g. Within 10 days of receipt of the report of the board of censors with a recommendation for **disapproval** of membership, or at the next regularly scheduled meeting, whichever comes first, the executive board (or other society officers if there is no executive board) may vote to deny or accept the applicant for membership.
  1. When the recommendation of the board of censors is disapproval of an application for membership, the applicant may request a hearing before the executive board. If the applicant requests no hearing or after completion of the hearing, the executive board

While this playbook explains the policies and procedures for accepting a new member, you should remember that physician applicants are eager to be members and begin receiving benefits. Your expediency would be appreciated and helps ensure the first impression of the organization is positive.

Circulation of applicants' names among its members is at the discretion of the local county medical society and is **not** required for TMA membership.

- shall vote to deny or accept the applicant for membership.
2. When an application for membership has been denied on the basis of investigations that disclose unethical or unprofessional practices, the secretary of the component county medical society shall report promptly to the TMA Board of Councilors the name of the physician thus denied membership.
  3. If an application for membership is denied based upon professional incompetence or misconduct, the society secretary must report such a professional review action to the National Practitioner Data Bank through the Texas Medical Board within 15 days of the date that all due process rights have been exhausted.
- h. If no action is taken on a completed application within these specified periods, the applicant may appeal to the TMA Board of Councilors.
  - i. After the application is approved, the county medical society forwards a copy of the approved application to the TMA Membership Department along with TMA membership dues (if they have not already been forwarded).

**NOTE:** Physicians refused membership in a county society under Section 1.16 of the TMA Bylaws shall have the right to request, from said county society, permission to apply for membership in a contiguous county medical society. See Membership in a Contiguous Society in this section for more information.

#### **Reapplication for Former Members**

Physicians who have not been a member of TMA for more than one year are considered former members and will need to reapply by filling out the Active Membership Application.

## **B. First Year in Practice**

This dues category is for physicians in their first year of practice after completion of residency. Physicians elected to this category pay one-half of TMA Active membership dues plus county medical society dues. This applicant completes an **Active Membership Application. (See page 65.)**

## **C. Retired Membership**

Four membership categories are available to physicians who retire or reach a comparative point of inactivity. They are:

- 1. Retired (formerly Inactive)**
- 2. Honorary**
- 3. Life**
- 4. Emeritus**

Physicians elected to these categories become exempt from state and local dues.

The following pages describe the four exempt categories and instructions for initiating their applications.



## 1. Retired Membership

### Requirements

- a. The member must be retired from the active practice of medicine.
- b. Retired physicians moving to Texas from another state where they were a member in good standing at the time of retirement may also apply for Retired membership.

### Application Procedures

- a. The county medical society secretary completes a **Nomination for Retired Membership. (See page 66.)**
- b. The county society approves the application and forwards it to the TMA Membership Department.
- c. The society and the member are notified of the change in TMA membership status.

**NOTE:** Retired members are not counted when determining the number of delegate seats allocated to a county society in the TMA House of Delegates.

### Retired Physicians Moving to Texas

Physicians moving to Texas from another state who wish to apply for Retired membership must complete an Active Membership Application and be approved by the county medical society to which they are applying. Please note on the application that the member is being accepted as a Retired member. No dues will be required from the member.

Furthermore, it is not necessary to submit a Nomination for Retired Membership for the member, and the nomination need not be approved by the TMA Board of Councilors.

### Reapplication Exception for Retired Members

Physicians who are Retired members and those who are fully retired from the practice of medicine and who relocate from the jurisdiction of one county medical society to another shall be granted the option of reapplying to the new society or retaining membership in the original society.

## 2. Honorary Membership

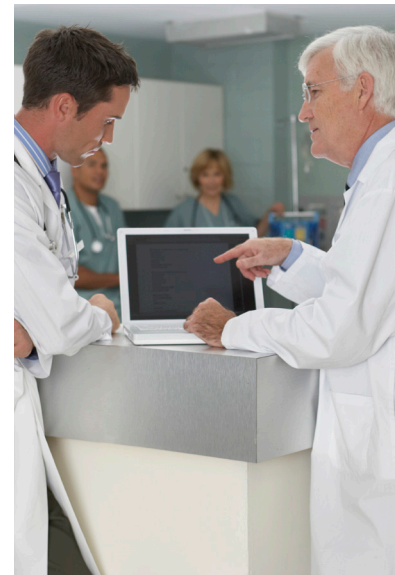
### Requirements

The physician member must:

- a. Practice less than 50 percent of the time;
- b. Have rendered outstanding service to the federation of medicine;
- c. Have made a noteworthy contribution to scientific medicine; and
- d. Have paid full TMA membership dues for the year prior to being nominated to an exempt category if elected at TexMed, TMA's annual session of the House of Delegates (April/May), and for the year in which he or she is elected if approval is at TMA Fall Conference.

### Nomination Procedures

- a. The county medical society secretary completes a **Nomination for Honorary Membership. (See page 67.)**



- b. The county medical society approves the application.
- c. The county society forwards the approved application to the TMA Membership Department by April 1 to be considered at TexMed.
- d. The House of Delegates votes on the application at TexMed (April/May).
- e. The society and the member are notified of the election results shortly after the vote.
- f. Physicians who are not approved for an exempt category at TexMed must pay full dues within 30 days after notification of election results.

### **3. Life Membership**

#### **Requirements**

The physician member must have:

- a. Paid full TMA membership dues for the year prior to being nominated to an exempt category;
- b. Been a dues-paying member of organized medicine for 35 years or more, of which 25 years must have been dues-paying years in TMA and its component societies;
- c. Reached a point of comparative inactivity as determined by the county medical society.

#### **Nomination Procedures**

- a. The county medical society secretary completes a **Nomination for Life Membership. (See page 69.)**
- b. The county society approves the application.
- c. The society forwards the approved application to the TMA Membership Department.
- d. The society and the member are notified of the change in TMA membership status.

### **4. Emeritus Membership**

#### **Requirements**

The physician member must have rendered exceptional and distinguished service to scientific or organized medicine, or both, to be elected to Emeritus status.

#### **Nomination Procedures**

- a. The county medical society secretary completes a **Nomination for Emeritus Membership. (See page 70.)**
- b. The county society approves the application.
- c. The society forwards the approved application to the TMA Board of Councilors 30 days before TMA Winter Conference to be considered at TexMed.
- d. The Board of Councilors approves the application at TMA Winter Conference.
- e. The House of Delegates votes on the application at TexMed (April/May). A two-thirds majority vote of the house is required for election.
- f. The society and the member are notified of the election results shortly after the vote.
- g. Physicians who are not approved for an exempt category at TexMed must pay full dues within 30 days after notification of election results.

## D. Leave of Absence

### Requirements

County medical societies may grant a leave of absence for a period of one or more years for:

- a. Physician members who leave the active practice of medicine due to:
  1. Further training in an approved internship or an approved residency,
  2. Service as a missionary outside the geographical limits of the United States,
  3. Temporary service in the U.S. Armed Forces,
  4. Temporary civilian service outside the geographical limits of the United States,
  5. Illness,
  6. Sabbatical, or
  7. Family leave;
- b. Physician members who are temporarily out of state on sabbatical leave or who accept nonclinical or administrative positions that do not require a transfer of licensure to practice (one-year leave of absence); and
- c. Resident physician members and fellows or graduating medical student members who are accepted to an out-of-state graduate training program approved by the Accreditation Council for Graduate Medical Education, or its equivalent (leave of absence for the period of the training program).

While on leave, these members may hold direct membership in the association; county medical society membership may be continued at the discretion of the member. The privilege of direct membership in the association shall terminate six months after the date of termination of the training unless sooner terminated by acceptance for membership by a county society.

### Application Procedures

- a. The physician or medical student notifies the county medical society of the impending change, either by written notice or by completing a **Leave of Absence Membership Application. (See page 71.)**
- b. The society approves the status change to Leave of Absence membership.
- c. The society forwards the change of status notification and the appropriate dues to the TMA Membership Department.

Or, once the physician or medical student notifies the county medical society of the impending change, the society may notify TMA Associate Vice President of Membership Operations Michael Hebert at (800) 880-1300, ext. 1430, or (512) 370-1430, or michael.hebert@texmed.org.

Associate membership is available to physicians who currently are members in a state and county society adjacent to where they are applying.

## E. Affiliate Membership

Affiliate membership is available to physician members who leave the state to practice but wish to retain membership in the Texas Medical Association. Members have six months from the date they leave Texas to complete the requirements for Affiliate membership. Affiliate members do not retain membership in a local county medical society.

### Requirements

- a. Active, Military, and Resident members whose dues are paid and who leave the state may permanently apply for Affiliate membership in TMA.
- b. Members must be licensed by the Texas Medical Board and must present proof of such each year at dues billing.

### Application Procedures

To initiate Affiliate membership for a physician, the TMA Membership Department must receive:

- a. A completed **Member Record Change Form (see page 74)**, indicating the physician's new out-of-state address,
- b. A copy of the physician's current Texas medical license, and
- c. TMA dues (if member is not paid for current dues year).

## F. Associate Membership

Associate membership is available to physicians who currently are members in a state and county society adjacent to where they are applying. For example, a physician in Texarkana, Ark., who is a member of the Arkansas State Medical Association and Miller County Medical Society may join the Bowie County Medical Society in Texarkana, Texas.

### Requirements

- a. Associate members must be licensed by the Texas Medical Board.
- b. Physicians may apply for Associate membership in a county medical society adjacent to the state society in which they are members.

### Application Procedures

- a. The applicant completes an **Active Membership Application (see page 65)**, making sure the appropriate block is checked indicating the type of membership requested.
- b. The applicant forwards the completed application along with the appropriate dues for the county medical society and TMA.
- c. County medical societies are urged to forward TEXPAC contributions to TMA immediately upon receipt to comply with state regulations pertaining to political contributions.
- d. The society secretary or staff verify the information on the application.
- e. The secretary forwards the application to the board of censors for review.
  1. The board of censors has 60 days to review, sign, and forward the application to the county society executive board (or other society officers if there is no executive board) with a recommendation for **approval** or **disapproval** of membership.

2. An extension of time, not to exceed 90 days, may be granted to the board of censors by the executive board for good cause.
- f. Within 10 days of receipt of the application and board of censors' recommendation for **approval** of membership, or at the next regularly scheduled meeting, whichever comes first, the executive board (or other society officers if there is no executive board) shall declare the applicant a member.
- g. Within 10 days of receipt of the report of the board of censors with a recommendation for **disapproval** of membership, or at the next regularly scheduled meeting, whichever comes first, the executive board (or other society officers if there is no executive board) may vote to deny or accept the applicant for membership.
  1. When the recommendation of the board of censors is disapproval of an application for membership, the applicant may request a hearing before the executive board. If the applicant requests no hearing or after completion of the hearing, the executive board shall vote to deny or accept the applicant for membership.
  2. When an application for membership has been denied on the basis of investigations that disclose unethical or unprofessional practices, the secretary of the component county medical society shall report promptly to the board of councilors the name of the physician thus denied membership.
  3. If an application for membership is denied based upon professional incompetence or misconduct, the secretary of the component county medical society must report such a professional review action to the National Practitioner Data Bank through the Texas Medical Board within 15 days of the date that all due process rights have been exhausted.
- h. If no action is taken on a completed application within these specified periods, the applicant may appeal to the TMA Board of Councilors.
- i. After the application is approved, the county society forwards a copy of the approved application to the TMA Membership Department along with TMA membership dues (if they have not already been forwarded).

**NOTE:** Associate members are not counted when determining the number of delegate seats allocated to a county society in the TMA House of Delegates.

## **G. Military Membership**

Military physicians who serve in the U.S. Armed Forces may join the county medical society where they are stationed.

Physicians refused membership in a county society under Section 1.16 of the Bylaws shall have the right to request, from said county society, permission to apply for membership in a contiguous society. See Membership in a Contiguous Society in this section for more information.

### **Requirements**

Military members must serve in the U.S. Armed Forces within the geographical jurisdiction of the component county medical society.



### **Application Procedures**

- a. The applicant completes an **Active Membership Application (see page 65)**, making sure the appropriate block is checked indicating the type of membership requested.
- b. The applicant forwards the completed application to the county medical society along with the appropriate dues for the county society and TMA.
- c. The society secretary or staff verify the information on the application.
- d. After the society has verified the application, it notifies the applicant that the application is complete. The applicant then may apply for member benefits.
- e. The application is forwarded to the society censors for review.
  1. The board of censors has 60 days to review, sign, and forward the application to the county society executive board (or other society officers if there is no executive board) with a recommendation for **approval** or **disapproval** of membership.
  2. An extension of time, not to exceed 90 days, may be granted to the board of censors by the executive board for good cause.
- f. After review, the county society board of censors forwards the application to the society executive board (or other society officers if there is no executive board) with a recommendation for **approval** or **disapproval** of membership.
- g. Within 10 days of receipt of the application and board of censors recommendation for **approval** of membership, or at the next regularly scheduled meeting, whichever comes first, the executive board (or other society officers if there is no executive board) shall declare the applicant a member.
- h. Within 10 days of receipt of the report of the board of censors with a recommendation for **disapproval** of membership, or at the next regularly scheduled meeting, whichever comes first, the executive board (or other society officers if there is no executive board) may vote to deny or accept the applicant for membership.
  1. When the recommendation of the board of censors is disapproval of an application for membership, the applicant may request a hearing before the executive board. If the applicant requests no hearing or after completion of the hearing, the executive board shall vote to deny or accept the applicant for membership.
  2. When an application for membership has been denied on the basis of investigations that disclose unethical or unprofessional practices, the secretary of the component county medical society shall report promptly to the TMA Board of Councilors the name of the physician thus denied membership.
  3. If an application for membership is denied based upon professional incompetence or misconduct, the CMS secretary must report such a professional review action to the National Practitioner Data Bank through the Texas Medical Board within 15 days of the date that all due process rights have been exhausted.
- i. If no action is taken on the application within these specified periods, the applicant may appeal to the TMA Board of Councilors.

Physicians refused membership in a county society under Section 1.16 of the Bylaws shall have the right to request, from said county society, permission to apply for membership in a contiguous county medical society.

- j. After the application is approved, the county society forwards a copy of the approved application to the TMA Membership Department along with TMA membership dues (if they have not already been forwarded).

**NOTE:** Military members are not counted when determining the number of delegate seats allocated to a county society in the TMA House of Delegates.

## H. Resident Membership

Resident membership is for physicians who are serving internships, residencies, or fellowships in hospitals located within the geographical boundaries of a county society, who are not in private practice. Resident membership shall cease with the completion of the internship, residency, or fellowship.

### Requirements

- a. Resident members must be licensed by the Texas Medical Board.
- b. Resident members must not be in private practice.

### Application Procedures

- a. The applicant completes a **Resident Membership Application (see page 72)**, making sure the appropriate block is checked indicating the type of membership requested.
- b. The applicant forwards the completed application along with the appropriate dues for the county society and TMA.
- c. County medical societies are urged to forward TEXPAC contributions to TMA immediately upon receipt to comply with state regulations pertaining to political contributions.
- d. The county society secretary or staff verify the information on the application.
- e. The secretary forwards the application to the board of censors for review.
  - 1. The board of censors has 60 days to review, sign, and forward the application to the society executive board (or other society officers if there is no executive board) with a recommendation for **approval** or **disapproval** of membership.
  - 2. An extension of time, not to exceed 90 days, may be granted to the board of censors by the executive board for good cause.
- f. Within 10 days of receipt of the application and board of censors recommendation for **approval** of membership, or at the next regularly scheduled meeting, whichever comes first, the executive board (or other society officers if there is no executive board) shall declare the applicant a member.
- g. Within 10 days of receipt of the report of the board of censors with a recommendation for **disapproval** of membership, or at the next regularly scheduled meeting, whichever comes first, the executive board (or other society officers if there is no executive board) may vote to deny or accept the applicant for membership.

Resident membership is for physicians who are serving internships, residencies, or fellowships in hospitals located within the geographical boundaries of a county society, who are not in private practice.

1. When the recommendation of the board of censors is disapproval of an application for membership, the applicant may request a hearing before the executive board. If the applicant requests no hearing or after completion of the hearing, the executive board shall vote to deny or accept the applicant for membership.
  2. When an application for membership has been denied on the basis of investigations that disclose unethical or unprofessional practices, the secretary of the component county medical society shall report promptly to the TMA Board of Councilors the name of the physician thus denied membership.
  3. If an application for membership is denied, based upon professional incompetence or misconduct, the society secretary must report such a professional review action to the National Practitioner Data Bank through the Texas Medical Board within 15 days of the date that all due process rights have been exhausted.
- h. If no action is taken on a completed application within these specified periods of time, the applicant may appeal to the TMA Board of Councilors.
  - i. After the application is approved, the county society forwards a copy of the approved application to the TMA Membership Department along with TMA membership dues (if they have not already been forwarded).

**NOTE:** Physicians refused membership in a county society under Section 1.16 of the Bylaws shall have the right to request, from said county society, permission to apply for membership in a contiguous county medical society. See Membership in a Contiguous Society in this section for more information.

## **I. Student Membership**

Student membership is for students who are pursuing a course of study in a medical school in Texas that is approved by the Texas Medical Board. Students shall be eligible for student membership in the county society in which the medical school is located. Student membership shall cease upon termination of student status.

### **Requirements**

Student members must be full-time students pursuing a course of study that leads to the degree of doctor of medicine or doctor of osteopathy.

### **Application Procedures**

- a. The applicant completes a **Medical Student Membership Application. (See page 73.)**
- b. The applicant forwards the completed application along with TEXPAC contributions (if applicable) to TMA.
- c. TMA processes the application and sends it to the county medical society for approval.
- d. After the application is approved, the society forwards a copy of the approved application to the TMA Membership Department.

## J. Membership in a Contiguous Society

A component medical society may grant permission for a physician under its jurisdiction to apply for membership in contiguous society.

Any applicant refused membership in a county society under Section 1.16 of the TMA Bylaws shall have the right to request, from said county society, permission to apply for membership in a contiguous component county medical society.

Permission for a physician to apply in a contiguous component society, and consideration of that application by the contiguous society, shall be denied only for a violation of the Constitution and Bylaws of TMA or a component county medical society; a violation of the American Medical Association Principles of Medical Ethics; criminal conduct; or unprofessional conduct likely to deceive, defraud, or injure the public.

Should a request for permission to apply for membership in a contiguous component society be denied, the physician shall have the right of appeal to the TMA Board of Councilors, which, on a majority vote, may permit the physician to apply for membership in a contiguous component county society.

## K. At-Large Membership

This dues category is for physicians who reside or work in a county where no county society charter exists. The category carries all the privileges and responsibilities of Active membership.

### Requirements

Physicians against whom no charges of unethical or unprofessional conduct that could lead to denial of membership are pending shall be eligible for at-large membership. All requirements of Active membership apply as well.

### Application Procedures

- a. The applicant completes an **Active Membership Application. (See page 65.)**
- b. The applicant forwards the completed application along with TEXPAC contributions (if applicable) to TMA.
- c. TMA approves and processes the application and notifies the applicant.

## 4. Transfer Procedures

Regardless of membership classification, a physician who relocates from the jurisdiction of one county medical society to another shall notify the current society, the new society, or the TMA Membership Department. Once the TMA Membership Department is notified of the physician's relocation, the member will be transferred to the new county society.

Student membership is for students who are pursuing a course of study in a medical school in Texas that is approved by the Texas Medical Board.

Students shall be eligible for student membership in the county society in which the medical school is located.

Regardless of membership classification, a physician who relocates from the jurisdiction of one county society to another shall notify the current county society, the new county society, or the TMA Membership Department. Once the TMA Membership Department is notified of the physician's relocation, the member will be transferred to the new county society.

**Then:**

- a. The Membership Department will inform the original society and the society to which the member has transferred.
  1. TMA forwards a transfer notification and a copy of the member's current application to the society to which the member has transferred.
  2. The new society collects any additional information needed from the member.
  3. Membership benefits of the association continue, those from the original society cease, and those of the society to which the member has transferred begin.
  4. TMA will notify the physician of the transfer from the old society to the new society with the new society contact information.
- b. The secretary at the new society will inform the physician of any local requirements and meeting dates, and collect dues if not already paid for the current year.
- c. Upon receipt of the notification of transfer and current application, the secretary completes any required verification then forwards the completed form(s) to the county society's board of censors for review.
  1. The board of censors has 60 days to review, sign, and forward a transfer notification and current application and any additional information needed by the county to the society executive board (or society officers if there is no executive board) with a recommendation of approval or disapproval. If after 90 days the association has not been informed of disapproval, the physician's membership will remain with the new society. The physician will also be informed of the 90-day time frame.
  2. A request for an extension of time, not to exceed 90 days, may be granted to the board of censors by the executive board (or other society officers if there is no executive board) for good cause. If an extension is required, TMA should be notified.
- d. Within 10 days of receipt of the report of the board of censors with a recommendation for **approval** of a transfer notification and current application, or at next regularly scheduled meeting, whichever comes first, the executive board (or other society officers if there is no executive board) shall declare the applicant a member of the society.
- e. Within 10 days of receipt of the report of the board of censors with a recommendation for **disapproval** of a transfer notification and current application, or at the next regularly scheduled meeting, whichever comes first, the executive board (or other society officers if there is no executive board) may vote to deny or approve the notification and current application.



1. When the recommendation of the board of censors is disapproval of a transfer notification and current application for membership, the applicant may request a hearing before the executive board. If the applicant requests no hearing or after completion of the hearing, the executive board shall vote to deny or accept the applicant for membership.
  2. When a transfer notification and current application for membership have been denied on the basis of investigations that disclose unethical or unprofessional practices, the secretary of the component county medical society shall report promptly to the TMA Board of Councilors the name of the physician thus denied membership.
  3. If a transfer notification and current application for membership are denied based upon professional incompetence or misconduct, the society secretary must report such a professional review action to the National Practitioner Data Bank through the Texas Medical Board within 15 days of the date that all due process rights have been exhausted.
- f. If no action is taken on a transfer notification and current application within these specified periods, the applicant may appeal to the TMA Board of Councilors.
- g. After the transfer notification and current application are approved, a copy of the signature form is forwarded to the TMA Membership Department.

**NOTE:** Physicians refused membership in a county society under Section 1.16 of the Bylaws shall have the right to request, from said county society, permission to apply for membership in a contiguous county medical society. See Membership in a Contiguous Society in this section for more information.

#### **Reapplication Exception for Retired Members**

Physicians who are retired members and those who are fully retired from the practice of medicine and who relocate from the jurisdiction of one county medical society to another shall be granted the option of reapplying to the new society or retaining membership in the original society.

## **5. Locum Tenens**

County medical societies are encouraged to retain as Active members those physicians performing locum tenens outside of Texas. Locum tenens is by definition temporary, and the desire to retain membership indicates intent to return to Texas. Dues for physicians performing locum tenens are the same as TMA Active membership dues.



# V. Membership Dues

Delinquent members (those dropped for nonpayment of membership dues) are **not** eligible for half-year dues. They must pay full-year dues to be reinstated.



The next page lists full-year dues amounts required by TMA.

## **Delinquent and Drop Dates**

Members whose dues are not paid are **considered delinquent on Feb. 1** and are **dropped from membership on March 1**. Physicians who are dropped from membership for nonpayment of dues in March may reinstate their membership by paying **full-year dues** by Dec. 31.

## **Reduced Dues (Half-Year Dues)**

Dues are reduced by one-half for physicians who join as new members **after June 1**, as they will only receive benefits for six months.

## **First-Year Rate**

A physician who joins the association as a new member after June 1 in the same year that residency or fellowship training or active military service is completed will owe one-half of the first-year rate for the balance of that year and will be assessed the full first-year rate the following year.

**Example:** A physician completes his or her training or military service in June 2018. The physician owes \$134.25 for the balance of 2018 and \$268.50 for 2019. In 2020, the physician will be assessed the second-year rate.

Physician members who complete their training or military service at midyear and are elevated to Active membership will not owe additional dues for that same year. This rule is applicable when the physician is relocating to the jurisdiction of another county medical society as well as when he or she is remaining in the same county medical society.

**Example:** A Resident member of Harris County Medical Society in Houston completes his or her training in June 2018 and relocates to Tyler, to open a practice. The county medical society in Tyler processes the application for Active membership but will not collect additional dues for 2018. The physician will be eligible for the first-year rate of \$268.50 for 2019.

All dues amounts should include TMA + CMS dues. If you are unsure about your CMS dues schedule, please call: **TMA Membership Operations at (800) 880-1300, ext. 1439, 1438, 1442, or 1430** (associate vice president of department).

## 1. TMA Membership Dues Schedule (2018)

<u>Membership Type</u>	<u>TMA Dues</u>
<b>Active (Regular)</b>	\$549.00
<b>Active-First Year</b>	\$274.50
<b>Active-Second Year</b>	\$549.00
<b>Retired/Honorary/Life/Emeritus</b>	Exempt
<b>Leave of Absence</b>	
1. Resident	Exempt
2. Missionary	\$ 30.00
3. Military	\$ 30.00
4. Military Resident	\$ 30.00
5. Foreign Civil Service	\$ 30.00
6. Illness	\$ 30.00
7. Sabbatical	\$ 30.00
<b>Affiliate</b>	\$274.50
<b>Associate</b>	\$274.50
<b>Military</b>	\$ 50.00
<b>Resident/Intern/Fellow</b>	\$ 20.00
<b>Medical Student</b>	Exempt

## 2. Member Record Changes

### Member Record Change Form. (See page 74.)

This multipurpose form is used to notify TMA of changes in a member's record such as name, address, membership status (front of form), and membership discontinuations (back of form), e.g., retirement, moved out of state, deceased. Or, the county medical society may convey this information to TMA Associate Vice President of Membership Operations Michael Hebert at (800) 880-1300, ext. 1430, or (512) 370-1430, or michael.hebert@texmed.org.

#### 1. Name Changes

Name changes for licensed physicians require documentation that the physician's name has been changed with the Texas Medical Board.

#### 2. Address Changes

When submitting address changes, indicate whether the new address is the home or office address. Address changes received that are not specified as home or office will be considered a home address and will not be released.

This multipurpose form is used to notify TMA of changes in a member's record such as name, address, membership status, and membership discontinuations.

### **3. Membership Status Changes**

Elevations to Retired, Life, Honorary, and Emeritus membership require a nomination form as outlined in Processing Membership Applications in the previous section.

### **4. Membership Discontinuation**

This form is used to report physicians and medical students who discontinue membership in the county medical society. Provide the date of discontinuation and new address whenever possible.

When reporting the death of a member, provide the date of death and name and address of the next of kin, if available.

### **5. Delinquent and Drop Dates**

Members whose dues are not paid are considered delinquent members on Feb. 1 and are dropped from membership on March 1. Physicians who are dropped from membership for nonpayment of dues in March may reinstate their membership by paying full-year dues by Dec. 31.

It is not necessary to send a Member Record Change form on physicians who are dropped for nonpayment of dues in March.

## **3. To Post TEXPAC Contributions (for Medical Societies With Remote iMIS Capabilities)**

Use the product code TXPC on all TEXPAC contributions unless the payment is made with a corporate check or corporate charge card; if payment is made with one of these, use product code TXPC-Corp. Federal law requires that TEXPAC keep corporate funds separate.

Post the any alliance TEXPAC contribution to the alliance member, not the physician. If a physician pays the \$50 for alliance TEXPAC and has no spouse, apply the \$50 to the physician's record. Post these payments to product code alli-txpc.

300 Club contributions should be entered as one payment of \$300 and not split into multiple payments unless the physician or alliance member contributes to the 300 Club in multiple payments.

The Capital Club level (\$1,000) is a joint membership level and covers membership for both the physician and his or her spouse. The entire \$1,000 payment should be applied to the member who makes the dues payment; the spouse's activity record will be updated via a nightly subroutine in iMIS.

The Patron Club level (\$5,000) is a joint membership level that covers membership for both the physician and his or her spouse. The entire \$5,000 payment should be applied to the member who makes the dues

payment; the spouse's activity record will be updated via a nightly subroutine on iMIS. Following the initial \$5,000 payment, each subsequent year will be a \$2,500 joint membership, and it covers membership for both the physician and his or her spouse.

TMA and TEXPAC no longer collect dues on behalf of AMPAC, the political action committee of AMA. Members who wish to contribute to AMPAC must do so directly via [www.ampaonline.org](http://www.ampaonline.org).

TEXPAC contributions should be posted as soon as possible. According to Federal Election Commission regulations, contributions must be forwarded within 10 days of receipt if the contribution exceeds \$50. For amounts under \$50, the contributions must be forwarded within 30 days. (See FEC regulations 102.8[a] and [b].)

Additionally, TEXPAC electronically reports to the Texas Ethics Commission on the fifth of each month. These reports include all contributions made to TEXPAC for the reporting period that has just ended. (Example: March 26-April 25 reporting period is due on May 5.) TMA reports to the Federal Election Commission on a quarterly basis. (Example: Jan. 1-March 31 is due on April 15.) It is important to have all TEXPAC contributions entered into iMIS so that TMA reports are accurate; inaccurate reports may incur large financial penalties.

The disclaimer for the 2018 dues year should read as follows:

Texas Medical Association Political Action Committee (TEXPAC) is a bi-partisan political action committee of TMA and affiliated with the American Medical Association Political Action Committee (AMPAC) for congressional contribution purposes only. Its goal is to support and elect pro-medicine candidates on both the federal and state level. Voluntary contributions by individuals to TEXPAC should be written on personal checks. Funds attributed to individuals or professional associations (PAs) that would exceed federal contribution limits will be placed in the TEXPAC statewide account to support non-federal political candidates. Contributions are not limited to the suggested amounts. TEXPAC will not favor or disadvantage anyone based on the amounts or failure to make contributions. Contributions used for federal purposes are subject to the prohibitions and limitations of the Federal Election Campaign Act. Contributions or gifts to TEXPAC are not deductible as charitable contributions or business expenses for federal income tax purposes. Federal law requires us to use our best efforts to collect and report the name, mailing address, occupation, and name of employer of individuals whose contributions exceed \$200 in a calendar year. To satisfy this regulation, please include your occupation and employer information in the space provided. Contributions from a practice business account must disclose the name of the practice and the allocation of contributions for each contributing owner. Should you have any questions, please call TEXPAC at (512) 370-1363.

The TEXPAC disclaimer must be included on every dues statement or marketing piece promoting TEXPAC. This disclaimer changes frequently to comply with increasingly complex legal requirements. Before each dues year, be sure that you have a copy of the most current disclaimer.

Occupation: \_\_\_\_\_

Employer: \_\_\_\_\_

Self-Employed: \_\_\_\_\_

Other: \_\_\_\_\_





# Active Membership Application



Texas Medical Association  
401 West 15th Street  
Austin, TX 78701-1680

## TMA/County Medical Society Membership Application

Physicians Caring for Texans

Membership Type:  Resident  First Year in Practice  Active  Military

### BIOGRAPHICAL INFORMATION AND EDUCATION

Name: Last	First	Middle	Suffix	Degree	Gender
<input type="checkbox"/> Office Address (check if this is your preferred contact address)			City	State	ZIP
Work Phone	Work Fax		Work E-mail		
<input type="checkbox"/> Home Address (check if this is your preferred contact address)			City	State	ZIP
Home Phone	Home Fax		Home E-mail		
Date of Birth	Place of Birth (Country)	Texas Medical License #	<input type="checkbox"/> Yes <input type="checkbox"/> No		NPI #
Marital Status	Spouse's Name	If married, is spouse also a physician?			
Practice Name	Specialty: Primary		Secondary		
Medical School	Degree	Grad. Date	Residency/Fellowship (list most recent)	Specialty	Completion Date

### PRACTICE TYPE AND EMPLOYMENT STATUS

- |   |  |  |   |   |                                  |
|---|--|--|---|---|----------------------------------|
| <input type="checkbox"/> Direct Patient Care              | <input type="checkbox"/> Administration (non-clinical)     | <input type="checkbox"/> Not in Patient Care     | <input type="checkbox"/> Not Employed         | <input type="checkbox"/> Hospital NPHO  | <input type="checkbox"/> Retired |
| <input type="checkbox"/> Direct Patient Care and Teaching | <input type="checkbox"/> Full-Time Teaching (non-clinical) | <input type="checkbox"/> Military                | <input type="checkbox"/> Phys.-owned Prac.    | <input type="checkbox"/> Academic Inst. | <input type="checkbox"/> Other   |
| <input type="checkbox"/> Direct Patient Care and Research | <input type="checkbox"/> Research (non-clinical)           | <input type="checkbox"/> Veterans Administration | <input type="checkbox"/> Direct Emp. by Hosp. | <input type="checkbox"/> FQHC           |                                  |

### MEMBERSHIP QUALIFICATION AND AUTHORIZATION

Have you ever had an application for membership in a medical society rejected? .....	Yes	No
Have you ever been convicted of a crime, other than a non-felony motor vehicle violation? .....	<input type="checkbox"/>	<input type="checkbox"/>
Has your medical license ever been revoked or suspended? .....	<input type="checkbox"/>	<input type="checkbox"/>
Have you ever been subjected to disciplinary action by any of the following?		
Board of Medical Examiners .....	<input type="checkbox"/>	<input type="checkbox"/>
County/State Medical Society .....	<input type="checkbox"/>	<input type="checkbox"/>
Hospital Medical Staff .....	<input type="checkbox"/>	<input type="checkbox"/>

I hereby apply for membership in the \_\_\_\_\_ County Medical Society and Texas Medical Association and, if accepted, agree to abide by and be subject to terms and conditions of the Constitution and Bylaws of the Society and of the TMA and the Principles of the Medical Ethics of the American Medical Association. In order to process my application for membership, I grant permission and consent for you to obtain from any appropriate source all relevant information concerning my credentials and qualifications.

I understand that if my application for membership is denied by the Board of Censors, I have a right to appeal the denial to the County Medical Society pursuant to the *Hearings Procedure Manual*. I also understand that if my application for membership is denied, based on professional competence or conduct, the County Medical Society must report such a professional review action to the National Practitioner Data Bank through the Texas Medical Board within 15 days of the date that all due process rights have been exhausted.

I also agree that biographical information will be disseminated in accordance with the policy and procedures established by the TMA Board of Trustees unless otherwise directed by me.

Physician Signature (required) \_\_\_\_\_ Date \_\_\_\_\_

### APPROVAL OF BOARD CENSORS

The Board of Censors have had the above application under consideration, and:  Approve or  Disapprove on Date \_\_\_\_\_

Signature and Title

**Note: Membership becomes effective when application has been approved and dues have been paid to the association.**

### PAYMENT INFORMATION

A physician becomes a member of the Texas Medical Association when joining the county medical society, since the county society is a component organization chartered by the association. \$20 of TMA active membership dues is for a one-year subscription to *Texas Medicine*. **Dues paid to the county society and TMA are not deductible as charitable contributions for federal income tax purposes.** A portion of dues may be deductible as ordinary and necessary business expenses.

- Check (make payable to Texas Medical Association)  Credit Card:  VISA  MasterCard  Discover  AMEX
- Automatic Dues Renewal: By checking "Automatic Dues Renewal," I authorize TMA to retain my credit card information securely and to charge my credit card to pay my membership dues annually.

Name as it appears on card \_\_\_\_\_ Credit card number \_\_\_\_\_ Expiration date \_\_\_\_\_

Signature (required) \_\_\_\_\_

### PLEASE SUBMIT PAYMENT WITH MEMBERSHIP APPLICATION TO:

Texas Medical Association, 401 W. 15th St., Austin, TX 78701-1680 Phone: (800) 880-1300 Fax: (512) 370-1631

T7161.6/2012

# Retired Membership Application



Physicians Caring for Texans

## Nomination for Retired Membership

This form is to be completed by an officer or executive of the county medical society. The original should be forwarded to the TMA Membership Department. A copy should be retained by the county society. **Applications must be received before April 1** to obtain dues-exempt status for the year.

**Requirements:** Retired applicants must be retired from the active practice of medicine.

**Privileges:** Retired members shall be entitled to all of the privileges of TMA membership except the right to vote, hold office, or serve as a delegate or alternate delegate to the association.

The \_\_\_\_\_ County Medical Society met on \_\_\_\_\_ 20\_\_\_\_ and nominated the following member for Retired membership:

Name \_\_\_\_\_ Birthplace \_\_\_\_\_  
Home address \_\_\_\_\_ Birth date \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

**Please complete the following information for the computation of total years in organized medicine, as applicable:**

**Member of this society:**

\_\_\_\_\_ No. of years from \_\_\_\_\_ to \_\_\_\_\_

**Member of other Texas county medical societies:**

\_\_\_\_\_ Name of society \_\_\_\_\_ No. of years from \_\_\_\_\_ to \_\_\_\_\_

\_\_\_\_\_ Name of society \_\_\_\_\_ No. of years from \_\_\_\_\_ to \_\_\_\_\_

**Member of other state medical associations:**

\_\_\_\_\_ Name of state association \_\_\_\_\_ No. of years from \_\_\_\_\_ to \_\_\_\_\_

\_\_\_\_\_ Name of state association \_\_\_\_\_ No. of years from \_\_\_\_\_ to \_\_\_\_\_

**Years served in U.S. Armed Forces as a physician:**

\_\_\_\_\_ Branch of service \_\_\_\_\_ No. of years from \_\_\_\_\_ to \_\_\_\_\_

**Total years in organized medicine:** \_\_\_\_\_

Date retired from active practice \_\_\_\_\_.

As provided by the Constitution and Bylaws of the Texas Medical Association, the nomination is submitted for the following reasons:

\_\_\_\_\_

Applicant is a member in good standing with dues paid for the year 20 \_\_\_\_\_.

\_\_\_\_\_ Signed

\_\_\_\_\_ Date

22904.T3275.7/2010

# Honorary Membership Application



Physicians Caring for Texans

## Nomination for Honorary Membership

This form is to be completed by an officer or executive of the county medical society. The original should be forwarded to the Executive Staff of the TMA Board of Councilors. A copy should be retained by the county society. **Applications must be received before April 1 to obtain dues-exempt status for the year.**

**Requirements:** Honorary applicants must have reached a point of comparative inactivity (to be determined by the county medical society) in the practice of medicine and must have rendered outstanding service to organized medicine or made noteworthy contributions to scientific medicine.

**Privileges:** Honorary members shall be entitled to all of the privileges of membership except the right to vote, hold office or other elective position, or serve as delegate or alternate delegate to the association. However, upon election to honorary membership, the physician so elected may retain these rights by immediately paying current dues in the same amount as required of regular members.

The \_\_\_\_\_ County Medical Society met on \_\_\_\_\_, 20\_\_\_\_, and nominated the following member for Honorary membership.

Name \_\_\_\_\_ Birthplace \_\_\_\_\_

Home address \_\_\_\_\_ Birthdate \_\_\_\_\_

**Member of this society**

\_\_\_\_\_ # of years \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

**Member of other Texas county medical societies:**

\_\_\_\_\_ Name of Society # of years \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

\_\_\_\_\_ Name of Society # of years \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

**Please report offices in local, state, or national medical societies:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Membership in other professional and/or specialty organizations:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Qualifications for Honorary Membership (see reverse side of this page for Guidelines).**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Honorary Membership Application *(continued)*

**Please use additional sheets for description of qualifications and attach letters of recommendation if required.**

Date retired from active practice \_\_\_\_\_ or

Date practice reduced \_\_\_\_\_.

Applicant is a member in good standing with dues paid for the year 20 \_\_\_\_\_. It is hereby requested that this nomination be placed before the House of Delegates at its next session.

\_\_\_\_\_  
Signed

## **Guidelines for Honorary Membership**

The requirements for election of a physician to honorary membership in the Texas Medical Association are found in Section 1.203 of the TMA Bylaws and are printed on the front side of this form.

Honorary membership should reflect a career of distinguished and dedicated service by a physician to patients, colleagues, and the community over a period of years — not simply membership in medical and community organizations.

The Board of Councilors recognizes that determining eligibility for honorary membership requires a subjective evaluation. However, some structured objective eligibility criteria are necessary (1) to assure that honorary membership remains meaningful as a special status, and (2) to coordinate the dual responsibilities of county medical societies that nominate physicians and of the Board of Councilors, which makes recommendations to the House of Daelegates.

The following guidelines are provided as suggested criteria. They are not intended to be inflexible requirements, but should help assure that the nominations of all honorary members reflect roughly equivalent levels of service and achievement.

1. Honorary membership should recognize a career of service and achievement in medicine. A significant portion — perhaps 40 percent — of a physician's career should have been spent in positions of leadership and service. While length of tenure in an organization is no longer a major criterion, it may be a factor. Alternatively, a meritorious career cut short by illness or disability may be recognized if it meets other criteria.
2. Compulsory or traditionally expected memberships on hospital medical staffs or in professional organizations should not be persuasive, although executive positions in such organizations would reflect outstanding or noteworthy service.
3. Distinguished civic service, such as election to a community's school board or its city council, or appointment to the board of a private organization devoted to improving public health, should be recognized if the service reflects honor upon the individual and enhances the public image of the profession.
4. Distinguished service in medical teaching or research should be recognized.
5. Active participation as a member of the councils or committees of major medical organizations should be recognized, especially if the physician has served as chair. Service as an officer of a state or nationwide medical organization also reflects the leadership qualities on which honorary membership is based.
6. However, honorary membership **also** should be available to a physician whose achievements are not usually listed in a curriculum vitae. A physician who has been dedicated "above and beyond the call of duty" to patients and who is held in special esteem or affection by patients or colleagues in the community will be eligible alongside others who have been more publicly active in medical, scientific, or civic organizations. Both careers reflect an excellent public image for the medical profession.

County societies that nominate a physician based upon these more personal and non-organizational criteria bear a special responsibility to assemble a convincing body of laudatory letters and other documentation to assist the Board of Councilors in its deliberations.

**The TMA Bylaws require that nominations for honorary membership originate with county medical societies. However, the Board of Councilors acts as a reference committee to make recommendations to the TMA House of Delegates. A county medical society that submits a nomination also must collect and provide appropriate and verified information to support that nomination. The Board of Councilors will then have access to the most complete body of information available on which to base its recommendations to the House of Delegates. If a county society does not provide information sufficient to support a nomination, the Board of Councilors may be forced to recommend that the House defer action on the nomination.**



# Life Membership Application



Physicians Caring for Texans

## Nomination for Life Membership

This form is to be completed by an officer or executive of the county medical society. The original should be forwarded to the TMA Membership Department. A copy should be retained by the county society. **Applications must be received before April 1** to obtain dues-exempt status for the year.

**Requirements:** Life applicants must have reached a point of comparative inactivity (to be determined by the county medical society) and must have been dues-paying members of organized medicine for 35 years, of which 25 years must have been dues-paying years in TMA and its component county societies.

**Privileges:** Life members shall be entitled to all of the privileges of TMA membership except the right to vote, hold office or other elective position, or serve as a delegate or alternate delegate to the association.

The \_\_\_\_\_ County Medical Society met on \_\_\_\_\_ 20\_\_\_\_\_, and nominated the following member for Life membership:

Name _____		Birthplace _____	
Home address _____		Birth date _____	
City _____	State _____	ZIP _____	

Please complete the following information for the computation of total years in organized medicine, as applicable:

**Member of this society:** \_\_\_\_\_  
 No. of years \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

**Member of other Texas county medical societies:**

\_\_\_\_\_  
 Name of society \_\_\_\_\_ No. of years \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

\_\_\_\_\_  
 Name of society \_\_\_\_\_ No. of years \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

**Member of other state medical associations:**

\_\_\_\_\_  
 Name of state association \_\_\_\_\_ No. of years \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

\_\_\_\_\_  
 Name of state association \_\_\_\_\_ No. of years \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

**Years served in U.S. Armed Forces as a physician:**

\_\_\_\_\_  
 Branch of service \_\_\_\_\_ No. of years \_\_\_\_\_ from \_\_\_\_\_ to \_\_\_\_\_

**Total years in organized medicine:** \_\_\_\_\_

Date retired from active practice \_\_\_\_\_ or Date practice reduced: \_\_\_\_\_

Applicant is a member in good standing with dues paid for the year 20 \_\_\_\_\_ .

\_\_\_\_\_  
 Signed \_\_\_\_\_ Date \_\_\_\_\_

22906.T3277.7/2010

# Emeritus Membership Application



Physicians Caring for Texans

## Nomination for Emeritus Membership

This form is to be completed by an officer or executive of the county medical society. The original should be forwarded to the Executive Staff of the TMA Board of Councilors. A copy should be retained by the county society. When a physician, who in the preceding year was in good fiscal standing, is nominated for emeritus membership, payment of dues is not required for the year in which the physician's name is presented to the House of Delegates. Applications to be considered at the Winter meeting in time for TEXMED must be received at least **30 days** prior to the Winter meeting.

**Requirements:** Upon nomination by the county medical society to which the member belongs and approval by the Board of Councilors, the House of Delegates may elect to the status of emeritus membership any association member who has rendered exceptional and distinguished service to scientific or organized medicine. A two-thirds majority vote of the house shall be required for election. The distinction thus conferred may not be removed except by action of the House of Delegates upon recommendation by the Board of Councilors.

Members emeritus shall have all rights and privileges of membership.

The \_\_\_\_\_ County Medical Society met on \_\_\_\_\_, 20\_\_\_\_, and nominated the following member for Emeritus membership.

\_\_\_\_\_  
Name Birthplace

\_\_\_\_\_  
Home Address Birthdate

**Member of this society** \_\_\_\_\_  
# of years from to

**Member of other Texas county medical societies**

\_\_\_\_\_  
Name of society # of years from to

\_\_\_\_\_  
Name of society # of years from to

Please report offices in local, state or national medical societies:

\_\_\_\_\_  
\_\_\_\_\_

Membership in other professional and/or specialty organizations:

\_\_\_\_\_  
\_\_\_\_\_

Qualifications for Emeritus Membership:

\_\_\_\_\_  
\_\_\_\_\_

Please use additional sheets for description of qualifications and attach letters of recommendation if required.

Date retired from active practice \_\_\_\_\_ or,

Date practice reduced \_\_\_\_\_.

Applicant is a member in good standing with dues paid for the year 20\_\_\_\_. It is hereby requested that this nomination be placed before the House of Delegates at its next session.

\_\_\_\_\_  
Signed

# Leave of Absence Membership Application



Physicians Caring for Texans

## Leave of Absence Membership Application

**TEXAS MEDICAL ASSOCIATION** 401 WEST 15TH ST. AUSTIN, TX 78701-1680 (512) 370-1441 FAX: (512) 370-1631

**Please complete the information below and submit this application to your county medical society for approval.**

Name \_\_\_\_\_ License No. \_\_\_\_\_

Current Address \_\_\_\_\_ City \_\_\_\_\_ ZIP \_\_\_\_\_

County Medical Society \_\_\_\_\_

**I am applying for Leave of Absence Status in the following category:**

- Resident\*
- Missionary
- Military
- Military Resident\*
- Civilian Service
- Sabbatical
- Illness
- Family Leave

**Please indicate preferred mailing address while on leave:**

Address \_\_\_\_\_ City \_\_\_\_\_ ZIP \_\_\_\_\_

Telephone Number \_\_\_\_\_ Fax Number \_\_\_\_\_

Country \_\_\_\_\_

Expected length of LOA status \_\_\_\_\_

Specialty \_\_\_\_\_

\*Name of facility \_\_\_\_\_

Address of facility \_\_\_\_\_

Member Signature \_\_\_\_\_ Date \_\_\_\_\_

County Medical Society Approval \_\_\_\_\_ Date \_\_\_\_\_

22907.T3278.7/2010

# Resident Membership Application



Physicians Caring for Texans

Texas Medical Association  
401 West 15th Street  
Austin, TX 78701-1680

## TMA/County Medical Society Resident Membership Application

Membership Type:  Resident

### BIOGRAPHICAL INFORMATION AND EDUCATION

Name:	Last	First	Middle	Suffix	Degree	Gender
<input type="checkbox"/> Office Address (check if this is your preferred contact address)	City			State	ZIP	
Work Phone	Work Fax		Work Email			
<input type="checkbox"/> Home Address (check if this is your preferred contact address)	City			State	ZIP	
Home Phone	Home Fax		Home Email			
Date of Birth	Place of Birth (Country)		Texas Medical License #/Physician-in-Training Permit #		NPI #	
Medical School	Degree	Grad. Date	Residency/Fellowship (current)		Specialty	Est. Completion Date
			Residency/Fellowship (previous)		Specialty	Completion Date

### MEMBERSHIP QUALIFICATION AND AUTHORIZATION

	<b>Yes</b>	<b>No</b>
Have you ever had an application for membership in a medical society rejected? .....	<input type="checkbox"/>	<input type="checkbox"/>
Have you ever been convicted of a crime, other than a nonfelony motor vehicle violation? .....	<input type="checkbox"/>	<input type="checkbox"/>
Has your medical license ever been revoked or suspended? .....	<input type="checkbox"/>	<input type="checkbox"/>
Have you ever been subjected to disciplinary action by any of the following?		
Board of Medical Examiners .....	<input type="checkbox"/>	<input type="checkbox"/>
County/State Medical Society .....	<input type="checkbox"/>	<input type="checkbox"/>
Hospital Medical Staff .....	<input type="checkbox"/>	<input type="checkbox"/>

I hereby apply for membership in the \_\_\_\_\_ County Medical Society and Texas Medical Association and, if accepted, agree to abide by and be subject to terms and conditions of the Constitution and Bylaws of the Society and of TMA, and the Principles of the Medical Ethics of the American Medical Association. In order to process my application for membership, I grant permission and consent for you to obtain from any appropriate source all relevant information concerning my credentials and qualifications.

I understand that if my application for membership is denied by the Board of Censors, I have a right to appeal the denial to the County Medical Society pursuant to the *Hearings Procedure Manual*. I also understand that if my application for membership is denied, based on professional competence or conduct, the County Medical Society must report such a professional review action to the National Practitioner Data Bank through the Texas Medical Board within 15 days of the date that all due process rights have been exhausted.

I hereby release, and hold harmless from liability or loss, the County Medical Society, TMA, and any other CMS to which I transfer, their officers, agents, employees, and members for acts performed in good faith and without malice in connection with evaluating my application and my credentials and qualifications, and hereby release from any liability any and all individuals and organizations, who, in good faith and without malice, provide information to the above-named organizations, or their authorized representatives, concerning my professional competence, ethical conduct, character and other qualifications for membership.

I further authorize disclosure of information generally considered to be reliable which has a bearing on my professional competence, character, and ethical qualifications to all hospitals, medical discipline boards, and medical licensure boards which request such information.

I also agree that biographical information will be disseminated in accordance with the policy and procedures established by the TMA Board of Trustees unless otherwise directed by me.

Physician Signature (required) \_\_\_\_\_ Date \_\_\_\_\_

### APPROVAL OF BOARD CENSORS

The Board of Censors, have had the above application under consideration, and:  Approves or  Disapproves on Date \_\_\_\_\_

Signature and Title **Note: Membership becomes effective when application has been approved and dues have been paid to the association.**

### PAYMENT INFORMATION

A physician becomes a member of the Texas Medical Association when joining the county medical society, as the county society is a component organization chartered by the association. \$20 of TMA active membership dues is for a one-year subscription to *Texas Medicine*. **Dues paid to the county society and The Texas Medical Association are not deductible as charitable contributions for federal income tax purposes.** A portion of dues may be deductible as ordinary and necessary business expenses.

Check (make payable to Texas Medical Association)  Credit Card:  VISA  MasterCard  Discover  AMEX

Automatic Dues Renewal: By checking "Automatic Dues Renewal," I authorize TMA to retain my credit card information securely and to charge my credit card to pay my membership dues annually.

Name as it appears on card \_\_\_\_\_ Credit card number \_\_\_\_\_ Expiration date \_\_\_\_\_

Signature (required) \_\_\_\_\_

### PLEASE SUBMIT PAYMENT WITH MEMBERSHIP APPLICATION

Texas Medical Association, 401 West 15th St., Austin, TX 78701-1680 Phone: (800) 880-1300 Fax: (512) 370-1693

304023\_12/17

# Medical Student Membership Application



Physicians Caring for Texans

**TEXAS MEDICAL ASSOCIATION**  
401 WEST 15TH STREET  
AUSTIN, TEXAS 78701-1680  
(800) 880-7955

## Medical Student Membership Application

**Welcome!** The Texas Medical Association is an organization of physician and medical student members working to promote excellence and professionalism in medicine. When you join TMA you also become a member of your county medical society.

As a medical student, you are eligible for FREE membership in the Texas Medical Association and your county medical society. Activate your membership today by completing the application below. Send your application and dues, if applicable, to: TMA, 401 W. 15th Street, Austin, TX 78701.

Please print legibly. This information will be used to distribute your member benefits such as *Texas Medicine* Magazine and JAMA.

MD  DO  MD/PhD \_\_\_\_\_  Female  Male

Degree Sought \_\_\_\_\_

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Maiden Name \_\_\_\_\_

Current Address \_\_\_\_\_ Apt. Number \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number \_\_\_\_\_ E-mail Address \_\_\_\_\_

Other Names Under Which You Are Legally Registered \_\_\_\_\_ Ethnicity – optional (aggregate demographic purposes only) \_\_\_\_\_

Birthdate (MM/DD/YY) \_\_\_\_\_ Birthplace: Country \_\_\_\_\_  Yes  No

Spouse's Name, if Married \_\_\_\_\_ (Is spouse also a medical student/physician?) \_\_\_\_\_

Medical School \_\_\_\_\_ Estimated Graduation Date (Month/Year) \_\_\_\_\_

I hereby apply for membership in the \_\_\_\_\_ County Medical Society and Texas Medical Association and, if accepted, agree to abide by and be subject to terms and conditions of the Constitution and Bylaws of the Society and of the TMA and the Principles of the Medical Ethics of the American Medical Association. In order to process my application for membership, I grant permission and consent for you to obtain from any appropriate source all relevant information concerning my credentials and qualifications.

I understand that if my application for membership is denied by the Board of Censors, I have a right to appeal the denial to the County Medical Society pursuant to the Hearings Procedure Manual. I also understand that if my application for membership is denied, based on professional competence or conduct, the County Medical Society must report such a professional review action to the National Practitioner Data Bank through the Texas Medical Board within 15 days of the date that all due process rights have been exhausted.

I also agree that biographical information will be disseminated in accordance with the policy and procedures established by the TMA Board of Trustees unless otherwise directed by me.

Signed \_\_\_\_\_ Date \_\_\_\_\_

Medical Student Elected/Rejected \_\_\_\_\_, 20\_\_\_\_ County Medical Society Official \_\_\_\_\_

**Three great memberships! The TMA and County Medical Society student memberships are FREE. AMA offers a special student rate.**



Physicians Caring for Texans

**Yes!** I wish to activate my FREE Texas Medical Association and County Medical Society memberships.

**FREE!**



**Yes!** I wish to join the American Medical Association, too. (Receive a free copy of *Netter's Anatomy Flash Cards*, or *Rapid Review Pathology* if you join for four years through your AMA local student section chapter.) My AMA dues are included with this application for my FREE CMS and TMA memberships.

4 years.....\$68  2 years.....\$38  
 3 years.....\$54  1 year.....\$20

Check  
 Credit card:  American Express  MasterCard  Optima  Visa

Credit Card #:  -  -  -  Exp. Date \_\_\_\_\_  
MONTH / YEAR

Print Name \_\_\_\_\_ Sign Name \_\_\_\_\_

W001614.05/15



# Member Record Change Form



Physicians Caring for Texans

## Member Record Change Form

**TEXAS MEDICAL ASSOCIATION** 401 WEST 15TH ST. AUSTIN, TX 78701-1680 (512) 370-1441 FAX: (512) 370-1631

County Medical Society \_\_\_\_\_ Date \_\_\_\_\_

Submitted by \_\_\_\_\_ Title \_\_\_\_\_

Member Name \_\_\_\_\_ Lic # \_\_\_\_\_

**Complete only those sections which apply:**

**1) Name/License Number Change**

Name \_\_\_\_\_ Lic # \_\_\_\_\_

**2) Address Change Please indicate preferred mailing address by checking one of the boxes.**

Office Address 1 \_\_\_\_\_  
Street \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ ZIP \_\_\_\_\_ Area code and phone number \_\_\_\_\_

Office Address 2 \_\_\_\_\_  
Street \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ ZIP \_\_\_\_\_ Area code and phone number \_\_\_\_\_

Home Address \_\_\_\_\_  
Street \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ ZIP \_\_\_\_\_ Area code and phone number \_\_\_\_\_

**NOTE:** If member has moved into an adjacent county, will he or she remain a member of your society?  Yes  No

**3) Membership Status Change**

*Prior Type:*

- Active
- Associate
- Military
- Leave of Absence/Resident
- Leave of Absence/Missionary
- Leave of Absence/Military
- Leave of Absence/Foreign Civilian Service
- Leave of Absence/Temporary Illness
- Leave of Absence/Sabbatical
- Resident
- Student
- Other, please specify \_\_\_\_\_

*Change to:*

- Active\*
- Associate\*
- Military\*
- Leave of Absence/Resident/Fellow
- Leave of Absence/Missionary
- Leave of Absence/Military
- Leave of Absence/Foreign Civilian Service
- Leave of Absence/Temporary Illness
- Leave of Absence/Sabbatical
- Resident\*
- Student\*

**\*Note: Candidates applying for Active, Resident, Student, Associate, and Military membership must submit applications. Active applicants must complete ethics requirements.**

# Member Record Change Form *(continued)*

## Member Record Change Form

County Medical Society \_\_\_\_\_ Date \_\_\_\_\_

Submitted by \_\_\_\_\_ Title \_\_\_\_\_

Member Name \_\_\_\_\_ Lic # \_\_\_\_\_

### 4) Membership Discontinuation

\_\_\_\_\_ Effective Date

Retired\*

Nonpayment of dues

Resigned, state reason: \_\_\_\_\_

Moved out of state

**Please provide us with any information you might have on a new address.**

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Deceased

\_\_\_\_\_ Date of death

\_\_\_\_\_ Next of kin \_\_\_\_\_ Relationship \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

**\*Retired physicians may be eligible for dues exempt status. The county medical society must initiate nominations for exempt membership categories. Contact the Texas Medical Association Membership Department for application forms.**

### Texas Medical Association

*Membership Department*

401 West 15th St.

Austin, TX 78701-1680

(512) 370-1441

Fax: (512) 370-1631

# Resident Membership Application



**TEXAS MEDICAL ASSOCIATION**

401 West 15th St. Austin, TX 78701-1680  
Phone: (800) 880-1300 Fax: (512) 370-1631

## TMA/ County Medical Society Membership Application

Membership Type:  Resident  First Year in Practice  Active  Military

### Biographical Information and Education

Name \_\_\_\_\_

Last	First	Middle	Suffix	Degree	Gender
------	-------	--------	--------	--------	--------

Office Address (check if this is your preferred contact address) \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Work Phone \_\_\_\_\_ Work Fax \_\_\_\_\_ Work Email \_\_\_\_\_

Home Address (check if this is your preferred contact address) \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone \_\_\_\_\_ Home Fax \_\_\_\_\_ Home Email \_\_\_\_\_

Date of Birth \_\_\_\_\_ Place of Birth (Country) \_\_\_\_\_ Texas Medical License # \_\_\_\_\_ NPI# \_\_\_\_\_  
 Yes  No

Marital Status \_\_\_\_\_ Spouse's Name \_\_\_\_\_ If married, is spouse also a physician? \_\_\_\_\_  
Specialty: \_\_\_\_\_

Practice Name \_\_\_\_\_ Primary \_\_\_\_\_ Secondary \_\_\_\_\_

Medical School \_\_\_\_\_ Degree \_\_\_\_\_ Grad. Date \_\_\_\_\_ Residency/Fellowship (list most recent) \_\_\_\_\_ Specialty \_\_\_\_\_ Completion Date \_\_\_\_\_

### Practice Type and Employment Status

Direct Patient Care  Administration (non-clinical)  Not in Patient Care  Not Employed  Hospital NPHO  Retired

Direct Patient Care and Teaching  Full-Time Teaching (non-clinical)  Military  Phys.-owned Prac.  Academic Inst.  Other

Direct Patient Care and Research  Research (non-clinical)  Veterans Administration  Direct Emp. by Hosp.  FQHC

### Membership Qualification and Authorization

Have you ever had an application for membership in a medical society rejected? \_\_\_\_\_ Yes  No

Have you ever been convicted of a crime, other than a non-felony motor vehicle violation? \_\_\_\_\_ Yes  No

Has your medical license ever been revoked or suspended? \_\_\_\_\_ Yes  No

Have you ever been subjected to disciplinary action by any of the following?  
 Board of Medical Examiners \_\_\_\_\_ Yes  No   
 County/State Medical Society \_\_\_\_\_ Yes  No   
 Hospital Medical Staff \_\_\_\_\_ Yes  No

I hereby apply for membership in the County Medical Society and Texas Medical Association and, if accepted, agree to abide by and be subject to terms and conditions of the Constitution and Bylaws of the Society and of the TMA and the Principles of the Medical Ethics of the American Medical Association. In order to process my application for membership, I grant permission and consent for you to obtain from any appropriate source all relevant information concerning my credentials and qualifications.

I understand that if my application for membership is denied by the Board of Censors, I have a right to appeal the denial to the County Medical Society pursuant to the Hearings Procedure Manual. I understand that if my application for membership is denied, based on professional competence or conduct, the County Medical Society must report such a professional review action to the National Practitioner Data Bank through the Texas Medical Board within 15 days of the date that all due process rights have been exhausted.

I hereby release, and hold harmless from liability or loss, the County Medical Society, the TMA, and any other CMS to which I transfer, their officers, agents, employees, and members for acts performed in good faith and without malice in connection with evaluating my application and my credentials and qualifications, and hereby release from any liability any and all individuals and organizations, who, in good faith and without malice, provide information to the above named organizations, or their authorized representatives, concerning my professional competence, ethical conduct, character and other qualifications for membership.

I further authorize disclosure of information generally considered to be reliable which has a bearing on my professional competence, character, and ethical qualifications to all hospitals, medical discipline boards, and medical licensure boards which request such information.

I also agree that biographical information will be disseminated in accordance with policy and procedures established by the TMA Board of Trustees unless otherwise directed by me.

Physician Signature (required) \_\_\_\_\_ Date \_\_\_\_\_

### Payment Information

A physician becomes a member of the Texas Medical Association when joining the county medical society, since the county society is a component organization chartered by the Association. \$20 of TMA active membership dues is for a one year subscription to *Texas Medicine*. **Dues paid to the county society and TMA are not deductible as charitable contributions for Federal Income Tax Purposes.** A portion of dues may be deductible as ordinary and necessary business expenses.

Check (make payable to Texas Medical Association)  Credit Card:  Visa  Mastercard  Discover  American Express

Credit card number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Name as it appears on card \_\_\_\_\_

Signature (required) \_\_\_\_\_

Automatic renewal  By checking, I authorize TMA to retain my credit card information securely and to charge my credit card to pay my membership annually.

PLEASE SUBMIT PAYMENT WITH MEMBERSHIP APPLICATION TO:

TEXAS MEDICAL ASSOCIATION  
401 West 15th St. Austin, TX 78701-1680

Phone: (800) 880-1300  
Fax: (512) 370-1631

### Approval of Board of Censors

The Board of Censors have had the above application under consideration, and:  Approve or  Disapprove on Date \_\_\_\_\_

Signature and Title \_\_\_\_\_

Note: Membership becomes effective when application has been approved and dues have been paid to the Association.

# Texas Medical Association Resident and Fellow Exclusive Member Benefits



The Resident and Fellow Section (RFS) is an organized membership section of TMA that helps address issues unique to Texas resident physicians and provides a forum for residents and fellows to communicate with each other and the membership at large. Participation in the RFS is a complimentary benefit of your TMA membership.



### Help With Transitioning to Practice

- Free seminars on debt management, medical liability risk management, and new practice setup;
- Employment and recruitment contract negotiation guide;
- Professional liability insurance for moonlighting, through the Texas Medical Liability Trust;
- Major medical, life, and disability insurance and financial services through the Texas Medical Association Insurance Trust; and
- Consulting services at below-market rates for expert advice in setting up your new practice and operating it efficiently from the start.

### Resources for Surviving Residency

- Medical licensing and credentialing information (e.g., *Texas Jurisprudence Manual and Study Guide* and FAQ webpage to help you through the licensure process);
- Education opportunities, including a resident video library covering business-of-medicine topics;
- Rapid access to the association's expertise in health care, health law, practice management, medical economics, and public health via TMA Knowledge Center;
- Legislative advocacy on issues that residents identify, such as resident work hours and physician-in-training permits;
- TMA's information-packed website with extensive online library resources and a dedicated page for residents at [www.texmed.org/residents](http://www.texmed.org/residents); and
- Low interest rates on resident and graduate medical education loans.

### Opportunities for Leadership

- Elected leadership positions on the RFS Executive Council, which guides the activities of the section;
- Slotted seats for RFS members to sit among top physician leaders on a TMA board, council, or committee in your area of interest, such as legislative affairs, child and adolescent health, or medical education; and
- Three statewide conferences annually featuring RFS meetings, networking opportunities, and sessions to enhance your knowledge of the medical profession.

### Outreach in Your Community

- TEXPAC, TMA's political action committee, which actively endorses candidates for public office who support medicine's agenda;
- First Tuesdays at the Capitol, TMA's organized visits to legislators during the state legislative session;
- TMA's public health initiatives, such as Hard Hats for Little Heads or Be Wise — Immunize<sup>SM</sup>, which provide resources you can use to help your community; and
- The American Medical Association, which strengthens the voice of medicine at the national level.

You have a lifetime partner in TMA. We understand the issues you are facing today and are prepared to meet your needs now and at every stage of your career.

### Stay Connected With TMA

Visit us online at [www.texmed.org](http://www.texmed.org).



[www.facebook.com/TexasResidents](https://www.facebook.com/TexasResidents)



[www.twitter.com/TexasResidents](https://www.twitter.com/TexasResidents)

**For more information**, contact your RFS coordinator at [RFSinfo@texmed.org](mailto:RFSinfo@texmed.org) or (800) 880-1300, ext. 1443.



Physicians Caring for Texans





We want you to know that you don't have to go it alone and you don't have to recreate the wheel. This guide is meant to be a resource in navigating your role and responsibilities as a county medical society leader. We think you will be pleased to find information on requirements, bylaws, dues, and helpful resources.

**If you cannot find what you need, just give us a call.**

**Toll Free: (800) 880-7955**  
**Email: [knowledge@texmed.org](mailto:knowledge@texmed.org)**  
**[www.texmed.org](http://www.texmed.org)**

Michael Hebert  
*Associate Vice President, Membership Operations*  
(800) 880-1300, ext. 1430

Sylvia Salazar  
*Associate Vice President, Membership Development*  
(800) 880-1300, ext. 1433

**[www.texmed.org/cmsresources](http://www.texmed.org/cmsresources)**











Physicians Caring for Texans

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