

Standing Rules for NCSMA Delegates and Alternates to AAMA

Effective 03/30/2025

Delegates and alternates are elected by the membership of NCSMA to represent our society at the AAMA House of Delegates. NCSMA reimburses the delegates and first two alternates for specified expenses (see the reimbursable expenses section of this document) that are incurred while attending the AAMA National conference up to the amount specified in the budget as determined by the NCSMA House of Delegates.

Delegates and alternates are required to attend a training session during the NCSMA Convention following their election in the NCSMA House of Delegates. The training session materials will be developed with the aid of the Past Presidents and conducted by the NCSMA President. The NCSMA President will be responsible for coordinating this event with the Convention Chair.

Required Functions at AAMA Conference:

Delegates and alternates are required to attend the following functions at the AAMA National conference. The conference brochure provided by AAMA to attendees will provide the dates, times, and locations for these functions.

- House of Delegates – all sessions
- Candidates Forum
- Reference Committee Hearings
- Open session(s) of the Board of Trustees
- Leadership Workshop(s)
 - Leadership program(s) – (regardless of CEU approval)
 - Orientation for the House of Delegates
- Excel Awards presentation/Welcome Party
- President's Banquet
- Any other functions assigned by the NCSMA President

Attendance at these functions will allow our representatives to interact with leaders on the national level and with leaders of other state societies. These functions provide opportunities to learn of current issues facing medical assisting and AAMA. NCSMA representatives can also keep abreast of new policies and directions being discussed and/or considered for AAMA.

Delegates/alternates are free to attend continuing educational sessions and other non-mandated functions that do not conflict with attendance at the mandated functions.

First-time attendees are required to attend the First Timers Break.

Delegates and alternates chosen to serve on national committees, strategy teams, task forces, or boards must attend any meetings for these committees, strategy teams, task forces, or boards.

In the event of a conflict, i.e. two mandated sessions occurring at the same time, the delegate/alternate will consult with the NCSMA President. The NCSMA President will determine which of the sessions the delegate/alternate should attend.

If a delegate or alternate is unable to attend a mandated function, she/he must notify the NCSMA President and include the reasoning. The President will indicate in her/his report for the Delegates Packet if the absence was excused or not excused.

Delegates/alternates are expected to register for and attend the entire conference. If they are unable to attend the entire conference, he/she must inform the NCSMA President before attending the conference and provide the reason.

Required Reporting:

Each delegate and alternate that attends the AAMA national conference and who receives reimbursement for expenses incurred will prepare a written report for the NCSMA Delegates packet. The report must include:

- List of mandated functions attended
- Short report of each mandated function
- A list of the days attended
- What attendee learned from conference
- Leadership information learned to share with NCSMA members

The President will also bring any noncompliance with these standing rules by any delegate/alternate to the attention of the Board of Directors. The Board of Directors will request a refund of part or all monies paid to the delegate/alternate found to be in violation of these standing rules.

Reimbursable Expenses for Delegates and Alternates to National Convention

The Budget shall be set at an amount determined by the Budget and Finance Committee for each delegate and the first and second alternate and approved by the House of Delegates. Delegates/alternates are expected to work within the budgeted amount.

Those seeking reimbursement should remember that NCSMA will reimburse ONLY the expenses detailed below. Each member requesting reimbursement should submit individual receipts. When multiple persons are included on one receipt (for example a hotel bill), everyone is responsible for obtaining a copy to seek individual reimbursement. **Rationale:** As amounts are budgeted based on individual line items the expenses must be allocated to the correct budget line item(s).

All submitted expenses are subject to review by the President and President-Elect to ensure compliance with these guidelines. Every effort is made to process the vouchers promptly. Vouchers with discrepancies/questions/non-eligible expenses will be brought to the attention of the requestor as soon as known for clarification, by the President or President-Elect. Discrepancies **MUST** be resolved before reimbursement **and may be brought before the Board of Directors for a resolution if necessary.**

Examples in these guidelines are not to be considered all-inclusive but are designed to provide clarification.

1. Travel:

Mileage in lieu of airfare

Round-trip mileage expenses to the AAMA conference, at the current mileage rate of \$0.50 (effective 04/29/2024), will be reimbursed up to the amount of round-trip economy fare, whichever is less.

Required Documentation: A printout of the economy round-trip airfare + the standard baggage fee for one bag from the delegate's closest airport 30 – 60 days before the conference and a printout of an online map showing the round-trip mileage from the member's point of origin to the host hotel for the AAMA conference host hotel. The lesser of the two amounts will be reimbursed. If the online map shows more than one available route the amount considered will be for the lowest mileage amount, regardless of the

route taken. If two delegates/alternates share a ride to the conference then reimbursement will be made to the member driving their vehicle. It should be noted on the voucher that $\frac{1}{2}$ of the mileage should be charged to each of the delegate's budgets.

For example: A delegate decides to drive to the AAMA conference as they prefer not to fly. The delegate researches the airfare from their closest airport to the conference 60 days before the conference. The cost of round-trip airfare is \$500 + \$35 for one standard bag for a total of \$535. An online map shows the shortest round-trip mileage to be 1,640 miles. $1,640 \times .50 = \$820.00$. The delegate will be reimbursed \$535 **NOT** \$820.

For example: Two delegates share a ride to the AAMA conference. The delegate/alternate driving will claim reimbursement for the mileage but will note that $\frac{1}{2}$ of the expense should be charged to their budget and $\frac{1}{2}$ to the other delegate/alternate's budget.

Travel to the airport:

Travel to the airport is reimbursable. If travel is to an airport, other than the closest to the home or workplace of the delegate/alternate, the savings on the airfare should outweigh the greater mileage cost.

For example: If the delegate is opting to travel to an airport that is 50 miles away – (100 miles round trip) – then the savings on the airfare should equal or exceed the \$50.00 that would be paid in mileage to the further airport.

Required documentation:

Mileage to the closest airport: Printout of an online map (Google, MapQuest) showing the mileage from the member's point of origin to the airport. If the online map shows more than one available route, the amount reimbursed will be for the lowest mileage amount, regardless of the route taken.

Mileage to a further airport:

Printout of an online map (Google, MapQuest) showing the mileage from the member's point of origin to the airport. If the online map shows more than one available route, the amount reimbursed will be for the lowest

mileage amount, regardless of the route taken. Additionally, a copy of a printout from the delegate/alternate's closest airport demonstrating a savings that equals or outweighs the amount spent on mileage.

2. **Air Travel:**

Round-trip economy fare class is reimbursable. Whenever possible, tickets should be purchased at least 30 – 60 days in advance to take advantage of discount fares. A copy of the itinerary, including the amount paid, must be submitted with the expense voucher. Standard baggage fees for one bag are reimbursable. If the delegate/alternate chooses to alter their itinerary, the delegate/alternate will not be reimbursed for the difference above round-trip economy class fare. NCSMA will pay for airfare based on arrival the day before the start of the conference and leaving the day after the conference ends.

For example:

- 1) *A delegate purchases a round-trip ticket for economy fare. The airline offers an option for priority boarding at no additional cost for those holding a particular credit card. The delegate opted for the upgrade and was charged for taxes on the priority boarding but not for the upgrade itself. The additional taxes are not reimbursable as this is a cost above the economy fare.*
- 2) *A delegate purchases a ticket for a class other than economy fare, intending to pay the difference. The delegate is responsible for ensuring that documentation of the economy fare for that flight is provided as part of the documentation they provide for reimbursement.*
- 3) *The delegate/alternate opts to arrive early to attend a special workshop to be held the day prior to the conference. If the airfare is greater by adding day(s) the delegate/alternate will be responsible for paying the difference.*

Required documentation: An itinerary/receipt detailing the economy airfare and a receipt for one standard bag, if applicable. If the delegate/alternate chooses to arrive early/leave later then they should also

provide an itinerary that shows the change in dates did not increase the airfare.

3. **Registration:**

Reimbursement is allowed in an amount not to exceed the lowest AAMA member package rate. Delegates and alternates are expected to register for the entire conference and attend all required functions.

Required documentation: a receipt showing payment for the lowest AAMA member package rate.

4. **Per Diem:** An allowance of \$70.00 per day (Effective 03/30/2025) times the number of days at the conference plus two travel days (maximum of 6 days or \$420.00) and shall be the total disbursement for meals, tips, ground transportation between the airport and AAMA host hotel(s) and any parking fees. Alcoholic beverages are not reimbursable. **Note:** The member package rate includes meal functions, which can vary by conference. Delegates/alternates should not request reimbursement as part of their allowance for any meals that are included in the package rate.

Required documentation: To comply with IRS guidelines, acceptable documentation includes receipts for any of the above expenses. If documentation is **NOT** provided, the allowance will not be reimbursed.

5. **Hotel Room Costs:**

One-half (1/2) of the lowest double occupancy AAMA group rate + applicable taxes offered by the host hotel(s) is the maximum that will be reimbursed. If a hotel room is shared by more than two persons, then reimbursement will be based on the proportionate share (1/3 for 3 occupying the room, 1/4 for 4, etc.) of the lowest group double occupancy rate. Reimbursement is eligible for the night before the start of the conference and for each night of the conference.

For example:

For example, three people, one of whom is a delegate, share a room for the AAMA conference. The hotel offers a double occupancy room rate of \$210 (including taxes) per night. Additionally, the hotel provides a double occupancy suite option for a rate of \$270 (including taxes), which the three

reserved for the conference. When calculating reimbursement for the delegate, the \$210 rate will be used as it is the lowest double occupancy rate. Consequently, the delegate would be reimbursed for 1/3 of \$210, which totals \$70 per night, not 1/3 of \$270, which would amount to \$90 per night.

Required documentation:

A copy of the hotel bill documenting the lowest group double occupancy room rate and applicable taxes. If the room rate shown on the bill is greater than the lowest group double occupancy room rate including applicable taxes, then that rate should be noted on the bill for reimbursement purposes. The bill should also note the number of individuals occupying the room.

6. **Over-budgeted expenses** for delegates and alternates are **NOT** reimbursed unless there are extenuating circumstances. The extenuating circumstances and over-budgeted amounts must be brought before the Board of Directors for consideration and approval before the over-budgeted expenses can be reimbursed.
7. **Advance:** Delegates and alternates will be advanced one-half (1/2) of the budgeted amount before the conference registration deadline. The remaining funds will be reimbursed upon receipt of a completed and approved voucher, including all required documentation, by the Treasurer. In the event a delegate/alternate is unable to attend the AAMA conference, any funds advanced **MUST** be returned to NCSMA within 120 days of notification of their inability to attend, per IRS guidelines.

Questions regarding these standing rules should be referred to the President and President-Elect. Delegates/alternates who have questions regarding the eligibility of expenses should have their questions answered before submission of the expense for reimbursement.