



Policy Manual

Policy Title:	Member Information Sharing	Adopted Date:	1-20-10
Policy Category:	Operational	Review Date:	7-22-15
Policy Number:		Amended Date:	8/12/2015

Purpose: To establish Tennessee Chapter (Chapter) guidelines and limitations for disbursing individual or group membership information to parties who are not Chapter members.

Policy: It is the policy of the Chapter to support all members and insure that members have access to educational events of interest to them. To this end, the Chapter will share its membership list with certain organizations who may promote events to Chapter members. Processing of requests for member information will follow the procedures in this policy which are stated in accordance with National HFMA guidelines.

Procedures:

- **Sharing membership information with sponsors:**

Neither Chapter membership lists nor Chapter membership directories will be included in Chapter Sponsorship package. Member information will be released to Sponsors as noted below:

* Chapter membership directory - If the sponsor (or one of their employees) is a Chapter member, they will receive the directory as a member upon joining and at subsequent, regular directory release dates. If the sponsor is not a member of the Chapter (but of another chapter), they will NOT receive a Chapter membership directory.

Note regarding general membership directory distribution:

All current members as of the printing of the membership directory will receive a membership directory. Only those new members joining between the membership directory release (i.e. 2009-2010 yr) that join between the date of directory release and May 30th will receive a copy of the directory. Members joining after June 1 of the year will not receive a directory until the current year directory is released.

* Chapter conference/education session attendee lists - For state conference or education session, ALL sponsors will receive a list of attendees. The attendee list will be mailed one time only, approximately 7-10 days in advance of the event. Member name and organization only will be included on the list. It will be the responsibility of the Registration committee co-chair to distribute the attendee list to Sponsors.

- **Sharing membership information with other chapters :**

Other HFMA chapters that request a member list from the Chapter will be approved only if the event is not within 3 weeks before or after any State one-day or multi-day event. All requests from other chapters must be submitted via the Request and Permission Form to Use a Chapter's Membership List, attached to this policy.

When completed by the requesting chapter, this form must be submitted to the Chapter president for review/approval. The Chapter president will sign and forward the request form to HFMA

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National, indicating approval or denial. HFMA National will be responsible for sharing Tennessee Chapter information to the requesting chapter as outlined in the signed request form.

- **Sharing with Other Financial/Healthcare organizations**

Membership lists can be shared with other organizations for co-sponsored events (i.e. TSCPA, THA or any other state/national associations) and only for marketing purposes for the particular co-sponsored event. No membership information will be shared with any organization that is not co-sponsoring an event with TNHFMA.

For all co-sponsored events a completed Sharing Agreement, attached to this policy, must be completed and approved by the Chapter president. The Chapter president will provide the membership list to the co-sponsoring organization, excluding members who have set their personal profile to 'No outside mail/fax/email'.

- HFMA.org National policy regarding access to Membership information is available to all members through HFMA.org. This consists of Member Name, Organization Name, Title, and City State & Chapter. A complete listing of any chapter's members is also available. Individual Member addresses and phone number detail can be looked up on the HFMA website. Prior to accessing member information, users must agree to the following statement which governs use of information on the HFMA.org site:

As a current member you are eligible to use the Member Directory. Click the button below titled 'View Directory'.

***Conditions of use:**

By accessing this service you agree and accept that the contents hereof are proprietary to HFMA and may not, in whole, or in part, be reproduced, copied, disseminated, entered into a computer database, used as part of or in connection with a mailing list, or otherwise utilized, in any form or manner by any means, except for the user's individual, personal, and confidential reference. Failure to comply with these conditions may result in prosecution under federal copyright laws. Chapter Leaders have a higher level of access and can download chapter membership info under the following terms outlined on the HFMA.org website.

For more information regarding acceptable use of membership information, refer to the HFMA website at: www.HFMA.org/membership/

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Sharing Agreement

Co-Sponsoring Organization Information:

Please complete the section below indicating details about your request.

Organization: _____

Event Title: _____

Date(s): _____

Location: _____

Organization Contact: _____

I am requesting permission from you for a one-time use of your chapter’s membership roster for a mailing or e-mail promotion of the event listed above. ***I/We understand that the contents of any mailing list/information received is proprietary to HFMA and may not, in whole, or in part, be reproduced, copied, disseminated, entered into a computer database, used as part of or in connection with a mailing list, or otherwise utilized, in any form or manner by any means, except for promotion of the event and for the date(s) listed above. Furthermore, following any mailing necessary to promote or report this event, any membership information received from TNHFMA will be destroyed or properly disposed of in a manner appropriate to protect the privacy of individuals involved. Failure to comply with these conditions may result in prosecution under federal copyright laws.***

Name of Requestor: _____ Email _____

Phone _____

Format Requested [*check desired format(s)*]:

Electronic List (Excel) for Mail and/or E-mail

OR

Mailing Labels

Labels/List Needed By (date):

Chapter Permission:

Please complete the section below indicating your permission –

_____ On Behalf of the Tennessee Chapter,

I grant permission for **one-time use** of my chapter’s membership mailing list as requested above or with

the following changes: _____

_____ No, I do not grant permission.

Name of Chapter President Granting Permission

Request and Permission Form to Use a Chapter's Membership List

Chapter or Region *Requesting* Permission:

Please complete the section below indicating details about your request.

[You can use the TAB key to switch between fields in the electronic form.]

On behalf of the Chapter or Region, I am requesting permission from you for a one-time use of your chapter's membership roster for a mailing or e-mail promotion of the following event:

Title:

Date:

Location:

If you need more details about this meeting, you can contact me at:

Name of Requestor

E-mail Phone

Format Requested [*check desired format(s)*]:

Electronic List (Excel) for

Mail and/or E-mail

OR

Mailing Labels

Labels/List Needed By:

Chapter *Granting* Permission:

Please complete the section below indicating your permission – then e-mail the completed form to chapter@hfma.org.

[You can use the TAB key to switch between fields in the electronic form.]

On Behalf of the Chapter,

I grant permission for **one-time use** of my chapter's membership mailing list [*check one*]:

E-mail

Mail

Both e-mail and mail

OR

No, I do not grant permission.

Name of Chapter Officer Granting Permission

Volunteer Position Today's Date

If you have questions or need assistance,

please contact Chapter Relations at

(800) 252-4362 or e-mail chapter@hfma.org.