

**CALIFORNIA SOCIETY FOR
HEALTHCARE
RISK MANAGERS (CSHRM)**

**BOARD OF DIRECTORS
POLICY AND PROCEDURE**

MEMBERSHIP

**CALIFORNIA SOCIETY FOR HEALTHCARE
RISK MANAGEMENT (CSHRM)**

**BOARD OF DIRECTORS
POLICY AND PROCEDURE**

TITLE: Processing Membership
Applications - New Members and
Renewals

COMMITTEE: Membership
AUTHOR: Lori O'Rourke
NUMBER: M-1
DATE: September 1994
DATE OF APPROVAL: October 1994
DATE OF REVIEW / REVISION:
August 2003

POLICY:

PROCEDURE:

1. All Applications

- a. It is assumed that the majority of new and renewal memberships will be received from January through the conference in March. Thus, processing and acknowledgements will be continuous January through March by the Membership Chair.
- b. Membership applications are received at the CSHRM mailbox and opened by the CSHRM Secretary. The Secretary will make a copy of the membership application and a copy of the corresponding check. Within one week of receiving the application, the Secretary will:
 - 1) submit the actual check and a copy of membership application to the CSHRM Treasurer.
 - 2) submit the actual membership application and a copy of the check to the Membership Chair.
- c. If the member status and dues amount is incorrect, the Membership Chair shall call the applicant to resolve the problems within one week of receipt.

2. New Member Applications

- a. Confirm status of membership, i.e. Regular vs. Academic membership. (Bylaws Section 6.1.1 and 6.1.2)
- b. Enter all information into computer system's Membership database.

- c. Distribute "Welcome new member" letter and membership card with CSHRMCA.org website access within one week of application receipt.

2. Renewal Applications

- a. Confirm this is a "renewal" and revise list as appropriate on the Membership database.
- b. Distribute "Welcome member" letter and membership card with CSHRMCA.org website access within one week of renewal receipt.

CROSS-REFERENCE:

New Member Welcome Letter
Membership Change of Address Form
Renewal Notice
Renewal Questionnaire
Follow-up Renewal Notice

**CALIFORNIA SOCIETY FOR HEALTHCARE
RISK MANAGEMENT (CSHRM)**

**BOARD OF DIRECTORS
POLICY AND PROCEDURE**

TITLE: Membership Roster Distribution

COMMITTEE: Membership

AUTHOR: Lori O'Rourke

NUMBER: M-2

DATE: June 29, 1994

DATE OF APPROVAL:

DATE OF REVIEW/REVISION:

August, 2003

POLICY:

Membership roster will be updated within a week of changes and available upon request.

PROCEDURE:

1. The Membership Chair will submit an up-to-date membership list to the President at each Board meeting when requested.
2. The Membership secretary will forward the current membership roster as requested by Committee Chairs and the Board, *e.g.*, Nominating Committee in the medium requested.
3. The Membership secretary, with the Membership Chair's approval, will distribute to the Education Chair of any Board approved organization the current membership roster in the medium requested for the purpose of distributing conference flyers to the membership. (See attachment 1)
4. Other outside requests for membership list/labels must be presented and approved by the CSHRM Board of Directors.
5. Membership rosters will not be distributed to any member or non-member without prior approval of the Board.

CROSS-REFERENCE: None.

Membership Labels: Distribution
Attachment 1

Organizations that may receive set(s) of CSHRM mailing labels

Southern California Association Healthcare Risk Management	(SCAHRM)
San Diego Association Healthcare Risk Management	(SDAHRM)
California Healthcare Association	(CHA)
Patient Care Assessment Council	(PCAC)

Reviewed: May 2, 2000; August, 2003

**CALIFORNIA SOCIETY FOR HEALTHCARE
RISK MANAGEMENT (CSHRM)**

**BOARD OF DIRECTORS
POLICY AND PROCEDURE**

TITLE: Membership Renewal Notification

COMMITTEE: Membership

AUTHOR: Lori O'Rourke

NUMBER: M-3

DATE: September 1994

DATE OF APPROVAL: October 1994

DATE OF REVIEW/REVISION: 7/28/03

POLICY:

CSHRM shall have a consistent method for Membership Renewal – Notification.

PROCEDURE:

1. Member Notification

- a. First Notice. In November of each year, prior to the expiration of membership which is December 31, the Membership Chair will notify all current members that membership renewal is due. There will be a posting on the CSHRM website with a renewal form for downloading, an email notice to each member with attached renewal form, and a regular mail notice to those members who do not have an e-mail address.
- b. Final Notice. If the renewal with dues are not submitted by January 31, the Membership Chair will send a final notice in the three methods described above in “First Notice”, saying that March 31 is the final date before the member is deleted from the CSHRM membership roster.

2. Documentation & Reports

- a. Note dates first and final reminders sent to members on the working membership list.
- b. Submit a Summary of reasons for member non-renewals to the CSHRM Board of Directors by April 15. NOTE: Information presented to the Board in a confidential manner.
- c. Submit a list of members that have not renewed or responded to renewal notices by April 15 to the Board of Directors and move those names to the inactive list.
- d. Transfer non-renewing members from regular membership list to archive file maintained for not more than seven (7) years; document reasons for non- renewal, if known.

CROSS-REFERENCE:

M-1: Processing Membership Applications – New & Renewals
CM-2 Record Retention

**CALIFORNIA SOCIETY FOR HEALTHCARE
RISK MANAGEMENT (CSHRM)**

**BOARD OF DIRECTORS
POLICY AND PROCEDURE**

TITLE: Board Review of
Membership Information

COMMITTEE: Membership

AUTHOR: Carol Johnstone

NUMBER: M-4

DATE: MAY 1998

DATE OF APPROVAL: 4/10/00

DATE OF REVIEW/REVISION: 7/28/03

POLICY:

The Membership Chair will provide reports of membership information at each Board Meeting to allow ongoing Board oversight of membership operations. The Board will review the information to assure accurate maintenance of membership records and timely processing of renewals.

PROCEDURE: The Membership Chair will provide the following information for review at each Board Meeting:

1. The total number of current members.
2. The number of new members.
3. The number of resigning members.
4. An up to date membership roster upon request, and at least once a year by April 30.

CROSS-REFERENCE: None.