



CSA HANDBOOK

CSA Handbook

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 - State Advocacy Leader
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1. Introduction and Tips for Getting Started

Welcome new CSA leaders!

This handbook has been assembled to provide CSA leaders with functional guidelines to aid in the administration of their CSA. Also, this handbook assures uniformity of practice among all CSAs, and promotes a strong working relationship between the CSAs and AHIMA.

Everything you need to know about managing your CSA is in this indispensable guide. We have provided links where appropriate to where you can locate certain documents on Engage. We encourage you to peruse this handbook and share this information with your CSA's Board of Directors.

Please contact the AHIMA Volunteer Leadership Development team with any questions, at volunteer.services@ahima.org

2A. AHIMA Resources for CSAs and CSA Requirements

- a. [Advocacy](#)
 - [Advocacy Assistant](#)- The AHIMA Advocacy Assistant is your interactive tool to learn about and participate in the important initiatives being addressed by AHIMA in Washington, DC. You can use the AHIMA Advocacy Assistant to write to your Member of Congress, identify and learn about your elected officials, submit comments on proposed regulations, identify and contact your local media and more!
 - State [Advocacy Leader Toolkit](#)
 - [State Track](#) – State Track is the legislative and regulatory tracking tool that AHIMA provides to its State Advocacy Leaders in the Component State Associations. [State Track](#) enables you to specifically track legislative and regulatory developments in your state. There is no cost to the CSA for using [State Track](#). State Track does require use by a licensed user and the State Advocacy Leader in each state will be the licensed user. Please visit [State Track](#) for additional information.
- b. AHIMA Ethics Information
 - <http://www.ahima.org/about/aboutahima?tabid=ethics>
- c. AHIMA Foundation
 - [Annual Giving Program](#)
 - Registered Apprenticeship Program
 - [For Employers](#)
 - [For Job Seekers](#)
 - [Community Fundraising Toolkit](#)
- d. AHIMA Report to the CSAs and Board Liaisons

- The most current AHIMA Report presentation slides and script, as well as the current year CSA Board Liaison map and CSA annual meeting schedule, are posted [here on Engage](#).
- e. Awards/Recognition
 - [AHIMA Triumph Awards](#)
 - [AHIMA Fellowship](#)
 - [AHIMA Grace Award](#)
- f. [AHIMA Style Guide](#)
- g. [Board Orientation – Sample CSA Resources](#)
- h. [Coding Roundtable Coordinators Toolkit](#)
- i. [CSA Annual Meeting Schedule](#)
- j. [CSA/Delegate Calendar](#)
 - A link is provided to the annual calendar posted on Engage. The calendar outlines all the upcoming deadlines and events for the year that CSAs and delegates will want to be aware of.
- k. CSA Dues Rebates

CSA membership is automatically granted at the time of AHIMA membership or renewal. A percentage of the annual AHIMA member dues collected from the members of each CSA shall be paid annually in monthly increments to each CSA for use in carrying out the purposes of AHIMA. For more information about CSA Rebates, please contact volunteer.services@ahima.org
- l. CSA Excellence Presentation Series
 - This series includes PowerPoint presentations and scripts that are available to download and present at your CSA meeting. Click [here](#) to view and download the titles, presentation slides and notes. You may ask your CSA Board liaison attending your CSA annual meeting to present on any of these topics.
- m. [CSA Financial Toolkit](#)
- n. [CSA Local/Regional Guidelines](#)
- o. [Regional Affiliation Agreement Template](#)
- p. [CSA Membership Reports Reference Guide](#)
- q. [CSA New Member Letter - template](#)
- r. CSA Optional Services from AHIMA (*please see [CSA Master Agreement](#) for details of each service*)
 - Election
 - CSA Engage Community
 - Forward Funding
 - Subject Matter Expert Speakers
 - Job Board/Career Assist
 - Meeting Sourcing
 - Web Ex Webinar and Conference Call Services
- s. [Social Media and Communications Guidelines and Strategy](#)

- t. [CSA Survey](#)
 - Annually, AHIMA conducts a survey for CSAs, in order to collect data for CSA and AHIMA use. Survey completion is due June 30. An Executive Summary Report will be placed on Engage in the State Leaders and HoD community. The most recent CSA Survey Executive Summary can be found [here](#).
- u. [CSA Webinar Series](#)
 - The AHIMA Volunteer Leadership Development staff holds webinars for CSA Leaders and Central Office Coordinators on various topics related to managing a CSA office. A schedule of webinar dates, topics and registration links can be found on the State Leaders and House of Delegates community on Engage.
- v. *CSA Leaders and House of Delegates Digest* Newsletter
 - *CSA Leaders and House of Delegates Digest* is the electronic communication for state leaders, delegates, central office executives, and House Team members. [Issues are stored on the State Leaders and House of Delegates community on Engage.](#)
- w. [HIM Awareness Campaign](#)
- x. [Mimecast Secure Email Messaging](#)
- y. [Tips for Writing Meeting Minutes](#)
- z. *Volunteer Quarterly* Newsletter
 - *Volunteer Quarterly* is a quarterly electronic communication for all AHIMA volunteers to help them stay informed about AHIMA volunteer opportunities, learn more about effective leadership, and get an inside look at how AHIMA is serving and recognizing its volunteers. This e-newsletter features a variety of topics on leadership and volunteerism, as well as highlighting upcoming AHIMA events and deadlines. [Issues are stored on the State Leaders and House of Delegates community on Engage.](#)
- aa. [State Leaders and House of Delegates Community on Engage](#) (also see the [Central Office Coordinator/Executive Director library sub-folder](#) under the *Component State Associations library folder*)
- bb. [Volunteer Succession Planning for CSA Leaders](#)
- cc. [Web Ex Resources](#)
- dd. [Web site Template](#)
- ee. [Whistleblower Policy](#)

2B. Educational Opportunities

- a. CSA Leadership Symposium (visit [Engage](#) for more information)
- b. Advocacy Summit and Hill Day (visit [Engage](#) for more information)

2C. Sample Documents and Templates to Submit to AHIMA

- a. [AHIMA Volunteer Conflicts and Dualities of Interest and Confidentiality and Non-Disclosure Form link](#)

- b. [CSA Master Agreement](#) (*between AHIMA and the CSAs; signed by June 30 of each year*)
- c. [CSA Bylaws Template](#) (and Bylaws Amendment Form)
- d. [CSA Lobbying Expense Report](#) (*previous year's lobbying expenses due to AHIMA by April 30 of each year*)
- e. [Nominating Committee Candidate Submission Form](#)- *due June 1*
- f. Position Descriptions (*samples*)
 - [Board Liaison](#)
 - CSA [Central Office Coordinator/Executive Director](#)
 - [State Advocacy Leader](#) (*within the State Advocacy Leader Toolkit*)
 - CSA [Student Liaison](#)

3. House of Delegates (HoD)/Governance

- a. [CSA Environmental Scan Toolkit](#)
- b. [Delegate Apportionment Report](#)
- c. [Orientation Resources](#)
- d. [HoD Leadership Dashboard](#)
- e. [HoD Resources and Governance Documents](#)
- f. [SBAR Resources](#)