AMCP AFFILIATE ORIENTATION PACKET

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Section 1 - AMCP Areas of Support

- Financials – AMCP manages affiliate bank accounts; sends report quarterly

- Announcements, Notices – AMCP sends emails on behalf of affiliates (see Section 3)

- Elections (Ballot Setup, Voting) – AMCP helps to manage logistics end of elections

- Meeting Registrations/ Vendor Payments – AMCP requires this system for all paid events

- Documentation – housed on affiliate site

    o Individual Affiliate Agreement – policies and procedures specific to the affiliate

    o Affiliate Operations Manual – as approved by the AMCP Board of Directors

    o AMCP W9 – Affiliates are incorporated under AMCP and can provide this upon request

- Consultation – AMCP staff meets by phone with individual affiliate presidents in addition to affiliate joint officer meetings and email touch points.

Section 2 - AMCP Website

- **Affiliate Web Pages – PUBLIC Section/Content**
  - www.amcp.org/georgia
  - www.amcp.org/midwest
  - www.amcp.org/northeast
  - www.amcp.org/ohky
  - www.amcp.org/southwest
  - www.amcp.org/utah
  - www.amcp.org/northwest

- **Affiliate Sections – PRIVATE Section/Content (includes affiliate specific documentation)**
  - www.amcp.org/affiliates
  - Select "Affiliate Operations Manual"
  - Enter Password "AFFILIATE"
  - Select Your Affiliate Section

- **Also under the Operations Manual in the PRIVATE Section is a "Shared Resources Section" which includes helpful tools and samples such as:**
  - Agendas
  - Position Descriptions
  - List of helpful Web Tools

Section 3 - Email Communications

- **How broadcast emails work**
  - Emails are sent using a system called Real Magnet.   Real Magnet is a well-known system used by many businesses that helps in scheduling, managing opt outs and tracking.

  - Emails do get caught in junk filters at times – most companies have multiple filters. Real Magnet helps avoid some of the common triggers that changes almost daily.

  - If someone is not receiving your emails, be sure to have them add your affiliate email address to their safe sender list. If further research is needed, please provide AMCP with their email address and we'll research as we can troubleshoot to see if an email is going through and hitting their company server or personal email. At that point, they would need to contact their IT expert.

  - Affiliate emails are sent out to every AMCP member who lives within an Affiliate's geographic territory plus any individuals who have signed up for an affiliate's mailing list.

  - AMCP limits the number of emails sent to members each weekday so it is important to schedule emails ahead of time.   We ask at least 2 weeks' notice – but more time helps

planning and preparation! IMPORTANT: AMCP's email calendar requires some flexibility to optimize responses/reduce unsubscribes – adjustments are usually minor in nature (for example, rescheduling to next day).

- o   If someone is requesting to be placed on your email list, please have them visit your webpage and click the link near the bottom that reads JOIN OUR LIST.

Section 4 - Affiliate Meetings and Events

- ▪ **AMCP Antitrust Guidelines**
  - o   The AMCP Antitrust Statement should be included on all meeting agendas and referenced prior to the start of any meeting. They can be found at http://www.amcp.org/WorkArea/DownloadAsset.aspx?id=18419 .
  - o   Below is a version that can be verbally stated prior to the start of the meeting in lieu of the full version:

    AMCP's anti-trust policies are in affect and included in your packet. We will be monitoring the discussion for antitrust issues – if you have any questions, please ask*.*

- ▪ **Online Registration Payment System for Affiliates**
  - o   Attached is the form to complete and submit to AMCP to launch setup of registration for your respective affiliate event. All paid affiliate events are encouraged to work within this system. The system accommodates credit card and check payments and allows AMCP to provide the affiliate with pertinent event reports such as financial updates, registration counts and lists.
  - o   At this link is a recorded webinar demonstrating the online payment system: http://www.amcp.org/Tertiary.aspx?id=18546
- ▪ **For Free Meetings – many affiliates use www.signupgenius.com**

Section 5 - Affiliate Elections

- ▪ Parameters for affiliate elections specific to each affiliate can be found in the affiliate's respective agreement. General parameters are located in the Affiliate Operations Manual (see access information) in Section 1.
- ▪ Here is the suggested timetable for the affiliate election process:

November   Nomination Committee formed

December   Affiliate provides Call for Nominations announcement – with job descriptions to AMCP

Send to Betty Whitaker and Susan Noell (bwhitaker@amcp.org/snoell@amcp.org)

January   AMCP issues Call for Nominations

January 30 – affiliate nominations committee finalizes ballot

February	Nomination Committee submits ballot to AMCP – voting opens
	February 15 – AMCP: setup-distributes ballot to affiliate members plus one reminder
March 1	Voting Closes
April	Installation of Officers at AMCP Annual Meeting

Section 6 – Financials (Reimbursements and Payables)

IMPORTANT -- New AMCP Financial System/Procedures for Affiliate Reimbursements and Payments - EFFECTIVE IMMEDIATELY

1. **A completed W9 (attached**) must be submitted (or already on file) with AMCP for any payment or reimbursement to an individual or organization. **Submit the completed W9 to finance@amcp.org.** Do **not** use this email to submit your check request or invoice.

   Link to IRS W9 form: https://www.irs.gov/pub/irs-pdf/fw9.pdf

2. **Submission of Check Requests and Invoices:**

   a. **Complete the updated Check Request Form** (updated forms attached, **be sure to select, file and use the form with your affiliate's name**). Discard/destroy any older versions.

   b. **Include appropriate backup** with your check request submission - invoice, receipts - electronic copies acceptable.

   c. **Combine these into one PDF before you submit** - here's how to combine into one PDF file:
      i. If you have ADOBE ACROBAT, use these instructions: https://acrobat.adobe.com/us/en/acrobat/how-to/merge-combine-pdf-files-online.html
      ii. If you don't have ADOBE ACROBAT, this site combines PDFs into one file for free: https://www.pdfmerge.com/

   d. **Submit this PDF file to ap@amcp.org** - this goes into our new CONCUR system. Do not send this to finance@amcp.org (that email address is only for W9's)

3. **Important Things to Remember:**
   a. W9's go to finance@amcp.org and must be on file to process any payment to individuals or organizations.
   b. Reimbursement Requests/Invoices go to ap@amcp.org in one combined PDF and must include your affiliate's Check Request Form.

c. Only affiliate officers should submit payables so AMCP knows these are approved by the affiliate - speakers, facilities invoices go to you to review and then submit to AMCP.

AMCP Affiliate Event Registration Check List

AMCP FAQs:

- AMCP recommends the affiliate submit this form at least three weeks prior to the opening of registration for the event. At minimum it must be received two weeks before anticipated use.
- The Affiliate Point of Contact (info to be completed below), will receive a current registration list every week from AMCP staff.
- AMCP will separately promote your event through broadcast emails – please contact us at least a month out to schedule event emails.
- Paid vs. Free Event:
  - Paid Event:
    - All affiliates must use the new system if collecting money.
    - There will be a $3 fee per registrant plus the credit card fee which is approximately 3%.
      - Please note that AMCP does not keep credit card numbers.
      - Individuals that are submitting a check payment will be instructed to send these to AMCP – C/O Your Affiliate Name. The check must be payable to the Affiliate.
      - It is the Affiliate's responsibility to follow up on pending payments – AMCP will provide these names via the weekly registration list.
    - Our recommendation is to let individuals transfer registrations but to not have them be refundable.
    - Registration can stay open up until the day of event, as the individual can register on their phone or computer – unless the event needs a final count before the actual event.
  - Free Event:
    - The Affiliate has the choice to use the new system or not.
    - There is be a $3 fee per registrant charged by the system vendor.
    - Registration can stay open up until the day of event, as the individual can register on their phone or computer – unless the event needs a final count before the actual event.

Date of this Submission: Name and Date of Affiliate Event:

Who is submitting the request to setup an event (which Affiliate and individual contact information)?

Is the agenda or information on the event available, if not, when will this become available? Please attach a word document if it is ready.

What are your registration types and fees, if any? Please include any sponsorship or exhibit fees. (Ex. Pharmacist Member, Student Member, Non Member, Exhibitor)

Is there information available for those who need to reserve a hotel? Is there a deadline to reserve housing? Please include instructions and any group reservation information.

Is there a maximum number of registrants for the event, if so, what is this number?

What date will registration open?

Would you like to keep registration open up until the day of event or after? If no, please tell us the last day that you would like someone to be able to register.

Will you have any comp registrations such as affiliate leaders, sponsors/exhibitors, speakers)?   If yes, indicate below and feel free to list them. Be sure to have them select check as a payment as we don't want others to be able to select comp by mistake so that won't be an option.