

APTA Pennsylvania Policies and Procedures Manual

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APTA HOUSE OF DELEGATES (HOD): DISTRICT AND DELEGATE RESPONSIBILITIES

Elections and Term of Service

1. Each district shall elect the number of the assigned delegates and at least one alternate delegate. Each delegate and alternate delegate's term shall be 2 years. Elections should comply with existing APTA Pennsylvania bylaw requirements.
2. If a delegate is unable to fulfill his or her term, an alternate delegate from the delegate's District will complete the term. Alternates will be selected based on votes received. If an alternated from the delegate's district is not available the Chief Delegate (CD), based on the apportionment formula, will identify an elected alternate from another District. In the event that no alternate delegate can be identified, the CD will carry the extra vote(s) at the House of Delegates (HOD).
3. When an elected alternate delegate becomes a delegate, s/he will fill the full remainder of the delegate term. The delegate who originally could not fulfill the term will have the opportunity to serve as the first alternate delegate from that district.

Responsibilities

4. Delegates are expected to fully participate in year-round HOD activities. There will be at least 10 required meetings of the Pennsylvania delegation scheduled by the Chapter's CD throughout the year prior to the HOD. These meetings will be in a combination of face-to-face and electronic/telephonic venues. In addition, delegates are expected to attend all activities and sessions associated with the HOD, including Chapter caucus meetings. To maintain eligibility as a delegate, the delegate must attend 70% of the scheduled meetings of the delegation prior to the HOD and attend all meetings of the HOD. Conflicts with scheduled meetings prior to the HOD must be reported to the CD as soon as the delegate becomes aware of the conflict. Delegates are expected to attend all scheduled APTA Pennsylvania caucuses and must attend all sessions of the HOD. The CD may waive this requirement in the event of dire circumstances.
5. If a delegate does not meet the attendance standard in Item 4 above, or is found ineligible to serve for another reason, the delegate forfeits the position as a delegate to the next available elected alternate from the same District. The process outlined in Item 2 above will be used to replace the delegate.

Reimbursement

6. Any sessions of the HOD that a delegate misses without the approval of the CD will result in a proportional reduction in the delegate's total reimbursement, prorated on the percentage of HOD sessions attended (e.g., if there are 4 sessions of the HOD and delegate attended 2, they would only receive 50% of the maximum allocation for a delegate). The decision of the CD may be appealed to the APTA Pennsylvania Executive Committee through the Chapter President following the HOD.

Conduct of Business

7. Meetings held prior to the HOD will require a quorum in order to formally take action on behalf of the delegation. Attendance of 2/3 of the delegates (not including alternates) shall be considered a quorum. Fractional amounts less than .5 shall be rounded down, and those .5 or greater shall be rounded up.
8. Votes taken to initiate an action related to motions to come before the HOD must meet the following criteria.
 - a. 100% of delegates must concur when a proposal is made to be a co-maker of a motion. If a delegate is not available at the time of the vote, the CD will email the that persons(s) and request a vote within 3 days, with the note that failure to respond will be considered a yes vote.
 - b. 2/3 of delegates must concur when a proposal is made to be a co-sponsor of a motion.
 - c. A majority vote shall be required to establish a position of agree, neutral, or disagree, with a motion. There is no required action resulting from adopting any of these three positions, but the information can be shared outside the delegation when a formal vote has been taken.
 - d. 2/3 of delegates must concur when a proposal is made to oppose a motion.
 - e. All vote tallies during the HOD shall be recorded and made available on request of a PPTA member.

Revised & Approved – APTA Pennsylvania Board of Directors, April 13, 2013

Revised & Approved – APTA Pennsylvania Board of Directors, January 9, 2015

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Edited & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

Edited & Approved – APTA Pennsylvania Membership, October 16, 2020

APTA HOUSE OF DELEGATES (HOD): PTA CAUCUS REPRESENTATIVE AND ALTERNATE REPRESENTATIVE RESPONSIBILITIES

The PTA Caucus Representative shall:

1. Attend and participate in all meetings of the Chapter Delegation unless specified by the Chief Delegate.
2. Prepare for and attend all meetings of the HOD and PTA Caucus and abide by the rules adopted by the House.
3. Act as a spokesperson for the Chapter at the annual PTA Caucus.
4. Vote at meetings of the PTA Caucus in accordance with the policies of the Chapter.
5. Present to the PTA Caucus matters suggested by the APTA Pennsylvania Board of Directors, Executive Committee, or Chapter delegation.
6. Act as a liaison and maintain an open line of communication between National PTA Caucus and the PTA Special Interest Group Executive Committee as well as the PPTA membership.

The Alternate PTA Caucus Representative shall:

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1. Assume the above responsibilities in the event the PTA Caucus Representative is unable to attend the annual PTA Caucus meeting or the House of Delegates.
2. Attempt to attend and participate in all meetings of the Chapter Delegation unless specified by the Chief Delegate so as to be prepared in the event they have to serve as the PTA Caucus Representative.

Approved – APTA Pennsylvania Board of Directors, January 25, 2020

APTA HOUSE OF DELEGATES: APPORTIONMENT OF APTA PENNSYLVANIA DELEGATES

The APTA makes an allocation of delegates to the APTA Pennsylvania Chapter based on the membership of the Chapter on June 30 of a given year for the House to be held the following year. After allocating one position each for the Chapter Chief Delegate and the Chapter President, the remaining delegates are apportioned to the Districts based on the Districts percentage of the total Chapter membership, with each District entitled to a minimum of 1 delegate. The District membership number is equal to the total of the active and life members, and one-half of the affiliate and life affiliate members.

Example: A District has 200 active, retired active, and life members, and 100 affiliate, retired affiliate, and life affiliate members. Using the formula above, the District membership number to be utilized for the apportionment would be 250. Assuming the Chapter membership number was 2500, the District would be entitled to 10% of the delegates. If the Chapter had 20 delegates to apportion, the District would receive 2.

As the Chapter rarely has the benefit of working with round numbers such as used in this example, the apportionment is often based on a partial number. If there are 3 delegates to be apportioned, and District A is entitled to 1.47 and District B is entitled to 1.57, District B would receive an apportionment of 2 delegates and District A would be apportioned 1 delegate.

It is important however that each District attempt to slate more delegates than their apportionment. The reason for this is that it is not uncommon for a delegate to be unable to serve their full term, and the Chief Delegate must then appoint an alternate to serve as the active delegate. If the District has individuals who were slated but not elected, they would be the first individuals offered the opportunity to take the position of active delegate, and the Chief Delegate will offer the position to each unelected candidate in order of their popular vote. If however the District had no “slated but not elected” individuals, the position would be offered to an individual from the District with the next largest partial apportionment number until the position is filled. If there is no one available to fill the position, the Chief Delegate will carry the vote.

Approved – APTA Pennsylvania Executive Committee, August 10, 2002

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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ATTENDANCE AT CHAPTER PRESIDENT'S MEETINGS

1. The Chapter President shall attend the APTA Chapter President's Meetings at the President's discretion with funding by the Chapter.
2. In the event the President is unable to attend; he/she shall delegate this responsibility to the Vice President or another officer of APTA Pennsylvania.

Revised & Approved – APTA Pennsylvania Board of Directors, September 1993

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

APTA PENNSYLVANIA POLICY FOR APTA CANDIDATE SUPPORT

All members of APTA Pennsylvania who are nominated and subsequently slated for an APTA office or Nominating Committee position will receive the following support:

1. When an APTA Pennsylvania member is a candidate for national office, the Chapter may host a reception or other social event after APTA elections to honor the candidate's contributions to the Chapter and potential for the Association.
2. All candidates are encouraged to request meeting times with the delegates to present a request for personal support. It shall be clear that this is a request for individual support and that each delegate is free to become involved in supporting a candidate or not. These meetings may occur at any of the delegate meetings.
3. All nominated candidates who are members of APTA Pennsylvania receive a copy of this policy at the time of their nomination.

Revised & Approved – APTA Pennsylvania Board of Directors, January 1996

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

POLICY FOR RECOGNITION OF INDIVIDUALS AT THE NATIONAL LEVEL

At times, APTA Pennsylvania members/students may be running for national office or be receiving APTA awards. In addition, the APTA may recognize non-Physical Therapists as being supporters of the physical therapy profession.

Therefore, the APTA Pennsylvania would like to provide some mechanism to recognize these individuals who are being recognized at the national level.

Hershey chocolate bars from Hershey, PA may be distributed at the annual APTA House of Delegates. The wrapper will recognize those Pennsylvania individuals (Physical Therapists, Physical Therapist Assistants, Students, Others) who are either running for office and/or receiving an APTA award. APTA Pennsylvania Past Presidents who also fit into this category, even if they are no longer residents of Pennsylvania, will also be included on the wrapper.

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Approved – PPTA Executive Committee, August 7, 2004

Reviewed & Approved – PPTA Executive Committee, April 22, 2016

Reviewed & Approved – Board of Directors, October 26, 2019

POLICY ON REIMBURSABLE EXPENSES

Personal Auto Mileage: Mileage occurring traveling to and from destinations to be reimbursed at a rate commensurate with IRS established rate.

Hotel Room: Reimbursement maximum to allow \$150/allowable night.

Meals:

- Daily Per Diem Maximum of \$65.

- Any meals provided by the APTA Pennsylvania will be deducted from the total daily per diem. For example; if APTA Pennsylvania is providing a meal, that meal would be deducted from the daily per diem maximum at the following rate:

- Breakfast \$12
- Lunch \$18
- Dinner \$35

HOUSE OF DELEGATES REIMBURSABLE EXPENSES

The maximum amount of reimbursement is \$1200 per delegate.

The maximum cap is based on attendance at the entire House of Delegates (Sunday to Wednesday). Delegates who only attend part of the HOD will receive pro-rated amount; as approved by the Chief Delegate.

Approved – APTA Pennsylvania Board of Directors, April 23, 2016

Revised & Approved - APTA Pennsylvania Board of Directors, February 27, 2018

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

CRITERIA AND PROCESS FOR APPROVAL OF DISTRICT CONTINUING EDUCATION

- Districts submit continuing education plans to the Chapter Office and Conference and Continuing Education Committee (CCEC) 30 days prior to the date of the presentation (title/topic, speakers, course objectives, duration and detail schedules if more than 1 hour in duration).
- Chapter Office will review the submitted materials for completeness, and if complete will forward the materials to the CCEC for review. If the submission is incomplete, the Chapter Office will contact the District and request missing or incomplete information.
- The CCEC will review the submitted materials to approve and assign contact hours. If the presentation meets requirements, the CCEC will approve the presentation, assign the evaluative and general contact hours and will notify the District and Chapter Office. If additional clarification is needed to make a determination about contact hours, the CCEC will notify the District, list the areas of concern, and provide possible recommendations for changes.
- If the CCEC and District remain in conflict after review, it will be referred to the APTA Pennsylvania Board Liaison to the CCEC and if needed, to the Executive Committee for resolution.
- This process will be completed within 7-14 days of receiving final course or presentation proposal.

Approved – APTA Pennsylvania Executive Committee, August, 1991

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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DISTRICT GUIDELINES FOR CONDUCTING MEETINGS OF THE MEMBERSHIP

The following format may assist the District Chair in conducting meetings of the District membership. Such consistency across the seven (7) districts of APTA Pennsylvania may ultimately assist the Chapter in the conduction of business for APTA Pennsylvania as a whole.

FORMAT OF THE MEETING/AGENDA:

- The Chair, with the assistance of the Secretary, establishes that a quorum is present.
- Having established a quorum is present, the Chair follows the same format:

Chair calls the meeting to order

Reading and Approval of the Minutes Reports of the District Officers

Reports of the Standing District Committees Reports of Special District Task Forces Unfinished Business

New Business

Adjournment

RULES OF ORDER

ESTABLISHMENT OF A QUORUM (3% of the District Membership consistent with APTA Pennsylvania Bylaws: necessary for business to be conducted)

MINIMUM OFFICERS PRESENT TO CONDUCT BUSINESS (Chair or designee and Secretary/appointed recorder)

PRIOR NOTICE OF THE MEETINGS (Publish in newsletter, web page, etc. as soon as established)

GUIDELINES FOR PARLIMINARY PROCEDURES

RECOMMENDED RESOURCES FOR THE CHAIR AT EACH MEETING:

- District Bylaws
- List of all Standing Committees and Task Forces (if applicable)
- A memo or outline with the agenda for the complete order of business

DISTRICT RULES OF ORDER

Motions may be generated from any Active or Affiliate member of the District.

As a courtesy, when possible, motions should be submitted in writing to the District Chair, 24 hours prior to the beginning of the business meetings.

As necessary, the District Secretary should be consulted regarding the clarity of the text of the motion and the support statement.

As necessary, the District Treasurer should be consulted regarding the fiscal impact of the motion to ensure that the district membership has an accurate description of the financial implications.

The District Chair should be consulted with regard to the conformity of the motion to the APTA and APTA Pennsylvania Bylaws.

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1. Only members of the APTA Pennsylvania, Staff and Guests approved by the District officers may attend meetings of the District.
2. Members of the Chapter Staff, members of the APTA Pennsylvania, and member of District and State Committees and/or SIGs may be recognized for the purpose of giving information and/or participating in discussion.
3. No district officer or member of the district shall be entitled to the floor until recognized by the District Chair. Individuals recognized by the Chair to speak may be limited to 3 minutes.
4. A speaker may not speak more than once to the same motion until everyone requesting to speak has been recognized and given the floor.
5. A district member shall not rise to speak to debate and close by moving the previous motion.
6. Motions must be in writing with a copy to the Secretary prior to the opening of the meeting, if possible, or immediately after the motion is made.
7. The District Secretary, in consultation with the District Chair shall:
 - Edit all motions for grammar and punctuation
 - Edit related items when newly adopted motions require editorial changes in previously adopted motions
 - Provide documentation of editorial changes to any member, upon request. When a motion comes before the membership, no support statement may be made prior to the motion being seconded.
8. No tape or other recording may be made of the proceedings of the District other than those Individuals approved by the District Executive Committee.

RULES OF THE DISTRICT: MAY NOT BE SUSPENDED

1. Each active member of the district may have 1 vote and affiliate member 1 vote
2. A quorum shall be 3% of the number of active and affiliate members of the district.
3. Voting on motions and resolutions may be made by voice, show of hands, standing or roll call.
4. Consultants to the district may reply to inquiries directed by the Chair.

Guidelines for the Chair re: Parliamentary Procedures: Motions:

1. The maker of the motion states: "I move to"
2. Another member seconds the motion: "I second the motion"
3. The Chair restates the motion: "It has been moved and seconded..."
4. The Chair recognizes the maker of the motion for support
5. The Chair recognizes all those wishing to speak to the topic
6. When debate is concluded, the Chair asks "Are you ready for the question?"
7. Voting on motions may be made by voice, show of hands. Standing or roll call.
8. Inform the membership of the results of the vote: ie "the motion passes OR the motion fails"

Approved – APTA Pennsylvania Board of Directors, October 18, 2002

Reviewed & approved – APTA Pennsylvania Executive Committee, April 22, 2016

Edited & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

POLICY ON VENDOR ADVERTISING AT PROFESSIONAL DEVELOPMENT ACTIVITIES

From time to time, vendors or advertisers may request that promotional materials be placed in the registration packets given to participants at regional seminars and/or annual conference. It is the policy of APTA Pennsylvania to have the Executive Director, in consultation with the President, review the materials for appropriateness and provide approval to the vendor or advertiser along with information on the total number attending the seminar/conference so that all participants may receive a copy.

Procedure:

- Verbal or written request to allow promotional materials to be distributed to the registrants at the beginning of the seminar/conference shall be forwarded to the Executive Director. The Executive Director will request a sample of the item or information to be distributed. The Executive Director, in consultation with the President, will evaluate whether the item is appropriate for distribution based on relevance to physical therapy practice and in accordance with existing policies of APTA Pennsylvania.
- Once the materials have been deemed appropriate, the Executive Director shall notify the vendor of the fees which will be determined by the current pricing structure.
- All vendor/advertiser materials to be included in the registration packets must be provided by the vendor/advertiser to the Chapter Office in a timely fashion as determined by the Executive Director.
- Chapter Office staff will ensure that the promotional materials are placed in each participant's registration packet to be distributed at the beginning of the specified seminar/conference.

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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ADMINISTRATIVE POLICY

Procedural policies related to the function of the APTA Pennsylvania Board of Directors, day-to-day activities of the Chapter Office or other activities not governed by APTA or APTA Pennsylvania Policies and Procedures may be established by the APTA Pennsylvania Board of Directors through a majority vote.

These policies/guidelines do not require APTA approval through their Component Relations Department.

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

PROCEDURE ON EXPRESSING SYMPATHY

In the circumstance of death of a Chapter member, immediate family member of a Chapter member, or a friend of the Chapter, any of the following may be done:

- A card of sympathy shall be sent by the Chapter Executive Director on behalf of the Chapter.
- A floral tribute as appropriate may be sent to the home on behalf of the Chapter.
- A monetary gift to the Foundation for Physical Therapy or to a charity may be made as a memorial to the deceased by the Chapter.

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

POLICY FOR USE OF CHAPTER STATIONARY

1. Chapter stationary shall not be used in any endorsements, testimonials, or correspondence by individual members or groups of members unless used for official Chapter business and unless prior approval is received from the Chapter Secretary.
2. The Board of Directors, Committee Chairs or designees, Special Interest Group Chairs or designees, Task Force Chairs or designees, Liaisons and Staff may use the APTA Pennsylvania Letterhead Template for the purpose of official Chapter business. The template is housed on Basecamp.
3. Copies of all correspondence using the Chapter letterhead template shall be forwarded to the Chapter Secretary or Executive Director for retention and informational purposes.

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Edited & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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PROCEDURE FOR INVITED GUESTS AT APTA PENNSYLVANIA BOARD OF DIRECTORS MEETINGS

Only members of the APTA Pennsylvania, Association staff and guests approved by the President of the Board may attend meetings of the Board of Directors.

In order to have an invited guest attend, the following procedure will apply:

1. The APTA Pennsylvania member will contact the Chapter Office that he/she is requesting to invite a guest to attend the PPTA Board of Directors Meeting.
2. The Chapter Office will notify the President of the request.
3. The Chapter Office will inform the member that the request has been approved/denied.
4. Prior to the start of the meeting, the Executive Director will notify the Board of Directors of guests in attendance.
5. The President may introduce and/or request introduction of all guests.
6. Chapter Office will include a list of all in attendance in the Board of Directors meeting minutes.

Revised & Approved – APTA Pennsylvania Board of Directors, January 1996

Reviewed & Approved – PP APTA Pennsylvania TA Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

POLICY FOR SPECIAL INTEREST GROUPS (SIG) ACCOUNTS/ALLOCATIONS

The allocation for the SIGs will be determined by the APTA Pennsylvania Board of Directors and set into the Association's operating budget for the year. Allocations will be a base sum to allow the SIG operating expenses for the year.

All funds designated for the SIG will be maintained in the Association's operating account and be distributed by APTA Pennsylvania staff when the SIG Chair approves the expenditure. If the annual allocation has been exhausted during the year, the SIG must present a motion to the APTA Pennsylvania Board of Directors for approval of additional funding. The SIG chair can request the latest actual to budget expense report from chapter staff in order to effectively track SIG finances.

Should a SIG have designated funds donated for sole use of the SIG, these monies will be listed as "restricted" for the intended use as designated by the donor and the SIG, when forwarded to the Chapter.

The SIG Chair will continue to submit year end expenditure reports, upon the request of the Chapter Treasurer, as described for accounting purposes.

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Edited & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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POLICY/PROCEDURE FOR SOLICITING NOMINATIONS TO APTA PENNSYLVANIA/APTA LEADERSHIP AND APTA AWARDS

1. Nominations for APTA Pennsylvania Leadership are solicited by the following methods:

- Nominating Committee
- APTA Pennsylvania Weekly Happenings and APTA Pennsylvania Web Page
- District Directors
- SIG Officers
- Committee Chairs
- Individual Members

Specific processes can be found in the Nominating Committee manual, the SIG manual, and the Ethics Committee Handbook.

2. The candidates for APTA Pennsylvania Committees are set forth by the Board of Directors. Recommendations come from APTA Engage, Committee Chairs and Chapter Leadership.
3. Committee Chairs are appointed by the President. Recommendations come from the BOD, Chapter Leadership and APTA Engage.
4. Candidates for national office are set forth by the Chief Delegate as approved by the Board of Directors.
5. Any member can nominate candidates for APTA Awards. However, if they seek the Chapter's support, the candidate would be approved by the Board of Directors. The BOD seeks candidate recommendations from all APTA Pennsylvania leadership and members, including the Districts, PA Delegates and Nominating Committee.

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Approved – APTA Pennsylvania Board of Directors, January 25, 2020

POLICY ON PRESIDENTIAL APPOINTMENTS

When the American Physical Therapy Association, PA State Board of Physical Therapy, or any other National/State Organization requests submission of names for appointment for service, the President of the APTA Pennsylvania will request input from the Board of Directors with a deadline for submission. The names submitted will be confirmed to be members by the Chapter Office and will be reviewed to determine if their credentials match the needs of the position. The qualified member that agrees to serve will be appointed by the President. The President reserves the right to approve without input from all of the Board of Directors when the appointment time is urgent.

Approved – APTA Pennsylvania Executive Committee, August 10, 2002

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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CONSULTATION WITH SPECIAL INTEREST GROUP OFFICERS

The APTA Pennsylvania Board of Directors is to consult with any related existing Chapter Special Interest Group Officers when requests for a liaison to an APTA Section is made.

Approved – APTA Pennsylvania Board of Directors, January, 1999

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

ARTICLE SUBMISSION TO THE APTA PENNSYLVANIA NEWSLETTER

1. Articles must be submitted to the APTA Pennsylvania Executive Director.
2. The name, telephone number, email address and affiliation of the author must accompany the article.
3. Physical Therapy and Physical Therapist Assistant Program's articles and District News articles are limited to 350 words per issue.
4. The Chapter Secretary and Executive Director reserve the right to accept, reject, or edit all materials for grammar and spelling. If after the editing, the intent of the article appears to have been substantially altered, the author will be consulted before publication.
5. The Chapter Secretary and Executive Director reserve the right to reject any articles if submitted after the established print deadlines.
6. Articles must be of interest/assistance to Physical Therapists and Physical Therapist Assistants.
7. Members of the APTA Pennsylvania or guests invited by the APTA Pennsylvania Board of Directors may submit an article within the established guidelines.
8. The intent of the APTA Pennsylvania Newsletter is to provide timely information to the membership; however, the author(s) should be aware that others also gain access to the APTA Pennsylvania newsletter. All articles are to be written in a professional and factual manner. While each author has author rights and privileges, it should be emphasized that this newsletter is perceived to represent the APTA Pennsylvania.
9. Articles considered editorial in nature are not accepted for publication unless requested to be written by the APTA Pennsylvania Board of Directors.
10. The newsletter will be distributed to the membership once per year in a printed format.

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Edited & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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ADVERTISING IN APTA PENNSYLVANIA PUBLICATIONS

Any advertising done in APTA Pennsylvania publications will follow the same established standards to ensure conformity.

PROCEDURES

1. Commercial and classified advertising will be accepted at the specified issue and annual contract rate.
2. "Camera Ready" advertisements must be submitted to the APTA Pennsylvania Executive Director as per specified print deadlines. An extra fee will be charged if art production is required.
3. All outstanding invoices must be paid in full prior to submission.
4. Advertisements will only be accepted if they conform to the ethical standards of the American Physical Therapy Association.
5. APTA Pennsylvania does not verify the accuracy of claims made in advertisements.
6. Publication of an ad does not imply endorsement by the APTA Pennsylvania. A standard format will appear on all advertisements, disclaiming any endorsements by the APTA Pennsylvania.
7. All advertisements for APTA Pennsylvania publications will fall into specified categories and charges will be based on ad size, posted time frames and member status.

Approved – APTA Pennsylvania Board of Directors, January 11, 2003

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

APTA PENNSYLVANIA GUIDELINES FOR WEB PAGE POSTINGS

LINKS

1. Links to APTA and Chapter sponsored events may be posted on the web site at a predetermined rate.
2. Links to APTA Pennsylvania member sponsored events will be reviewed by Chapter policy and posted at a predetermined rate on the APTA Pennsylvania Events calendar.

WEB PAGE POSTINGS

1. All paid advertising via web page postings will be of deliberate access rather than automatic access.
2. All postings will be at a prescribed rate and time interval.

Approved – APTA Pennsylvania Board of Directors, January 11, 2003

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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ADVERTISING

APTA Pennsylvania shall not advertise in print or electronically for non-APTA Pennsylvania courses dated three weeks prior to or three weeks after a Chapter continuing education event.

Approved – APTA Pennsylvania Board of Directors, January 11, 2003

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

INFORMATION DISTRIBUTION TO MEMBERS

APTA Pennsylvania members' emails addresses that have been collected by the APTA or APTA Pennsylvania shall be used exclusively for the dissemination of information related to APTA Pennsylvania business and activities.

Any blast emails to members to disseminate such information shall be issued from the Chapter Office and will indicate in the subject heading the purpose of the email.

Blast emails sent to the membership must be pre-approved by the President or his/her designee. The President at his/her discretion may first consult with the Board of Directors.

The APTA Pennsylvania does not sell, share or transfer email addresses to any other party for the purpose of initiating electronic email address lists or messages. The APTA Pennsylvania no longer produces or sells printed mailing labels.

Approved – APTA Pennsylvania Executive Committee, August 7, 2004

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Edited & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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APTA PENNSYLVANIA WEB PAGE

The Chapter Office is responsible for all required maintenance and updating of the APTA Pennsylvania website.

PROCEDURES

1. The Executive Director and Chapter Office staff will supervise the content and appearance of the web page and all links for uniformity and continuity throughout.
2. Information will only be accepted for uploading once it has been proofread for style and format by the Executive Director and reviewed for content by the Secretary as needed.
3. The Chapter Office will assume responsibility for security and maintenance of the web page and its links.
4. Updates to the web page and its links will be scheduled according to the nature of the information included. This schedule will be determined by the Executive Committee and enforced by the Chapter Office.
5. Districts and any other groups using a APTA Pennsylvania link must update their web page information at least semi-annually and proposed updates should be submitted to the Executive Director for approval.
6. As added or revised, each link will carry a stamp indicating when it was last updated and the name of the officer or committee chair in charge of that link update.
7. No photographs, drawings, video clips or sound clips may be used on the web page without the written permission of the publisher of the original work. Such signed permissions will be kept on file in the Chapter Office by the Executive Director.
8. No personal information may be included on the web page without permission from that individual. Such signed permissions will be kept on file in the Chapter Office by the Executive Director.
9. All pages for the web site must have a link that directs the user back to the home page.
10. The Chapter Office will stay current with new web page development/versions/updates/development tools that may enhance the appearance and efficiency of the web page. Such tools will be brought to the attention of the Executive Committee.
11. Each component of the district will have reserved space on the web page for development. Individuals desiring to add a link to the web page must petition the Chapter Office.

Approved – APTA Pennsylvania Board of Directors, May 3, 1997

Approved – APTA Pennsylvania Membership, October 18, 1997

Approved – APTA Pennsylvania Board of Directors, October 18, 2002

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Edited & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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LEADERSHIP OATH: Officer

At the first APTA Pennsylvania Board of Directors meeting of the year, newly elected and appointed leaders within the APTA Pennsylvania shall be sworn into office.

As a volunteer representing APTA Pennsylvania and therefore, the APTA, each leader shall state and follow this oath during their term of their leadership position:

I, _____, having been elected to the office of _____ in APTA Pennsylvania, do agree to execute the duties of my office to the best of my abilities; to protect the rights and privileges of the membership in APTA Pennsylvania, to repay with full measure the trust and confidence placed in me; and to assume these responsibilities at the meeting of the Board of Directors and to fulfill them during my entire term of office.

While serving in this leadership position, I agree to uphold all decisions approved by the Board of Directors regardless of my individual opinions.

I, _____ agree to serve as a volunteer of APTA Pennsylvania in the capacity of _____

_____ to uphold the oath and to represent APTA Pennsylvania and Board of Directors to the best of my abilities.

_____ Signature

_____ Print Name

_____ Date

Approved – APTA Pennsylvania Executive Committee, August 7, 2004

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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LEADERSHIP OATH: Committee Chairs

At the first APTA Pennsylvania Board of Directors meeting of the year, newly elected and appointed leaders within the APTA Pennsylvania shall be sworn into office.

As a volunteer representing the APTA Pennsylvania, and therefore the APTA, each leader shall state and follow this oath during the term of their leadership position:

I, _____, having been appointed to serve as Chair of the _____ Committee in APTA Pennsylvania, do agree to execute the duties of my position to the best of my abilities; to protect the rights and privileges of membership in APTA Pennsylvania; to repay with full measure the trust and confidence placed in me; and to assume these responsibilities at the meeting of the Board of Directors and to fulfill during my entire term of office.

While serving in this leadership position, I agree to uphold all decisions approved by the Board of Directors regardless of my individual opinions.

I _____ agree to serve as a volunteer of APTA Pennsylvania in the capacity of Chair of the _____ Committee to uphold the oath and to represent APTA Pennsylvania to the best of my abilities.

Signature

_____ Print Name

_____ Date

Approved – APTA Pennsylvania Executive Committee, August 7, 2004

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

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LEADERSHIP OATH: SIG Chairs

At the first APTA Pennsylvania Board of Directors meeting of the year, newly elected and appointed leaders within the APTA Pennsylvania shall be sworn into office.

As a volunteer representing the APTA Pennsylvania, and therefore the APTA, each leader shall state and follow this oath during their term of their leadership position:

I, _____, having been appointed to serve as Chair of the _____ Special Interest Group in APTA Pennsylvania, do agree to execute the duties of my position to the best of my abilities; to protect the rights and privileges of membership in APTA Pennsylvania; to repay with full measure the trust and confidence placed in me; and to assume these responsibilities at the meeting of the Board of Directors and to fulfill during my entire term of office.

While serving in this leadership position, I agree to uphold all decisions approved by the Board of Directors regardless of my individual opinions.

I, _____ agree to serve as a volunteer of APTA Pennsylvania in the capacity of Chair of

the _____ Special Interest Group to uphold the oath and to represent APTA Pennsylvania

to the best of my abilities.

_____ Signature

_____ Print Name

_____ Date

Approved – APTA Pennsylvania Executive Committee, August 7, 2004

Reviewed & Approved – APTA Pennsylvania Executive Committee, April 22, 2016

Reviewed & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

Page Twenty.

GUIDELINES FOR RESPONDING TO CONSUMER REQUESTS FOR PT REFERRALS

Consumers requesting assistance with a PT referral will be referred to the APTA Pennsylvania webpage and directed to the “For the Public” section where they will be able to access the APTA “Find a PT” link.

Edited & Approved – APTA Pennsylvania Board of Directors, October 26, 2019

Page Twenty-one.

RESEARCH DISTRIBUTION REQUESTS

This policy relates to the distribution of links to research projects by APTA Pennsylvania members to other APTA Pennsylvania members.

Procedure:

APTA Pennsylvania members may request electronic distribution of links for research purposes by sending the following information to the Chapter Office (via electronic submission using link on website):

1. Brief (3-5 sentences) description of the project (this is the information that will accompany the link that will be sent via email distribution).
2. IRB name and approval date
3. Link to research information

APTA Pennsylvania members must be aware of the following procedures when requesting research survey link distribution:

1. Research must be related to the practice of physical therapy.
2. Research links will be distributed on the first electronic (email) communication of the month. Links will not be placed on social media.
3. Research links will be accessed at the discretion of individual members.
4. Research links will be sent only once per month, but individuals may request permission for distribution across several months.
5. PPTA will not distribute links to research for individuals who are not APTA Pennsylvania members.

Requests to distribute research links from external agencies engaged in work that will benefit APTA Pennsylvania members will be considered by the Practice and Research Committee. Organizations with projects meeting this criterion should adhere to the same submission process that is outlined above for APTA Pennsylvania member submission.

Approved – APTA Pennsylvania Board of Directors, January 2019

SELECTION AND FUNDING OF THE ALTERNATE DELEGATE ATTENDING THE HOD

One alternate delegate will be selected to attend the House of Delegates each year. The following process will occur to determine which alternate will be able to attend the House:

1. At the end of the APTA Pennsylvania delegate meeting in January, the Chief Delegate will select an alternate delegate to attend the House that coming June. All eligible candidates' names will be placed on a piece of paper, put in a hat or jar, and the alternate delegate's name will be selected from the hat/jar. A second alternate delegate's name will also be selected from the hat/jar. This delegate will be placed on "stand-by" in the event the first alternate delegate is unable to attend or that alternate delegate is moved to the delegate position because a delegate in his or her district forfeits their position.
2. To be eligible for selection, alternate delegates must meet the following qualifications:
 - a. Be a current alternate delegate
 - b. Attended (via webinar or in person) the October, December, and January delegate meetings.
 - c. Must plan to attend either virtually or in person the March, June, and May meetings leading up to the House of Delegates
3. Once an alternate delegate has been selected and attends the House, he or she cannot be in the running for this position the following year.
4. The alternate delegate selected will receive the same funding to attend the House as the elected delegates.

Approved - APTA Pennsylvania Board of Directors, September 2019

PROCEDURE FOR ANSWERING INQUIRIES RELATED TO ETHICS OR PRACTICE ISSUES

Any inquiry received by APTA Pennsylvania Leadership or staff that is related to either ethical concerns or practice issues should be directed to the appropriate committee for response (Ethics, Practice and Research).

When an issue involves components of both ethics and practice, both committees should be informed and should collaborate on the issue to provide a cohesive response to the individual making the inquiry.

The responding committee members must recognize that they are speaking on behalf of APTA Pennsylvania and must not compromise the integrity of the Association.

The responding committee chairs/members should confer with APTA Pennsylvania Legal Counsel if there is a question about legal authority that requires professional advice after receiving approval from the Board Liaison. The intention is for legal counsel to provide advice to guide the committee member's response to the inquiry. It is not the responsibility of legal counsel to provide specific advice to the individual making the inquiry.

If the inquiry comes from an APTA/ APTA Pennsylvania member, the response should provide advice and also direct the individual to appropriate supporting documents, including APTA documents and links reserved as "Members Only" information.

If the inquiry comes from a non-APTA/ APTA Pennsylvania member, or from the public, the response should provide general advice and also direct the individual to appropriate supporting documents, but APTA documents and links reserved as "Members Only" must not be shared, as per APTA policy.

No attempt should be made to interpret the Pennsylvania Physical Therapy Practice Act 110 or provide any specific legal advice. Individuals may be referred to specific language contained in the Practice Act or the accompanying Rules and Regulations.

Examples of links and documents that may be shared include but are not limited to:

APTA links and Documents:

Policies and Bylaws

<http://www.apta.org/Policies/Practice/>

- Direction and Supervision of the Physical Therapist Assistant
- Documentation Authority for Physical Therapy Services
- Guidelines: Physical Therapist Scope of Practice
- Guidelines: Physical Therapy Documentation for Patient/Client Management
- Medically Necessary Physical Therapy Services
- Principles of Professionalism Guiding Physical Therapist Business Relationships
- Procedural Interventions Performed Exclusively By Physical Therapists
- Provision of Physical Therapy Interventions and Related Tasks
- Standards of Practice for Physical Therapy

Ethics

<http://www.apta.org/Policies/Ethics/>

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- Code of Ethics
- Standards of Ethical Conduct for the PTA
- Guide for Professional Conduct
- Guide for Conduct for the Physical Therapist Assistant

Center for Integrity in Practice/ APTA

<http://integrity.apta.org/ClinicalJudgment/>

- Clinical Judgment in Physical Therapist Practice

Practice and Patient Care:

<http://www.apta.org/Practice/>

Practice Administration/Documentation

- Defensible Documentation for Patient/Client Management
- Medicare Outpatient Rehab Services – Complying with Documentation Requirements
- Medicare Part B Documentation Requirements

Practice Administration/Supervision and Teamwork

- APTA Policies and Procedures on Supervision
- Supervision and Medicare
- Co-Treatment

Pennsylvania Practice Act

<http://www.dos.pa.gov/ProfessionalLicensing/BoardsCommissions/PhysicalTherapy/Pages/Board-Laws-and-Regulations.aspx#.VHTUUVZOk5s>

- Law – Act 110 of 1975 (pdf)
- Regulations