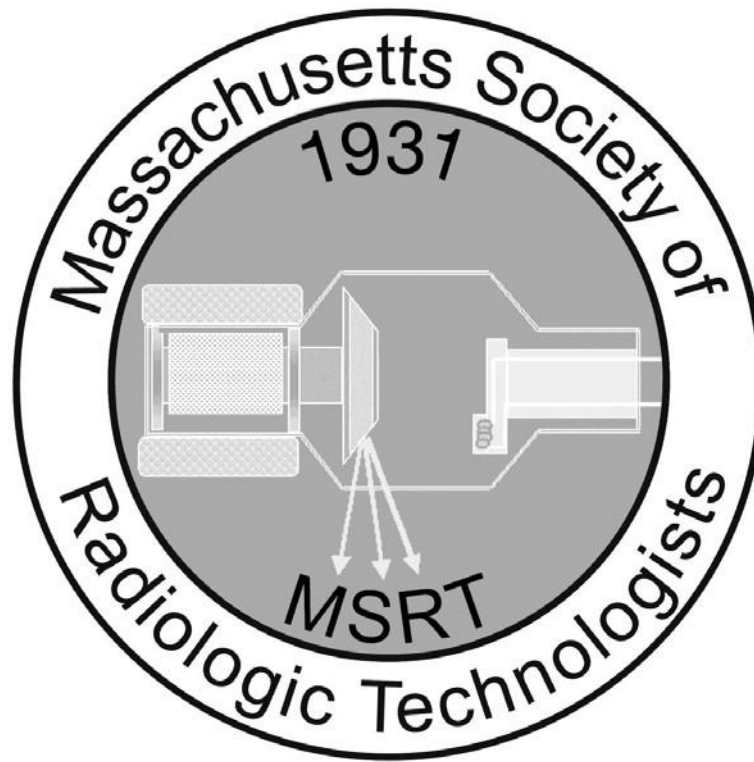


Massachusetts Society of Radiologic Technologists



Policy & Procedures Manual 2026

Contents

Part I General Board Policies and Operating Procedures	1
Introduction to the Policy and Procedures Manual.....	1
Distribution	1
Board of Directors	1
President	2
Responsible to the membership of the MSRT	2
President-Elect	3
Responsible to the president and the membership of the MSRT	3
Vice - President	4
Responsible to the president and the membership of the MSRT	4
Chair of the Board	4
Responsible to the president and the membership of the MSRT	4
Secretary	4
Responsible to the president and the membership of the MSRT	4
Treasurer	5
Responsible to the president and the membership of the MSRT	5
Treasurer-Elect.....	5
Responsible to the president and the membership of the MSRT	5
Chair-Of-The-Board	5
Responsible to the president and the membership of the MSRT	6
Member-At-Large.....	6
Educational Counselors (3 Positions).....	6
Responsible to the president and the membership of the MSRT	6
Committees.....	7
Selection of Committee Members.....	7
Annual Conference Committee	7
Buzz Bowl Committee	8
Nominating Committee	8
Procedure for Recruiting Candidates.....	9
Scholarship Committee	9

Advocacy Committee	9
Social Media Committee	9
Goals.....	9
Methods	9
Insurance Coverage.....	10
MSRT Reimbursement Policy	10
Expense Reimbursement	10
Procedure	11
Cash Advances.....	11
MSRT Fee Policy	11
Annual MSRT Conference Registration Hotel Rooms	12
ASRT House of Delegates Meeting	12
MSRT Delegate and Alternate Delegate Funding Policy	12
Whistleblower Policy	13
Confidentiality	14
Conflicts of Interest.....	14
Part II Financial Policy	15
<i>Policy Maintenance and Review</i>	15
<i>IRS Classification</i>	15
<i>Accounting Methods</i>	15
<i>Financial Controls</i>	15
<i>Computer Files</i>	16
<i>Accounting Software</i>	16
<i>Budget Process</i>	16
<i>Records Retention and Destruction</i>	16
<i>Receipt of Funds</i>	17
<i>Disbursement of Funds</i>	18
<i>Bank Reconciliation</i>	18
<i>Operations Administrator Contract & Payment</i>	18
<i>IRS Forms: FORM 990-EZ</i>	19
<i>IRS Forms: FORM 1099-MISC / 1096</i>	19
<i>Massachusetts: Report AR-180</i>	20

<i>Bad Debt Write-Off</i>	20
<i>Loans</i>	20
<i>Bonding</i>	20
Appendix A: Guidelines for Planning Educational Webinars, Lectures & Seminars	21

Part I General Board Policies and Operating Procedures

Introduction to the Policy and Procedures Manual

This manual provides guidelines and directions for each person who has responsibilities to the Massachusetts Society of Radiologic Technologists (MSRT), and to give them a better understanding of what is expected of them to fulfill the position to which they have been elected or appointed. Policies are reviewed annually by the board and updated as needed.

Distribution

Each member of the MSRT Board of Directors and committee members will be provided with an orientation kit at the beginning of his or her term.

- Each kit will contain the following:
 - MSRT Policy and Procedures Manual
 - Board of Directors listing
 - MSRT Bylaws

Board of Directors

The Board shall meet at least six times per year, with meetings convened at the call of the President. Decisions by the board are validated by a simple majority of the votes of the board members present at a meeting or participating in a vote.

The Composition of the Board of Directors is as follows:

- President
- President Elect
- Vice-President
- Chair of the Board
- Secretary
- Treasurer
- Treasurer Elect
- Member at Large
- Educational Counselors (3)

The Board of Directors is the administrative and policy making body of the Society. The various duties and responsibilities, as outlined in the Bylaws, are as follows:

- All officers of the MSRT shall be active MSRT and ASRT members and shall practice in the medical imaging or radiation therapy professions or health care.
- Officers who meet eligibility requirements at the time of assuming office shall be permitted to complete the term, even though employment status may change.

All officers are expected to:

- Be cognizant of the MSRT By-Laws and policies and procedures
- Communicate and encourage active engagement of your colleagues in all matters related to the MSRT, ASRT and the profession.
- Monitor and respond in a timely fashion to email communication from the MSRT and ASRT as needed or when requested by the President.
- Attend and actively participate at board meetings held throughout the year and vote on matters presented to the board.
- Contribute to the member communications as needed or requested.
- The Board has the power to act on all matters affecting the Society
 - As the administrative body of the Society, the Board shall;
 - Interpret and administer the MSRT Bylaws
 - Formulate rules and policy for all MSRT members.
 - Provide guidelines for members.
 - Provide guidance to committees, as well as provide the approval of necessary funding for committee operations.
 - Appoint special committees as needed.
 - Receive committee reports and implement their recommendations when those recommendations are accepted by a simple majority vote of the board.
 - The Board shall appoint an Operations Administrator and determine the terms of their duties and administration fees.
 - The Board shall work cooperatively and in conjunction with the Operations Administrator to ensure the smooth operation of the State Society.
 - The Board shall express opinions to the MSRT delegates to the ASRT House of Delegates (HOD) meeting on matters to be acted upon by the ASRT.
 - The Board shall approve all major expenditures of money from the treasury.

President

The President represents and serves the membership of MSRT. The President's role is to manage, stay informed, and see that all lawful orders and resolutions of the Board of Directors are carried out.

Term of Office: One Year. Term begins at the annual conference & ends at the annual conference of the following year. At the end of the term as President will assume the office of Chair-of-the-Board for one year.

Responsible to the membership of the MSRT

Duties and Responsibilities:

- Be elected by the members, serve for the one (1) year
- Preside at all the MSRT and the Board of Director's meetings.
- See that all recommendations submitted to the Board of Directors are duly considered and all actions that are voted on by the simple majority of the Board are carried out.
- Appoint the chairs and members of all standing and special committees, subject to approval by the Board of Directors.

- Collaborate with and assist the chair/s of the conference committee and the Vice President with the nominations committee
- Review and approve all submitted statements of expenses if the Treasurer is unavailable to pay bills in a timely manner.
- Represent the state association when invited to attend meetings of allied groups.
- Keep membership informed of the Society's activities by writing articles for the MSRT newsletter or via notices sent to membership's e-mail accounts.
- In collaboration with the Board establishes the current year ASRT Affiliate Development Program (ADP) application and completes the requirements and submission of the previous year's ASRT Affiliate Development Program report.
- Collaborate with the Board to establish and complete the annual ASRT Financial Assistance Program application and report.
- Make suggestions, with assistance of the Board of Directors, for the recipients of the Oliver E. Merrill Lecture and the Florence Wakefield Award,
- Maintain a file of up-to-date MSRT policies in collaboration with the Operations Administrator.
- Represents the MSRT at all meetings and activities planned for Presidents and Presidents-Elect at the ASRT Annual HOD Meeting.
- Initiate proper procedures, as stated in MSRT Bylaws, for filling the unexpired terms of any elected officer when a vacancy occurs.
- Have general powers of supervision and active management usually vested in the offices of President.
- Prepare an annual report summarizing the year by June 1 to be published on the website.
- Attend the annual ASRT HOD Meeting as an Affiliate Delegate

President-Elect

The President-Elect is an elected official who first serves as President-Elect, then as President of the MSRT. In general, the President-Elect assists the President in all of the President's duties.

Term of Office: One Year. The President-Elect assumes the office of President when the President's term expires. Term begins at the annual conference and ends at the annual conference of the following year at which time the President-Elect begins his/her role as President.

Responsible to the president and the membership of the MSRT

Duties and Responsibilities:

- Be elected by the members, serve for one (1) year, and be a member of the Board of Directors.
- Perform the functions of the office of President in the absence of the President and Vice President.
- Assist the President with the function of the Society and Society activities.
- Be familiar with the duties and responsibilities of the President and all other officers and assist with the coordination of programs and committees.
- Collaborates with the President and the Board to establish the current years ASRT's Affiliate Development Program application.
- Represent the MSRT at all meetings and activities planned for Presidents and Presidents-Elect at

the ASRT Annual HOD Meeting.

- Attend the ASRT HOD Meeting as an Affiliate Delegate.

Vice - President

The Vice-President is an elected official and a member of the Board of Directors. The Vice President shall be responsible for any duties assigned to him/her by the President.

Term of Office: One Year. Term begins at the annual conference and ends at the annual conference of the following year.

Responsible to the president and the membership of the MSRT

Duties and Responsibilities:

- Serve as Chairperson of the Nominating Committee
- Perform the functions of the office of President in the absence of the President.

Chair of the Board

Responsible to the president and the membership of the MSRT

Duties and Responsibilities:

- Advise and assist the President, President-Elect, and other officers.
- Chair meetings in the absence of the President and Vice President.

Secretary

The Secretary is an elected official and a member of the Board of Directors. The Secretary shall be responsible for the annual review of the Policy and Procedures Manual and be a member of the Strategic Planning Committee.

Term of Office: One Year. Term begins at the annual conference and ends at the annual conference of the following year.

Responsible to the president and the membership of the MSRT

Duties and Responsibilities:

- Coordinate minutes of all Board of Directors meetings with the Operations Administrator.
- Be a voting member of the Board of Directors and the Strategic Planning Committee.
- Take roll call of those present and absent at Board of Directors meetings.
- Tally all ballots.
- Notify each candidate for office of the results of the election (via email).
- Conduct correspondence as directed by the President and coordinate with the Operations Administrator.
- Prepare an annual report summarizing actions taken by the Board of Directors and submit this report to the President by June.

Treasurer

The Treasurer is an elected official who sits on the Board of Directors. They are a member of the Budget Committee, and direct the finances of the organization.

Term of Office: Two Years. Serves as Treasurer - Elect for one year and then assumes office of Treasurer the following year. The term begins at the annual conference and ends at the annual conference of the second year.

Responsible to the president and the membership of the MSRT

Duties and Responsibilities:

- Direct preparation of the annual budget of the MSRT with the President, President-Elect, Vice President, and Operations Administrator.
- Maintain custody, with the Operations Administrator, of all funds and securities of MSRT.
- Coordinate the compilation of accurate financial records.
- Arrange for annual review of records with a Certified Public Accountant (CPA).
- Report on the financial status of MSRT to the Board of Directors as requested.
- Prepare and present report of MSRT's financial status at the Board of Directors meetings, at the annual MSRT conference meeting and for the annual report.
- Represent the MSRT as the liaison with banking institutions and complete necessary documentation for all accounts.
- Advise the Board of Directors, in a timely manner with respect to vote requirements of Certificates of Deposit and/or investment due dates.
- Prepare and sign checks for payment of invoices.
- Prepare an annual report on the finances of the association at the end of the fiscal year.

Treasurer-Elect

The Treasurer- Elect is an elected official who sits on the Board of Directors. They are a member of the Budget Committee, and in conjunction with the Treasurer help to direct the finances of the organization.

Term of Office: One year. The term begins at the annual conference and ends at the annual conference of the following year, at which time the Treasurer-Elect assumes the position of Treasurer.

Responsible to the president and the membership of the MSRT

Duties and Responsibilities:

- Work closely with the Treasurer to become acquainted with all the duties and functions of the Treasurer.
- Make the necessary preparations for elevation to the office of Treasurer.

Chair-Of-The-Board

Once the President completes his/her term of office, they assume the position of Chair of the Board.

Term of Office: One Year. Term begins at the annual conference and ends at the annual conference of the following year.

Responsible to the president and the membership of the MSRT

Duties and Responsibilities:

- Assist the incoming president in the transition to office.
 - Advise the president on matters related to initiatives begun during his/her term as president.
 - Assist the President with the orientation to the Board of Directors of all newly elected officers and new committee members.
- Attend the ASRT's HOD annual meeting as an Affiliate Delegate.

Member-At-Large

The Member-at-Large is an elected official who sits on the Board of Directors. They serve as a liaison between the general membership and the Board of Directors.

Term of Office: One Year. Term begins at the annual conference and ends at the annual conference of the following year.

Duties and Responsibilities:

- Act as a liaison between the general membership and the Board of Directors.
- Advise, assist, and counsel radiologic technologists about professional matters, acting as an official representative of the MSRT.
- Serve as an active member of at least one MSRT committee.

Educational Counselors (3 Positions)

The Educational Counselor is an elected official who sits on the Board of Directors. They are responsible for organizing educational lectures/seminars for the membership.

Term of Office: One Year. Term begins at the annual conference and ends at the annual conference of the following year.

Responsible to the president and the membership of the MSRT

Duties and Responsibilities:

- Facilitate educational activities.
- Encourage and assist in fostering such activities that will be of general interest and benefit to radiologic technologists.
- Advise, assist, and counsel radiologic technologists in their area about professional matters, acting as official representatives of the MSRT.
- Plan and organize educational lectures, seminars, or webinars with the assistance of other delegates and guidance of the Operations Administrator and other elected board members.
- Obtain CE Credit approval through the ASRT and CQR Category designation through the ARRT

- Verify attendance, prepare and distribute CE certificates to members.

Detailed guidelines for planning events are located in Appendix A of this manual

Advertising/Mailing

- The Operations Administrator will post the information about the educational seminar on the MSRT website, social media and send an e-mail notification about the event to the MSRT members.

Committees

The President appoints Committee Chairs with the advice and counsel of the Board of Directors and committee members.

Selection of Committee Members

Successful committees function and make recommendations to the Board. Since most committees are relatively small, each member plays a critical role in effective committee operations. The burden of selecting a group that will function in a responsible manner rests with the President. They have to be relatively certain that the appointees will participate on the committee. When making committee appointments, they must attempt to be objective by considering all those who are eligible and must put aside personal preferences and opinions that are not germane to the committee's responsibilities. When a committee is formed to report on a controversial topic, care should be taken to appoint representatives from both sides of the question in order for the final report to be meaningful.

Below are qualifications to consider for selecting committee members:

- Have expressed interest in that subject.
- Dependability.
- Willing to accept responsibility.
- Able to work independently and as a team member.
- Fair-minded. (Respects different opinions.)
- A good listener. (To both sides of the question.)
- Able to participate in decision making.
- Able to abide by the majority decision.

Annual Conference Committee

The MSRT Annual Conference is a major education event for its membership. The purpose of the conference is to provide the membership with quality, reasonably priced continuing education while providing networking opportunities within the Radiology community. The conference is also the time when the Annual Membership meeting, the Quarter Century Club (QCC) meeting and the Annual Educators' meeting are held, as well as when the installation of new officers occurs.

Responsible to: MSRT Board of Directors

Term of Office: A one-year term begins during the month following the MSRT annual conference and ends during the same month on the following year.

Duties and Responsibilities, Annual Conference Co-Chairpersons:

- Work with the Treasurer to prepare a conference budget and submit it to the Board of Directors by September 30th.
- Establish the Conference Committee.
- Schedule and organize meetings.
- Plan and organize conference lecture program.
- Coordinate all arrangements and activities with the Conference Committee and Operations Administrator.
- Speaker selection.
- Collect the required documentation from the speakers and submit this documentation to the Educational Coordinator who will submit the necessary paperwork to the ASRT for continuing education credit approval.
- Exhibit organization. •
- Program promotion.
- Program design and preparation.
- Coordinate with the President-Elect and the Operations Administrator the venue for the following year and arrange for venue contract.
- Oversee activities of the Buzz Bowl Committees.
Direct all conference activities to conform to planned budget.
- Prepare the Annual Conference Report and submit it to the Board of Directors by June 1st.

Buzz Bowl Committee

The Buzz Bowl Committee will prepare for the annual competition by reviewing rules for participation, preparing games, and coordinating the event with the Conference Committee Chair and Operations Administrator.

Nominating Committee

The Nominating Committee, chaired by the Vice President, will designate a slate of candidates to run for office as required by the Association Bylaws.

Duties and Responsibilities:

- Submit a request to the MSRT membership in the fall for nominee suggestion
- Meet with committee members to discuss possible candidates.
- Assign committee members potential candidates to contact.
- Contact suggested candidates.
- Obtain candidate information from candidates for publication with ballot.
- Work with the Operations Administrator to ensure that the ballot is distributed to voting members not less than 30 days prior to the closing of the polls.

Procedure for Recruiting Candidates

- Review current job descriptions for each position.
- Ensure that each nominee meets all requirements of the position.
- Ensure that committee members and candidates have a copy of job description for each position.

Scholarship Committee

The function of this committee is to update and distribute scholarship information to all Massachusetts Radiologic Technology Programs, select the recipient(s) of the scholarship(s), notify the recipient(s), and award the scholarship(s) at the Annual Conference.

Advocacy Committee

This committee serves as a bridge between the Massachusetts Radiation Control Program and the MSRT Board of Directors, as well as between the ASRT and the MSRT Board, on state and national advocacy matters. It continuously monitors regulatory and legislative developments and provides written reports to keep members informed about issues affecting Radiologic Technologists.

Written reports are generated to keep the membership informed.

Social Media Committee

The purposes of the Social Media Committee are as follows:

- To increase the society's visibility by better engaging all R.T.s (not only MSRT members).
- To utilize social media as advertising for MSRT events/initiatives.
- To maintain visibility by consistently disseminating information about events/issues concerning R.T.s.

Goals

- To improve the consistency and quality of the MSRT social media posts.
- Increase interaction with membership via Facebook, Twitter & Instagram (responding to posts, including background stories with our photos, etc.).
- Encourage members of the Facebook & Twitter group to "share" posts in order to reach more people.
- Increase the number of views/likes of our posts by 5% in the coming year.
- Pursue increased LinkedIn presence in the future.

Methods

The Social Media Committee will achieve its goals through the following methods:

- The Social Media Committee will make, at minimum, 1 post every 2 weeks to Facebook, Instagram, and LinkedIn.
- Committee members are empowered to post without requiring approval from the Board or other Committee members.
- All posts must follow the established Content Guidelines included in this document.

- Members of the board will be frequently asked by Social Media Committee members to “share” and “like” posts by the MSRT. This will aid us in reaching a wider audience, which is critical to our goal with this initiative.

Content guidelines:

- Visuals such as photos from events or interesting stories relevant to the profession are appropriate.
- Photos taken from events should be sent to the Operations Administrator and added to the cloud storage for Social Media Committee access.
- Content should not be limited to advertisement of events, though the advertisement of Society events will be an important component. Anything related to imaging, advocacy, scholarship, contests, volunteer/networking opportunities, or general medical information are all acceptable topics.
- Responses from members can be answered by any member of the Social Media Committee.

Insurance Coverage

As an Affiliate in good standing with the American Society of Radiologic Technologists (ASRT), the MSRT is enrolled in both a Commercial General Liability (CGL) and a Management Liability Policy provided by ASRT.

- A CGL policy protects against actual or alleged negligence resulting in either bodily injury or property damage that arises from the Affiliate’s use or occupancy of a premise (e.g., meetings at hotels and restaurants, facility tours, etc.). Very often facilities will require that they be named as an Additional Insured on the affiliate’s insurance policy.
- The Management Liability Policy contains three coverage modules, Directors & Officers (D&O) Liability, Employment Practice (EPL) Liability and Fidelity (Employee Dishonesty). Nonprofit D&O protects against claims that allege a director or officer failed to perform their fiduciary duty (i.e., certain legal responsibilities such placing the interests of the organization before their own).

MSRT Reimbursement Policy

Expense Reimbursement

Members of the MSRT are entitled to reimbursement for personal funds used for activities of the society. Reimbursement of expenses within the allotted budget is authorized by the Treasurer when a completed expense voucher (or email with attached receipt) is submitted to the MSRT office with the appropriate receipts

Example of acceptable receipts includes:

- Photocopies, scans or facsimiles of register or credit card receipts (or originals).
- Photocopies, scans, or facsimiles of canceled checks.
- Tax vouchers.
- Restaurant receipts.
- Photocopies, scans, or facsimiles of phone bills with MSRT calls identified.

- Postage receipts.
- Parking and Toll receipts.

Procedure

- MSRT member sends an email request for reimbursement with appropriate attached receipts to committee chairperson.
- Committee chairperson (or designee) approves expenses and submits the request to the Treasurer.

The following information must be included:

- Date request is submitted
- Name of the person requesting payment
- Name of the payee
- Complete address including zip code, for mailing the check
- A concise description for item of expenditure and the budget category for line item
- The amount of each expenditure listed separately
- The treasurer approves reimbursement of expenses and processes reimbursement.

Cash Advances

MSRT does not provide cash advances for anticipated expenses. If a member is anticipating a large upcoming expense (over \$100) arrangements should be made for the service provider to bill the MSRT. Any other arrangements must be made with the Treasurer at least two (2) weeks prior to needing the payment to allow for check preparation, documentation, and mailing.

MSRT Fee Policy

MSRT Educational Lecture/Seminar Registration Fees for non-MSRT members will be set in consultation with the Board

Annual MSRT Conference Registration Fees will be waived for the following attendees:

- Speakers
- Board of Directors members who attend the majority of scheduled board meetings and events during their term of office.
- Conference Committee Members.
- Buzz Bowl Coordinators and Buzz Bowl Committee.
- Quarter Century Club Members will receive a discount as determined by the board.
- Scholarship Recipients and Student Leadership Development Program (SLDP) participants, who would not otherwise attend, will be invited to attend the awards presentation at the annual conference.

Annual MSRT Conference Registration Hotel Rooms

The cost of conference hotel rooms is to be paid by the MSRT for:

- Conference Co-Chairs.
- The Operations Administrator.
- Board of Directors members who attend the majority of the scheduled board meetings and events during their term of office.
- Buzz Bowl Coordinators and Committee provided they share a room.

The cost of conference hotel rooms is to be paid by the MSRT for other committee with the stipulation that committee members must attend a minimum of ½ of the MSRT board meetings and activities. annually to be eligible for the waiver of the hotel fee. If a member of a committee prefers their own private room, he or she will be required to pay ½ of the hotel room costs.

The committee planning the event will set fees in consultation with the board. Separate fees for members, QCC members, student members and non-members will be defined. Registrations will be checked against the membership database. Non-members registering as members will be billed for the difference.

Registration is due on the date set by the conference committee. No refunds for non-attendance of the meeting will be given (except where documentation of personal tragedy or illness is provided or in the event of an unforeseen circumstance such as a pandemic or other State/national emergency.)

Registrations are accepted at the door or after the registration due date only as space permits.

For the annual MSRT conference, member registration rates will be offered to technologists who show proof of membership in either the ME, NH, or CT Society of Radiologic Technologists and to RI and VT technologists who show proof of membership in the American Society of Radiologic Technologists.

ASRT House of Delegates Meeting

- The current sitting President and the Chair-of-the Board, as of the ASRT's January submission deadline, will serve as the MSRT's Affiliate Delegates to the ASRT's HOD meeting.
- If the designated individuals identified above cannot attend the ASRT HOD meeting, the MSRT Board of Directors shall appoint another sitting board/committee member as a replacement if feasible
- Two to four additional MSRT board or committee members will be designated by the MSRT Board to serve as alternate affiliate delegates.

MSRT Delegate and Alternate Delegate Funding Policy

Affiliate Delegates

The ASRT will prepay the cost of economy airfare and four (4) nights of hotel accommodations for two (2) seated affiliate delegates attending the ASRT House of Delegates (HOD) meeting.

Alternate Affiliate Delegates

The MSRT will fund the cost of economy airfare and four (4) nights of hotel accommodations for two (2) alternate affiliate delegates attending the ASRT HOD meeting.

In addition, the MSRT will reimburse each of the two (2) seated delegates and the two (2) alternate delegates for reasonable and economical expenses related to:

- Airport transfers or parking
- Baggage fees
- Meals not included at the meeting

A maximum of \$200 per person is budgeted for reimbursement of incidental expenses.

Affiliate Delegates and Alternate Delegates are expected to minimize reimbursable expenses by:

- Selecting economical transportation and parking options
- Reducing baggage fees when possible
- Choosing reasonably priced meal options

ASRT Educational Symposium Attendance

Delegates and Alternate Delegates who wish to attend the ASRT Educational Symposium are responsible for covering their own registration fees and any additional expenses associated with attendance.

Whistleblower Policy

This Whistleblower Policy of Massachusetts Society of Radiologic Technologists:

- Encourages staff and volunteers to come forward with credible information on illegal practices or serious violations of adopted policies of the Organization
- Specifies that the MSRT will protect the person from retaliation.
- Identifies where such information can be reported.

Encouragement of reporting. The MSRT encourages complaints, reports or inquiries about illegal practices or serious violations of the Organization's policies, including illegal or improper conduct by the Organization itself, by its leadership, or by others on its behalf. Appropriate subjects to raise under this policy would include financial improprieties, accounting or audit matters, ethical violations, or other similar illegal or improper practices or policies. Other subjects on which the Organization has existing complaint mechanisms should be addressed under those mechanisms, such as raising matters of alleged discrimination or harassment via the Organization's human resources channels, unless those channels are themselves implicated in the wrongdoing. This policy is not intended to provide a means of appeal from outcomes in those other mechanisms.

Protection from retaliation. The Massachusetts Society of Radiologic Technologists prohibits retaliation by or on behalf of the Organization against staff or volunteers for making good faith complaints, reports, or inquiries under this policy or for participating in a review or investigation under this policy. This protection

extends to those whose allegations are made in good faith but prove to be mistaken. The Organization reserves the right to discipline persons who make bad faith, knowingly false, or vexatious complaints, reports or inquiries or who otherwise abuse this policy.

Where to report. Complaints, reports, or inquiries may be made under this policy on a confidential or anonymous basis. They should describe in detail the specific facts demonstrating the bases for the complaints, reports, or inquiries. They should be directed to the Organization's President or Chair of the Board of Directors; if both persons are implicated in the complaint, report, or inquiry, it should be directed to the Vice President. The Massachusetts Society of Radiologic Technologists will conduct a prompt, discreet, and objective review or investigation. Staff or volunteers must recognize that the Organization may be unable to fully evaluate a vague or general complaint, report or inquiry that is made anonymously.

Confidentiality

As a member of the Board, I recognize that I owe a fiduciary duty of care to the Massachusetts Society of Radiologic Technologists. This includes a duty of confidentiality. All information and documentation that I receive from the MSRT and others in connection with my service on the Board will be treated with strict confidentiality. Neither the contents nor the existence of this information or documentation will be shared with anyone in the MSRT other than the officers, directors, and authorized agents of the Massachusetts Society of Radiologic Technologists. I will direct any questions regarding my confidentiality obligations to the chair of the Board.

Conflicts of Interest

As a member of the Board, I recognize that I owe a fiduciary duty of loyalty to the Massachusetts Society of Radiologic Technologists. This duty requires me to avoid conflicts of interest and to act at all times in the best interests of the MSRT. The purpose of the conflicts of interest policy (set forth below) is to help inform the Board about what constitutes a conflict of interest, assist the Board in identifying and disclosing actual and potential conflicts, and help ensure the avoidance of conflicts of interest where necessary. This policy may be enforced against individual Board members as described below:

Board members have a fiduciary duty to conduct themselves without conflict to the interests of the Massachusetts Society of Radiologic Technologists. In their capacity as Board members, they must subordinate personal, individual business, third-party, and other interests to the welfare and best interests of the MSRT.

A conflict of interest is conduct, a transaction or relationship that presents or might conflict with a Board member's obligations owed to the MSRT and the Board member's personal, business, or other interests.

All conflicts of interest are not necessarily prohibited or harmful to the MSRT. However, full disclosure of all actual and potential conflicts, and a determination by the disinterested Board (or an MSRT Executive Committee) members – with the interested Board member(s) recused from participating in debates and voting on the matter – are required.

All actual and potential conflicts of interest shall be disclosed by Board members to the MSRT Executive Committee through the annual disclosure form and/or to the Board whenever a conflict arises. Disinterested members of the MSRT Executive Committee shall make a determination as to whether a prohibited conflict exists and what subsequent action is appropriate (if any). The MSRT Executive Committee shall inform the Board of such determination and action. The Board shall retain the right to modify or reverse such determination and action and shall retain the ultimate enforcement authority with respect to the interpretation and application of this policy.

On an annual basis, all Board members shall be provided with a copy of this policy and procedure manual and will be required to complete an electronic acknowledgment and disclosure. The MSRT Board of Directors shall review any reported conflicts of interest.

Part II Financial Policy

Policy Maintenance and Review

Policy: It is the policy of the Massachusetts Society of Radiologic Technologists (“MSRT”) to maintain this financial policy and procedures manual. This manual will be submitted to the MSRT board and shall be reviewed annually each August.

Procedure: The manual will be maintained by the MSRT Treasurer, Secretary and MSRT Operations Administrator, and modified and updated as needed. New policies will be maintained and incorporated into the primary manual annually. The manual, any recommended policy or change to existing policy, and the rationale for the change will be submitted to the MSRT Secretary prior to the Annual review. After review and approval by the board of directors, the changes will be incorporated.

IRS Classification

Policy: The MSRT has been assigned a tax classification by the ASRT of a 501(c)(6) organization, a category specifically reserved to Professional and Trade organizations (Associations and Societies), and may engage in limited political activities that inform, educate, and promote their given interest.

Procedure: The ASRT Group Exemption form must be completed and submitted annually.

Accounting Methods

Policy: It is the policy of the MSRT to utilize the [cash basis of accounting](#). **Procedure:** N/A.

Financial Controls

Policy: The MSRT Treasurer will operate within the parameters set forth in the MSRT By-Laws. It is the policy of the MSRT that authorization is necessary for signatures on contracts, checks, payments, and receipt, deposit, or withdrawal of money. The board shall have oversight of any individual authorized to purchase, withdraw money or sign contracts for the MSRT. The board shall approve any expense that exceeds the

budget. The MSRT shall place all accounts in financial institutions that are federally insured. All funds received by MSRT shall be deposited within the designated timeframe.

Procedure: All incoming checks are received by the MSRT Operations Administrator or Treasurer for processing. The checks are deposited in the designated MSRT account within 5 business days. Expenditures that exceed the budget shall be approved by the board of directors at a board meeting.

Computer Files

Policy: All files downloaded or created for MSRT Operations will be kept for the time period defined in the Record Retention Schedule in this document.

Procedure: All files should be stored in OneDrive.

Accounting Software

Policy: It is the policy of the MSRT to utilize a computerized accounting software package to track all financial activity. (QuickBooks Online)

Procedure: At the end of each calendar month, the MSRT Operations Administrator will email scans of all deposits and their invoices, receipts, and their sources to the MSRT Treasurer for entry into the accounting software.

After the accounts have been updated monthly, the MSRT Treasurer will upload a copy of the accounting software data file (e.g. the .QBW file) to the society's Cloud Storage account for safe keeping, as well as being backed up and distributed as described elsewhere in this document.

Budget Process

Policy: It is the policy of the MSRT to annually prepare a balanced budget.

Procedure: A budget will be prepared by the MSRT Treasurer before the start of the new fiscal year (July-1) and presented for consideration by the MSRT Board of Directors at the meeting. The MSRT Board of Directors will review and approve the budget in a timely manner.

Records Retention and Destruction

Policy: It is the policy of the MSRT to retain paper or electronic records as per the following Record Retention Schedule.

Paper records may be scanned into electronic form for storage and backed up before the paper record is destroyed (e.g., shredded).

The board of directors must approve the destruction of records not on the retention schedule shown below.

Procedure:

RECORD RETENTION SCHEDULE

Document Type	Retention Period
Vouchers For Payment to Vendors and Members, and any accompanying 2-step verification emails.	7 years
Bank Statements	7 years
Canceled Checks	7 years
Deposit Slips	7 years
Independent Contractor Contracts	7 years
Audit Reports	Permanent
Check Registers	Permanent
End Of Year Financial Statements	Permanent
Document Type	Retention Period
Insurance Policies	Permanent
Board Meeting Minutes	Permanent
IRS 990 / 1099 Tax Forms	Permanent

Receipt of Funds

Policy: Receipts are income from received cash, checks, donated honorariums or other payments, and PayPal account sweeps into the bank account.

Procedure:

- Upon receipt, all checks will be immediately endorsed to the MSRT and deposited within 5 working days.
- Checks may be signed by either the MSRT President or MSRT Treasurer.
- A receipt will be generated for every transaction, and the ledger will be updated.
- A formal audit by a third party may be requested by the board at any time for just cause.

Disbursement of Funds

Policy: All check disbursements will originate from the Treasurer or the President, both of whom are authorized by the bank to sign checks. These may be in the form of a handwritten check from the paper ledger, or a bank-generated check issued through the on-line bank account.

At no time will CASH be disbursed to any party.

Procedure:

Disbursements under \$750.00:

- 1) Day-to-Day Purchases: The MSRT uses bank debit-cards, issued to the Treasurer and President for covering daily normal expenses of running the MSRT. At the end of each calendar month the Operations administrator forwards all Statements, Bill, and Receipts to the Treasurer to reconcile the bank's Statement.
- 2) 3) Other Payment/Reimbursement: The MSRT utilizes on-line banking payment services, when possible, to reduce materials, labor, and postage expenses. Payment or Reimbursement requests from businesses and individuals are received by the Operations Administrator and forwarded to the Treasurer via email for approval and payment.

Disbursements between \$750.00 - \$999.99:

Any expense between these amounts shall require authorization by the Treasurer, and any one of the following: President or Vice President.

All payment requests are forwarded to the Treasurer via email. The Treasurer will then issue payment to the payee.

We use email between two individuals in lieu of a "two-signature check" to implement a two-party payment authorization. Such emails will be retained for a certain time period and made available to the board as described elsewhere in this document.

Disbursements equaling or exceeding \$1,000.00:

Any expense "greater than or equal to" this amount shall require authorization by the Board of Directors before payment is issued. This will occur in the form of a board vote "upon request," or a vote made prior to an anticipated future payment.

Bank Reconciliation

Policy: It is the policy of the MSRT to have all bank statements directly available to the MSRT Treasurer, who will review the checks cleared and deposits made during the prior month. This includes Checking, Savings, and Money-Market accounts held at various FDIC insured institutions.

Procedure: The MSRT Treasurer will be responsible for reconciling the bank statements.

All statements, check-images and activity will be downloaded in the form of a PDF, used to update the accounts, and will be kept in accordance with the Record Retention Policy found elsewhere in this document.

Operations Administrator Contract & Payment

Policy: The Operations Administrator is contracted annually to perform the administrative duties of the MSRT.

Procedure: The contract is negotiated and renewed annually, effective each July. Compensation will be paid at the beginning of the month for services rendered during the previous month.

IRS Forms: FORM 990N or-EZ

Policy: It is the policy of the MSRT to annually file with the IRS Form 990N or 990-EZ and supporting documentation. The 990-N is a simple electronic notice for the smallest organizations, while the 990-EZ is a short information return for mid-sized organizations with higher receipts and assets. Small tax-exempt organizations generally are eligible to file Form 990-N to satisfy their annual reporting requirement if their annual gross receipts are normally \$50,000 or less.

“Form 990-EZ is for use by organizations other than sponsoring organizations and controlling organizations ... with gross receipts of less than \$100,000 and total assets of less than \$250,000 at the end of the year.” (IRS Website, 2014) The Form 990 is filed no later than 4-1/2 months (on Nov-15) after the close of your fiscal year (July-1).

If Form 990- EZ must be filed, accounting software data files and supporting documentation shall be sent to a certified accountant hired for the purpose of reviewing the prior FY transactions and creating Form 990-EZ and 4562. A hardcopy/softcopy of the IRS forms shall be sent back to the MSRT Treasurer. The MSRT Treasurer will review the forms and sign their release to the IRS, where the accountant will be instructed to file the forms electronically.

The ASRT needs Proof of 990 tax filing before Aug-29 each year; as a practice, the forms are completed and filed as soon as practical after the close of the fiscal year.

IRS Form 990-EZ forms filed by the MSRT in prior years are freely available at the following website: <https://www.citizenaudit.org/046190252/>. Request for hardcopies of Form 990-EZ must be made in writing, and such requests will be first approved by the MSRT Board of Directors.

IRS Forms: FORM 1099-MISC / 1096

Policy: It is the policy of the MSRT to submit a form 1099-MISC to any vendor whose payment has exceeded \$600 during the last calendar year. This form shall be received by the vendor before January-31 of the following year.

MSRT must issue Form **1099-NEC** for any payee who meets *both* conditions:

1. **Paid \$600 or more** during the calendar year
2. **Provided services** (not goods) to MSRT as an individual or unincorporated business

Additionally, MSRT must issue Form **1099-MISC** for:

- Legal services (even if the law firm is incorporated)

Procedure: The accounting software will be used to generate 1099's to vendors requiring this form, and the MSRT Treasurer will be responsible for:

- Mailing the form to the vendor by January 31.
- A separate Form 1096 must be used for each *type* of information return submitted by mail. Form 1096 is not required for electronic filings.
- Form 1096 must be submitted to the IRS before February 15th.

- Order forms for the following year from the IRS, such that they will readily be available for use in the next filing season.

Massachusetts: Report AR-180

Policy: The State of Massachusetts AR180 Annual Report is due Nov-1, but is typically filed earlier to meet the ASRT August compliance deadline.

Procedure: At the Corporate Divisions Annual Reports website, “Corporations Online Filing System - **Annual Report**”: (https://corp.sec.state.ma.us/corp/loginsystem/login_form.asp?FilingMethod=I) will be reviewed on-line and filed by the required date.

The report may be printed and sent manually at “<http://www.sec.state.ma.us/cor/corpdf/180npcar.pdf>”.

Bad Debt Write-Off

Policy: It is the policy of the MSRT to ensure that all available means of collecting bad debts have been exhausted before write-off procedures are initiated.

Procedure: If a debt is deemed uncollectible, approval by the MSRT Treasurer and the MSRT President are required before write-off implementation. Once a write-off has been initiated, the MSRT Operations Administrator will be advised of the actions deemed necessary by the MSRT President.

Loans

Policy: It is the policy of the MSRT that a loan may not be made to any board member, officer, or employee of the organization, except in accordance with state statute or law. Any such loan may be made only by written agreement approved by the board and reviewed and approved by legal counsel. **Procedure:** N/A.

Bonding

Policy: It is the policy of the MSRT to bond all individuals involved in the financial functions of the organization.

The bond is included as part of the Management Liability Policy provided through the ASRT.

Appendix A: Guidelines for Planning Educational Webinars, Lectures & Seminars

Appendix A

Guidelines for Planning Educational Webinars, Lectures & Seminars

Speakers

- For each lecture, a speaker form must be completed
 - <https://membermsrt-maorg/wp-content/uploads/2025/03/MSRT-Speaker-Form-2025docx>
- An honorarium of \$100.00 is provided for each 50-minute lecture

CE Credit

Approval

- All lectures are submitted to the ASRT CE Request for Approval (RFA) portal for CE approval (30 days in advance)
 - <https://www.asrt.org/main/continuing-education/request-for-approval>
 - The approval will be emailed to the submitter once completed by the ASRT
- After ASRT CE approval is received, the lecture is submitted to the ARRT for Credit Distribution
 - <https://apps.rrt.org/SponsorSuite/Login.aspx>
 - Credit [distribution](#) must be reviewed and approved by the submitter to finalize

Attendance

- Participants must sign in no more than 10 minutes after the start time and be present for a minimum of 50 minutes
 - In Person
 - Attendance forms are used for in-person lectures with a lecture verification code given at the conclusion of the lecture, forms are collected and must be kept on file for 5 years
 - A speaker survey is made available to all attendees (QR code or email)
 - Virtual
 - Pre-Registration is required
 - Online login including full name and email is required
 - A post-webinar speaker survey **must** be completed for attendance verification

Webinar Prep

- Get completed Speaker Info form
- Create post-webinar survey in google forms (need link for Zoom)
- Schedule in Zoom using template & get registration page link for flyer
- Create flyer & save as pdf & doc & jpg (need pdf for ASRT CE request, jpg used for website)
- Submit CE request to ASRT
- Post on website on calendar & webinar page
- Set up email blast in wild apricot
- Post on MSRT social media
- Share info with affiliate partners

- Confirm ASRT approval & download pdf file
- Submit to ARRT for credit distribution (need ASRT approval 1st)
- Create CE certificate using template
- Monitor zoom registration, check membership, and approve or deny
- Verify affiliate membership of registrants from other states
- Send email to any registrants denied
- Prepare welcome PowerPoint
- Send registration reminder via wild apricot & social media
- Confirm with speaker & send them zoom link as panelist

Post Webinar

- Get attendance report from zoom & review time stamps
- Get speaker surveys from google docs (needed to confirm CE eligible)
- Create an excel file of eligible attendees (needed to prepare CE Certificates)
- Prepare CE certificates with mail merge & save to individual **pdf** files
- Send **PDF** CE certificates to affiliate partners to distribute
- Upload CE certificates to individual MSRT member accounts in Wild Apricot
- Send email in wild apricot "CE Certificate Uploaded"

Guidelines for Planning In- Person Educational Lectures or Seminars

- **Choose a Venue & Date**
 - Auditorium or Conference Room; consider capacity and seating arrangement
- **AV Equipment**
 - At a minimum, the following are needed: Computer, projector, screen, and microphone A laser pointer is also helpful
- **Attendance**
 - Pre-registration is recommended for planning purposes but not required
 - Attendance forms are used for in-person lectures with a lecture verification code given at the conclusion of the lecture. Forms are collected and must be kept on file for 5 years
- **Food**
 - Check the in-house food service availability Try to arrange a continental breakfast for ½ day seminar
 - A per person cost for food service is common
- **Parking**
 - Free parking is preferable. If there is a charge for parking be sure to include this information with the seminar website posting
 - Determine if there is a designated lot for attendees to park
 - Determine if you need to make arrangements with security

- Consider placing signs outside for parking directions, and directional signs in the hallways to direct people to the venue
- **Post Seminar**
 - Collect sign in forms
 - Create an excel file of eligible attendees (needed to prepare CE Certificates)
 - Prepare CE certificates with mail merge & save to individual pdf files
 - Send PDF CE certificates to affiliate partners to distribute
 - Upload CE certificates to individual MSRT member accounts in Wild Apricot
 - Send email in wild apricot "CE Certificate Uploaded"



The MaSRT, CSRT, NHSRT and MeSRT have partnered together to offer members monthly continuing education webinars, free to all members. Each webinar is approved for 1 ASRT Category A continuing education credit. These are live presentations offered through the Zoom Webinar Platform. All participants must be active members of their affiliate society, must pre-register and must complete a brief survey at the conclusion of the presentation to receive CE credit.

The host state arranges all aspects of the webinar and shares information with the partner affiliates for distribution to members. Currently, NH, CT & ME, each host one webinar per calendar year. An email distribution list is maintained to facilitate communication.

2026 Webinar Schedule

January 2026		NHSRT	Jan 22	Kristi Moore (ASRT)		
February 2026	MSRT					
March 2026	MSRT					
April 2026		CSRT	MSRT Annual Meeting			
May 2026	MSRT		2 nd NHSRT Annual Meeting		Maine Annual Meeting	
June 2026	MSRT					
July 2026	MSRT					
August 2026	MSRT					
Sept 2026	MSRT					
October 2026		Maine	CSRT Annual Meeting			
November 2026	MSRT					

December 2026	MSRT					
---------------	------	--	--	--	--	--

MSRT CE Presentation Suggested Topics

General Interest

- Anatomy and pathology with sectional anatomy correlation
- Trauma, mobile and operating room imaging
- Radiation protection
- Digital imaging best practices
- Patient care, safety, scope of practice, practice standards and ethics
- Communication skills
- Emerging technologies and treatment techniques
- Scientific research and case studies

Computed Tomography

- CT radiation dose
- Coronary CT
- CT angiography
- Trauma CT
- Neurological emergency CT
- Positron emission tomography (PET) and CT
- Diseases of the brain, chest, abdomen, or pelvis
- Contrast media considerations and safety

Management

- Service excellence: patient care and safety
- Informatics, including picture archiving and communication systems (PACS), radiology information systems (RIS), digital imaging and communications in medicine (DICOM), and workflow
- Fiscal management, including budget preparation, revenue growth, expense control and exam volume
- Employee satisfaction, including mentoring and other human resource management skills
- Compliance, including state, federal, Joint Commission and accreditation agencies' regulations

Women's/Breast Imaging

- Digital breast tomosynthesis
- Stereotactic breast biopsy
- Digital mammography
- Imaging breast implants
- Breast density current issues
- Breast ultrasound
- Breast MRI
- Bone densitometry
- Quality management

Radiation Therapy/Oncology Topics

- Medical Dosimetry:
- Treatment Planning:
- Emerging Technologies:
- Patient Care:
- Radiation Therapy for Cancer Treatment:
- External Beam Radiation Therapy:
- Brachytherapy
- Simulation

Webinar Sponsors

- **Only one sponsor is featured per month** — spots are available on a first-come, first-served basis.
- **Sponsorship Fee:** \$250 per webinar (MSRT hosts 9 out of 12 webinars annually).

As a sponsor, your company will receive:

- Recognition as the monthly sponsor on the MSRT website and social media posts.
- A link to your company's website featured on the MSRT website.
- Sponsor acknowledgment on both the introductory and closing PowerPoint slides of the webinar.
- The option to provide your own branded PowerPoint slide, showcased at the close of the session.

=====

<<< End of Document >>>