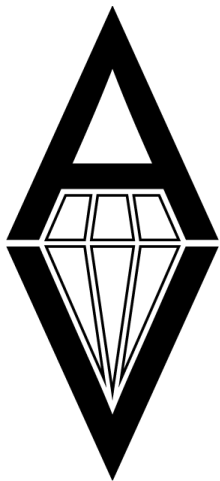


2025 DELEGATES PACKET



AMERICAN ASSOCIATION
OF MEDICAL ASSISTANTS®



69TH ANNUAL
AAMA
CONFERENCE

SEPTEMBER 19–22, 2025 • ARLINGTON, VA

updated August 15, 2025

AMERICAN ASSOCIATION OF MEDICAL ASSISTANTS
69th ANNUAL HOUSE OF DELEGATES
TABLE OF CONTENTS

	Page
Preliminary Agenda	3
Letter to Delegates and Alternate Delegates.....	5
A Guide for Delegates	7
General Rules	11
 BOARD OF TRUSTEES REPORTS	
Board of Trustees	12
President	15
Immediate Past President	26
Secretary	38
Speaker of the House	42
Vice Speaker of the House	47
Trustees.....	51
CEO and Legal Counsel.....	70
 COMMITTEES	
Ad Hoc Mentoring	82
Advisory Service.....	83
Annual Conference	85
Awards.....	89
Bylaws and Resolutions	91
Documents	95
Editorial Advisory	97
House of Delegates Minutes.....	99
Nominating	100
Social Media	105
Strategic Issues Planning.....	108
 STRATEGY TEAMS	
Leadership Development	111
Marketing	115
Membership Development.....	117

TASK FORCES

Educators Collaborative Task Force.....	121
Partnership	123

BOARDS AND COUNCILS

Certifying Board.....	132
Continuing Education Board	135
Judicial Council.....	138

PROPOSED BYLAWS AMENDMENTS AND RESOLUTIONS

Proposed Resolution 25-01.....	139
Proposed Bylaws Amendment 25-01	141
Proposed Bylaws Amendment 25-02.....	142
Proposed Bylaws Amendment 25-03.....	143
Proposed Bylaws Amendment Texas 25-01	144
Proposed Bylaws Amendment Texas 25-02.....	145

APPENDIX

Delegates/Alternates

2025 Delegates and Alternates.....	146
------------------------------------	-----

Information Only

Maxine Williams Scholarship Committee.....	150
--	-----

AAMA Financial Reports

2024 Audit Report	157
General Fund Budget for the fiscal year beginning July 1, 2025	161

Additional Information

AAMA Organizational Structure.....	164
Initialisms and Acronyms	166
Medical Assisting Creed	167
Proposed Motion Form	168

American Association of Medical Assistants®
HYATT REGENCY CRYSTAL CITY AT REAGAN NATIONAL AIRPORT
ARLINGTON, VIRGINIA
Preliminary Agenda

SATURDAY, SEPTEMBER 20, 2025

8:30 AM HOUSE OF DELEGATES

Presentation of the Colors

National Anthem

Pledge of Allegiance

Call to Order

Jane Seelig, CMA-A (AAMA)
Speaker of the House

Opening Reflections

Introductions

Report of the Credentials Chair

Deborah Novak, CMA (AAMA)

Approval of Agenda

Jane Seelig, CMA-A (AAMA)

Orientation of Delegates

Claire Houghton, CMA (AAMA)
Vice Speaker of the House

Adoption of Rules of the House

Appointment of Reference Committees and Tellers

Supplemental Report

Virginia Thomas, CMA (AAMA)
AAMA President

Report of the Nominating Committee

Monica Case, CMA (AAMA)

Nominations from Floor

Jane Seelig, CMA-A (AAMA)

Announcements

Special Announcement

Rebecca Walker, CMA (AAMA)

Recess

“Meet the Candidates”—This follows the morning session of the House with an estimated start time of 10:15 am and the Reference Committee Hearings to start at 1:15pm.

Reference Committee Schedule

1:15 PM

Reports, Resolutions, Bylaws

The committee hearings will be in sequence, beginning at 1:15 p.m. and continuing until concluded

6:30 PM HOUSE OF DELEGATES RECONVENES

Call to Order	Jane Seelig, CMA-A (AAMA)
Report of the Credentials Chair	Deborah Novak, CMA (AAMA)
Moments of Remembrance and Reflection	Rebecca Walker, CMA (AAMA)
Report of the Reference Committees:	
Reports	Claire Houghton, CMA (AAMA)
Resolutions	Claire Houghton, CMA (AAMA)
Bylaws	Jane Seelig, CMA-A (AAMA)
Election of Officers and Nominating Committee	Jane Seelig CMA-A (AAMA)
Unfinished Business	Jane Seelig CMA-A (AAMA)
New Business	Jane Seelig, CMA-A (AAMA)
Good and Welfare Statements <i>(Please note only 15 minutes will be allowed)</i>	
Announcements	
Adjournment	

**PLEASE BE ADVISED THAT AUDIO-RECORDING OR VIDEO-RECORDING OF THE
HOUSE OF DELEGATES, "MEET THE CANDIDATES," OR REFERENCE COMMITTEE
HEARINGS IS NOT ALLOWED**

American Association of Medical Assistants®

Letter to Delegates and Alternate Delegates

Dear Delegate or Alternate Delegate:

Congratulations on your election as delegate or alternate to the 2025 House of Delegates of the American Association of Medical Assistants (AAMA). A delegate is a person given authority to act for others and who serves as a decision and policy maker for medical assistants. This is a serious responsibility that requires preparation, commitment, and performance.

Preparation

Delegates and Alternates have the responsibility to review the entire Delegates Packet before arriving at the national conference. A printed copy may be requested from the Executive Office and reserved to be picked up on site.

Discuss items in the packet with other members. Be prepared to express your views. Should your opinion not prevail, abide by the majority rule. Parliamentary procedure is designed to let a majority accomplish their ultimate goals.

Commitment

It is your duty to listen, to think objectively, and to consider all issues for the good of the entire membership and profession. Your position requires a commitment to be an active listener who bases your decisions on the deliberations of the House.

Performance

Motions must be legibly written on a motion form before being presented to the House for consideration. After the motion is made, send the written motion, via a Page, to the Parliamentary Advisor as quickly as possible.

You were elected to represent your peers for your individual knowledge and expertise. When voting on a question, it is not necessary to concur with the other members of your delegation, although you are permitted to do so.

The reference committee hearings are open to everyone, and it is particularly important for delegates and alternates to attend each hearing. These hearings provide an opportunity for all members to express opinions and hear the opinions of others. Following the hearings, the reference committees go into executive session to complete written reports to present to the House. Should you disagree with a report recommendation, you will have ample opportunity to express your views during the next session of the House.

On Friday only those with CHANGES to delegates or alternates from their original submissions or those that need PROXIES, MUST check in at the Credentials Desk. Proxies will be issued on Friday and only for emergencies on Saturday morning.

DO NOT wait until Saturday to check in for changes, issues, or questions. On Friday, the Credentials Desk will be open as follows:

Friday, September 19, 2025, 3:30 – 4:15 PM

The following protocols must be observed for the House of Delegates:

On Saturday, each delegate and alternate must check in with the Credentials Desk **prior to each session**. The Credentials Desk will be open, outside of the House of Delegates, as follows:

Saturday, September 20, 2025, 7:15-8:15 AM

Saturday, September 20, 2025, 5:30-6:15 PM.

Each delegate must be seated in the House **15 minutes** prior to each session.

Delegates and alternates shall enter the House only through the designated door.

If a delegate is not checked in by the Credentials Committee, the delegate cannot be seated in the House and is not eligible to vote.

Voting will be conducted electronically during the evening session of the House. Each delegate must vote within the time frame allowed. No voting will be allowed before or after the designated time.

All delegates and alternates will receive a Delegates Packet electronically by email. It also will be posted to the AAMA website. **A limited number of printed packets will be available on site: first come, first served.** You are encouraged to download the packet to your computer or device before the HOD, as there will not be any public internet access in the HOD room.

For room locations of conference activities, please check the hotel directory listing, on-site conference program or the Cvent app. If you have questions, please feel free to ask any Board of Trustees member. We want to assist you at any time and are looking forward to seeing you in Arlington!

Jane Seelig, CMA-A (AAMA)
Speaker of the House

Claire Houghton, CMA (AAMA)
Vice Speaker of the House

American Association of Medical Assistants® (AAMA)

A Guide for Delegates

Credentialing

Active or life members whose dues were postmarked by December 31 of the preceding year and who have been duly elected by their constituent societies may be seated in the AAMA House of Delegates. The society shall submit the names of delegates and alternates to the Executive Office by the deadline (at least ninety days before the Annual Meeting of the House of Delegates).

Each delegate and alternate will be required to register with the Credentials Committee (see official program for time and location) and to present the following:

Check-In Process

Each delegate and alternate must arrive no later than 45 minutes before the House of Delegates' Opening Session to check in at the Credentials Desk. The Credentials Desk will only be open for the hours listed. The Credentials Committee will verify the delegate's or alternate's status in their records.

Seating of Delegates

Each delegate and alternate must check in at the Credentials Desk prior to entering the House. Delegates are to be seated no later than 15 minutes before each House of Delegates session opens. Entrance to and exit from the House of Delegates will be monitored.

Relinquishing Delegate Credentials to an Alternate

Should illness or an emergency prevent a delegate's attendance at a House of Delegates session after credentials have been verified by the Credentials Committee, the alternate may be seated as follows:

Exiting Delegate contacts the alternate.

Delegate and alternate present themselves together at the Credentials Desk for approval by the Credentials Committee and the Speaker of the House. (If the delegate is physically unable to be available, another officer of the state—such as the president, president-elect, or secretary-treasurer—should appear with the alternate to verify the substitution.)

Delegate relinquishes the delegate ribbon to the alternate.

The new delegate's name will be placed on the official roll, and seating of the new delegate (former alternate) will be in order. The newly seated delegate will remain on the roll for the remainder of all House sessions, voting, etc.

Parliamentary Procedure in the House

It is necessary in an assembly of this size to insist that each individual speaking to an issue be at a microphone and wait to be properly recognized by the chair.

The deliberations of the House are governed by *Robert's Rules of Order Newly Revised* (current edition). However, the AAMA Bylaws and this "Guide for Delegates" may modify *Robert's Rules of Order*. This blend of rules is established by tradition and interpreted for the House by the Speaker and Vice Speaker, with the assistance of the HOD Parliamentary Advisor. Parliamentary procedure serves to aid an assembly in the fair, orderly, and efficient conduct of business. The majority opinion of the House in determining what it wants to do and how it wants to do it should always be the goal. It is the

obligation of the Speaker to sense the will of the House, to preside accordingly, and to recognize that decisions of the Speaker may be subject to challenge from, and reversal by, the assembly. An appeal against a ruling of the Speaker must be made at once, seconded and then decided by a majority vote of the House.

The following outline of procedures is offered as a guide, in the hope that compliance will advance smoothness of operation by reducing confusion and misunderstanding.

Introduction of Business

Tradition governs a substantial portion of each formal session of the House of Delegates. Remarks by the Speaker, recognition of distinguished guests, presentations of awards, and similar activities are in this category. It is the prerogative of the Speaker to permit as many of these niceties as may be appropriate without intruding upon the time necessary for the House to accomplish its regular business.

Reports are routinely received as business of the House when they come from the Board of Trustees, AAMA Special and Standing Committees, Strategy Teams, Task Forces, Executive Office Leadership, Liaisons, Boards, and certain officials of the association. Except under special circumstances, such reports are referred to appropriate reference committees so that hearings may be held on the substance thereof. The Speaker may request acceptance of a report by unanimous consent or by a vote without referral, but a motion to refer is always in order.

Resolutions

Business is introduced into the House through presentation of resolutions by members, state societies, component chapters, AAMA delegates, or the Board of Trustees. Resolutions are submitted to the Board of Trustees, included in the AAMA Delegates Packet, and are referred to the Reference Committee on Resolutions. To be considered as regular business, each Resolution must be submitted to the Executive Office by the required deadline established annually.

Procedure for Emergency or Late Resolutions

Copies of the resolution of emergency nature should be in the hands of the Speaker by noon of the day preceding the opening of the House of Delegates.

The emergency resolution is referred without debate to a reference committee, which considers it and then reports to the House of Delegates on its conclusions as to the validity of the emergency.

In the event the reference committee does not consider it an emergency, it is not accepted as the business of the House.

If the emergency resolution is upheld by the reference committee, the matter is put before the House with or without consideration and recommendation from the reference committee.

The emergency resolution requires a three-fourths affirmative vote of the House of Delegates for approval.

Presentation of Resolutions to the House of Delegates

At the appropriate time, the Speaker will call for the report of the Reference Committee on Resolutions. Opportunity will be given full consideration by the House. However, the sponsor of the resolution may withdraw it WITH PERMISSION of the House. At the time of a resolution's introduction, any delegate can object to its consideration. If the House sustains such objection by a two-thirds vote, the resolution is not accepted as business of the House.

Reference Committees

Reference committees are groups of about five delegates selected by the Speaker to conduct open hearings on business matters of the association. Having heard discussion on the subject before it, the

committee draws up a report offering MOTIONS or RECOMMENDATIONS to the House. These motions and recommendations will propose the action needed based on the submitted reports, proposed Bylaws amendments, and proposed resolutions.

Reference Committee Hearings

Reference committee hearings are open to **ALL MEMBERS** of the association and nonmember registrants. Members are privileged to speak on an issue; however, nonmembers may speak only when recognized by the chair of the reference committee. The chair may invite discussion or comment from anyone present who may be willing to share information. Discussion should be permitted if those in attendance wish to be heard, within reason, according to the time scheduled for this purpose.

Equitable hearings are the responsibility of the reference committee chair. The committee may establish its own rules on the presentation of testimony with respect to limitations of time, repetitive statements, and the like. It is recommended the reference committee chair **NOT** ask for an informal vote for an expression of the sentiments of those attending. The committee members may ask questions to be sure they understand the opinions expressed. The committee listens carefully and evaluates all opinions presented so that it may provide the voting body with a carefully considered motion.

Following its open hearing, a reference committee will go into executive session for deliberation and drafting of its report. It may call into such executive session any person it may wish to hear or question.

Reference Committee Reports

Reference committee reports comprise the bulk of the official business of the House of Delegates. Reference committees shall present reports to determine the best course of action to be taken by the House. They will be written after completion of the hearings and made available in written form to the delegates. Reference committees may present MOTIONS (to table, to refer to the Board of Trustees, to amend, or to consolidate related resolutions).

These reference committee reports may contain recommendations to pass or not pass a particular measure coming before the House of Delegates. Reference committee reports may also contain reference committee motions for consideration by the House of Delegates.

Handling of Reference Committee Reports

If a reference committee recommends that a proposal coming before the House of Delegates be passed or defeated, the item of business before the House of Delegates is the original proposal, not the recommendation of the reference committee.

If a reference committee offers an action (e.g., to refer to a committee or the Board of Trustees) for consideration by the House of Delegates, the item of business before the House of Delegates is the motion, not the original proposal.

According to *Robert's Rules of Order*, the officers and the board of trustees of a society give a written report of the actions taken during their terms of office at the annual meeting of the society. This report is considered to be informing either the general assembly or members of the House of Delegates of what was accomplished during their term of office. Unless there is a recommendation or motion within the report body or at the end, there is no action to be taken on the reports of the officers or the trustees. These reports are given to a reference committee for consideration. *Robert's Rules of Order* further states that "a society need not endorse the report of its board and can even decline to allow the report to be printed for future reference, or it can adopt a portion of the report, but whatever it records from the report must show any changes clearly marked."

Nominating Committee

The AAMA Bylaws, Article IX, Section 1a, state that four members shall be elected by ballot by the House of Delegates, following nominations from the floor. A plurality vote will elect. If there is a tie between the candidates receiving the fourth highest number of votes, another ballot shall be taken to determine the successful candidate. There shall be four members from four different states elected to this committee. If two candidates are nominated from the same state, the one receiving the highest number of votes will be the one elected.

Only a delegate may nominate a member to the Nominating Committee. Each person nominating someone for the Nominating Committee must come to the microphone, be recognized, and identify himself or herself as “a delegate from” his or her state. They will state the name of the nominated person and the state society the nominated person represents. They should slowly spell the nominee’s first and last name for the scribe.

New Business

New business, other than that which is on the agenda of the Speaker of the House under “New Business,” may be introduced at the final meeting of the House only if it meets the following criteria:

It is presented from the Board of Trustees; or
It is of an emergency nature; or
It is introduced by unanimous consent of the House of Delegates; and
It is in the hands of the Speaker of the House by 8 am of the day of the final session.

Voting

The ballots for Officers, Trustees, and the Nominating Committee will be electronic. Each delegate will check in at the Credentials desk as instructed in these documents. The electronic devices will be distributed to delegates in the evening session after the credentials report by the tellers. If you carry a proxy vote you will also receive a device for that vote. The voting will take place at the start of the evening session. Votes will be counted electronically, and the Tellers Chair will announce the results later in the evening session.

Voice Vote

Motions presented during the HOD may be voted on by voice. If the result cannot be determined, the Speaker may request a vote by standing or a show of hands.

Standing Vote or Show of Hands Vote

When the Speaker calls for a standing vote (or show-of-hands vote), stand and remain standing (or raise a hand until the tellers have counted), then be seated (or lower the hand).

American Association of Medical Assistants® (AAMA)

General Rules

D. Admission to the House of Delegates

The AAMA business session may be attended by all individuals wearing a current registration badge, and by AAMA members wearing a special HOD registration badge.

2. Seating

The voting body shall be seated in the front of the room in the assigned seats. To facilitate the work of the House, they will occupy the same seats at all business meetings until final adjournment. The delegates shall be in their seats fifteen minutes before the opening of the business meeting. Alternates may be seated in the gallery.

3. Voting Body

Voting delegates must check in with the Credentials Desk, where they will be issued a special ribbon, designating them as delegates or alternates. They shall wear this ribbon during the House of Delegates sessions.

4. Orders

Orders of the day for the session will be shown in the official program and, when once adopted by a majority vote, cannot be deviated from except by a two-thirds vote of the House.

5. Motions

Motions may be introduced and voted upon ONLY by members of the voting body. All main motions are to be presented to the Speaker in writing and signed by the maker before the close of the House session at which the motion was made.

6. Discussion

The right to the floor may be granted to nonvoting members by general consent or by a majority of the House of Delegates. The nonvoting member shall address the chair, give her/his name, credential, state society, and ask permission before proceeding. All remarks will be directed to the chair.

7. Debate

Each delegate shall be limited to two minutes of debate on each question. Additional time may be obtained at the discretion of the chair or by a two-thirds vote of the House. A delegate can speak twice on the same question on the same day but cannot make a second speech on it if any delegate who has not spoken on that question desires the floor. It is out of order to be standing when another delegate has the floor.

8. POINT OF INFORMATION

A delegate who does not understand the question and needs clarification should rise to a “point of information”.

***BOARD
OF TRUSTEES'
REPORTS***

**American Association of Medical Assistants® (AAMA)
Report of the Board of Trustees
For the Period Ending September 2025**

The Board of Trustees (BOT) is entrusted to govern the American Association of Medical Assistants (AAMA) between meetings of the House of Delegates (HOD). The 2024-2025 BOT consists of five officers and six trustees. The two education board chairs and the first vice chairs may attend the BOT meetings with voice but without vote.

The 2024-2025 BOT has met numerous times (in person and virtually) since the 68th AAMA Annual Conference held in Grand Rapids, Michigan.

- AAMA Post Conference Board of Trustees Executive Session/ Maxine Williams Board of Directors/ Board Orientation – Grand Rapids, Michigan – September 23, 2024
- AAMA Virtual Executive Session – October 20, 2024
- AAMA MSC meeting – Chicago, Illinois – November 8, 2024
- AAMA BOT Planning session/ Executive Session – Chicago, Illinois – November 10-11, 2024
- AAMA Virtual MSC meeting – November 20, 2024
- AAMA Virtual MSC meeting – December 15, 2024
- AAMA Virtual Executive Session – December 15, 2024
- AAMA Virtual MSC meeting – January 10, 2025
- Winter Board of Trustees MSC meeting/ Budget and Finance meeting –Chicago, Illinois – February 6, 2025
- Winter Board of Trustees Open and Executive Session – Chicago, Illinois – February 7-8, 2025
- AAMA Virtual MSC meeting – March 9, 2025
- AAMA Virtual Executive Session – March 9, 2025
- Summer Board of Trustees MSC meeting/ Budget and Finance meeting – Reno, Nevada – June 5, 2025
- Summer Board of Trustees Open and Executive Session – Reno, Nevada – June 5-7, 2025
- AAMA Virtual Executive Session – June 29, 2025

The BOT approved the appointments of committee/ strategy teams/ task force chairs, board chairs, and staff liaisons for 2024-2025.

Committee

Annual Conference
Awards
Bylaws and Resolutions
Career Professional Development
Documents
Editorial Advisory
HOD Minutes
Maxine Williams Scholarship
Nominating

Chair

Monica Case, CMA (AAMA)
Shannon Thomas, CMA (AAMA)
Loxie Kistler, CMA (AAMA)
Shirley Sawyer, CMA (AAMA)
Claire Houghton, CMA (AAMA)
Cameron Smith, CMA (AAMA)
Sherry Bogar, CMA (AAMA)
Virginia Thomas, CMA (AAMA)
Monica Case, CMA (AAMA)

49	Social Media	Aimee Quinn, CMA (AAMA)
50	Strategic Issues Planning	Claire Houghton, CMA (AAMA)
51		
52	<u>Strategy Team</u>	<u>Chair</u>
53	Leadership Development	Candy Miller, CMA (AAMA)
54	Marketing	Jane Seelig, CMA-A (AAMA)
55	Membership Development	Pam Neu, CMA (AAMA)
56		
57	<u>Task Force</u>	<u>Chair</u>
58	Advisory Services	Loxie Kistler, CMA (AAMA)
59	Educator Collaborative	Shannon Thomas, CMA (AAMA)
60	Partnership	Monica Case, CMA (AAMA) Co-chair
61		Shirley Sawyer, CMA (AAMA) Co-chair
62		
63	<u>Educational Boards and Councils</u>	<u>Chair</u>
64	Certifying Board	Carolyn Fuller, CMA (AAMA)
65	Continuing Education Board	Sue Hawes, CMA (AAMA)
66	Judicial Council	Patty Licurs, CMA (AAMA)
67		
68	The following represents a partial list of the actions and decisions of the 2024-2025 BOT:	
69	<ul style="list-style-type: none"> Approved appointment of AAMA members and chairs to Continuing Education 	
70	Board (CEB) Task Forces	
71	<ul style="list-style-type: none"> Approved moving the Career Professional Development Committee to the CEB 	
72	<ul style="list-style-type: none"> Approved purchase of booth to the 2025 MGMA Leaders Conference 	
73	<ul style="list-style-type: none"> Approved purchase of booth to the 2025 AMGA Conference 	
74	<ul style="list-style-type: none"> Approved Medical Assistants Recognition Week theme presented by Marketing 	
75	Committee	
76	<ul style="list-style-type: none"> Approved updates to “Appointed Volunteers Policy” 	
77	<ul style="list-style-type: none"> Approved updates to the AAMA Strategic Issues Plan 	
78	<ul style="list-style-type: none"> Approved the creation of Mentoring Ad Hoc and appointments: Shirley Sawyer, 	
79	CMA (AAMA) (chair), Candy Miller, CMA (AAMA), Jane Seelig, CMA-A	
80	(AAMA), Cameron Smith, CMA (AAMA), Loxie Kistler, CMA (AAMA)	
81	<ul style="list-style-type: none"> Approved additional funds required to complete the AAMA Trailblazer wall in 	
82	the AAMA office	
83	<ul style="list-style-type: none"> Approved additional appointments to AAMA committees, strategy teams, and 	
84	task forces	
85	<ul style="list-style-type: none"> Approved 2024-2025 AAMA business cards/ colors 	
86	<ul style="list-style-type: none"> Approved student essay questions presented by Awards Committee 	
87	<ul style="list-style-type: none"> Approved appointment of Loxie Kistler as Chair of Advisory Services Task 	
88	Force	
89	<ul style="list-style-type: none"> Approved BOT Representatives Bureau assignments 	
90	<ul style="list-style-type: none"> Approved the change for Advisory Services Task Force to Advisory Services 	
91	Committee	
92	<ul style="list-style-type: none"> Approved purchase of exhibiting furniture for AAMA exhibiting opportunities 	
93	<ul style="list-style-type: none"> Approved 2025 AAMA Conference logo 	
94	<ul style="list-style-type: none"> Approved the creation of AAMA Educators Facebook group 	
95	<ul style="list-style-type: none"> Approved Membership Development Strategy Team to create focus groups 	
96	<ul style="list-style-type: none"> Approved Leadership Development Strategy Team to create focus groups 	

- Approved providing of extra CEU opportunity in *Medical Assisting Today* with better advertising and data collection
- Approved 2026 Conference Education Committee: Heather Mendy, CMA (AAMA) (Utah) – Chair, Julie Benson, CMA (AAMA) (Oklahoma), Toni Coffman, CMA (AAMA) (New Mexico), Dina Harrett, CMA (AAMA) (Texas)
- Approved 2025 Conference registration fees
- Approved Certifying Board Director Gottwaldt to forward RFP to: Society of Past Presidents, State Society Presidents, Presidents-elect, and Vice Presidents, Advisory Services Committee, Educators Collaborative Task Force, and any other BOT committees, strategy teams, and task forces as appropriate
- Approved updates to AAMA Life Member scoring sheet
- Approved appointment of Shirley Sawyer, CMA (AAMA) to Advisory Services Committee
- Approved 2025 Conference pin/ charm
- Approved documents and PowerPoints presented by the Documents Committee
- Approved Medical Assistants Recognition Week poster
- Approved items to sell in the AAMA Pop-Up shop at the 2025 AAMA Annual Conference
- Approved document presented by Partnership Task Force
- Approved outline presented by Mentoring Ad Hoc Committee
- Approved submission to the House of Delegates of proposed Bylaws amendments and resolution presented by the Bylaws and Resolutions Committee
- Approved AAMA Community Service Project with Department of Human Services of Arlington for the 2025 AAMA Annual Conference
- Approved appointment of Dr. Joseph Perez as Physician Liaison for 2025-2027
- Approved appointment of 2025-2026 CEB chair, vice chair, board members, and task force chairs/ vice chairs
- Approved appointment of 2025-2026 CEB task force members
- Approved BOT Post Conference Executive Session minutes
- Approved BOT virtual meeting minutes
- Approved BOT Planning Session/ Executive Session and Winter BOT Open and Executive Session minutes

The BOT has worked hard for the AAMA membership for the 2024-2025 year. This President is thankful for their dedication, hard work, and time put toward representing the AAMA members. This officer is grateful to have the opportunity to work alongside these dedicated board members. The BOT is appreciative of the challenging work of the Certifying Board and Continuing Education Board, as well as their willingness to collaborate amongst the boards. The BOT is thankful to CEO Balasa, Board Services Manager Sharon Flynn, and the AAMA staff for their dedication and support.

Virginia Thomas, CMA (AAMA)
AAMA President 2024-2025

**American Association of Medical Assistants® (AAMA)
Report of the President
For the Period Ending September 2025**

The AAMA President serves as chair of the Board of Trustees (BOT), Management Steering Committee (MSC), the Budget and Finance Committee, and the Chair of the AAMA Maxine Williams Board of Directors. The President also serves as ex-officio to all boards, committees, strategy teams, and task forces with the exception of the Nominating Committee. The President represents the AAMA at all official functions as needed during their time of office. This officer assumed the duties of President at the close of the House of Delegates (HOD) in Grand Rapids, Michigan on September 21, 2024.

Additionally, this President serves as a member of the AAMA Representatives Bureau.

Representatives Bureau Assignments

- North Carolina Society of Medical Assistants March 27-30, 2025, Village Inne Clemmons, NC – The Annual Conference of the North Carolina State Society of Medical Assistant was held in Clemmons, NC with one hundred eighty-eight (188) registered for the event. There was a student session that was well attended by no less than thirty-five (35) students visiting four (4) fun skills tables in teams of two. Upon completion, each student received a bag with information regarding the NCSMA, AAMA, CMA (AAMA) exam, as well as goodies. Over the two-and-a-half-day conference, there were multiple opportunities for CEUs ranging from Employee Retention and Engagement, Lymphatic Drainage Therapy, Negative Pressure Wound Therapy and the popular Knowledge Bowl, with Friday also serving as the House of Delegates. This representative was asked to serve as timekeeper as well as teller. All concerns brought to this representative were reported to the appropriate staff or committee/ task force/ strategy team chair for further review. This representative was honored to attend this in-person meeting and appreciated the warm and friendly hospitality, as well as meeting students and members.
- Michigan Society of Medical Assistants April 24-27, 2025, Comstock Inn Owosso, MI – The Annual Conference of the Michigan State Society of Medical Assistant was held in Owosso, MI. Friday served as the House of Delegates with forty-three (43) delegates in attendance to conduct the business of the association. Saturday offered a chance for continuing education ranging from fun sessions (Medical Bingo and Bowl of Knowledge) to informative topics on AI Updates, Medical Assistant Burnout, Leadership, and Social Media Impacts. All concerns brought to the attention of this representative were reported to the appropriate staff or committee/ task force/ strategy team chair for further review. This representative was honored to attend this in-person meeting and appreciated the warm and friendly hospitality, as well as meeting members.

Meetings Attended

- In-Person meetings

- AAMA 2024 Annual Conference- Grand Rapids, Michigan, September 19-23, 2024
 - Board of Trustees Pre-HOD Executive Session –September 19, 2024
 - First Timers and Students Reception –September 20, 2024
 - Board of Trustees Open Session Meeting – September 20, 2024

- Board of Trustees Executive Session Reconvene – September 20, 2024
- Welcome and Awards Celebration – September 20, 2024
- 68th AAMA House of Delegates – September 21, 2024
- Meet the Candidates – September 21, 2024
- House of Delegates Reference Committee Hearings: Reports, Bylaws – September 21, 2024
- House of Delegates Reconvene and Voting –September 21, 2024
- AAMA Board of Trustees Meeting with the Society of Past Presidents (SoPPs) – September 22, 2024
- AAMA Knowledge Bowl – September 22, 2024
- AAMA State Leaders Session – September 22, 2024
- AAMA Presidents Banquet – September 22, 2024
- Post Conference Board of Trustees Executive Session/ Orientation/ Maxine Williams Board of Directors Meetings –September 23, 2024
- AAMA 2023-2024 Committees, Strategy Teams, and Task Forces Meet and Greet – September 23, 2024
- MGMA Conference Exhibitor Booth – Denver, Colorado – October 6-8, 2024
 - Session: Legally Allowable Medical Assistant Tasks in Telehealth – Donald Balasa, JD, MBA
 - Session: Leading Transformational Change Through Serving Leadership – Michael O’Connell, MHA, FACHE, FACMPE
- CEB Planning Session – Chicago, Illinois – November 8-9, 2024
- MSC – Chicago, Illinois – November 8, 2024
- BOT Planning Session/ Executive Session – Chicago, Illinois – November 10-11, 2024
- Winter Board of Trustees – February 6-8, 2025 – Chicago, Illinois
 - February 6 – MSC
 - February 7-8 – Board of Trustees
- Winter Continuing Education Board – February 9-10, 2025 – Chicago, Illinois
- Winter Certifying Board – February 22, 2025 – Chicago, Illinois
- MSC Meeting – June 5, 2025 – Reno, Nevada
- Summer Board of Trustees – June 5-7, 2025 – Reno, Nevada
- Summer Continuing Education Board – June 8-9, 2025 – Reno, Nevada
- Summer Certifying Board – July 26, 2025 – Chicago, Illinois
- Occupational Analysis – July 27, 2025 – Chicago, Illinois
- Virtual Meetings
 - Virtual Board of Trustees meetings – October 20, 2024, December 15, 2024, March 9, 2025, June 29, 2025
 - MSC – Virtual Meeting – November 20, 2024, December 15, 2024, January 10, 2025, March 9, 2025, July 21, 2025
 - Committee/ Task Force/ Strategy Team meetings – ex-officio (see report of the chair):
 - Advisory Services
 - Virtual meeting – February 24, 2025
 - Annual Conference Committee
 - Virtual meeting – May 19, 2025

- Bylaws Committee
 - Virtual meeting – November 3, 2024, January 6, 2025
- Documents Committee
 - Virtual meeting – December 16, 2024, January 21, 2025, April 28, 2025
- Educators Collaborative Task Force
 - Virtual meeting – October 24, 2024, January 23, 2025, March 20, 2025, May 22, 2025
- Leadership Development Strategy Team
 - Virtual meetings – October 10, 2024, November 14, 2024, January 16, 2025, February 11, 2025, February 13, 2025, March 5, 2025, March 13, 2025, April 10, 2025, June 12, 2025, June 26, 2025, July 10, 2025
 - Focus group meetings – May 4, 2025, May 6, 2025, May 12, 2025, May 14, 2025, May 15, 2025, May 17, 2025
 - Leadership CEU sessions – December 14, 2024, March 1, 2025, July 12, 2025
- Marketing Strategy Team
 - Virtual meetings – October 17, 2024, October 31, 2024, February 19, 2025, March 19, 2025, April 16, 2025, May 21, 2025, June 18, 2025
- Maxine Williams Scholarship
 - Virtual meetings – January 19, 2025, February 25, 2025, April 29, 2025, May 31, 2025
- Membership Strategy Team
 - Virtual meeting – November 20, 2024, January 22, 2025, February 12, 2025, March 12, 2025, June 25, 2025, July 23, 2025
 - Focus group meetings – May 27, 2025, May 28, 2025, July 14, 2025, July 15, 2025, July 16, 2025, July 17, 2025
- Mentoring Ad Hoc Committee
 - Virtual meeting – January 26, 2025, February 20, 2025, May 5, 2025
- Partnership Task Force
 - Virtual meetings – December 30, 2024, March 4, 2025, May 8, 2025
- Social Media Committee
 - Virtual meeting – November 21, 2024, January 23, 2025, February 27, 2025, April 24, 2025, May 22, 2025
- Strategic Issues Planning Committee
 - Virtual Meeting – November 5, 2024 (meeting with Chair Houghton and Immediate Past President Case only)
- CEB – Virtual Meeting – January 25, 2025, April 14, 2025, May 17, 2025, July 20, 2025
- Conference Planner Kathy Basel and Immediate Past President Case – March 16, 2025, July 6, 2025
- Follow up discussion regarding AMGA Conference exhibiting – April 9, 2025
- AMGA Connections – May 19, 2025, May 22, 2025
- Informational Meeting with Michael Knight and Don Balasa – June 1, 2025
- Meeting with Immediate Past President Case and Society of Past Presidents Regent Rebecca Walker – June 11, 2025
- BOT meeting with Dr. Joseph Perez – June 19, 2025
- Meeting with Continuing Education Board Chair Sue Hawes and BOT – July 1, 2025

- Conference meeting with staff – July 15, 2025

Committee Appointments

- All volunteer leadership forms were reviewed by this President and Immediate Past President Case the evening prior to the post conference BOT meeting. Appointments were presented to the BOT and approved. Any volunteer leadership forms received after the post conference BOT meeting were reviewed and an e-vote or in person vote was conducted. Appointment letters were completed and emailed.

Post Conference BOT Meeting

- This President presided at the Post Conference Board of Trustees Executive Meeting. IT Consultant Michael Knight completed the newly elected Trustees Microsoft Teams setup and email addresses. Mr. Knight presented updates on the current AAMA website. Mr. Knight also presented updates for the restructuring and building of a new AAMA website.
- This officer presented and the Board of Trustees approved appointments of chairs and members of committees, strategy teams, and task forces. This President tasked the 2023-2024 chairs to upload all information from their term into Teams for the 2024-2025 chairs to access. The newly appointed chairs should contact the 2023-2024 chairs and discuss the status of pending projects. Pending projects need to be followed through and completed. A brief orientation and BOT packet was given to all members of the BOT, and documents were discussed by Board Services Manager Sharon Flynn and CEO Balasa. These documents were completed, signed, and returned to Ms. Flynn. All BOT members were to be familiar with the documents prior to the BOT planning session.
- CEO/ Legal Counsel Balasa discussed the importance of confidentiality among the BOT members and the Conflict-of-Interest document and Confidentiality Policy Agreement to be signed by each BOT members yearly.
- This officer announced the BOT Planning Session dates were November 10-11, 2024, in Chicago, Illinois. More information will be sent by email. This officer assigned each BOT member a task in the time before the committee meet and greet. All trustees were encouraged to have lunch together to give new trustees information on what to expect in the coming year as a new trustee. Immediate Past President Case was asked to have lunch with the newly elected Speaker and Vice Speaker of the House of Delegates as a previous Speaker and Vice Speaker to provide them with information on the positions. This officer met with the newly elected Secretary to go over the new procedure for all virtual meeting minutes. Any new and unfinished business was reviewed and addressed as needed.

2024-2025 AAMA Committee Members Meet and Greet

- This officer welcomed everyone in attendance. Committee, Strategy Team, and Task Force chairs introduced themselves. Time was allotted for each committee to meet, the chairs to cover the charge of the committee, strategy team, or task force, and exchange ideas and comments about the work ahead. This meeting was well attended and informative.

MGMA (Medical Group Management Association) Conference Exhibitor – Denver, Colorado, - October 6-8, 2024

- This President, along with CEO Balasa, Immediate Past President Case, Secretary Kistler, 2022-2023 AAMA President Novak, Board Services Manager Sharon Flynn, and Social Media Manager Felicia Eldridge, staffed the AAMA's booth during this

conference. With over 3,000 attendees, the booth had a good amount of traffic. This officer was available to attendees to answer questions about the AAMA, State Societies, AAMA products for their employees to grow their knowledge. 2022-2023 AAMA President Novak and Secretary Kistler were available to attendees as well regarding Advisory Services. This officer attended a presentation by CEO Balasa entitled Legally Allowable Medical Assistant Tasks in Telehealth and a session by Michael O'Connell entitled Leading Transformational Change through Serving Leadership. Ms. Eldridge recorded a short video for each MSC member wishing all AAMA members a Happy Medical Assistants Week.

AAMA BOT – Virtual Meeting- October 20, 2024

- This was a virtual BOT meeting. Agenda items for discussion: update for new AAMA website and testing, MGMA, a petition submitted by a member, committee/ strategy team/ task force updates for: Social Media, Bylaws, Leadership, Educators Collaborative, Marketing, Membership, Career Profession Development proposal from the CEB, and Mentoring Ad Hoc.

Continuing Education Borad (CEB) Planning Session – Chicago, Illinois – November 8-9, 2024

- As AAMA President and Ex Officio, this officer attended the CEB Planning session held in Chicago, Illinois. This was a very productive meeting, including a mini-SWOT (Strengths/ Weaknesses/ Opportunities/ Threats) to create a Strategic Issues Plan for the CEB. Chair Hawes presented to the members of the CEB a discussion with this officer and Immediate Past President Case asking to consider moving Career Professional Development to the CEB. This officer was also requested to ask the Editorial Advisory Committee to provide more administrative topics. Please see the report of CEB Chair Sue Hawes, CMA (AAMA).

BOT Planning Session/ Executive Session – Chicago, Illinois – November 10-11, 2024

- This President presided during the BOT planning session. An orientation session was conducted, as well as a presentation by CEO Balasa. CEO Balasa provided a financial update.
- IT Consultant Michael Knight presented information about the new AAMA website that was less than a week from release to the AAMA membership.
- The Strategic Issues Committee, with assistance from CEB Chair Sue Hawes, held a mini-SWOT to assess the current Strategic Issues Plan to assure the committee and BOT are on target or if there are new items that need to be addressed or old items that could be removed or edited.
- Committee, Strategy Team, and Task Force chairs were given an opportunity to meet with staff liaisons and any available committee members to discuss projects.
- The BOT approved the following:
 - Approved appointment of Terry Slinker to the Practice Managers Task Force
 - Approved the moving of the Career Professional Development to the CEB
 - Approved the appointment of Deb Novak as chair, Linda Vitzthem as Vice Chair, and Shirley Sawyer as BOT representative of the CPDTF (Career Professional Development Task Force)

- 376 ○ Approved purchase of Peninsula Booth for 2025 MGMA and have staff research
- 377 rental of furniture vs. purchase of furniture for booth
- 378 ○ Approved purchase of 10x20 booth with four badges for AMGA
- 379 ○ Approved appointment of Julie Benson to Educators Collaborative Task Force
- 380 and Membership Strategy Team
- 381 ○ Approved Medical Assistant Recognition Week theme presented by Marketing
- 382 Committee – Medical Assistants: Valued Champions of Healthcare
- 383 ○ Approved Appointed Volunteers Policy presented by the Documents Committee
- 384 ○ Approved the updated Strategic Issues Plan presented by the Strategic Issues
- 385 Committee
- 386 ○ Approved the creation of Mentoring Ad Hoc and the following appointments:
- 387 Shirley Sawyer (Chair), Candy Miller, Jane Seelig, Cameron Smith, and Loxie
- 388 Kistler
- 389 ○ Any new and unfinished business was reviewed and addressed as needed.

390

391 AAMA BOT -Virtual Meeting- December 15, 2024

- 392 • This was a virtual BOT meeting. Agenda items for discussion: Senior Director of
- 393 Marketing and Communications Gina Mokijewski and Director of Special Projects Fred
- 394 Lenhoff presented information regarding pricing for podcast editing, CEO Balasa
- 395 reviewed the AAMA audit, additional funds required to complete the AAMA Trailblazer
- 396 wall in the AAMA office (approved), updates from committee, strategy team, task force
- 397 chairs: Annual Conference, Bylaws, Leadership.

398

399 E-Votes (prior to Winter BOT meeting)

- 400 • September 28, 2024 – appointments to Membership, Educators Collaborative,
- 401 Leadership, and Social Media – approved
- 402 • September 28, 2024 – appointments to CEB, LEAP Vice Chair, PMTF Chair and CCETF
- 403 member – approved
- 404 • October 5, 2024 – appointments to Social Media and Marketing and removal from
- 405 Marketing – approved
- 406 • October 10, 2024 – AAMA Business Cards/ colors – approved
- 407 • January 18, 2025 – Student Essay Question presented by Awards Committee – approved
- 408 • February 5, 2025 – appoint Loxie Kistler as Chair of Advisory Services Task Force –
- 409 approved.

410

411 AAMA Winter BOT meeting – Chicago, Illinois – February 7-8, 2025

- 412 • The winter BOT open session had members in attendance from seven (7) state societies.
- 413 • Director of Continuing Education and Membership Mickowski reported that as of
- 414 January 31, 2025, there are 14, 771 total members.
- 415 • Senior Director of Marketing and Communications Mokijewski reported on the volunteer
- 416 leadership support through January 2025.
- 417 • Information Technology Consultant Knight gave a report on the status of the AAMA
- 418 website and ongoing projects that are marked as priority by BOT, CEB, CB, and staff.
- 419 • Director of Certification Gottwaldt reported a total of 69,570 CMAs (AAMA) as of
- 420 January 16, 2025.

- The BOT approved by consensus to change the name from Advisory Service Task Force to Advisory Service Committee.
- The following is a list of the 2025 Representative Bureau Assignments:
 - South Carolina – March 14-16, 2025 – Anderson, SC – Aimee Quinn
 - North Carolina – March 28-30, 2025 – Clemmons, NC – Virginia Thomas
 - Idaho – April 4-6, 2025 – Idaho Falls, ID – Monica Case
 - Indiana – April 4-6, 2025 – Edinburg, IN – Shannon Thomas
 - Ohio – April 4-6, 2025 – Perrysburg, OH – Shirley Sawyer
 - Virginia – April 5, 2025 – Virtual – Claire Houghton
 - Alabama – April 11-13, 2025 – Virtual – Jane Seelig
 - Oregon – April 11-13, 2025 – Portland, OR – Cameron Smith
 - Wisconsin – April 11-13, 2025 – Pewaukee, WI – Loxie Kistler
 - New York – April 23, 2025 – Virtual – Candy Miller
 - Florida – April 25-27, 2025 – Orlando, FL – Claire Houghton
 - Michigan – April 25-27, 2025 – Owosso, MI – Virginia Thomas
 - Missouri – April 25-27, 2025 – Springfield, MO – Loxie Kistler
 - Montana – April 25-27, 2025 – Great Falls, MT – Jane Seelig
 - Nebraska – April 25-27, 2025 – Grand Island, NE – Pam Neu
 - New Hampshire – May 2-4, 2025 – Virtual – Cameron Smith
 - Washington – May 2-4, 2025 – Everett, WA – Monica Case
 - Maine – October 18, 2025 – Bangor, ME – Candy Miller
- A suggestion by the BOT for the CB would be to conduct focus groups to see why medical assistants are not recertifying (passed to CB Chair Fuller).
- BOT approved the purchase of the following exhibiting furniture for exhibiting opportunities: one (1) additional pull up display, lights for the large backdrop, two (2) tablecloths in varying styles/colors.

CEB Winter Meeting – Chicago, Illinois – February 9-10, 2025

- This President attended the winter meeting of the CEB and presented updates from the winter BOT meeting – approval of the 2025 AAMA Conference logo, student essay question approved, Maxine Williams Scholarship committee beginning work on the application and scoring rubric for Maxine Williams Scholarship in honor of Crystal Coleman, CMA (AAMA), BOT approved the name change of the Advisory Service Task Force to Advisory Service Committee, Educators Collaborative created and launched a Facebook group dedicated to educators. The Membership Development Strategy Team would like to ask for CEB to approve one (1) possible CEU for all focus group participants. An email with the three (3) suggested topics for CEB to select one (1) will be sent to Chair Hawes. CEB approved the ADHD can be offered to all participants of the focus group to take for one (1) CEU free. CEB approved the 2026 Annual Conference Education Committee and will email President Thomas for BOT e-vote. Please see the report of CEB Chair Sue Hawes, CMA (AAMA).

Resignation of Secretary Kistler – February 10, 2025

- This President and the Management Steering Committee (MSC) received the resignation notification of AAMA Secretary Kistler on February 10, 2025, to be effective at the close of the 2025 House of Delegates in Arlington, Virginia. A memo was emailed notifying

the 2024-2025 House of Delegates and Alternate Delegates, State Society Presidents, Vice Presidents, and Presidents elect, the Society of Past Presidents, and the BOT.

Certifying Board Winter (CB) Meeting – February 22, 2025

- This President attended the winter meeting of the CB and presented updates from the winter BOT meeting to CB members (see above from winter BOT and CEB meetings). Chair Fuller asked the BOT to consider allowing a member of the CB to be appointed to the Strategic Issues Planning Committee to be a part of conversations regarding the credential. This President will take back to the BOT for discussion and report to Chair Fuller. The PowerPoint for Representative Bureau assignments will be sent to Director Gottwaldt for review of CB slides for accuracy of information and updates. Please see the report of CB Chair Carolyn Fuller, CMA (AAMA).

AAMA BOT – Virtual Meeting- March 9, 2025

- This was a virtual BOT meeting. Agenda items for discussion: update from CEO Balasa; update from President Thomas; BOT approved to extend the extra CEU opportunity with better advertising and data collection; CB would be interested in being part of the strategic issues plan, updates from committee, strategy team, and task force chairs: Annual Conference; HOD update: Speaker of the House Seelig and Vice Speaker of the House Houghton.

E-Votes (prior to summer BOT meeting)

- February 17, 2025 – appointment of the 2026 Conference Education Committee: Heather Mendy – Chair (Utah), Julie Benson (Oklahoma), Toni Coffman (New Mexico), Dina Harrett (Texas) – approved.
- February 25, 2025 – 2025 Conference registration fees – approved.
- March 24, 2025 – request from CB Director Gottwaldt to forward RFP to the following individuals: Society of Past Presidents, State Society Presidents, Presidents-elect, and Vice Presidents, Advisory Committee, Educator Collaborative Task Force, and any other BOT committees/ strategy teams/ task forces as appropriate – approved.
- May 30, 2025 – updated AAMA Life member scoring sheet – approved.

Additional Representative Bureau Assignments

- This President received a request from the Southwest Region for a representative for their regional meeting July 18-20, 2025, in Salt Lake City, Utah. Immediate Past President Case was requested and will be in attendance.

Maxine Williams Board of Director – Reno, Nevada – June 5, 2025

- Approved Maxine Williams Scholarship in Honor of Crystal Coleman, CMA (AAMA) application.
- Approved Maxine Williams Scholarship in Honor of Crystal Coleman, CMA (AAMA) scoring rubric.
- Approved for eight (8) or the last thirteen (13) scholarship winners that did not receive their one (1) year AAMA membership to be contacted by staff. Staff also will create a workflow for the future.

AAMA Summer BOT meeting – Reno, Nevada – June 6-7, 2025

- Director of Membership Mickowski reported total number of members as of May 30, 2025 – 17,847.
- Information Technology Consultant Knight reported ABR-OE (Assessment Based Recognition- Order Entry) testing will begin the following week. Members can now see the total number of CEUs (continuing education units). CEUs are also broken down by category. A digital vendor has been identified. States and chapters can see the total number of members in each state and chapter roster.
- Speaker of the HOD Seelig reported there will be an HOD tab under the conference tab for easy access to all documents and information.
- Annual Conference Committee Chair Case reported two hundred six (206) currently registered for the annual conference (twelve (12) more than 2024 at this time).
- The Maxine Williams Scholarship Committee announced the winners of the 2025 scholarship. Each winner will receive a \$2,000 scholarship. See the report of the Maxine Williams Scholarship Committee Chair for a list of winners, school, and city/state.
- Nominating Chair Case reported the open positions for the 2025-2026 BOT and provided the slate of candidates. Chair Case noted the deadline to run from the floor is August 20, 2025. Virtual Meet the Candidates dates/ times were presented. See the report of the Nominating Committee Chair for the slate of candidates and Meet the Candidates dates/times.
- Leadership Development Strategy Team Chair Miller announced the Leadership Focus Groups have completed and the focus group team met to discuss the results. Chair Miller will review and share with the strategy team so plans can begin for the State Leaders Session,
- Membership Strategy Team Chair Neu reported the team has begun their focus groups.
- Five (5) bids for the 2027 AAMA Annual Conference have been received. Kathy Basel will begin to send the requests for proposals (RFPs).
- BOT will be meeting with a possible Provider Liaison mid-June.
- AAMA will be exhibiting at the 2025 MGMA Conference September 28-October 1, 2025, in Orlando, Florida.
- The following were approved:
 - 2025 AAMA Conference pin/charm design
 - Documents Committee: Representative Bureau Manual, Membership Manual, Guidelines on submitting a resolution to the AAMA House of Delegates, Membership Recruitment and Retention PowerPoint, Creating labels from Excel to Word, and Membership Matters PowerPoint.
 - Marketing Committee: Medical Assistant Recognition Week (MARWeek) poster, items for AAMA pop-up store at AAMA Annual Conference: AAMA bling pin (\$20 each) and AAMA iron-on patch (\$5 each). PowerPoint “Why Hire a Credentialed Medical Assistant” for states, chapters, and AAMA use while presenting at meetings outside of the AAMA, state, or chapter organization. Partnership Task Force: document “Campaign Outline Suggestions.”
 - Ad Hoc Mentoring Committee – outline approved.
 - Bylaws and Resolutions Committee – Resolution and bylaws for 2025 HOD.

CEB Summer Meeting – Reno, Nevada – June 8-9, 2025

- This President attended the summer meeting of the CEB and presented updates from the summer BOT meeting (reference previous section for complete list). CEB discussed

reappointments/ appointments to the CEB, as well as chairs/ vice chairs for: CEB, Leaders in Education and Practice (LEAP) Task Force, and Conference Continuing Education Task Force (CCETF). A list will be sent to this President to present to the BOT for approval after discussion. Please see the report of CEB Chair Sue Hawes, CMA (AAMA).

Meeting with Society of Past Presidents (SoPPs) Regent Walker and Immediate Past President Case – June 11, 2025

- This President reached out to Regent Walker after discussion with Immediate Past President Case to discuss collecting funds for the new Maxine Williams Scholarship in Honor of Crystal Coleman, CMA (AAMA) and a request for the SoPPs to assist with spreading word about the new scholarship at the AAMA Annual Conference. A QR code will be created and will be shared with Regent Walker to share with the SoPPs.

Meeting with Dr. Joseph Perez – June 19, 2025

- The BOT met with potential Physician Liaison candidate. Questions were asked by both BOT members as well as Dr. Perez of the board and CEO Balasa. Dr. Perez is extremely interested in the AAMA and becoming more involved.

AAMA BOT – Virtual meeting – June 29, 2025

- This was a virtual meeting. The following updates were presented: AAMA will begin doing a yearly community service project to benefit the community where the conference is being held (approved by consensus); Senior Director of Marketing and Communications Mokijewski, Director of Continuing Education and Membership Mickowski, and Information Technology Consultant Knight attended to discuss membership benefits and suggestions. BOT to review all information shared for the next virtual meeting to discuss and vote.

Resignation of Secretary Kistler – July 21, 2025

- This President and the Management Steering Committee (MSC) received the resignation notification of AAMA Secretary Kistler on July 21, 2025, to be effective immediately. This President sent two e-votes to the BOT for appointment of interim chairs for the Bylaws and Resolutions Committee and the Advisory Services Committee. Trustee Cameron Smith was elected interim Chair of the Bylaws and Resolutions Committee. President Virginia Thomas and Immediate Past President Case were elected Co-Chairs of the Advisory Services Committee. A memo was emailed notifying the 2024-2025 House of Delegates and Alternate Delegates, State Society Presidents, Vice Presidents, and Presidents elect, the Society of Past Presidents, and the BOT.

CB Summer Meeting – July 26, 2025

- This President attended the summer meeting of the CB. There was great discussion that will be taken back to discuss with the BOT, CEB, and AAMA staff. Please see the report of CB Chair Carolyn Fuller, CMA (AAMA)

Occupational Analysis (OA) – July 27, 2025

- This President attended the second session of OA by invitation of CB Chair Fuller. There were ten (10) subject matter experts (SMEs) in attendance. There were eight hundred

fifty-one (851) responses to the survey. This President would like to thank Chair Fuller for the invitation to the OA.

E-Votes (prior to AAMA Annual Conference)

- Appointment of Dr. Joseph Perez as Physician Liaison – approved.
- Appointments for the CEB: Reappointments to the CEB: Clare Ley, Brian Stimpson, Linda Vitzthum, Francie Mooney. LEAP Chair: Francie Mooney, CCETF Chair: Brian Stimpson, CCETF Vice Chair: Summer O’Neal. CEB Chair: Sue Hawes, CEB Vice Chair: Clare Ley. PMTF member (2025-2026): Mary Worden.

MSC Calls or Meetings

- There were MSC in-person or virtual meetings throughout the year, as necessary. All information was shared before or during the next BOT virtual or in-person meeting.

This officer has participated in meetings with Immediate Past President Case to review and discuss updates, status of projects, information, representative assignments, and the representative assignment packet/documents for 2025.

This officer has also remained available to the MSC, members of the Board of Trustees, AAMA CEO Balasa, AAMA Staff Directors/ Managers and all AAMA members.

All correspondence and communications have been responded to in a timely manner.

This officer would like to thank CEO and Legal Counsel Donald Balasa, JD, MBA, for his availability and support. This officer would also like to thank Board Services Manager Sharon Flynn and all AAMA staff for their willingness to support the efforts and ideas of the entire Board of Trustees. This officer would like to thank Immediate Past President Case for her availability to discuss concerns/ questions and for guidance in decision making. This officer thanks the Board of Trustees for their dedication to the AAMA, the profession of medical assisting and the AAMA membership. Lastly, this office would like to thank the AAMA membership for their support throughout the year. We are all stronger together.

Virginia Thomas, CMA (AAMA)
AAMA President 2024-2025

American Association of Medical Assistants® (AAMA)
Report of the Immediate Past President
For the Period Ending September 2025

The duties of the Immediate Past President are as follows:

- Serve as member of the Board of Trustees
- Serves as a member of the Management Steering Committee (MSC)
- Serves as a member of the Budget and Finance Committee
- Serves as a member of the Maxine Williams Board of Directors
- Serve as a member of the AAMA Representatives Bureau
- Serves as Chair of the Nominating Committee
- Serves as Chair of the Annual Conference Committee

Additionally, this officer was appointed to serve on the following:

- Partnership Task Force- Chair
- Advisory Task Force- Member
- Awards Committee- Member
- CASAT-FASD- Member
- Maxine Williams Scholarship Fund- Member
- Ad Hoc Committee Mentoring- Member

MEETINGS ATTENDED:

AAMA 2024 Annual Conference- Grand Rapids, Michigan- September 20-23, 2024

- AAMA Board of Trustees Pre-HOD Executive Session- September 19, 2024
- First Timers and Students Reception –September 20, 2024
- AAMA Board of Trustees Open Session Meeting – September 20, 2024
- AAMA Board of Trustees Executive Session Reconvene – September 20, 2024
- Welcome and Awards Celebration – September 20, 2024
- AAMA 68th House of Delegates – September 21, 2024
- Meet the Candidates – September 21, 2024
- House of Delegates Reference Committee Hearings: Reports, Bylaws –September 21, 2024
- House of Delegates Reconvene and Voting –September 21, 2024
- AAMA Board of Trustees Meeting with the Society of Past Presidents (SoPPs) – September 22, 2024
- General Session Knowledge Bowl –September 22, 2024
- AAMA State Leaders Session – September 22, 2024
- AAMA Presidents Banquet – September 22, 2024
- AAMA Post Conference Board of Trustees Executive Session/ Maxine Williams Scholarship Fund Board of Directors Meetings –September 23, 2024
- AAMA 2024-2025 Committees, Strategy Teams, and Task Forces Meet and Greet –September 23, 2024
- MGMA Leadership Conference Exhibitor Booth- Denver Colorado- October 6-10, 2024
- BOT- Virtual Meeting- October 20, 2024
- CEB Planning Session- Chicago, Illinois- November 8-9, 2024
- MSC meeting- Chicago, Illinois- November 8, 2024
- BOT Planning Session/Executive Session- Chicago, Illinois- November 10-11, 2024

- 691 • Leadership Development Strategy Team- Virtual Meeting- November 14, 2024
- 692 • NCCRT Annual Conference- Dallas, Texas- November 20-22, 2024
- 693 • MSC – Virtual Meeting – November 20, 2024
- 694 • Marketing Strategy Team -Virtual Meeting- November 20, 2024
- 695 • Annual Conference Committee- Virtual Meeting- December 11, 2024
- 696 • Leadership Development Strategy Team CEU session- Virtual- December 14, 2024
- 697 • MSC-Virtual Meeting- December 15, 2024
- 698 • BOT-Virtual Meeting- December 15, 2024
- 699 • Documents Committee- Virtual Meeting-December 16, 2024
- 700 • Partnership Task Force- Virtual Meeting- December 30, 2025
- 701 • Partnership Chair, Liaisons, and MarCom- Virtual Meeting – January 3, 2025
- 702 • Bylaws and Resolution Committee- Virtual Meeting- January 6, 2025
- 703 • Exact Sciences, Flynn -Virtual Meeting- January 10, 2025
- 704 • MSC-Virtual Meeting- January 10, 2025
- 705 • Partnership Task Force- Virtual Meeting- January 13, 2025
- 706 • Marketing Development Strategy Team- Virtual Meeting- January 15, 2025
- 707 • Maxine Williams Scholarship-Virtual Meeting- January 19, 2025
- 708 • Partnership Task Force- Virtual Meeting -January 20, 2025
- 709 • Document Committee- Virtual Meeting- January 21, 2025
- 710 • Membership Committee- Virtual Meeting- January 22, 2025
- 711 • Ad Hoc Mentoring Committee- Virtual Meeting- January 26, 2025
- 712 • BOT Winter Meeting- February 6-8, 2025- Chicago, Illinois
- 713 • MSC Meeting- February 6, 2025- Chicago, Illinois
- 714 • CEB Winter Meeting- February 9-10, 2025- Chicago, Illinois
- 715 • Membership Strategy Team Virtual Meeting- February 12, 2025
- 716 • Leadership Development Strategy Team Virtual Meeting- February 13, 2025
- 717 • Marketing Strategy Team Virtual Meeting- February 19, 2025
- 718 • Ad Hoc Mentoring Committee Virtual Meeting- February 20, 2025
- 719 • CB Winter Meeting- February 22, 2025- Chicago, Illinois
- 720 • Nominating Committee Virtual Meeting- February 23, 2025
- 721 • Advisory Services Virtual Meeting- February 24, 2025
- 722 • Maxine Williams Virtual Meeting- February 25, 2025
- 723 • AAMA Staff, Dr. Perez Virtual Meeting- February 27, 2025
- 724 • Leadership CEU Session Virtual- March 1, 2025
- 725 • Partnership Task Force Virtual Meeting- March 4, 2025
- 726 • Leadership Development Strategy Team Focus Group Discussion Virtual Meeting-
- 727 March 5, 2025
- 728 • MSC Virtual Meeting- March 9, 2025
- 729 • BOT Virtual Meeting- March 9, 2025
- 730 • Board Services Manager Flynn/ Dr. Perez Virtual Meeting- March 12, 2025
- 731 • Project C.U.R.E/ Board Services Manager Flynn Virtual Meeting- March 12, 2025
- 732 • Membership Strategy Team Virtual Meeting- March 12, 2025
- 733 • Leadership Development Strategy Team Virtual Meeting- March 13, 2025
- 734 • Conference Planner Basel/ President Thomas Virtual Meeting- March 16, 2025
- 735 • Marketing Strategy Team Virtual Meeting- March 19, 2025
- 736 • AMGA Annual Conference AAMA Exhibiting- Grapevine, Texas- March 26-29, 2025
- 737 • AAMA Annual Conference 2025 Staff and President Thomas Virtual Meeting- April 2, 2025
- 738 • Idaho State Society Annual Conference – Idaho Falls, Idaho- April 4-6, 2025
- 739 • AMGA Exhibiting Follow up Virtual Meeting- April 9, 2025

- Leadership Develop Strategy Team Virtual Meeting April 10, 2025
- MSC/ CEO Balasa/ Board Services Manager Flynn Virtual Meeting- April 16, 2025
- Marketing Strategy Team Virtual Meeting- April 16, 2025
- CEB Virtual Meeting- April 19, 2025
- AAMA Staff- Mickowski, Mokijewski/ Board Services Flynn/CEO Balasa (SUN Bus discussion) Virtual Meeting- April 22, 2025
- Documents Committee Virtual Meeting- April 28, 2025
- Board Services Manager Flynn (Exact Sciences/ Project C.U.R.E) Virtual Meeting- April 29, 2025
- Maxine Williams Scholarship Virtual Meeting- April 29, 2025
- Washington State Society Annual Conference- May 2-4, 2025
- Ad Hoc Mentoring Committee Virtual Meeting- May 5, 2025
- Leadership Development Strategy Team Focus Group Virtual Meeting- May 6, 2025
- Partnership Task Force Virtual Meeting- May 8, 2025
- Leadership Development Strategy Team Focus Group Virtual Meeting- May 12, 2025, May 14, 2025, May 15, 2025, and May 17, 2025
- CEB Virtual Meeting- May 17, 2025
- AMGA Connections Virtual Meeting- May 19, 2025
- Annual Conference Committee Meeting- May 19, 2025
- Conference 2026- Education Committee/ CCETF Chair Ley Virtual Meeting- May 21, 2025
- AMGA Connections Virtual Meeting- May 22, 2025
- Nominating Committee Virtual Meeting- May 22, 2025
- Nominating Committee Conference Call- May 25, 2025
- Membership Strategy Team Focus Group Virtual Meetings- May 27, 2025, May 28, 2025,
- July 14, 2025, July 15, 2025, July 16, 2025, July 17, 2025
- Maxine Williams Scholarship Virtual Meeting- May 31, 2025
- MSC Meeting – June 5, 2025 – Reno, Nevada
- BOT Summer Meeting -Reno, Nevada- June 5-7-2025
- CEB Summer Meeting -Reno, Nevada- June 8-9, 2025
- Meeting with President Thomas and Society of Past Presidents Regent Rebecca Walker – June 11, 2025
- Leadership Development Strategy Team Virtual Meeting- June 12, 2025
- Leadership Development Strategy Team Virtual Meeting- June 16, 2025
- Marketing Strategy Team Virtual Meeting- June 18, 2025
- BOT meeting with Dr. Joseph Perez – June 19, 2025
- Membership Strategy Team Virtual Meeting- June 25, 2025
- BOT Virtual Meeting- June 29, 2025
- Conference Planner Basel/ President Thomas Virtual Meeting- July 6, 2025
- Leadership Development Strategy Team Virtual Meeting- July 10, 2025
- Leadership CEU Session- July 12, 2025
- Conference meeting with staff – July 15, 2025
- Southwest Regional Meeting- Salt Lake City, Utah- July 18-20, 2025
- Membership Strategy Team Virtual Meeting- July 23, 2025
- Marketing Strategy Team Virtual Meeting- July 24, 2025
- MSC Virtual Meeting- July 21, 2025
- CB Summer Meeting- Chicago, Illinois- July 26, 2025
- Occupational Analysis -Chicago, Illinois- July 27, 2025

COMMITTEE/STRATEGY TEAM ASSIGNMENTS AT THE TIME OF THIS REPORT:

- 790 • Annual Conference Committee- See separate report
- 791 • Nominating Committee- See separate report
- 792 • Partnership Task Force- See separate report
- 793 • Advisory Task Force-
 - 794 ○ Received email updates
 - 795 ○ Assigned a survey- Completed
 - 796 ○ Participated in task force name change- Completed
 - 797 ○ All assignments are completed
 - 798 ○ Refer to the report of the chair
- 799 • Awards Committee-
 - 800 ○ Met with chair and committee members during the BOT Planning Session
 - 801 ○ Discussed the Welcome and Awards Theme and the Student Essay
 - 802 Question
 - 803 ○ Assigned to send suggestions for the Welcome and Awards Theme
 - 804 ○ Assigned to send suggestions for the Student Essay Questions
 - 805 ○ Voted on the final Welcome and Awards Theme and the Student Essay
 - 806 Question
 - 807 ○ Gave feedback for Welcome and Awards Music
 - 808 ○ Participated in all emails
 - 809 ○ Judging of Awards in process at time of this report
 - 810 ○ All assignments are completed
 - 811 ○ Refer to the report of the chair
- 812 • Maxine Williams Scholarship Fund-
 - 813 ○ This member participated in emails
 - 814 ○ Assigned to review the changes of the application and scoring rubric
 - 815 ○ Attended virtual meeting and participated in discussions
 - 816 ○ Assigned for the Maxine Williams Scholarship in Honor of Crystal
 - 817 Coleman, CMA (AAMA) to review the Maxine Williams application to be
 - 818 repurposed
 - 819 Send suggestions to create an application for this scholarship- In progress
 - 820 ○ Participated in the application creation and process for the Maxine
 - 821 Williams Scholarship in Honor of Crystal Coleman, CMA (AAMA)
 - 822 Approved the application
 - 823 Discussed the application deadline and suggestions for the scoring rubric
 - 824 and approved
 - 825 ○ Assigned 16 Maxine Williams Scholarship applications for review
 - 826 ○ All assignments are completed
 - 827 ○ Refer to the report of the chair
- 828 • Ad Hoc Committee Mentoring-
 - 829 ○ Received email with documents to be reviewed for virtual meeting
 - 830 ○ Attended virtual meeting and participated in discussions relating to work ahead
 - 831 ○ Assigned to send to chair various categories for leadership by February 15, 2025
 - 832 ○ Assigned to participate and include feedback for created documents in the
 - 833 team's folder
 - 834 ○ Assigned to prepare ideas for objectives and outline
 - 835 ○ Gave feedback and approved name of outline
 - 836 ○ Participated in outline revisions and approved document
 - 837 ○ Refer to the report of the chair

838
839 **ADDITIONAL MEETINGS ATTENDED:**

840 **CASAT-FASD- Medical Assistant Partnership for Healthy Pregnancies and Families**
841 **Steering Committee (MAP)-Virtual Meeting- January 22, 2025**

842 As a steering committee member, this officer attended this virtual meeting.

843
844 An overview of MAP's two- and three-year activities were discussed. To mention a few,
845 the AAMA current CEU training courses on the AAMA eLearning Center included the
846 following updates.

847 Current CEU trainings on AAMA e-Learning Center

- 848 E. Engaging Conversation: A Motivational Interviewing Approach – 8,402 completions
849 2 Women and Alcohol: Prevalence, Trends, and Preventing Alcohol-Related
850 Harm – 7,092 completions
851 3. Understanding the Opioid Overdose Crisis: How Medical Assistants Can Help
852 Patients – 9,677 completions
853 4. What Medical Assistants Need to Know about Opioid Use Disorders and
854 Pregnancy in 2024 – 4,586 completions
855 5. FASD Awareness: OBGYNs and Medical Assistants Collaborating to Make a
856 Difference – 1,920 completions

857
858 **CASAT-FASD- Medical Assistant Partnership for Healthy Pregnancies and Families**
859 **Steering Committee (MAP)-Virtual Meeting- July 22, 2025**

860 As a steering committee member, this officer attended this virtual meeting

861
862 MAP year three activities were discussed. To mention a few, the current CEU training on
863 the AAMA e-Learning Center included the following:

- 864 1. Women and Alcohol: Prevalence, Trends, and Preventing Alcohol-Related
865 Harm
866 2. Understanding the Opioid Overdose Crisis: How Medical Assistants Can Help
867 Patients
868 3. What Medical Assistants Need to Know about Opioid Use Disorders and
869 Pregnancy in 2024
870 4. FASD Awareness: OBGYNs and Medical Assistants Collaborating to Make a
871 Difference

872
873 The FASD MAP members will attend the AAMA Conference in September 2025 and
874 will be exhibiting. Dr. Gonzalez will be presenting a CEU session on Ethical
875 Considerations and Effective Strategies for Preventing Excessive Alcohol Use. The next
876 MAP virtual meeting is anticipated for January 2026.

877
878 **Medical Group Management Association (MGMA) Leadership Conference Exhibitor**
879 **Booth- Denver Colorado- October 6-10, 2024**

880 This officer assisted CEO Donald Balasa, President Thomas, Secretary Kistler, Advisory
881 Services Representative Novak, Board Services Manager Sharon Flynn, and Social
882 Media Manager Eldridge in setting up and staffing the AAMA booth. The conference
883 attracted over 1,300 attendees, with more than 500 visiting the exhibiting hall. As in
884 previous years, the most frequently asked question at the booth was, "Where can I find
885 medical assistants or qualified medical assistants?" The AAMA booth received

significant traffic, allowing for the distribution of promotional materials and resources on AAMA membership, continuing education, professional development, CMA (AAMA) certification, Medical Office Basics (MOB), scope of practice, and advisory services. This officer also engaged with fellow exhibitors to explore partnership opportunities, collected their contact information, and gathered contact details from booth visitors. Additionally, this officer attended CEO Balasa's presentation and spoke with attendees about the value of credentialed medical assistants. A brief meeting was held with CEO Balasa, President Thomas, and Andrew Haide, CMPE, Director of Content and Consulting at MGMA, reinforcing the ongoing collaboration between AAMA and MGMA. This officer also connected with Daniel Williams, MBA, MSEM, Senior Editor of MGMA and Director of the MGMA Insights Podcast. Further discussions are planned for early 2025 to produce another AAMA podcast in collaboration with MGMA. Participation in a video recording led by Social Media Manager Eldridge offered an opportunity to wish all medical assistants a "Great Medical Assistants Week." Follow-up communication was sent to all attendees who provided their contact information. For additional details, please refer to the report of President Thomas.

CEB (Continuing Education Board) Planning Session – Chicago, Illinois – November 8-9, 2024

As the AAMA Immediate Past President, this officer attended the CEB Planning Session held in Chicago, Illinois. This was a very well run and productive meeting with many positive changes taking place. Chair Hawes conducted a mini-SWOT to create a Strategic Issues Plan for the CEB. Chair Hawes relayed information from a meeting with CEB Hawes, CEB Vice Chair Ley, President Thomas, and this officer. The discussion was concerning the consideration of moving the Career Professional Development Committee to the CEB. All was favorable, and President Thomas would take this information to the BOT for a vote. Any questions of this officer were answered and as always, this officer learned more about the CEB during any meetings attended. This officer wants to thank CEB Chair Hawes, CEB Vice Chair Ley, and CEB members for a productive meeting. Refer to the report CEB Chair Sue Hawes, CMA (AAMA).

CEB (Continuing Education Board) Meetings – Chicago, Illinois- February 9-10, 2025

As the AAMA Immediate Past President, this officer attended the CEB Winter Board meeting in Chicago, Illinois. This was a very well run and productive meeting with many positive changes taking place. Chair Hawes and CEB Vice Chair Ley are working hard to mentor the members, get all documents and CEU products updated while formulating new trending CEU products. Any questions of this officer were answered and as always, this officer learned more about the CEB during any meetings attended. This officer wants to thank CEB Chair Hawes, CEB Vice Chair Ley and CEB members for a productive meeting. Refer to the report CEB Chair Sue Hawes, CMA (AAMA).

Reno, Nevada – June 8-9, 2025

As the s AAMA Immediate Past President, this officer attended the CEB Summer Board meeting in Reno, Nevada. This was a great, productive meeting with new CEU products underway. This officer answered questions related to the 2025 AAMA Annual Conference. This officer enjoys learning more about the CEB and its members. This officer wants to thank CEB Chair Hawes, CEB Vice Chair Ley, and CEB members for a productive meeting. Refer to the report of CEB Chair Sue Hawes, CMA (AAMA).

CEB (Certifying Board) Meetings – Chicago, Illinois- February 22, 2025

As the AAMA Immediate Past President, this officer attended the CB Winter Board meeting in Chicago, Illinois. The meeting was very informative as this officer continues to learn about the board and its charge. This officer answered any questions asked from the members. This officer wants to thank CB Chair Fuller and the members for allowing me to attend this informative meeting. Refer to the report of CB Chair Carolyn Fuller, CMA (AAMA).

Chicago, Illinois- July 26, 2025

This AAMA Immediate Past President attended the CB Summer Board meeting in Chicago, Illinois. This was a meeting with a full agenda. This officer answered questions, asked questions, and many great discussions were had. This officer enjoys getting to know the members, including new ones.

This officer wants to thank CB Chair Fuller and the members for allowing me to attend this informative meeting. Refer to the report of CB Chair Carolyn Fuller, CMA (AAMA).

Occupational Analysis (OA) – July 27, 2025

This Immediate Past President was invited to attend the second session of the Occupational Analysis panel by CB Chair Fuller. This was a great opportunity as I represented the BOT during the last Occupational Analysis. There were ten SMEs (Subject Matter Experts) in attendance. Everyone in attendance was very engaged. There were eight hundred fifty-one responses to the survey sent out. This officer would like to thank Chair Fuller for the invitation to this meeting, and I am looking forward to the outcome in the future.

NCCRT (National Colorectal Cancer Roundtable) Annual Conference- Dallas, Texas- November 20-22, 2024

This officer represented the AAMA during the NCCRT Annual Conference along with Board Services Manager Sharon Flynn. This officer attended the following sessions on Day One: ACS NCCRT Orientation; Opening Remarks by Emily Bell, MPH, Director, ACS, NCCRT; Panel Discussion: What does the data tell us? What can we learn from the latest colorectal cancer screening rate trends over time? Panel Discussion: Current and emerging colorectal cancer test technologies; Strategic Priority Team Workshops.

Day Two: Opening Remarks; ACS NCCRT Chair Keynote; Panel Discussion: Timely Colonoscopy follow-up to positive (abnormal) Non-Colonoscopy Tests; Advances in Colorectal cancer diagnostic testing & treatment; Lived Experience Panel Discussion: Through the Lens of Colorectal Cancer survivors and Caregivers; Colorectal cancer facts & figures: Recent findings; Armchair Conversation on Colorectal Cancer Health Equity: Barriers and Solutions to reaching Asian American communities for colorectal cancer screening; Expanding our impact across the colorectal cancer continuum: Conversations on ensuring timely initiation of quality CRC treatment.

Day three: Welcome; Distinguished National Leadership Award to Lisa C Richardson, MD, MPH, Centers for Disease Control and Prevention; Panel Discussion: How to get involved in the colorectal cancer policy landscape at any level; Supporting the delivery of timely, quality colorectal cancer screening: A Conversation with Primary

Care Leaders; Lightning Round: Recent research and emerging work to guide timely, quality colorectal cancer screening and follow-up; Wrap-up and adjourn.

This officer appreciated the opportunity to participate in the breakout sessions and engage with attendees. Together with Board Services Manager Sharon Flynn, this officer provided information about the AAMA and the vital role of medical assistants. Numerous meaningful connections were made, with attendees expressing interest in contributing to *AAMA Medical Assisting Today* magazine, earning CEUs, participating in podcasts, and collaborating on initiatives such as colorectal cancer awareness. These include projects related to screening tools, survivor testimonials, and education tailored for medical assistants. Follow-up communication has been completed, meetings have taken place, and planning is underway for future magazine articles, CEU offerings, podcast episodes, and other collaborative efforts. This officer found the sessions to be both informative and inspiring, and valued the chance to represent the AAMA, promote the CMA (AAMA) credential, and raise awareness of the profession's importance. Sincere thanks are extended to the Board of Trustees for the opportunity to attend, and to Board Services Manager Flynn for her invaluable efforts in networking and promoting the AAMA and credentialed medical assistants.

American Medical Group Association (AMGA) Annual Conference Exhibitor Booth- Grapevine, Texas- March 26-29, 2025

This officer assisted CEO Donald Balasa, Secretary Kistler, and Social Media Manager Felicia Eldridge with the setup, operation, and takedown of the AAMA booth. The conference drew a high number of attendees and exhibitors. As in previous years, the most frequently asked question at the booth was, "Where can I find medical assistants or qualified medical assistants?" "The AAMA booth received significant traffic, providing an excellent opportunity to distribute promotional materials and share information on topics such as scope of practice, AAMA membership, continuing education, career and professional development, CMA (AAMA) certification, and medical assistant training programs. This officer engaged with fellow exhibitors to explore potential collaboration opportunities with the AAMA and collected contact information from both exhibitors and booth visitors. This data was organized into an Excel document by Social Media Manager Eldridge. This officer also attended a session titled "*Addressing Workforce Challenges – Utilizing a Breakthrough Strategy to Train Your Workforce.*" The session focused on an initiative by Mankato Clinic in Minnesota, which developed a fully-funded, full-time CCMA training program to address medical assistant shortages. The program follows a short online curriculum combined with in-office training, resembling an apprenticeship model. However, the session was primarily driven by audience discussion and feedback, with fewer structured takeaways. As a result, this officer did not find the session particularly beneficial.

This officer had the opportunity to review the Poster Presentations during the conference. This format may be worth considering for future AAMA Annual Conferences to showcase educational initiatives, research, or best practices. During the event, Dr. John Kennedy, MD, President of the AMGA Foundation and Chief Medical Officer of AMGA, visited the AAMA booth. This officer had previously met Dr. Kennedy at the NCCRT Annual Conference. Introductions were made with CEO Donald Balasa, Secretary Kistler, and Social Media and Marketing Manager Eldridge. The conversation centered on potential collaboration between AMGA and AAMA. Dr. Kennedy expressed

interest in arranging a meeting between AMGA and AAMA leadership. He also referenced a pending grant proposal with GSK focused on immunizations; if approved, he would like AAMA to be involved. Further discussions are anticipated. This officer also connected with a representative from Exact Sciences, who expressed enthusiasm about possible collaboration with AAMA. Introductions were made with CEO Balasa, Secretary Kistler, and Social Media and Marketing Manager Eldridge. Following the event, this officer participated in a virtual debriefing with AAMA Marketing Director Mokijewski, Social Media Manager Eldridge, Board Services Manager Flynn, CEO Balasa, Secretary Kistler, and President Thomas. A total of 44 contacts were identified for follow-up, including six potential exhibitors for the AAMA 2025 Annual Conference. Strategies discussed included sending follow-up emails thanking attendees for visiting the booth and scheduling two virtual meetings to address questions and explore partnership opportunities. This officer attended the virtual meetings held on May 19 and May 22, 2025. Both meetings were productive and informative, with many questions addressed. Additional follow-up and collaboration efforts are ongoing.

REPRESENTATIVES BUREAU ASSIGNMENTS:

- **Idaho Society of Medical Assistants Annual Conference April 4-5, 2025**

The Idaho Society of Medical Assistants (IdSMA) Annual Conference was held in Idaho Falls, Idaho, hosted by the Idaho Falls Chapter at the College of Eastern Idaho. The conference theme, *“Self-Care for the Health Care Professional,”* supported a hybrid format, with 75 total registrants—62 attending in person and 13 virtually. The attendees included 54 AAMA members, 16 students, and 5 nonmembers. The Idaho Falls Chapter facilitated a highly commendable event, featuring distinguished speakers, a well-organized agenda, and a welcoming atmosphere. A total of 8 CEUs were available to attendees. Topics included: Hormone Replacement Therapy; *Rethinking Care: Imagining a New Paradigm for Healthcare through the Lens of Parkinson’s care*; Lifestyle Medicine: What It Is and Why It’s Important; Beauty, Health, Wellness, and Aesthetics; Mindfulness, Meditation, and Gentle Movement. The final session on mindfulness and gentle movement was especially well-received and fitting for the conference theme. CEU participation was tracked via a QR code system, requiring attendees to input session information and a keyword provided at the end of each presentation. Support from other IdSMA chapters contributed significantly to the conference’s success: The Magic Valley Chapter provided drinks and snacks during session breaks. The North Idaho Panhandle Chapter donated speaker gifts. The Gate City Chapter supplied door prizes for attendees. Additional fundraising efforts included themed baskets donated for a raffle. Tickets were sold by students from the College of Eastern Idaho’s Medical Assisting program, with proceeds supporting their educational program. Students from the Idaho Falls and Magic Valley Chapters were actively involved, organizing a coffee and refreshment bar that featured specialty beverages and pastries—including notably popular cinnamon rolls. This initiative was both well-executed and well-received.

The state chapters came together to help create a meaningful and well-organized conference experience for all attendees. This officer collaborated with the Idaho Society of Medical Assistants (IdSMA) State President and Vice President on proposed bylaw revisions aimed at enabling more members to assume leadership roles and modernizing the bylaws to better reflect the organization’s needs. During the General Assembly, the proposed bylaw changes were presented and approved. Notable revisions included

modifications to the qualifications for state officers, which now allow more flexibility for members to seek leadership positions—an important step in supporting membership growth and increased participation. In addition, a new officer role, Media Communications Officer, was introduced and approved. Electronic voting links were used to accommodate both in-person and virtual attendees, ensuring an efficient and inclusive process. Elections were held for IdSMA officers as well as for delegates and alternates to represent the society at the AAMA House of Delegates (HOD). Idaho is entitled to three delegates and will be sending three delegates and two alternates to the AAMA HOD.

The General Assembly was conducted efficiently and professionally. This officer was given the opportunity to provide AAMA updates, engage with attendees, and respond to questions. Time was also spent discussing qualifications for Board of Trustees positions, as well as offering guidance and outlining a pathway for attendees interested in future leadership opportunities. Any concerns brought to this officer's attention were promptly referred to the appropriate AAMA staff member, committee, task force, or strategy team chair for follow-up. This officer was honored to attend this in-person event and appreciated the opportunity to reconnect with long-time colleagues and build new connections. Sincere thanks are extended to the IdSMA state leadership and members for the opportunity to attend and represent the AAMA.

- **Washington State Society of Medical Assistants Annual Conference May 2-3, 2025**

The Washington State Society of Medical Assistants (WSSMA) held its 58th Annual Conference at the Embassy Suites in Lynnwood, Washington. The conference theme, *“PNW Medical Assistants: Stronger Together,”* resonated throughout the event, which was attended by 107 individuals—96 AAMA members and 11 non-members. WSSMA facilitated a well-organized and commendable conference featuring distinguished speakers and a full agenda. Attendees had the opportunity to earn up to 14 Continuing Education Units (CEUs). Session topics included: Washington Children's Vaccine Program and Vaccine Dosage-Based Assessment Billing Requirements; Mohs Surgery; Workplace Safety and Health for Medical Assistants; Ovarian Cancer Awareness; Nutrition 101; Diabetes Management; Communication with Patients and Medical Record Documentation; HPV and Head and Neck Cancer; First Responder/Crisis Response in Conjunction with Law Enforcement; Medical Coding Updates; Physical Therapy; Medicare Part B Hot Topics for 2025; Patient and Staff Satisfaction (Keynote Presentation); Psychological Autopsy and Next-of-Kin Interviews (Keynote Presentation).

Seven exhibitors were in attendance, and this representative was provided with an exhibitor table, which served as a valuable platform for engagement and outreach. Attendees expressed interest in AAMA initiatives and resources. During the House of Delegates (HOD), voting was conducted by ballot. Officers for WSSMA and delegates/alternates to the AAMA House of Delegates were duly elected, and proposed bylaw amendments were passed. Washington is entitled to six delegates at the AAMA HOD. The HOD session was conducted efficiently, and this representative was invited to address the delegation, share national updates, and encourage continued involvement and leadership at all levels.

The “Fun Night” social and dinner event featured music from the 1960s through the 1990s, with Washington’s own Aaron Marshall serving as DJ. Attendees were encouraged to dress in era-themed attire, contributing to a festive evening filled with music, dancing, networking, and excellent cuisine.

The Presidents’ Luncheon provided an opportunity to recognize newly certified and recertified CMAs (AAMA), Life Members for 2024 and 2025, and the recipient of the Nancy Fortin Scholarship Fund. The WSSMA President also recognized current chapter presidents, WSSMA Life Members, 13 Past WSSMA Presidents in attendance, and announced the newly elected 2025–2026 state officers.

Throughout the event, this officer engaged with attendees, responded to questions related to AAMA national matters, and discussed the significance and benefits of AAMA membership. Several non-members expressed strong interest in joining and showed enthusiasm for participating in local and state-level activities. A highlight of the conference was the opportunity to meet AAMA Past President Barbara Parker, CMA-AC (AAMA), CPC. This meaningful connection revealed shared commitments to student and member engagement, teaching, professional advocacy, and the continued promotion of CEUs and AAMA membership. Ms. Parker remains active within her state and chapter. Any concerns or inquiries brought to this representative were forwarded to the appropriate AAMA staff, committee, task force, or strategy team chair for further review. This officer was honored to attend this in-person event, reconnect with long-standing colleagues, and make new professional connections. Special thanks are extended to the WSSMA leadership and members for the opportunity to attend and represent the AAMA.

- **Southwest Regional Meeting in Salt Lake City, Utah July 18-20, 2025**

The Southwest Regional Conference was held in Salt Lake City, Utah, and was hosted by the Utah Society of Medical Assistants at the Hilton Garden Inn. Themed “*Here’s the Buzz,*” the event creatively incorporated bee imagery throughout the program and materials. This in-person leadership and health seminar offered up to 16 Continuing Education Units (CEUs). The conference drew a strong turnout of 49 attendees representing nine states: Utah, Texas, New Mexico, Oklahoma, California, Tennessee, South Carolina, North Carolina, and Idaho. CEU sessions covered a wide range of relevant and engaging topics, including: Patient-Centered Care: Healthcare Customer Service; *We Can Prevent Colorectal Cancer Together*; Breast Cancer Screening; Empathetic Leadership; Providing Quality Patient Care: What Does It Mean?; *To Lead or Not to Lead*; *Balancing the Heart and Hustle: Providing Outstanding Care While Avoiding Burnout*; Medical Trivia Bingo.

In addition to educational sessions, the conference offered attendees opportunities to visit exhibitors, win fabulous door prizes, and enjoy theme-related gifts, such as bread and honey. These thoughtful touches added to the welcoming and engaging atmosphere. This officer had the opportunity to network with attendees, including four students, answer questions, and share AAMA updates. A brief presentation was given highlighting this officer’s personal journey within the AAMA and encouraging member engagement. Any concerns raised were promptly directed to the appropriate AAMA staff member, committee, task force, or strategy team chair for further review and follow-up. This officer was honored to attend this in-person event, appreciated the opportunity to reconnect with long-time colleagues, and valued the chance to build new professional relationships. Sincere appreciation is extended to the Utah Society of Medical Assistants

1174 and to each state represented for their leadership, hospitality, and dedication to the
1175 profession. It was a privilege to attend and represent the AAMA.
1176

1177 This Immediate Past President has participated in meetings and discussions with President
1178 Thomas to review and discuss updates, status of projects, representative assignments/ packets/
1179 documents for 2025, process information and has been available as an advisor. Also, I have
1180 participated in MSC meetings as needed. This officer has remained available to Secretary
1181 Kistler, Board of Trustee members, CEO Balasa, AAMA staff and all AAMA members.
1182 This officer participated in E-Ballots from President Thomas, and they were completed by the
1183 deadline.
1184

1185 All correspondence has been responded to in a timely manner and all deadlines have been met.
1186

1187 This officer would like to extend sincere thanks to CEO and Legal Counsel Donald Balasa, JD,
1188 MBA, for his consistent availability and invaluable support—not only to this officer, but also to
1189 the entire Board of Trustees. Much appreciation also goes to Board Services Manager Sharon
1190 Flynn and the dedicated AAMA staff for their continued willingness to support the initiatives
1191 and ideas of both this officer and the full Board of Trustees.

1192 This officer is grateful to the Continuing Education Board (CEB) and the Certifying Board (CB)
1193 for their collaborative efforts and meaningful conversations for the greater good of the AAMA
1194 and the profession.
1195

1196 As Immediate Past President, this officer thanks President Thomas for her guidance and
1197 leadership over the past year, and to the Board of Trustees for their unwavering dedication to
1198 growing, enhancing, and promoting the AAMA and the medical assisting profession. Lastly, this
1199 officer thanks the AAMA members for the opportunity to serve on the Board of Trustees. It has
1200 been a privilege.
1201

1202 Monica Case, CMA (AAMA)

1203 Immediate Past President 2024-2025

American Association of Medical Assistants® (AAMA)
Report of the Secretary
For the Period Ending September 2025

The duties of the Secretary are as follows:

- Serves as a member of the Board of Trustees and the Maxine Williams Board of Directors
- Serves as a member of the Management Steering Committee (MSC)
- Serves as a member of the Budget and Finance Committee
- Serves as a member of the AAMA Representatives Bureau

Additionally, this Secretary was assigned to serve on the following:

- Bylaws and Resolutions Committee, Chair
- Educators Collaborative, Member
- Maxine Williams Scholarship Fund, Member
- Membership, Member
- Advisory Services Task Force, Chair
- Ad Hoc Committee on Mentoring, Member

MEETINGS ATTENDED:

Face to Face:

- Post Conference Board Meeting, Grand Rapids, Michigan, September 23, 2024
- Strategy Teams Meeting, Grand Rapids, Michigan, September 23, 2024
- Medical Group Management Association, Denver, Colorado, October 5 to 9, 2024
- Planning Session, Chicago, Illinois, November 10 and 11, 2024
- MARCOM Director Gina Mokijewski, Chicago, Illinois, February 5, 2025
- BOT Winter Meeting, Chicago, Illinois, February 7-8, 2025
- American Medical Group Association (AMGA), Dallas, Texas, March 26-30, 2025
- Wisconsin Society of Medical Assistants Annual Conference, April 10-12, 2025
- Missouri Society of Medical Assistants Annual Conference, April 25-27, 2025
- Maxine Williams Board of Directors, Reno, Nevada, June 5, 2025 (I attended virtually)
- BOT Meetings, June 6 and 7, 2025 (I attended virtually)

Virtual BOT Meetings:

- Virtual BOT Executive Session Meeting, October 10, 2024
- Virtual MSC Meeting, December 12, 2024
- Virtual BOT Executive Session, December 15, 2024
- Virtual MSC Meeting, January 10, 2025
- Virtual MSC Meeting, March 9, 2025
- Virtual BOT Executive Session Meeting, March 9, 2025
- Virtual MSC Meeting, May 5, 2025

Committee/Strategy Team Meetings:

- Virtual Membership Committee Meeting, October 9, 2024
- Virtual Educators Collaborative Task Force Meeting, October 24, 2024
- Virtual Bylaws and Resolutions Committee Meeting, November 3, 2024
- Virtual Membership Committee Meeting, November 20, 2024
- Virtual Partnership Committee Meeting (as a guest), December 30, 2024

- 1252 • Virtual Bylaws and Resolutions Committee Meeting, January 6, 2025
- 1253 • Virtual Collaborative Meeting Advisory Services, Leadership Strategy and
- 1254 Membership Committees, February 11, 2025
- 1255 • Virtual Advisory Services Committee, February 24, 2025
- 1256 • Virtual Maxine Williams Scholarship Committee, February 25, 2025
- 1257 • Virtual Membership Committee Meeting, February 12, 2025
- 1258 • Virtual Ad Hoc Mentoring Committee Meeting, February 20, 2025
- 1259 • Virtual Maxine Williams Scholarship Committee Meeting, February 25, 2025
- 1260 • Virtual Membership Committee Meeting, March 12, 2025
- 1261 • Virtual Educators Collaborative Task Force Meeting, March 20, 2025
- 1262 • AMGA Debriefing and Planning Session, April 9, 2025
- 1263 • Virtual Maxine Williams Scholarship in Honor of Crystal Coleman, April 29, 2025
- 1264 • Virtual Leadership Strategy Development Team Focus Groups (silent observer),
- 1265 May 4 and May 6, 2025
- 1266 • Virtual Ad Hoc Mentoring, May 5, 2025
- 1267 • Virtual Membership Committee, May 7, 2025
- 1268 • Virtual AMGA Follow Up and Planning Meetings, May 19 and 22, 2025
- 1269 • Virtual Educators Collaborative Strategy Team, May 22, 2025
- 1270 • Virtual Leadership Focus Group, May 27 and 28, 2025
- 1271 • Virtual Maxine Williams Scholarship, May 31, 2025

1272
 1273 This Secretary participated in multiple phone and email conversations regarding Bylaws and
 1274 Resolutions and Advisory Services questions. Separate reports are filed for Bylaws and
 1275 Resolutions and Advisory Services Committees.

1276
 1277 This Secretary completed minutes for face-to-face and virtual BOT meetings (listed above) and
 1278 filed those minutes after approval by MSC and BOT members.

1279
 1280 This Secretary participated in all email requests/reports and electronic votes initiated by
 1281 President Thomas and CEO Balasa.

1282
 1283 All correspondence has been responded to in a timely manner and all deadlines have been met.

1284 1285 **Other Duties**

1286 1287 **AAMA Representative Bureau Assignments:**

1288
 1289 *Wisconsin State Society of Medical Assistants: Waukesha, Wisconsin*
 1290 This AAMA Representative attended all CEU sessions and presented one CEU session titled
 1291 “Keeping Women Healthy” for 1 C/G CEU and served as Timekeeper in the General
 1292 Assembly. Many AAMA promotional items were distributed to members in appreciation of their
 1293 questions regarding AAMA benefits of membership. Any questions regarding
 1294 certification/membership were forwarded to the appropriate AAMA staff member. This
 1295 Representative member took part in conversations regarding feasible locations to hold annual
 1296 state conferences and virtual continuing education. AAMA forms were distributed to the
 1297 Wisconsin President. This representative was privileged to attend the Wisconsin State Society
 1298 annual meeting and was honored to participate in the friendly environment. A report was filed

with the MSC and BOT members and sent to the WSMA President after viewing by the MSC and BOT members.

Missouri State Society of Medical Assistants: Springfield, Missouri

This AAMA Representative attended 11 of 13.5 CEUs offered and attended the Annual Business meeting and was available if an Installation of Officers Ceremony was needed. Many AAMA promotional items were distributed to members in appreciation of their questions regarding volunteer opportunities and benefits of membership. This BOT member viewed the AAMA website with members to locate individual states' Scope of Practice and "free" CEU opportunities. AAMA forms were distributed to the Missouri President. This representative was honored to attend the Missouri State Society of Medical Assistants annual meeting and appreciated the warm and friendly hospitality. A report was filed with the MSC and BOT members and sent to the MSMA President after viewing by the MSC and BOT members.

MGMA: Denver, Colorado

This officer assisted in setting up and presentation during the Conference. Information on credentialing and education of the medical assistant was provided to attendees visiting the booth. Benefits of AAMA membership were provided to attendees at the Conference. This officer participated in post-conference calls with office staff on follow-up information being shared with contacts made at the meeting.

AMGA: Dallas, Texas

This Officer participated in exhibit maintenance, presentation, and tear down after the Conference. Over 40 contacts were made with the main issues being scope of practice, membership, continuing education, and credentialing. AAMA informational items were distributed. This Officer participated in a virtual debriefing and planning session to follow up with the contacts made during the conference. This Officer attended virtual AMGA planning and follow up meetings on May 19 and 22, 2025.

Maxine Williams Scholarship and Maxine Williams Scholarship in Honor of Crystal Coleman:

This Committee member participated in all meetings regarding updating and creation of applications as well as setting deadlines. Initial drafts of scoring rubrics were created by this committee member and distributed to all committee members for critique. This Committee members participated in the viewing and selection of scholarship applications and award winners. This Committee member also participated in creation of a scoring rubric for the Maxine Williams Scholarship in Honor of Crystal Coleman Award.

Educators Collaborative Task Force:

This Committee member participated in virtual meetings. Work products included submission of possible topics for discussion during meetings and on the newly created AAMA Facebook (FB) for Educators page. Educators were instructed to sign up for the AAMA Educators FB page during AAMA Representative Bureau assignments.

Membership Committee:

This Committee member participated in virtual meetings. Work products include a revision of the current Membership Manual with a draft copy sent to Chair Neu and Documents Chair Houghton and a review of several AAMA PPTs being reviewed by the Documents and

1347 Membership Committees. As of this report, a sample of the potential new state Bylaws was sent
1348 to West Virginia and Maryland contacts for possible creation/re-creation of state societies. This
1349 committee member has offered guidance and support to the West Virginia and Maryland
1350 contacts.

1351

1352 **Ad Hoc Committee for Mentoring:**

1353 This committee member participated in all meetings. Work products submitted include a list of
1354 possible topics for discussion and an outline of a potential Mentoring/Leader Navigator Manual.
1355 This member reviewed the final outline prior to submission to the BOT.

1356

1357 **Bylaws and Resolutions Chair:**

1358 This Committee Chair filed a separate Bylaws and Resolutions Committee report.

1359

1360 **Advisory Services Chair:**

1361 This Committee Chair filed a separate Bylaws and Resolutions Committee report.

1362

1363 This officer would like to thank President Virginia Thomas for her leadership as well as Don
1364 Balasa, MBA, CEO, Sharon Flynn, Manager of Board Services, and all the AAMA staff for their
1365 support and guidance. This officer would also like to thank the members of the BOT, CEB, CB,
1366 and MAERB for all they do for the organization, and to all the members who represent our
1367 profession and organization daily. Also, thank you to all the members who volunteer their time
1368 to serve on AAMA committees.

1369

1370 Respectfully submitted,

1371

1372 Loxie Kistler, CMA (AAMA)

1373 AAMA Secretary, 2024-2025

**American Association of Medical Assistants® (AAMA)
Report of the Speaker of the House
For the Period Ending September 2025**

The duties of the AAMA Speaker of the House are as follows:

- Preside at meetings of the House of Delegates
- Serve as an officer of the AAMA Board of Trustees
- Serve as a member of the AAMA Representative Bureau

Additionally, this Officer was appointed to serve on the following:

- Conference Committee – member
- Documents Committee – member
- Marketing Strategy Team – chair
- Maxine Williams Board of Directors – member
- Maxine Williams Scholarship Committee- member
- Ad Hoc Mentoring Committee – member

HOUSE OF DELEGATES

The Speaker and Vice Speaker met in person with Immediate Past President Monica Case on Monday, September 23, 2024, for orientation to the duties of the office. Using the information provided, a proposed deadline schedule was developed in collaboration with Vice Speaker Houghton. On October 22, 2024, 2023-2024 Speaker of the House Bogar provided virtual instruction on the Teams files used in preparation for conducting the House of Delegates. This was very beneficial and greatly appreciated by the Speaker and Vice Speaker. On November 11, 2024, the Speaker and Vice Speaker met with President Thomas and Immediate Past President Case for review of the proposed deadline schedule and received preparation advice for conducting the HOD.

The Speaker and Vice Speaker collaborated in setting the calendar for House of Delegates

- Deadlines and timeline for Delegates Packet preparation
- Virtual Orientation Meetings for Reference Committees and House Committees
- House of Delegates schedule
- Credentials Desk schedule

Vice Speaker Houghton agreed to the selection of Past Presidents Janice Caplan, CMA-A (AAMA) as on-site and Carol Clapp, CMA (AAMA) as virtual Parliamentary Advisors.

The following House of Delegates documents were reviewed and updated in collaboration with Vice Speaker Houghton and the assistance of Board Services Manager Flynn.

- Delegates Letters
- Delegates & Alternates Form
- Reference Guide for Delegates and Alternates
- Virtual Orientation Script
- Virtual Orientation Power Point
- Instructions for Tellers
- Instructions for Sergeant-at-Arms and Pages
- Instructions for Credentials Committee

1422 Credentials Committee report to the HOD
1423 Tellers report to the HOD
1424 Tellers script for report delivery to the HOD
1425 Reference Committee on Reports report to the HOD
1426 Reference Committee on Resolutions report to the HOD
1427 Reference Committee on Bylaws report to the HOD
1428 Reference Committee on Reports script for report delivery to the HOD
1429 Reference Committee on Resolutions script for report delivery to the HOD
1430 Reference Committee on Bylaws script for report delivery to the HOD
1431 Reference Committee Instructions Template
1432 Reference Committee Report Template
1433 Script for conducting the House of Delegates
1434

1435 Two email communications were sent to states with the deadline for delegate and alternate
1436 submission. All submissions were verified by Board Services Manager Flynn and reviewed by
1437 the Speaker. The Speaker reached out to the state with one delegate who did not qualify for
1438 seating. Two days prior to the deadline for delegate and alternate submission, non-responding
1439 states were sent a reminder email and text by the Speaker. All states responded by the
1440 deadline. Three states will not be represented, two by choice and one because the leaders did not
1441 renew their dues. The Speaker sent an email to the state members advising them of the impending
1442 deadline for delegate submission. The membership committee chair was advised of the
1443 situation. As of this writing, the delegate count is 128 with 13 proxy votes requested.
1444

1445 The assignment of members to House of Delegates committees was made by the Speaker and
1446 reviewed by the Vice Speaker. Established guidelines for committee selection were observed with
1447 a focus on providing a new rather than repeat experience for leadership development.
1448

1449 Reference Committees
1450 Credentials Committee
1451 Tellers
1452 Pages
1453 Sergeant-at-Arms
1454 Scribe
1455 Timekeeper
1456 Ex-Officio members
1457

1458 During the House of Delegates opening ceremony all Armed Forces Veterans in the room will be
1459 invited to the front of the room prior to the Honor Guard entering the room so they can be
1460 recognized while the Honor Guard is in the room.
1461

1462 MEETINGS ATTENDED:

1463 In person:
1464 AAMA 2024 Annual Conference September 22-23, 2024, Grand Rapids MI
1465 AAMA SoPPs Breakfast
1466 AAMA State Leaders Session
1467 AAMA Presidents Banquet
1468 AAMA BOT Executive Session
1469 Committee Meet and Greet

1470 Vice Speaker and Immediate Past President
1471 AAMA Planning Session – Chicago, Illinois, November 9-11, 2024
1472 Staff liaison Gina Mokijewski – Chicago, Illinois, December 18, 2024
1473 BOT Board Meeting – Chicago IL, February 7-9, 2025
1474 Reno NV, June 5-7, 2025
1475 Maxine Williams Board of Directors, June 5, 2025
1476 Montana State Conference, April 25-27, 2025, Great Falls MT

1477
1478 This officer participated in virtual meetings
1479 BOT Executive Meeting – October 20, 2024
1480 BOT Executive Meeting – December 15, 2024
1481 BOT Executive Meeting – March 9, 2025
1482 BOT Executive Meeting – June 1, 2025
1483 BOT interview with Dr. Perez – June 19, 2025
1484 BOT Executive Meeting – June 29, 2025
1485 BOT meeting with CEB Chair – July 1, 2025
1486

1487 **REPRESENTATIVES BUREAU ASSIGNMENTS:**

1488 **ALABAMA Representative Bureau Assignment**

1489 This officer was privileged to virtually attend the Alabama Society of Medical Assistants
1490 meeting on April 11 & 12, 2025. The meeting was held at The Rock at Temple Baptist
1491 Church in Cullman Alabama. There were 11 CEUs offered; clinical, general and
1492 administrative. All presenters were very knowledgeable about their topics, medical
1493 assistants' scope of practice and provided relevant valuable information. This officer
1494 gave a leadership CEU session "Identify, Encourage and Inspire". Due to the delay in
1495 one speaker's arrival the Representative Bureau information was also provided.
1496 Because of a power outage on Thursday, April 10, President Owen conducted the
1497 Preconference Executive Board meeting during the lunch break on Friday, April 11. This
1498 officer provided guidance on general assembly parliamentary issues with editorial
1499 suggestions for their bylaws and policy manual. The general assembly was well
1500 conducted by the Speaker of the General Assembly. The meeting business included
1501 approval of editorial bylaws changes, election of society Officers, and Delegates and
1502 Alternates for the AAMA House of Delegates. Because there was no current Vice
1503 President, the President was elected to a second term. Members are being mentored to
1504 prevent this from recurring. An officer attended the post conference board meeting via
1505 telephone to complete the quorum for the business conducted. For fund raising there was
1506 a silent auction and logo shirts were sold. Saturday lunch, beverages and snack items
1507 were provided. Throughout the two days the 26 conference attendees were encouraged to
1508 visit this officer at the computer to share their concerns. Primary was the declining
1509 membership due to the lack of accredited education programs in the state. A program
1510 director was advised that a pathway would be forthcoming for her to sit for the CMA
1511 (AAMA) exam. A member inquired about using TikTok for communication but has not
1512 responded to Aimee Quinn's request for clarification. Concern regarding employers
1513 giving the title of "Certified Medical Assistant" to those who have lesser education and
1514 skills than the CMA (AAMA) and the risk these individuals pose to patients. The basic
1515 question was "Is there anything AAMA can do about this?". It was a wonderful
1516 experience attending this conference virtually. The members made frequent efforts to
1517 ensure this officer was included in all conference activities.

This officer attended virtual Leadership sessions on December 14, 2024; March 1, 2025; and July 12, 2025. Leadership focus group sessions were virtually attended on May 6, 2025; May 12, 2025; May 14, 2025; and May 15, 2025.

This officer attended virtual Membership focus group sessions on May 27, 2025; July 14, 2025; July 15, 2025; July 16, 2025; and July 17, 2025.

MONTANA Representative Bureau Assignment

The Montana Society of Medical Assistants met April 26 and 27, 2025 at the Holiday Inn in Great Falls, MT. The conference theme was “Transforming Lives Through Health”. The 18 attendees were provided with 10 CEUs. All speakers were engaging, provided excellent information and very familiar with the role of Medical Assistants in the health care team. One speaker cancelled due to a death in the family and one speaker did not communicate a reason for their absence. This officer provided two one-CEU sessions, one scheduled (Leading an Effective Meeting) and one to replace the cancelled program (Identify, Encourage and Inspire). The AAMA Representative Bureau information was presented in the remaining open time. Appreciation to Nick Mickowski for his prompt response to the request to approve the unscheduled CEU program. The new CMA and four first time attendees were given AAMA recognition items. Other marketing items were distributed including milestone pins. More than ten volunteer leadership forms were distributed. During the meeting one non-member joined and another indicated their intent to join. The General Assembly was conducted with lunch when new society officers and AAMA HOD delegates and an alternate were elected. This officer was able to provide guidance regarding budget, bylaws, parliamentary procedure, and the number of allowed delegates because the officers did not receive their Delegate notification letter. The purchase of equipment for document retention and website support was also approved. They will open a Venmo account to assist in collection of payments after the EIN number is located. During the meeting an attendee survey was conducted for suggestions for the 2026 society conference to be held in Helena. Appreciation was expressed for CEO Balasa’s assistance regarding scope of practice under supervision legislation. Fund raising was a raffle for donated items and a 50/50 raffle. Door prizes, Saturday lunch, beverages and snack items were provided. This officer was included in evening meals which were on your own. Interaction with the membership revealed frustration with the declining AAMA accredited education programs. The members attribute the loss of AAMA accredited programs to the high cost of accreditation by MAERB and CAAHEP. The Education Chairs for non-AAMA approved programs are unwilling to communicate with AAMA members at all. Another concern was the legality of the use of “Certified Medical Assistant” by employers for those who are not AAMA certified. Member retention and recruitment available tools were discussed as well as the importance of frequent promoting of society activities since the society is now bilevel. The website and social media will be included for information distribution.

The rivalry was posed as to why the member roster excel sheet columns changed with the new website. Nick Mickowski was contacted, and his response was forwarded to the member. Nick also assisted in the registration of a new member for the AAMA conference. This officer was honored to provide and conduct the installation service for the incoming officers and Trustees. The high level of warmth, local tours, and hospitality provided this officer was greatly appreciated.

COMMITTEE/STRATEGY TEAM ASSIGNMENTS:

Conference Committee: Met virtually December 11, 2024, May 19, 2025

1566		Participated in discussion
1567		Refer to the report of the chair
1568	Documents Committee:	Met virtually December 16, 2024, January 21, 2025, April
1569		28, 2025
1570		All assignments completed
1571		Refer to the report of the chair
1572	Maxine Williams	
1573	Scholarship Committee:	Met virtually on January 19, 2025, February 2025, May 31,
1574		2025
1575		Participated in discussion
1576		All assignments completed
1577		Refer to the report of the chair
1578	Ad Hoc Mentoring	
1579	Committee:	Met virtually January 26, 2025, February 20, 2025, May 5,
1580		2025
1581		Participated in discussion
1582		Refer to the report of the chair
1583		
1584	This Officer was appointed to Chair the Marketing Strategy Team and the report is in the	
1585	committee reports.	
1586		
1587	This officer participated in E-ballots from President Thomas.	
1588		
1589	All correspondence has been responded to in a timely manner and all deadlines have been met.	
1590		
1591	Appreciation to Vice Chair Houghton for her assistance in preparation for conducting the House	
1592	of Delegates; President Thomas, Immediate Past President Case, Donald Balasa, CEO and AAMA	
1593	Legal Counsel for their support and advice; and Sharon Flynn, Manager of Board Services for her	
1594	invaluable support utilizing her organizational talents and preparational skills.	
1595		
1596	House of Delegates	
1597	Jane B. Seelig, CMA-A (AAMA)	
1598	2024-2025 Speaker of the House	
1599		

American Association of Medical Assistants® (AAMA)
Report of the Vice Speaker
For the period ending September 2025

The AAMA Vice Speaker of the House assists the Speaker in the appointment of committees and preparing for the House of Delegates, serves as an officer of the AAMA Board of Trustees, serves as a member of the Maxine Williams Board of Directors, and serves as a member of the AAMA Representatives Bureau.

This officer received numerous documents including current Volunteer Position descriptions, AAMA Bylaws, past AAMA HOD scripts, previous HOD minutes, A Reference Manual for Delegates and Alternates, along with Guidelines for Reference committees in preparation of duties for this office.

This officer was appointed to chair the Documents Committee and Strategic Issues Planning Committee and appointed to serve as a member of the Educators Collaborative Task Force, Leadership Development, Marketing, and HOD Minutes Committee.

Other Assignments:

As of this date, this officer has represented the BOT/AAMA at the following meetings or events:

AAMA 2024 Annual Conference – Grand Rapids, MI – September 18-21, 2024

- First Timers and Students Reception
- BOT Pre-HOD meeting/ Executive Session
- AAMA Welcome and Awards Celebration
- AAMA House of Delegates
- AAMA House of Delegates Reference Committees
- Meeting with the SoPPs
- State Leaders Session
- Presidents Banquet
- BOT Orientation
- Post-HOD BOT/ Endowment Executive Session

AAMA BOT Planning Session – Chicago, IL November 10-11, 2024

AAMA BOT Virtual Meeting – October 20, 2024

AAMA BOT Virtual Meeting – December 15, 2024

AAMA BOT Winter Meeting – Chicago, IL February 7-8, 2025

AAMA BOT Virtual Meeting – March 9, 2025

Virginia State Society Annual Conference – Virtual – April 5, 2025

Florida State Society Annual Conference – Orlando, FL – April 25-26, 2025

AAMA BOT Virtual Meeting – June 1, 2025

AAMA BOT Summer Meeting – Reno, NV June 5-7, 2025

AAMA BOT Virtual Meeting – June 19, 2025

AAMA BOT Virtual Meeting – June 29, 2025

AAMA BOT Virtual Meeting – July 1, 2025

Representative Bureau Assignments:

Virginia State Society of Medical Assistants- April 5, 2025

Vice Speaker Houghton was assigned to VA State Society and joined them virtually. Vice Speaker Houghton attended CEUs on Hospice, Iron Deficiency/Iron Deficiency Anemia in Oncology, Illegal Interview Questions, Post-COVID Neurological Sequelae, and some fun with MA Trivia. They had eleven [?] attendees at the conference. They held the General Assembly and voted in new officers to the Board. Virginia State Society had 31 in attendance, and three of those were students. Their concerns and questions have been sent to the appropriate Board or committee.

Florida State Society of Medical Assistants – April 25-26, 2025, Orlando, FL

Vice Speaker Houghton was assigned to join the Florida State Society of Medical Assistant in Orlando, FL. Vice Speaker Houghton attended CEUs about Annual Learning Gets a Bad Grade, Hands on basic skills practice, and helped present From Basics to Brilliance: A Medical Assistant's Review. FSMA voted to go from a Tri-level state society to a Bi-level state society during their General Assembly. There was much discussion on this topic at this conference. Vice Speaker Houghton was able to network with the students in attendance, which had eight students at this conference. FSMA had a total of members, 4 non-members, and 3 educators at this conference. FSMA gave out two State Lifetime memberships, Marsha Benedict, CMA (AAMA) and Deniece Jozefiak, CMA (AAMA). Their concerns and questions have been sent to the appropriate Board or committee.

The following are the committee/strategy team assignments:

- Documents Committee – See separate report
- Strategic Issues Planning Committee – See separate report
- Educators Collaborative Task Force
 - Attended October 24, 2024, Virtual Meeting
 - Attended January 23, 2025, Virtual Meeting
 - Attended March 20, 2025, Virtual Meeting
 - Assignment completed
 - Refer to the report of the chair
- Leadership Development
 - Attended October 24, 2024, Virtual Meeting
 - Attended November 14, 2024, Virtual Meeting
 - Attended December 14, 2024, Virtual CEU Meeting for State Leaders
 - Attended January 16, 2025, Virtual Meeting
 - Attended February 13, 2025, Virtual Meeting
 - Attended March 1, 2025, Virtual CEU Meeting for State Leaders
 - Attended March 13, 2025, Virtual Meeting
 - Attended April 10, 2025, Virtual Meeting
 - Attended May 12, 2025, Virtual Meeting
 - Assigned to the focus group for Leaders; attended meetings May 4, May 6, May 12, May 14, May 15, and May 17
 - Attended June 1, 2025, Virtual Meeting debrief of Leadership focus group
 - Attended July 10, 2025, Virtual Meeting
 - Attended July 12, 2025, Virtual CEU Meeting for State Leaders

- 1696 ○ Assignment completed
- 1697 ○ Refer to the Report of the Chair
- 1698 • Marketing
- 1699 ○ Attended October 31, 2024, Virtual Meeting
- 1700 ○ Attended November 20, 2024, Virtual Meeting
- 1701 ○ Attended January 15, 2025, Virtual Meeting
- 1702 ○ Attended February 19, 2025, Virtual Meeting
- 1703 ○ Attended March 19, 2025, Virtual Meeting
- 1704 ○ Attended April 16, 2025, Virtual Meeting
- 1705 ○ Assigned to Chair sub-committee to review the Power Point on Why Hire
- 1706 a Credentialed Medical Assistant. Assignment completed
- 1707 ○ Assignment completed
- 1708 ○ Refer to the Report of the Chair
- 1709

1710 This officer also attended the following virtual Membership focus group sessions:

- 1711 • May 26, 2025
- 1712 • May 27, 2025
- 1713 • July 14, 2025
- 1714 • July 16, 2025
- 1715 • July 17, 2025

1716 Vice Speaker Houghton was asked to review the following documents by Speaker Seelig:

- 1717 Delegates Letters
- 1718 Delegates & Alternates Form
- 1719 Reference Guide for Delegates and Alternates
- 1720 Virtual Orientation Script
- 1721 Virtual Orientation Power Point
- 1722 Instructions for Tellers
- 1723 Instructions for Sergeant at Arms and Pages
- 1724 Instructions for Credentials Committee
- 1725 Credentials Committee report to the HOD
- 1726 Tellers report to the HOD
- 1727 Tellers script for report delivery to the HOD
- 1728 Reference Committee on Reports report to the HOD
- 1729 Reference Committee on Resolutions report to the HOD
- 1730 Reference Committee on Bylaws report to the HOD
- 1731 Reference Committee on Reports script for report delivery to the HOD
- 1732 Reference Committee on Resolutions script for report delivery to the HOD
- 1733 Reference Committee on Bylaws script for report delivery to the HOD
- 1734 Reference Committee Instructions Template
- 1735 Reference Committee Report Template
- 1736 Script for conducting the House of Delegates
- 1737

1738 All correspondence has been responded to in a timely manner and all deadlines have been met.

1739

1740 This officer would like to thank President Thomas for her leadership as well as Don Balasa, JD,
1741 MBA, CEO, Sharon Flynn, Board Services Manager, and all the AAMA staff, for their support
1742 and guidance. This officer would also like to thank the members of the BOT, CEB, and CB, for

1743 all they do for our organization, and to all the members who represent our profession and
1744 organization every day.

1745

1746

1747 Claire Houghton, CMA (AAMA)

1748 Vice Speaker 2024-2025

American Association of Medical Assistants® (AAMA)
Report of Trustee Miller
For the Period Ending September 2025

The duties of a Trustee are as follows:

- Serve as member of the Board of Trustees
- Serve as a member of the Maxine Williams Board of Directors
- Serve as a member of the AAMA Representatives Bureau

Additionally, this Trustee was appointed to serve on the following:

- Leadership Development Strategy Team Chair
- Annual Conference Committee 2024-2025 Member
- Membership Development 2024-2025 Member
- Mentorship Ad Hoc 2024-2025 Member
- Partnership Task Force 2024-2025 Member

BOARD OF TRUSTEES and COMMITTEE MEETINGS ATTENDED:

- September 19, 2024, BOT Executive Meeting- Grand Rapids, MI
- September 20-23, 2024, AAMA 2024 Annual Conference, including all Trustee meeting requirements and obligations-Grand Rapids, MI
- September 20, 2024, First Timers and Students Reception-Grand Rapids, MI
- September 20, 2024, BOT Open Session-Grand Rapids, MI
- September 20, 2024, Mix and Mingle and Awards Celebration-Grand Rapids, MI
- September 21, 2024, AAMA HOD Sessions I & II-Grand Rapids, MI
- September 21, 2024, Meet the Candidates-Grand Rapids, MI
- September 21, 2024, AAMA Reference Committees-Grand Rapids, MI
- September 22, 2024, Breakfast with the SoPPs-Grand Rapids, MI
- September 22, 2024, Knowledge Bowl-Grand Rapids, MI
- September 22, 2024, State Leaders Session-Grand Rapids, MI
- September 22, 2024, Mix and Mingle and Presidents Banquet-Grand Rapids, MI
- September 23, 2024, BOT Post Conference Meeting-Grand Rapids, MI
- September 23, 2024, Maxine Williams Board of Directors Meeting-Grand Rapids, MI
- September 23, 2024, AAMA Committees, Strategy Teams, and Task Force Meetings-Grand Rapids, MI
- October 9, 2024, Virtual Membership Development Strategy Team
- October 10, 2024, Virtual Leadership Development Strategy Team
- October 20, 2024, Virtual Board of Trustees
- November 14, 2024, Virtual Leadership Development Strategy Team
- November 10-11, 2024, AAMA Planning Session-Chicago, IL
- November 20, 2024, Virtual Membership Development Strategy Team
- December 11, 2024, Virtual Annual Conference Committee
- December 14, 2024, Leadership CEU Session-Virtual
- December 15, 2024, Virtual Board of Trustees
- December 30, 2024, Virtual Partnership Task Force
- January 13, 2025, Virtual Partnership Task Force
- January 16, 2025, Virtual Leadership Development Strategy Team

1797 January 20, 2025, Virtual Partnership Task Force
 1798 January 22, 2025, Virtual Membership Development Strategy Team
 1799 January 26, 2025, Virtual Mentorship Ad Hoc
 1800 February 7-8, 2025, Board of Trustees, Chicago, IL
 1801 February 11, 2025, Virtual Focus Group Collaboration
 1802 February 12, 2025, Virtual Membership Development Strategy Team
 1803 February 13, 2025, Virtual Leadership Development Strategy Team
 1804 February 20, 2025, Virtual Mentorship Committee
 1805 February 24, 2025, Virtual Bylaws Committee
 1806 February 26, 2025, Virtual LDST Focus Group with Team Leader
 1807 March 1, 2025, Virtual Leadership CEU Session
 1808 March 4, 2025, Virtual Partnership Task Force
 1809 March 9, 2025, Virtual Board of Trustees
 1810 March 12, 2025, Virtual Membership Development Strategy Team
 1811 April 10, 2025, Virtual Leadership Development Strategy Team
 1812 May 4, 2025, Virtual LDST Focus Group
 1813 May 5, 2025, Virtual Mentoring Ad Hoc
 1814 May 6, 2025, Virtual LDST Focus Group
 1815 May 7, 2025, Virtual Membership Development Strategy Team
 1816 May 8, 2025, Virtual Partnership Task Force
 1817 May 12, 2025, Virtual LDST Focus Group
 1818 May 14, 2025, Virtual LDST Focus Group
 1819 May 15, 2025, Virtual LDST Focus Group
 1820 May 19, 2025, Virtual Annual Conference Committee
 1821 May 27, 2025, Virtual LDST Focus Group
 1822 May 28, 2025, Virtual LDST Focus Group
 1823 June 1, 2025, Virtual LDST Focus Group Debrief
 1824 June 1, 2025, Virtual Board of Trustees
 1825 June 5, 2025, Maxine Williams Scholarship Fund Board of Directors, Reno, NV
 1826 June 6-7, 2025, Open Session Board of Trustees, Reno, NV
 1827 June 6-7, 2025, Executive Session Board of Trustees, Reno, NV
 1828 June 12, 2025, Virtual Leadership Development Strategy Team
 1829 June 19, 2025, Virtual Board of Trustees
 1830 June 25, 2025, Virtual Membership Strategy Team
 1831 June 25, 2025, Virtual Leadership Development Strategy Team
 1832 June 29, 2025, Virtual Board of Trustees
 1833 July 1, 2025, Virtual Board of Trustees
 1834 July 10, 2025, Virtual Leadership Development Strategy Team
 1835 July 12, 2025, Virtual Leadership CEU Session
 1836 July 14, 2025, Virtual Membership Focus Group
 1837 July 15, 2025, Virtual Membership Focus Group
 1838 July 16, 2025, Virtual Membership Focus Group
 1839 July 17, 2025, Virtual Membership Focus Group
 1840
 1841 Trustee Miller anticipates attending the following meetings:
 1842 July 22, 2025, Virtual Leadership Subgroup
 1843 July 23, 2025, Virtual Membership Strategy Team
 1844 August 10, 2025, Virtual Board of Trustees

1845 August 14, 2025, Virtual Leadership Development Strategy Team
1846 August 16, 2025, Virtual Bylaws Session
1847 August 25, 2025, Virtual Bylaws Session
1848 August 27, 2025, two Virtual HOD Information Sessions
1849 August 28, 2025, Virtual Candidates Session
1850 September 6, 2025, Virtual Candidates Session
1851 September 6, 2025, Virtual HOD Information Session
1852

1853 **REPRESENTATIVES BUREAU ASSIGNMENTS:**

1854 **New York State Society of Medical Assistants**

1856 NYSSMA met on Wednesday, April 23, 2025, at 7:00 pm EST. This was a
1857 General Assembly, held only to conduct the necessary business of the Society.
1858 This was the first time they had a GA outside of their conference. Seventeen
1859 members were present at this meeting. They voted to keep the same officers for
1860 the coming year: President; Todd Lasher, CMA(AAMA), Vice President; Karen
1861 Roward, CMA (AAMA), LPN, Immediate Past President; Kim Battaglini, CMA
1862 (AAMA), Secretary; Karen Roward, CMA (AAMA), LPN and Treasurer; Sue
1863 Schilling, CMA (AAMA). They voted unanimously on a bylaw change. Their
1864 membership total as of this meeting was 173, which has continued to decrease
1865 over the last few years. They are planning to offer more virtual/online education
1866 as they think this might gain more members and offer more education to their
1867 members. Their society is considering upgrading its website to be a better
1868 resource including creating a “user friendly” resource guide on how to use it.
1869 They are still working, along with Legal Counsel Balasa, on their rights to
1870 practice; it is a struggle. In October 2024, they disbanded a chapter due to non-
1871 involvement. The nineteen members of that chapter were changed to members at
1872 large. They awarded one student scholarship to Sara Kornecki, a student at SUNY
1873 Erie Community College. She was the only applicant. They discussed strategies to
1874 get more schools involved. At the end of their business, I was given a few minutes
1875 to present AAMA information. I reviewed the AAMA slide presentation with
1876 them and answered questions. Prior to this meeting I reviewed their bylaws and
1877 had questions which I discussed with Mr. Balasa, President Lasher, and
1878 Parliamentarian Lee Damon, CMA (AAMA).
1879 It was an honor – privilege to represent the AAMA at the NYSSMA Virtual
1880 General Assembly. It also was an honor to correspond with Parliamentarian
1881 Damon, who has always been a mentor to me.
1882 This Society also held an in-person CEU session on Saturday, April 26th, which I
1883 did not attend as it was in NY. They had twenty-nine people registered for this
1884 session.
1885

1886 **Maine State Society of Medical Assistants**

1887 This Trustee will be attending the MSSMA on October 18, 2025, in Bangor,
1888 Maine. Miller is looking forward to this opportunity to represent the AAMA at the
1889 Maine State Society of Medical Assistants.
1890

1891 **COMMITTEE AND STRATEGY TEAM ASSIGNMENTS:**

1892 Membership

1893 Attended and participated in all virtual meetings
1894 Reviewed the numerous documents assigned and participated in all conversations
1895 Attended and participated in all focus groups
1896
1897 Refer to the report of Chair Neu
1898
1899 Partnership
1900 Attended and participated in all virtual meetings
1901 Reviewed the documents and website articles assigned, participated in all conversations,
1902 and contributed to tasks assigned to the group
1903 Reached out to Shriners Children’s Hospital in Oregon with no response
1904 Will continue the attempt to contact them about a possible partnership
1905
1906 Refer to the report of Chair Case
1907
1908 Conference
1909 Attended and participated in all virtual meetings
1910 Participated and contributed to conversations
1911 Contributed to and finished all assignments given
1912 Kept team updated on the status of the Leadership Session to be held at the conference
1913
1914 Refer to the report of Chair Case
1915
1916 Mentoring
1917 Attended and participated in all virtual meetings
1918 Read the assigned documents and participated and contributed to the conversation
1919 Suggestions given for the new document the team has created
1920
1921 Refer to the report of Chair Sawyer
1922
1923 Leadership
1924 Attended and facilitated all meetings of the Leadership Development Strategy Team
1925 Attended and participated in the Focus Group Team meetings
1926 Attended, introduced, and thanked participants throughout all the Focus Groups.
1927
1928 Refer to the report of Chair Miller
1929
1930 OTHER ASSIGNMENTS:
1931
1932 November 3, 2024, attended the Virtual Bylaws Committee Meeting
1933 June 17, 2025, listened to “Reducing Attrition: Why Your Members are Leaving Your
1934 Association”
1935
1936 Miller was appointed to the 2024-2025 Career Professional Development Team. In
1937 November 2024, that team was assigned to the Continuing Education Board.
1938
1939 Trustee Miller has responded to all requests and E-votes by the deadlines.
1940

1941 All correspondence has been responded to on time and all deadlines have been met.
1942
1943 Trustee Miller wishes to thank President Thomas and Immediate Past President Case for their
1944 support and leadership, CEO and Legal Counsel Donald Balasa, JD, MBA, for his guidance and
1945 ever-willingness to answer questions, Sharon Flynn, Board Services Manager, for her assistance
1946 with so many issues, the AAMA Staff for their assistance, and the entire AAMA BOT for their
1947 never-ending support for this Trustee.
1948
1949 It is an honor and pleasure to serve as an AAMA Trustee.
1950
1951
1952 Candy Miller, CMA (AAMA)
1953 2024-2025 Trustee

1954 **American Association of Medical Assistants® (AAMA)**
 1955 **Report of Trustee Neu**
 1956 **For the Period Ending September 2025**
 1957

1958 The duties of the AAMA Trustee are as follows:

- 1959 Serve as member of the Board of Trustees
- 1960 Serve as a member of the AAMA Representatives Bureau
- 1961 Serve as a member of the Maxine Williams Board of Directors

1962
 1963 Additionally, this Trustee was appointed to serve on the following:

- 1964 Membership Development Strategy Team-Chair
- 1965 Strategic Issues Planning Committee-Member
- 1966 Educators Collaborative Task Force-Member
- 1967 Leadership Development Strategy Team-Member

1968
 1969 **MEETINGS ATTENDED:**

- 1970 September 22-23, 2024, Annual Conference, Grand Rapids, MI
- 1971 AAMA SoPPs Breakfast
- 1972 AAMA State Leaders Session
- 1973 AAMA Presidents Banquet
- 1974 AAMA BOT Executive Session
- 1975 Committee Meet and Greet
- 1976 Vice Speaker and Immediate Past President
- 1977 October 20, 2024, BOT Executive Meeting
- 1978 November 9-11, 2024, AAMA Planning Session, Chicago, IL
- 1979 December 15, 2024, BOT Executive Meeting
- 1980 February 7-9, 2025, BOT Winter Meeting, Chicago, IL
- 1981 February 12, 2025, Membership Development Strategy Team Meeting (Virtual)
- 1982 February 13, 2025, Virtual Leadership Meeting
- 1983 February 21, 2025, Virtual Meeting with the Certifying Board on the Ad Hoc IV Committee
- 1984 March 1, 2025, Virtual Leadership Meeting
- 1985 March 9, 2025, Virtual BOT Meeting
- 1986 March 12, 2025, Virtual Membership Meeting
- 1987 March 13, 2025, Virtual Leadership Meeting
- 1988 March 20, 2025, Educators Collaborative Task Force Virtual Meeting
- 1989 April 10, 2025, Leadership Virtual Meeting
- 1990 April 25-26, 2025, Nebraska State Conference as AAMA Representative
- 1991 May 7, 2025, Membership Committee Virtual Meeting
- 1992 May 12, 2025, Leadership Focus Group Virtual Meeting
- 1993 May 14, 2025, Leadership Focus Group Virtual Meeting
- 1994 May 15, 2025, Leadership Focus Group Virtual Meeting
- 1995 May 17, 2025, Leadership Focus Group Virtual Meeting
- 1996 May 22, 2025, Educators Collaborative Task Force Virtual Meeting
- 1997 May 27, 2025, Membership Focus Group Virtual Meeting
- 1998 May 28, 2025, Membership Focus Group Virtual Meeting
- 1999 June 1, 2025, BOT Executive Meeting Virtual Meeting
- 2000 June 6-7, 2025, BOT Spring BOT Meeting, Reno, Nevada Virtual
- 2001 June 19, 2025, Virtual BOT Interview with Dr. Perez

2002 June 29, 2025, BOT Executive Virtual Meeting
2003 July 1, 2025, BOT Meeting with CEB Chair
2004 July 7, 2025, Membership Focus Group Meeting-Virtual
2005 July 12, 2025, Leadership Workshop Virtual Meeting
2006 July 14, 2025, Membership Focus Group Meeting Virtual
2007 July 15, 2025, Membership Focus Group Meeting Virtual
2008 July 16, 2025, Membership Focus Group Meeting Virtual
2009 July 17, 2025, Membership Focus Group Meeting Virtual
2010

2011 **REPRESENTATIVES BUREAU ASSIGNMENTS:**

2012 This trustee was privileged to be asked to the Nebraska State Conference on April 25-26, 2025,
2013 in Grand Island, NE. They had over 50 members attending with twelve CEUs being offered on a
2014 variety of topics with a great selection of speakers. The General Assembly met, and they elected
2015 new officers for the state and delegates to represent Nebraska at the Annual Conference in
2016 Arlington, VA. The members discussed the new AAMA website and tried to navigate all the
2017 information that the new website has to offer. Nebraska is struggling with membership, new
2018 leadership, and the new law regarding pharmacists and the delegation of the administration of the
2019 Depo Provera injections. The seasoned members are working with ideas to draw in new
2020 members, and mentor the new leadership. The officers will be contacting Don Balasa, JD, MBA,
2021 CEO and Legal Counsel about the scope of practice regulation regarding the administration of
2022 Depo Provera injections. The officers inquired about criteria for the Excel and Website
2023 awards. President Thomas will address this at the summer BOT meeting. Questions on a variety
2024 of topics were referred to Don Balasa, JD, MBA, CEO and Legal Counsel, Virginia Thomas,
2025 CMA (AAMA), Monica Case, CMA (AAMA), Loxie Kistler, CMA (AAMA), and several of the
2026 AAMA staff. These questions were addressed and the response sent back to the officers of
2027 Nebraska. It was a wonderful opportunity to attend this state conference.
2028

2029 **COMMITTEE/STRATEGY TEAM ASSIGNMENTS:**

2030 **Strategic Issues Planning Committee**

2031 Attended and participated in all virtual meetings
2032 Reviewed all documents assigned and participated in assignments
2033 Refer to the report of Chair Houghton

2034 **Educators Collaborative Task Force**

2035 Attended and participated in all virtual meetings
2036 Reviewed all documents and participated/completed all assignments
2037 Refer to the report of Chair Thomas

2038 **Leadership Development Strategy Team**

2039 Attended and participated in all virtual meetings
2040 Participated in focus group meetings
2041 Refer to the report of Chair Miller

2042 **Membership Development Strategy Team**

2043 Attended and participated in all virtual meetings
2044 Review all documents and completed all assignments
2045 Refer to the report of Chair Neu

2046 **Maxine Williams Scholarship Committee:**

2047 Received and reviewed all applications that were submitted and have made
2048 recommendations for this year's winners who will be presented at the Awards Ceremony
2049 in Arlington, Virginia.

2050 Refer to Chair Thomas' report

2051

2052 **Additional Assignments:**

2053 All e-ballots from President Thomas were answered.

2054 All correspondence has been responded to in a timely manner and all deadlines have been
2055 met.

2056

2057 This trustee would like to thank Virginia Thomas, CMA (AAMA), President, Monica Case,
2058 CMA (AAMA), Immediate Past President, Loxie Kistler, CMA (AAMA), Secretary, Don
2059 Balasa, JD, MBA, CEO and Legal Counsel, and the staff of the AAMA for all their help this
2060 2024-2025 year. Their valuable help and information made this trustee's job a lot easier.

2061

2062 Pamela L. Neu, CMA (AAMA), MBA

2063 Trustee 2024-2026

American Association of Medical Assistants® (AAMA)
Report of Trustee Quinn
For the Period Ending Sept. 2025

The duties of a Trustee are as follows:

- Serve as a member of the Board of Trustees
- Serve as a member of the Maxine Williams Board of Directors
- Serve as a member of the AAMA Representatives Bureau

Additionally, this Trustee was appointed to serve on the following:

- Social Media Committee Chair
- Bylaws Committee Member
- Documents Committee Member
- Membership Committee Member
- Partnership Task Force Committee Member

MEETINGS ATTENDED:

As of the date of this report, this trustee attended the following in-person meetings:

- 2024 AAMA Annual Conference | Grand Rapids, MI
 - BOT Executive Session | September 19, 2024
 - BOT Pre-HOD Meeting | September 20, 2024
 - AAMA Welcome and Awards Celebration | September 20, 2024
 - AAMA House of Delegates | September 21, 2024
 - Meet the Candidates | September 21, 2024
 - Reference Committee Hearings: Reports and Bylaws | September 21, 2024
 - Meeting with the SoPPs | September 22, 2024
 - General Session CMA (AAMA) Knowledge Bowl | September 22, 2024
 - State Leaders Session | September 22, 2024
 - Presidents Banquet | September 22, 2024
 - Post-HOD BOT Executive Session | September 23, 2024
 - Maxine Williams Board of Directors | September 23, 2024
 - Committee and Task Force Meet and Greet | September 23, 2024
- AAMA BOT Planning Session | November 9-12, 2024
- AAMA Winter Board Meeting | Chicago, IL – February 7-8, 2025
- AAMA Maxine Williams Board of Directors | Reno, NV – June 5, 2025
- AAMA Summer Board Meeting | Reno, NV – June 6-7, 2025

As of the date of this report, this trustee attended the following virtual meetings:

- Membership Committee Meeting | October 9, 2024
- AAMA BOT Virtual Meeting | October 20, 2024
- Bylaws Committee Meeting | November 4, 2024
- Membership Committee Meeting | November 20, 2024
- Social Media Committee Meeting | November 21, 2024
- AAMA BOT Virtual Meeting | December 15, 2024
- Documents Committee Meeting | December 16, 2024
- Social Media Committee Meeting | December 19, 2024 (E-mail Communication)
- Partnership Task Force Meeting | December 30, 2024
- Bylaws Committee Meeting | January 6, 2025

- 2112 • Partnership Task Force Meeting | January 13, 2025
- 2113 • Partnership Task Force Meeting | January 20, 2025
- 2114 • Documents Committee Meeting | January 21, 2025
- 2115 • Membership Committee Meeting | January 22, 2025
- 2116 • Social Media Committee Meeting | January 23, 2025
- 2117 • Membership Focus Group Meeting | February 4, 2025
- 2118 • Membership Committee Meeting | February 12, 2025
- 2119 • Membership Focus Group Meeting | February 19, 2025
- 2120 • Bylaws Review – State Compliance | February 24, 2025
- 2121 • Social Media Committee Meeting | February 27, 2025
- 2122 • Leadership Presentation “Mentoring” | March 1, 2025
- 2123 • Partnership Task Force Meeting | March 4, 2025
- 2124 • AAMA BOT Virtual Meeting | March 9, 2025
- 2125 • Membership Committee Meeting | March 12, 2025
- 2126 • Membership Focus Group Meeting | April 7, 2025
- 2127 • Social Media Committee Meeting | April 24, 2025
- 2128 • Membership Focus Group Meeting | April 28, 2025
- 2129 • Documents Committee Meeting | April 28, 2025
- 2130 • Leadership Focus Group Meeting | May 4, 2025
- 2131 • Leadership Focus Group Meeting | May 6, 2025
- 2132 • Membership Committee Meeting | May 7, 2025
- 2133 • Partnership Task Force Meeting | May 8, 2025
- 2134 • Leadership Focus Group Meeting | May 12, 2025
- 2135 • Membership Focus Group Meeting | May 13, 2025
- 2136 • Leadership Focus Group Meeting | May 14, 2025
- 2137 • Leadership Focus Group Meeting | May 15, 2025
- 2138 • Leadership Focus Group Meeting | May 17, 2025
- 2139 • Social Media Committee Meeting | May 22, 2025
- 2140 • Membership Focus Group | May 27, 2025
- 2141 • Membership Focus Group | May 28, 2025
- 2142 • Informational Meeting with Michael Knight and Don Balasa | June 1, 2025
- 2143 • Reducing Attrition: Why Your Members are Leaving Your Association | June 17, 2025
- 2144 • Physician Liaison Discussion | June 19, 2025
- 2145 • Membership Committee Meeting | June 25, 2025
- 2146 • Social Media Committee Meeting | June 26, 2025
- 2147 • AAMA BOT Virtual Meeting | June 29, 2025
- 2148 • Membership Focus Regroup | July 7, 2025
- 2149 • Leadership Session “Goal Setting” | July 12, 2025
- 2150 • Membership Non-Renewing Focus Group | July 14, 2025
- 2151 • Membership Non-Renewing Focus Group | July 15, 2025
- 2152 • Membership Non-Renewing Focus Group | July 16, 2025
- 2153 • Membership Non-Renewing Focus Group | July 17, 2025

Representatives Bureau Assignments:

South Carolina Society of Medical Assistants Annual Conference | Anderson, SC – March 13-16, 2025

This Trustee attended the 53rd annual South Carolina Society of Medical Assistants Conference March 13-16. There was a decrease in the number of attendees this year: 47 full registrations, 1

Saturday only, 10 students only, 10 educators only and 6 students. They had members from North Carolina and New Mexico. There was a total of 19 CEU's offered. The CEU sessions were well-liked by all the attendees. The speakers were informative and knowledgeable. The South Carolina Society is divided into 6 chapters. This trustee presented the AAMA PowerPoint, which included slides on benefits and AAMA resources. Congratulations to the newly installed officers for SCSMA. The SCSMA awarded Life Membership to Deborah L. White, CMA (AAMA), Educator of the Year to Stacey A. Campbell, RMA(AMT), and MVP of the Year to Marvitta Brooks, RMA(AMT). It was also passed to rename the SCSMA Scholarship Fund to the Deborah L. White Scholarship Fund. The conference committee also awarded a first-time attendee a conference registration for the 2026 annual SCSMA Conference. This trustee thanks SCSMA for their overwhelming hospitality while attending the conference.

Committee/Strategy Team Assignments:

Bylaws Committee

This Trustee was available for meetings and discussions with the committee and the chair through multiple emails as well as virtual meetings. Please see the Bylaws Committee report.

Documents Committee

This Trustee was available for meetings and discussions with the committee and the chair through multiple emails as well as virtual meetings. This trustee reviewed the following documents: Please see the Documents Committee report.

Membership Committee

This Trustee was available for meetings and discussions with the committee and the chair through multiple emails as well as virtual meetings. This trustee was assigned to and tasked with developing a focus group for CMA (AAMA) nonrenewing members. Please see the Membership Committee report.

Partnership Task Force

This Trustee was available for meetings and discussions with the task force and the chair through multiple emails as well as virtual meetings. Please see the Partnership Task Force report.

Social Media Chair

Please see the Social Media Chair report.

Other Assignments:

This trustee participated in all E-Ballots from President Thomas and were completed and submitted by the deadlines.

All correspondence has been responded to in a timely manner and all deadlines have been met.

This Trustee would like to thank President Thomas for her support and leadership this past year. CEO and Legal Counsel Donald Balasa for his dedication, guidance and willingness to answer questions. The AAMA staff for their support and the AAMA BOT for their assistance, guidance and support.

Aimee Quinn, CMA (AAMA)
2023-2025 Trustee

American Association of Medical Assistants® (AAMA)
Report of Trustee Sawyer
For the Period Ending September 2025

The duties of a Trustee are as follows:

- Serve as member of the Board of Trustees and the Maxine Williams Scholarship Board of Directors
- Serve as a member of the AAMA Representatives Bureau

Additionally, this Trustee was appointed to serve on the following:

- Ad Hoc Mentoring Chair
- Leadership Development Committee
- Bylaws and Resolutions
- Partnership Task Force Co-chair
- Career Professional Development
- Advisory Service Committee

MEETINGS ATTENDED:

- September 2024 – BOT Post Conference Meeting, Grand Rapids, Michigan
- November 2024 – BOT Planning Session – Chicago, IL
- December 15, 2024 -BOT meeting- Virtual
- January 26, 2025 – Ad Hoc Committee on Mentoring – Virtual
- February 7-8, 2025 – BOT Meeting Open and Executive, Chicago, IL
- February 11, 2025 – All Committee meeting, - Virtual
- February 13, 2025 – Leadership Development – Virtual
- February 20, 2025 – Ad Hoc Committee on Mentoring – Virtual
- March 4, 2025 - Partnership Task Force – Virtual
- March 9, 2025 – BOT Meeting– Virtual
- April 10, 2024 – Leadership Development meeting– Virtual
- May 5 – Ad Hoc Committee on Mentoring- Virtual
- May 8, 2025 – Partnership Task Force Meeting – Virtual
- May 12, 2025 – Leadership Focus Group- Virtual
- May 14, 2025 – Leadership Focus Group- Virtual
- May 16, 2025 – Leadership Focus Group- Virtual
- May 17, 2025 – Leadership Focus Group- Virtual
- June 1, 2025 – Leadership Focus Group results discussion meeting
- June 5, 2025 – Maxine Williams Board of Directors Meeting – Reno, NV
- June 6, 2025- Open BOT Meeting – Reno, NV
- June 7, 2025 – Executive BOT Meeting, Reno, NV
- June 28, 2025 – Leadership Development
- June 29, 2025 – BOT meeting – Virtual
- July 1, 2025 – BOT meeting – Virtual
- July 10, 2025 – Leadership Development meeting- Virtual
- July 15, 2025 – Membership Focus Group meeting, virtual
- July 16, 2025 – Membership Focus Group, virtual

2257 REPRESENTATIVES BUREAU ASSIGNMENTS:

2258 April 3-5, 2025, the 68th Annual meeting of the Ohio Society of Medical Assistants was
2259 held in Perrysburg, Ohio. The theme of their conference was “The Magical World of
2260 Medical Assisting.” A total of 68 members were in attendance with a total of 15.5 CEUs
2261 available. Medicaid Fraud, Health Literacy, Security Issues Medical Staff Should Be
2262 Aware Of. Some of the topics provided were CPT and ICD-10 updates, Home Care,
2263 Medicaid Fraud, Health Literacy, Security Issues Medical Staff Should Be Aware Of, and
2264 this Trustee presented a CEU on Mentoring. This Society has great support in their
2265 Physician Liaison, Dr. Tabb, which this Trustee learned was very active and a participant
2266 in the annual meetings. The HOD was held on Friday morning and there were 25
2267 delegates and 5 alternate delegates representing the districts. The delegation elected 6
2268 delegates and 1 alternate to attend the AAMA Annual Conference. The community
2269 project for their conference was to collect socks. Over 400 pairs of socks were collected
2270 for a local shelter. It was a great weekend with a lot of education and networking.

2272 COMMITTEE/STRATEGY TEAM ASSIGNMENTS:

2273 Leadership Development: Trustee Sawyer was assigned to a subgroup to discuss a speaker
2274 for the July virtual CEU. Trustee Sawyer contacted Sue Hawes to speak at the July virtual
2275 leadership meeting. The speaker confirmation was sent to the chair of this subgroup and
2276 Chair Miller. Trustee Sawyer attended multiple Leadership Focus groups and did various
2277 tasks during each of those meetings from facilitator to note taker. The report was then typed
2278 and sent to the Focus Group Chair Bogar. This Trustee attended the meeting on June 1 to
2279 discuss the findings of the Focus Group. Refer to the report of the Chair. Trustee Sawyer
2280 was lead on a sub-committee for the Leadership Session at Conference.

2282 Career Professional Development: This committee was moved to CEB for further
2283 development and Trustee Sawyer will be on that committee under this new direction. Refer
2284 to the Report of the Chair

2286 Bylaws and Resolutions Committee: Trustee Sawyer attended virtual meetings. Trustee
2287 Sawyer was assigned 3 states bylaws to review; all were reviewed and returned to the chair
2288 with suggestions. Trustee Sawyer made suggestions for some resolutions to discuss at the
2289 January virtual meeting. Trustee Sawyer reviewed AAMA Proposed Bylaws Amendments
2290 and Resolutions. Refer to the Report of the Chair

2292 Partnership: Trustee Sawyer attending meetings and participated in new Guidelines for new
2293 and existing partnership. Refer to the Report of the Chair.

2295 Advisory Services Committee: Trustee Sawyer was voted as a member at the June 2025
2296 BOT meeting. Refer to the report of the Chair.

2298 Ad Hoc Committee on Mentoring: See separate report.

2300 All correspondence has been responded to in a timely manner and all deadlines have been met.

2302 Shirley Sawyer, CMA (AAMA)
2303 2023-2025 Trustee

American Association of Medical Assistants® (AAMA)
Report of Trustee Smith
For the Period Ending September 2025

The duties of a Trustee are as follows:

Serve as member of the Board of Trustees and the Maxie Williams Board of Directors

Serve as a member of the AAMA Representatives Bureau

Additionally, this Trustee was appointed to serve on the following:

Editorial Advisory – Chair

Bylaws and Resolutions Committee – Member

Awards Committee – Member

Social Media Committee – Member

Mentorship Committee – Member

MEETINGS ATTENDED:

September 23, 2024, BOT Post Conference Meeting, Grand Rapids, MI

November 3, 2024, Virtual Bylaws and Resolutions Meeting

November 10-11, 2024, BOT Planning Session – Chicago, IL

November 21, 2024, Virtual Social Media

December 14, 2024, Virtual Leadership Session

December 15, 2024, Virtual BOT Meeting

January 6, 2025, Virtual Bylaws and Resolutions Meeting

January 23, 2025, Virtual Social Media Committee Meeting

January 26, 2025, Virtual Mentorship Committee Meeting

February 7-8, 2025, BOT Winter Meeting, Chicago, IL

February 20, 2025, Virtual Mentoring Committee Meeting

February 24, 2025, Virtual Bylaws and Resolutions Meeting

February 27, 2025, Virtual Social Media Committee Meeting

March 1, 2025, Virtual Leadership Session

March 9, 2025, Virtual BOT Meeting

March 24, 2025, Virtual Social Media Committee Meeting

May 5, 2025, Virtual Mentorship Committee Meeting

May 15, 2025, Virtual Leadership Focus Group

May 22, 2025, Virtual Social Media Committee Meeting

June 5, 2025, Maxine Williams Board of Directors Meeting

June 26, 2025, Virtual Social Media Committee Meeting

June 29, 2025, Virtual BOT Meeting

July 1, 2025, Virtual BOT Meeting

July 12, 2025, Virtual Leadership Meeting

July 14, 2025 – July 17 Virtual Membership Focus Group Meetings

July 24, 2025, Virtual Social Media Committee Meeting

August 16, 2025 – Virtual Bylaws Session

August 25, 2025 – Virtual Bylaws Session

August 28, 2025 – Virtual Social Media Committee Meeting

September 18 – 22 – AAMA National Conference – Arlington, VA

REPRESENTATIVES BUREAU ASSIGNMENTS:

Oregon Society – April 10-12 – Portland, Oregon. The Oregon Society of Medical Assistants Annual Conference April 10-12, 2025, was held in Portland, Oregon. 132 were registered for the conference, with 9 of those being students. There were a variety of topics that offered 18 CEUs. Some of the ones that this trustee attended were Networking for Healthcare Professionals, Y'all Means All: Gender-Expansive Care, Starting Your AI Journey: An Introduction to AI in Healthcare. On Thursday this trustee presented the BOT PowerPoint that showed the updates from the organization. On Friday this trustee attended the General Assembly meeting where there were 74 voting members present. This trustee also served as a teller in the General Assembly. This was this trustee's first time being in a General Assembly. They elected new officers and elected 4 delegates to the AAMA House of Delegates. This trustee was also present around the vendor area and the registration desk to answer questions and to talk with members when not in CEU sessions.

New Hampshire Society – May 3, 2025 – New Hampshire Society of Medical Assistants Annual Conference May 3, 2025, was held virtually with 66 members. There were 4 CEUs offered, entitled: Packing a Colorful Lunch and how to coach our patients, The Granite State Knowledge Bowl, played on Kahoots. A presentation on Epilepsy Treatment – NeuroPace RNS Stimulator, and finally Communication Compassion – not contempt – Let's talk about Stigma. This trustee presented the BOT PowerPoint that showed the updates from the organization. They held their officer elections during this time and elected 4 delegates to send to the AAMA House of Delegates.

COMMITTEE/STRATEGY TEAM ASSIGNMENTS:

Met with committee members during the 2024-2025 committee "meet and greet" held on September 24, 2024.

Awards Committee

Awards committee email request to think of some themes for Awards Night and to develop a question for the student essay. Submitted to Chair Thomas

Awards Committee email ballot for the theme of the Awards Night, voted and returned to Chair Thomas.

Awards Committee email ballot for the Student Essay question, voted and returned to Chair Thomas.

Awards Committee email request to watch several videos and report back on the type of entertainment for the awards program. Submitted to Chair Thomas. Refer to the report of the Awards Committee Chair

Social Media Committee

Social Media ongoing assignment of developing ideas for each month to be celebrated across all our platforms.

Social Media ongoing assignment of developing ideas for Conference to spark excitement for members. Refer to the report of the Social Media Committee Chair

Social Media Committee to come up with ideas for the summer board meeting for pictures, collaboration with Chair Quinn. Refer to the report of the Social Media Committee Chair

Mentorship Committee

2406 Mentoring Committee to work on developing a more detailed outline on Communication. Refer to the
2407 report of the Mentoring Committee Chair
2408
2409 **Editorial Advisory Committee**
2410
2411 Editorial Advisory Chair: See separate report
2412
2413 All correspondence has been responded to in a timely manner and all deadlines have been met.
2414
2415 Cameron Smith, BS, CMA (AAMA), PBT (ASCP), HITCM-PP
2416 2024–2026 Trustee
2417

American Association of Medical Assistants® (AAMA)
Report of Trustee Thomas
For the Period Ending September 2025

The duties of a Trustee are as follows:

Serve as member of the Board of Trustees

Serve as a member of the AAMA Representatives Bureau

Additionally, this Trustee was appointed to serve on the following:

- Awards Chair
- Educators Collaborative Task Force-Chair
- Marketing
- Strategic Issues Planning
- Annual Conference
- Maxine Williams Scholarship Board of Directors

MEETINGS ATTENDED:

- Planning Session Chicago 11/9-11/12/2024
- Virtual Marketing Meeting 11/20/2024
- Virtual BOT Meeting 12/15/2024
- Virtual Marketing Meeting 1/15/2025
- Virtual Educators Collaborative Task Force Meeting 1/23/2025
- Winter BOT Meeting Chicago 2/6-2/9/2025
- Virtual Marketing Meeting 2/19/2025
- Virtual BOT Meeting 3/9/2025
- Virtual Educators Collaborative Task Force Meeting 3/20/2025
- AAMA Representatives Bureau Assignment Indiana State Society 4/4-4/6/2025
- Virtual Marketing Meeting 4/16/2025
- Virtual Marketing Meeting 5/21/2025
- Virtual Educators Collaborative Task Force Meeting 5/22/2025
- Summer BOT Meeting Reno Nevada 6/5-6/8/2025
- Maxine Williams Board of Directors Meeting Reno Nevada 6/5/2025
- Virtual BOT Meeting 6/29/2025

Plan Meetings to Attend (After Submission of Report)

- Virtual Marketing Meeting 7/23/2025
- Virtual Educators Collaborative Task Force Meeting 7/24/2025
- Virtual Awards Committee Meeting TBD Based on Annual Conference Meeting
- Virtual Orientation for Delegates and Alternates TBD
- Virtual Orientation for Delegates and Alternates TBD

REPRESENTATIVES BUREAU ASSIGNMENTS:

This Trustee attended the Indiana State Society of Medical Assistants Conference in Edinburgh, Indiana April 4-April 6, 2025. This trustee arrived a day early and was treated by my host for the weekend to a wonderful meal with some of the officers and on Friday morning was treated to

breakfast at a quaint place called Hob Nob Corner/ we were then taken on a sightseeing tour of Columbus, Indiana. It was then back to the hotel and to work. The conference theme was Elevating Your Potential. Friday night started out with two engaging speakers on Self Defense in and outside of the workplace. I learned that one of my fellow BOT members, Pam Neu, is a strong person and almost took me off my feet once or twice. Saturday morning started at 6:30 am with a buffet breakfast and a lawyer who spoke on advocacy for those with disabilities. This was a powerful presentation as this speaker was also blind. Indiana State Society holds a general assembly to conduct the business of their society. Once registration for this was complete the meeting started, and the meeting was conducted with parliamentary procedures. Lunch was then a time that this trustee was allowed to share the most recent updates from the AAMA, along with the benefits of membership, networking and the 2025 conference information. After lunch time was spent earning a certification in QPR which is Question, Persuade and Refer. This was a topic centered around suicide and was highly informative. Saturday evening was the time for installation of the incoming 2025 officers of the Indiana State Society, the theme for the 2025 year is "Pay it Forward" and the use of hourglasses. This Trustee was honored to be asked to be a part of the installation ceremony. The new officers were charged with giving their time to society and to each other as time is one of the most valuable things that we can give. Sunday morning started out with another wonderful breakfast and this trustee was asked to give two presentations: Elevate Your Potential with Crucial Conversations and Soft Skills for Job Success. At the end of these presentations the post-conference board meeting was held. This trustee was welcomed with true Hoosier hospitality and honored to be the AAMA representative in Indiana.

COMMITTEE/STRATEGY TEAM ASSIGNMENTS:

Marketing Committee:

Worked on and approved theme for 2025 MAR week, discussed and approved fresh marketing materials to be available at 2025 Annual Conference in Arlington, Virginia, at the AAMA sales table. Also looked at future marketing ideas to employer groups, social media ideas, and more new marketing items for purchase.

Refer to the report of the Chair Jane Seelig

Annual Conference Committee

Discussed and reviewed schedule for the 2025 Annual Conference, reviewed the needs for each special event such as Welcome and Awards night, Presidents Banquet, and will be reviewing menus as they become available for each meal.

Refer to the report of Chair Monica Case

Educators Collaborative Task Force:

Created new documents for educators regarding the start of student medical assisting groups. Facebook page for medical assisting educators has been created with 150 members Along with other resources for educators and students.

Refer to the report of Chair Thomas

Strategic Issues Planning:

Met at planning session to review the previous year's plan, worked on some changes that would better align with each committee and then this was presented by Chair Houghton to the Board of Trustees and approved. Each committee was then charged with the new plan and has been working and reporting updates to Chair Houghton.

Refer to the report of Chair Houghton

Additional Assignments

This Trustee participated in e-ballots conducted by President Virginia Thomas

All correspondence has been responded to in a timely manner and all deadlines have been met.

Trustee Thomas also wants to thank President Thomas for all her support, leadership, and guidance through her service on the Board of Trustees. This Trustee would also like to thank Donald Balasa, JD, MBA, for his guidance and willingness to serve the organization. This Trustee would also like to thank the AAMA staff for their dedication and hard work that they have put in this past year. They have endured many changes and losses but have pushed forward with strength and determination. This Trustee would also like to thank the members and all they do; if not for you, we would not have an AAMA, so you do not go unnoticed or unappreciated. This Trustee would also like to thank the Certifying Board and the Continuing Education Board for your hard work on behalf of the members of the AAMA, which is remarkable. This Trustee would also like to thank the Board of Trustees for the hard work and dedication to the membership and betterment of the AAMA, and for the guidance and support of my years on the board.

Shannon Thomas, CMA (AAMA)
2023-2025 Trustee

**American Association of Medical Assistants® (AAMA)
Report of the Chief Executive Officer and Legal Counsel
For the Period Ending (approximately) September 2025**

The following is a summary of Chief Executive Officer (CEO) Balasa’s priorities and accomplishments, and an update on pertinent developments, since (approximately) the American Association of Medical Assistants (AAMA) 2024 Annual Conference in September of 2024 in Grand Rapids, Michigan.

The CEO’s focus has been on facilitating the AAMA’s accomplishment of its *Mission* and *Strategic Issues Plan* by: (1) assisting President Thomas and all other volunteer leaders to achieve their goals; (2) scanning the external environment to discern opportunities and threats; and (3) overseeing the deployment of AAMA resources (e.g., staff and capital assets) in an effective and efficient manner.

2024 Medical Assistants Recognition Day Greetings

Mr. Balasa sent his annual greetings to all medical assistants on the 2024 Medical Assistants Recognition Day—October 23, 2024. He highlighted the accomplishments of the AAMA during this past year and closed his message as follows:

Through these and related activities, the AAMA seeks to promote and publicize the unique value of medical assistants in the delivery of the highest quality health care. And, once again, we recognize and congratulate each of you on the incomparable health care you bring to the patients and practitioners you serve every day. There would not be an American Association of Medical Assistants without your unswerving commitment to professional excellence. Happy 2024 Medical Assisting Recognition Day!

Presentation at MGMA Leaders Conference

Mr. Balasa presented “Legally Allowable Tasks for Medical Assistants in Telehealth” at the MGMA Leaders Conference in October of 2024, reaching medical managers from delivery settings throughout the United States.

Article for *The PAHCOM Journal*

Counsel Balasa’s article “Three Principles of Effective Staff Utilization” was published in *The PAHCOM Journal*, an online magazine of the Professional Association of Health Care Office Management (PAHCOM) in October of 2024.

Updating and Publication of “Public Affairs” Article

At the request of the Educators Collaborative—a strategy team established by the Board of Trustees—Mr. Balasa’s “Public Affairs” article “Best Practices for Practices: Protect Your Office by Employing Credentialed Medical Assistants” was updated and published in the November/December 2024 issue of *Medical Assisting Today*.

Institute for Credentialing Excellence (I.C.E.) Presentation

Mr. Balasa co-presented “The ABCs of ABC Accreditation: Best Practices in Assessment-Based Certificate Program Design” at the Institute for Credentialing Excellence (I.C.E.) Annual Exchange in November of 2024.

Positions of Leadership for I.C.E.

CEO Balasa continues to serve on the Institute for Credentialing Excellence (I.C.E.) Accreditation Services Council and Government Affairs Committee. He is also Co-Chair of the committee to revise the current *ICE 1100: Standard for Assessment-Based Certificate Programs–2019*, which outlines the criteria for high quality assessment-based certificate programs.

Association Sued on Antitrust Grounds for Allegedly Tying Membership to Certification

The following is an article written and posted in the *CLEAR Regulatory Network* by Counsel Balasa:

Association Sued on Antitrust Grounds for Allegedly Tying Membership to Certification
January 7, 2025

A class consisting of certified court reporters sued the National Court Reporters Association (NCRA) January 3, 2025, in a federal district court in New Jersey alleging that the NCRA is violating Section 1 of the Sherman Act by requiring stenographers who hold the NCRA Certified Court Reporter (CCR) certification to be members of the NCRA to maintain their certification. A significant element of this case is the fact that holding the NCRA CCR is a means of satisfying mandatory licensing requirements in several American jurisdictions.

The Sherman Act is the foundational federal statute in American antitrust law. To simplify, it forbids certain anticompetitive tying arrangements that require parties to purchase (or maintain) one product or service (in this case, membership in the NCRA) in order to purchase (or maintain) another product or service (in this case, certification by the NCRA). In the parlance of antitrust law, the complaint in this case (*Palazzi v. National Court Reporters Association*) asserts that the NCRA CCR certification is the “tying product,” and membership in the NCRA is the “tied” product. The following averments of the complaint describe the alleged tying arrangement and its anticompetitive effects:

3. Separately, and in addition to those certification-related requirements, NCRA, as a trade association, exploits the position it has, arising from state and court CCR certification requirements, by forcing Stenographers to also become paying members of NCRA and maintain that paid membership (regardless that they are certified and current on all CEU obligations) or lose their certification.

.....

12. Despite already being certified and meeting the requirements to be recognized as CCRs, including completing CEUs – and having already paid the fees associated with such certification and CEUs – NCRA requires Plaintiffs and its other certified CCR members separately to maintain their NCRA memberships in good standing, i.e., also pay annual membership fees to NCRA or lose their NCRA certifications.

17. NCRA has been able to charge a much higher membership fee than its competitors in the Stenographic Membership Market by using its unlawful tying arrangement to minimize any threats from potential competitors.

According to the complaint, 39 states of the United States “either require or have courts that require Stenographers to be licensed or certified to work as stenographers.” The complaint points out that “...37 states...accept NCRA certification as a way to satisfy that states’ or state courts’ requirement or as a way to waive out of completing that states’ licensing exam.” Furthermore, the complaint makes the following key points:

40. In fact, twelve of the 39 states requiring certification will only accept NCRA certification, to the exclusion of any other privately issued certifications. NCRA capitalizes on these exclusions to retain its dominance over the Stenographic Certification Market and extract annual membership dues from members.

38. No other certification besides NCRA’s offers Stenographers the ability to expand their work across as many state lines. This is particularly important in today’s digital age, where a Stenographer has the ability to virtually work across state lines.

The class of plaintiffs is seeking treble (triple) damages (as well as other legal relief) against the National Court Reporters Association.

AAMA Podcast

Counselor Balasa presented the inaugural AAMA podcast entitled “A Legal Look at Medical Assisting.”

Co-presentation for 2024 CLEAR International Symposium

CEO Balasa was a co-presenter for the virtual Council on Licensure, Enforcement, and Regulation (CLEAR) International Symposium in December of 2024. The title of his presentation was “Exploitation of International Health Care Workers by Unfair Recruiting Practices, Unconscionable Contracts, and Human Trafficking.” The following is an excerpt from his handout:

Block 4—Biases and Challenges

1. World Health Organization (WHO) *Global Code of Practice on the International Recruitment of Health Personnel*, 21 May 2010

3.4 Member States should take into account the right to the highest attainable standard of health of the populations of **source countries**, individual rights of health personnel to leave any country in accordance with applicable laws, in order to mitigate the negative effects and maximize the positive effects of migration on the health systems of the source countries. However, nothing in this Code should be interpreted as limiting the freedom of health personnel, in accordance with applicable laws, to migrate to countries that wish to admit and employ them.

.....

4.1. Health personnel, health professional organizations, professional councils and recruiters should seek to cooperate fully with regulators, national and local authorities in the interests of patients, health systems, and of society in general.

.....

4.4 Member States should, to the extent possible, under applicable laws, **ensure that recruiters and employers observe fair and just recruitment and contractual practices in the employment of migrant health personnel and that migrant health personnel are not subject to illegal or fraudulent conduct.** Migrant health personnel should be hired, promoted and remunerated based on objective criteria, such as levels of qualification, years of experience and degrees of professional responsibility on the basis of equality of treatment with the domestically trained health workforce. Recruiters and employers should provide migrant health personnel with relevant and accurate information about all health personnel positions that they are offered.

Presentation for the Commission on Accreditation of Allied Health Education Programs (CAAHEP) Symposium

Mr. Balasa presented “Undue Influence on Academic Accrediting Bodies and Professional Certifying Boards Is Forbidden: A Case Study from Medical Assisting” at the CAAHEP *Symposium* in January of 2025. The following are the “key takeaway” points from this presentation:

The National Commission for Certifying Agencies (NCCA) *Standards for the Accreditation of Certification Programs*: (a) prohibit undue influence on accredited certification programs; and (b) ensure autonomy of certification programs in making essential certification decisions. Such undue influence can come, for example, from a professional association or an academic accrediting body. Undue influence or lack of autonomy can prevent a certification program from becoming or remaining accredited by the NCCA.

The Council for Higher Education Accreditation (CHEA) *CHEA Standards and Procedures for Recognition* require that recognized academic accrediting bodies (and their subsidiary accreditation-recommending bodies): (a) “maintain independence from any sponsoring and/or parent organization with respect to all accreditation activities, reviews, actions, and decisions;” and (b) not allow a “Sponsoring and/or Parent Organization” from “limiting, influencing, or controlling accreditation activities.” Not

meeting these requirements can prevent a CHEA-recognized academic accrediting body from obtaining or maintaining CHEA recognition.

New York Legislation

Medical assistants for over thirty-five (35) years have been forbidden by New York law from administering medications and vaccines. Legal Counsel Balasa has been working with the New York State Society of Medical Assistants and its allies in drafting legislation that would allow medical assistants who have met education and training requirements to administer vaccines as directed by a licensed provider and under provider supervision. A bill has been introduced into the New York legislature, and all proponents of the legislation are hopeful that it will be enacted into law.

Texas Legislation

CEO Balasa has helped the Texas Society of Medical Assistants in efforts to pass human trafficking legislation in the Texas legislature. He wrote the following testimony:

Testimony of the Texas Society of Medical Assistants (TSMA) and the American Association of Medical Assistants (AAMA).....

Regarding the providing of human trafficking training to first responders and medical assistants

Donald A. Balasa, JD, MBA, AAMA CEO and Legal Counsel, dbalasa@aama-ntl.org

The American Association of Medical Assistants (AAMA), the national organization representing medical assistants throughout the United States, and the Texas Society of Medical Assistants (TSMA), its affiliated state society, express their strong and unequivocal support for the above-captioned bills that will assist the State of Texas combat the grave evil of human trafficking.

Medical assistants work in outpatient health care delivery settings such as provider offices, clinics, and health systems under licensed provider authority and supervision. They witness firsthand the unspeakable exploitation of human beings through the various forms of human trafficking.

Medical assistants are usually the first members of the medical staff to interact with patients. They are welcoming, highly perceptive, and quick to sense the hidden needs of patients in distress. Patients often are more comfortable revealing their life crises to medical assistants than to the provider.

To better help patients being exploited by human trafficking, medical assistants need to receive directed and professional training on “identifying, assisting, and reporting victims of human trafficking.” These bills would ensure that medical assistants receive this training.

These bills would also provide legal protection from discipline and retaliation against medical assistants and other staff who “in good faith report a suspected act of human trafficking” to an appropriate authority.

To safeguard its residents and to rid Texas of the scourge of human trafficking, the Texas Society of Medical Assistants and the American Association of Medical Assistants urge the enactment of the above-captioned bills.

Attendance at Washington Department of Health Virtual Hearings

Mr. Balasa attended virtual hearings of the Washington Department of Health on proposed regulations of relevance to medical assistants. Leaders of the Washington State Society of Medical Assistants also attended these virtual hearings.

The Present and Future of the Medical Assisting Profession

Mr. Balasa’s “Public Affairs” article “The Present and Future of the Medical Assisting Profession” was published in the July/August 2025 issue of *Medical Assisting Today*. He also presented on this topic for virtual continuing education sessions of the Wisconsin Society of Medical Assistants and the Anchorage Chapter of Medical Assistants of the Alaska Medical Assistants Society. The following are summary points from his article and presentations:

.....

- A strategy for the CMA (AAMA) to regain market share is to position the CMA (AAMA) so that its holders are proficient in tasks in addition to entry-level medical assisting tasks. This would differentiate the CMA (AAMA) from other medical assisting credentials.
- The Certifying Board of the AAMA is exploring the feasibility of establishing an add-on credential to the CMA (AAMA) in intravenous initiations and discontinuations. The add-on credential would require the completion of a course in theory and technique of IV starts and discontinuations. (To be considered, a course would require the successful performance of a sufficient number of IV starts and stops on live subjects (i.e., to clinical competence).) It would also require the passing of an examination in IV starts and stops offered by the Certifying Board of the AAMA. Those who complete the course and pass the exam would be able to add the letters “IV” to their CMA (AAMA). The full credential would be “CMA (AAMA)-IV.”
- The CB surveyed current CMAs (AAMA) and asked whether they would be interested in obtaining an IV credential as an add-on to the CMA (AAMA). **95% of the 10,000 survey respondents answered in the affirmative.**

- The CB of the AAMA has issued to education providers (including accredited medical assisting programs) a Request for Proposal (RFP) for a course in IV initiation and discontinuation for medical assistants. The Certifying Board will review any proposals it receives to determine which courses meet the standards of the CB.
- **The RFP would be for a course in IV *starts and discontinuations*, not IV *infusion*.**
- If the CB identifies one or more courses in IV initiation and discontinuation that meets its standards, it will explore the feasibility of creating an examination on IV starts and stops that would result in an IV add-on credential to the CMA (AAMA).
- Creation of a course and credential in IV initiation and discontinuation for medical assistants could result in boards of medical examiners and boards of nursing amending their regulations to allow medical assistants to be delegated IV tasks by (respectively): (1) physicians and physician assistants; and (2) advanced practice registered nurses, particularly nurse practitioners.
- If this occurs, it is likely that more providers would want to hire CMAs (AAMA)-IV.
- If this occurs, it is likely that more prospective medical assisting students who want to focus on the clinical aspects of medical assisting would want to attend a CAAHEP- or ABHES-accredited medical assisting program so they would be eligible for the CMA (AAMA) Certification Exam, and subsequently for the IV add-on credential that would permit them to perform IV initiations and discontinuations.
- This would distinguish the CMA (AAMA) credential from all other medical assisting credentials and would likely result in CMAs (AAMA)-IV being paid more for their additional knowledge and skill in IV starts and stops.
- If the CMA (AAMA)-IV comes to fruition and is successful, it may be prudent to determine whether other advanced add-on clinical credentials should be considered. It has been suggested that inserting urethral catheters may be a possibility. However, this task is (reportedly) not performed as frequently in outpatient settings and in certain specialty practices.

2839 **“Public Affairs” Articles in *Medical Assisting Today***

2840 Counselor Balasa wrote a two-part article entitled “Protecting Medical Assistants’ Right to
2841 Practice: A Retrospective” for his “Public Affairs” column in *Medical Assisting Today*. The first
2842 part appeared in the May-June 2025 issue, and the second part will be published in the
2843 September-October 2025 issue. The first part recounts how the AAMA has partnered with state
2844 societies to overcome legal obstacles to medical assisting scope of practice at the state level. The
2845 second part describes how the AAMA was instrumental in the decision of the United States
2846 Department of Health and Human Services (DHHS) Centers for Medicare & Medicaid Services
2847 (CMS) to require medical assistants to be credentialed to have their order entry into the
2848 Electronic Health Record (I) count for meaningful use calculation purposes under the Medicare
2849 and Medicaid Electronic Health Record Incentive Programs.

2850
2851 **South Dakota Society of Medical Assistants Presentation**

2852 On March 28, 2025, Mr. Balasa gave a virtual scope of practice presentation for the South
2853 Dakota Society of Medical Assistants.

2854
2855 **Fetal Alcohol Spectrum Disorders (FASD) United Article**

2856 Mr. Balasa was interviewed for a February 24, 2025, article published by *FASD United* featuring
2857 the American Association of Medical Assistants and its efforts to reduce prenatal alcohol
2858 exposure. The following is an excerpt from this article:

2859 *FASD United* is excited to spotlight each of the organizations that are part
2860 of CDC’s [National Partner Network \(NPN\)](#), a collaborative coalition of organizations
2861 dedicated to advancing key goals, including reducing prenatal alcohol exposure (PAE)
2862 and substance use, enhancing support services and access to care, and improving the
2863 identification and health of children and families impacted by FASDs. As a proud
2864 participant in this collaborative effort from 2022 to 2026, FASD United is honored to
2865 contribute to public education on FASD and prenatal substance exposure alongside these
2866 exceptional partners.

2867
2868 This February, we are proud to feature the [American Association of Medical Assistants](#)
2869 [\(AAMA\)](#), a key member of the NPN that works closely with the [University of Nevada,](#)
2870 [Reno](#) and their School of Public Health. I spoke with [Donald A. Balasa](#), who serves as
2871 Chief Executive Officer and legal counsel of AAMA, about AAMA’s important work to
2872 address FASDs. AAMA is the oldest and largest association dedicated to the
2873 advancement of the medical assisting profession in the United States. AAMA has about
2874 25,000 members and among its various services, provides continuing education credits
2875 for medical assistants.

2876
2877 Through the NPN, AAMA works in close collaboration with the [Center for the](#)
2878 [Application of Substance Abuse Technologies \(CASAT\)](#) at the University of Nevada,
2879 Reno to educate and train medical assistants on ways to reduce alcohol-exposed
2880 pregnancies and intervene with patients who may engage in risky or hazardous alcohol

use. Throughout our conversation, Don Balasa expressed his deep gratitude to the CASAT team for their “expertise and leadership” and to the CDC for “the guidance they have provided.”

Don described AAMA’s work through the NPN as focusing on educating their medical assistant members through in-person events and through a robust library of [continuing education resources](#) that address the prevention of alcohol-exposed pregnancies. “People can learn all about FASDs by reading our articles online and watching our videos on this topic,” Don explained, “and these resources are [all available on the AAMA website](#).” AAMA conducts many in-person train-the-trainer events, which Don describes as being “very successful” and are often featured at the [AAMA’s Annual Conference](#), as well as at regional workshops.

Podcast for Performance Testing Council Conference

Counselor Balasa gave a virtual presentation for the Performance Testing Council April 9, 2025, titled “President Trump’s Diversity, Equity, and Inclusion (DEI) Executive Orders and their Impact on Testing Bodies.”

LinkedIn Posts and Articles by CEO Balasa

- Circuit Court Rules that Open-Book Test Is Not Required by the ADA
- [Medical Assisting] “Assessment” is not always “Assessment”
- Permissible Medication Tasks for Credentialed Medical Assistants
- FAQs: Is President Trump’s DEI Executive Order Relevant for Testing Bodies?
- Reviewing Right-touch Regulation
- Categorization of Medical Assistants in Various States
- Department of Education: Treating Students Differently on the Basis of Race Is Illegal
- Attorney General to DOJ: Use of “Disparate Impact” Theories
- Web Accessibility Legal Requirements for US State and Local Governments
- Referring to Medical Assistants as Nurses: A Misdemeanor in Georgia
- Billing “Incident to” in Inpatient Facilities

Co-Presentation for the Association of Test Publishers Annual Conference

Mr. Balasa was a co-presenter for “Test Accommodations: Ask the Experts” at the annual conference of the Association of Test Publishers in January of 2025

House Legal Counsel Responsibilities

Counselor Balasa has continued to help constituent state societies and component chapters with issues involving bylaws, parliamentary procedure, suspected or actual misappropriation of funds, records retention, obtaining an Employer Identification Number/Taxpayer Identification Number (EIN/TIN), incorporation, advising states and chapters in regard to notices from the Internal Revenue Service, and the ineligibility of states and chapters for state sales tax exemption. He has

sent cease and desist letters to medical assistants who are using the CMA (AAMA) credential and are not CMAs (AAMA), and to former CMAs (AAMA) who are using the credential even though their CMA (AAMA) is not current.

Arizona Enacts Catheterization Law

Legislation was enacted by the Arkansas legislature that allows medical assistants with appropriate training to place and remove urinary catheters under general provider supervision. The following is an excerpt from this legislation:

32-1456. Medical assistants; allowable tasks; training; use of title; violation; classification; definition

.....

B. A medical assistant may place and remove urinary catheters after appropriate training and under the general supervision of a physician who is licensed pursuant to this chapter or chapter of this title, a nurse practitioner, clinical nurse specialist or certified nurse midwife who is licensed pursuant to chapter 15 of this title or a physician assistant who is licensed pursuant to chapter 25 of this title.

Arkansas Legislature Authorizes APRNs and Pas to Delegate to Medical Assistants the Administration of Injections

The Arkansas Legislature passed two bills in April of 2025 authorizing (respectively) advanced practice registered nurses (APRNs)—including nurse practitioners—and physician assistants to delegate to unlicensed personnel such as medical assistants the administration of medications and immunizations. These acts authorize the Arkansas State Medical Board and the Arkansas State Board of Nursing to promulgate regulations addressing specifics of this delegation.

LinkedIn Article on President Trump’s Executive Order on Accreditation

Counsel Balasa published the following article as his June 23, 2025, LinkedIn post:

Another Look at President Trump’s Executive Order on Academic Accreditation

President Trump issued his Executive Order (EO) “Reforming Accreditation to Strengthen Higher Education” on April 23. In light of subsequent and ongoing developments (e.g., see my article “[Trump Department of Education Files Reply in Support of Gainful Employment Regulations Adopted During Biden Administration](#)”), it is important to take another look at this EO.

Background

A postsecondary academic institution must be accredited by an accrediting body recognized by the United States Department of Education (USDE) for its students to receive financial assistance under Title IV of the Higher Education Act. In reality, it is difficult for a college or university to exist if its students are not eligible for federal assistance.

2964
2965 **Key Directive of the EO**

2966 Citing the 2023 United States Supreme Court decision in *Students for Fair Admissions v.*
2967 *Harvard College and the University of North Carolina*, this EO maintains that accreditors
2968 that require their accredited schools/programs to take actions furthering diversity, equity,
2969 and inclusion are engaging in unlawful discrimination and are in jeopardy of losing their
2970 USDE recognition. The Executive Order gave the following examples of statements by
2971 accrediting bodies that—according to the EO—violate federal law:

- 2972 • The American Bar Association’s Council of the Section of Legal Education and
2973 Admissions to the Bar (Council), which is the sole federally recognized accreditor
2974 for Juris Doctor programs, has required law schools to “demonstrate by concrete
2975 action a commitment to diversity and inclusion” including by “commit[ting] to
2976 having a student body [and faculty] that is diverse with respect to gender, race,
2977 and ethnicity.”
- 2978 • The Liaison Committee on Medical Education, which is the only federally
2979 recognized body that accredits Doctor of Medicine degree programs, requires that
2980 an institution “engage[] in ongoing, systematic, and focused recruitment and
2981 retention activities, to achieve mission-appropriate diversity outcomes among its
2982 students.”
- 2983 • The Accreditation Council for Graduate Medical Education, which is the sole
2984 accreditor for both allopathic and osteopathic medical residency and fellowship
2985 programs, similarly expects institutions to focus on implementing “policies and
2986 procedures related to recruitment and retention of individuals underrepresented in
2987 medicine,” including “racial and ethnic minority individuals.”

2988 **Other Points of Note in (or not in) the EO**

2989 There are other important points that are included in this EO, and some points that are
2990 conspicuously absent:

- 2991 • This EO does not forbid schools from offering classes on diversity, equity, or
2992 inclusion (DEI), nor does it prohibit accreditors from requiring schools or
2993 programs to include courses in DEI.
- 2994 • The EO directs the Secretary of Education to “take appropriate steps to ensure
2995 that barriers are reduced that limit institutions from adopting practices that
2996 advance credential and degree completion and spur new models of education.”
- 2997 • The Executive Order also mandates that higher education institutions “support
2998 and appropriately prioritize intellectual diversity amongst faculty in order to
2999 advance academic freedom, intellectual inquiry, and student learning.” This
3000 directive has been interpreted to mean that postsecondary schools must make sure
3001 that professors holding conservative political beliefs are not excluded from the
3002 faculty. However, this (presumably) would also apply to professors with liberal
3003 beliefs.

- In keeping with the gainful employment provisions of recent USDE regulations, the EO prohibits accreditors “from engaging in practices that result in credential inflation that burdens students with additional unnecessary costs.”
- The EO directs that the Secretary of Education “resume recognizing new accreditors to increase competition and accountability in promoting high-quality, high-value academic programs focused on student outcomes.”

New Idaho Law Extends Delegation to Non-Nurses such as Medical Assistants

Legislation that went into effect July 1, 2025, in Idaho now allows nurses “with appropriate education, training, and experience” to delegate to a “non-nurse” certain tasks “that do not involve the exercise of independent clinical judgment, as long as the nurse responsible for delegation maintains proper supervision and is satisfied that the person is qualified and adequately trained.” Medical assistants are classified as “non-nurses” under this law.

This amendment to the Idaho nurse practice act applies to all nurses, including advanced practice registered nurses (such as nurse practitioners). This law states that “tasks that do not involve the exercise of independent clinical judgment” are duties that “an individual has received formal training to perform and that such individual is certified to perform by a national organization acceptable to the board [of nursing].”

To restate, this new statutory language states that non-nurses (such as medical assistants) performing tasks not requiring the exercise of independent clinical judgment must have “formal training” to perform these tasks. The language also states that non-nurses (such as medical assistants) must be certified to perform these tasks by a “national organization acceptable to the board [of nursing].”

COMMITTEES'
REPORTS

**American Association of Medical Assistants® (AAMA)
Report of Ad Hoc Mentoring Committee
For the Period Ending September 2025**

The mentoring committee has been charged with developing a document for members on mentoring. The committee met virtually January 26, 2025, and all members were present. Don Balasa was excused as it was a brainstorming meeting.

The committee brainstormed on what they would like for the document to contain. The members also discussed different names to call mentors. Leadership Navigator and Skill Navigator were just a few.

The committee discussed the documents to come in two parts, one for leaders in officer roles and one for leaders and members in a committee role, from chapter level all the way to National level. In later discussions the committee thought it would be best to have a guide on what is a Leadership Navigator, the roles of the Navigator and the person whom they will be helping.

Member Kistler worked on an outline for delivering feedback and member Seelig worked on an outline for relationship building. The members worked on the various categories for leaders, with a deadline of February 15 to submit to the chair.

The committee met again virtually on February 20, 2025, to review the document and have further discussion. The committee finalized the outline and presented it to the BOT for approval. The document content was completed. The committee reviewed the document and made corrections and suggestions. The document will be sent to the BOT for approval.

This chair thanks the committee for all their hard work in getting this document completed.

Shirley Sawyer, CMA (AAMA), Chair

Members:

Monica Case, CMA (AAMA)
Loxie Kistler, CMA (AAMA)
Candy Miller, CMA (AAMA)
Jane Seelig, CMA-A (AAMA)
Cameron Smith, CMA (AAMA)

Staff Liaison:

Donald A. Balasa, JD, MBA, CEO and Legal Counsel

Ex Officio:

Virginia Thomas, CMA (AAMA)

**American Association of Medical Assistants® (AAMA)
Report of the Advisory Services Committee
For the Period Ending September 2025**

The Advisory Services Committee was established and charged in 2019-2020 with the task of researching ways to compile and distribute beneficial resources and knowledge to those hiring credentialed medical assistants as well as providing support to those employers in the outpatient setting.

This Committee Chair presented a recommendation at the February 2025 BOT meeting to amend the name of the Advisory Services Task Force to the Advisory Services Committee. The recommendation was passed unanimously by the BOT members and the Advisory Services Committee will be within the authority of the BOT.

A survey distributed among Committee members in February 2025 revealed the current members were willing to continue to serve on the Committee and to create strategies to educate the healthcare community of the value of the credentialed medical assistant.

This Committee took part in a virtual meeting on February 24, 2025, as well as several email communications. Ideas on strategies to promote the value of the credentialed medical assistant included (but were not limited to):

- Podcasts
- YouTube videos
- Tik Tok
- AAMA State Leaders Session at Conference breakout sessions
- State Conferences PPTs
- Grassroots events
- AAMA website
- Testimonials
- LinkedIn
- Facebook
- MAR Week

This Committee expressed a desire to promote the value of the credentialed medical assistant through empowerment and engagement of the credentialed medical assistant through example topics such as corporate medicine, roles of the MA of the future, the changing healthcare workforce, self-promotion, and mentoring. These topics are important to both employers and the credentialed medical assistant.

Several Committee members attended a webinar on March 5, 2025, titled “Better Primary Care” hosted by the United States of Care (a non-profit research organization at the state and federal levels). The webinar outlined findings that primary care is the corner stone of healthcare in the United States and listed many methods to improve outcomes.

This Committee awaited the findings of Focus Groups from the Leadership Development Strategy Team (LDST) and the planning session for follow up after the American Medical Group Association (AMGA) conference. Members expressed willingness to partner with the LDST at the AAMA 2025 Leader Session and the AMGA follow-up activities. Several email

communication updates were distributed to members. Due to the data collected, the LDST felt the time allotted for the State Leaders' Session at conference would all be dedicated to the presentation of the data from the Focus Groups.

This Committee, following an email update on May 13, 2025, contacted CEB Chair Hawes and CCETF Chair Ley regarding serving as a "backup" CEU or part of the LEAP education at the 2025 AAMA Conference. Past AAMA President Debby Houston contacted the 2025 Conference Education Committee and an application to serve as a "backup" presenter at the 2025 AAMA Conference was distributed to Advisory Services members for completion. This application was submitted to the 2025 Conference Education Committee on May 18, 2025, and the Advisory Services Committee was placed on a list for approval for continuing education at the 2026 AAMA Conference.

At the June 2025 BOT meeting, Shirley Sawyer, CMA (AAMA) was unanimously approved as an Advisory Services Committee member.

At the time of this report, communications among Committee members and MARCOM Director Lang are taking place regarding the development of podcasts to share information with employers and to empower the credentialed medical assistant. Tentative meeting times during the upcoming 2025 AAMA Conference are being sought to further discuss and plan the potential podcasts.

This Committee Chair would like to thank the members of this Committee for continual communications and suggestions to further advance the credentialed medical assistant through empowerment and the sharing of information with employers. Also, thanks for support and guidance from Don Balasa, CEO and Legal Counsel, Sharon Flynn, Board Services Manager, and Gina Lang Mokijewski, MARCOM Senior Director.

Respectfully submitted,
Loxie Kistler, CMA (AAMA) Chair, Advisory Services

Members:

Monica Case, CMA (AAMA)
Julie Flaatten, CMA (AAMA)
Sue Hawes, CMA (AAMA)
Debby Houston, CMA (AAMA)
Lisa Lee, CMA (AAMA)
Patty Licurs, CMA (AAMA)
Deborah Novak, CMA (AAMA)
Paula Purdy, CMA (AAMA)
Shirley Sawyer, CMA (AAMA)
Virginia Thomas, CMA (AAMA)
Rebecca Walker, CMA (AAMA)

Staff Liaisons:

Donald A. Balasa, CEO and Legal Counsel
Gina Mokijewski, Senior Marketing and Communications Director
Sharon Flynn, Board Services Manager

**American Association of Medical Assistants® (AAMA)
Report of the Annual Conference Committee
For the Period Ending September 2025**

The charge of this committee is to review the purpose and functions and the AAMA Annual Conference proceedings for opportunities to enhance events and schedules for the members and attendees.

The 69th Annual Conference will be in Arlington, Virginia, at the Hyatt Regency Crystal City from September 19-22, 2025. A welcoming email was sent to committee members, including the charge of the committee. Members were reminded to return signed volunteer forms and provide availability for a virtual meeting

The chair facilitated a virtual meeting with all committee members.

The committee's charge and structure were reviewed, and introductions were made. Committee members will provide input or discuss matters pertinent to their specific events or areas of the conference they are involved in, or when a decision is required from the entire committee. The roles of the BOT committee members were addressed. CCETF Chair Clare Ley, CMA (AAMA), and CCETF Vice Chair Brian Stimpson, CMA (AAMA), outlined their roles and functions related to the annual conference. The CCETF collaborates with staff liaison Nick Mickowski.

Nina Beamon, CMA (AAMA), was introduced as the Conference Education Chair, and this chair explained her role with the HOD and state conference functions. CCETF Chair Ley discussed CEB expectations for the hosting state and Conference Education Chair Beamon, including speakers. Chair Beamon provided updates on speakers as all CEU session speakers and topics including backup speakers are in place.

Following the BOT's recommendation to allocate additional time for lunch, the committee deliberated on the availability of restaurants at the conference site. The members concurred on the significance of this matter. Consequently, CCETF Chair Ley and this chair examined adjusting the schedule. The schedule has been revised accordingly, and Chair Ley has communicated the updated version to Chair Beamon.

This chair confirmed that AAMA Partnership CASAT/ FASD and the SUN Bus will be presenting CEU sessions and exhibiting. American Cancer Society will be exhibiting this year but not presenting a CEU session. Nick Mickowski will be communicating with these entities for the necessary paperwork and will be overseeing partnership speakers going forward.

Any requirements from Meeting Planner, Kathy Basel, such as room or AV needs, will be directed to the conference chair with a copy to the Board Services Manager, Flynn. This approach will streamline the process, minimize confusion, and not duplicate questions or requests.

Registration, including onsite conference registration, again will be through CVENT. There has been increasing positiveness as new features are added yearly. This year, this committee will investigate adding more features from CVENT to streamline and enhance the conference.

Chair Ley conveyed deadline for BIOs of all speakers will be due May 1, 2025.

Exhibitors are being explored. Please email any prospective contacts' information to Board Services Manager Flynn and copy both Director of Special Projects Lenhoff and this chair on the correspondence.

CCETF Chair Ley has included this chair in communications with the hosting state education chair. Speakers and topics are expected to be confirmed by early February. This chair and CCETF Chair Ley have communicated via email and phone to address the current needs of the conference.

This chair has received feedback concerning the AAMA Conference 2024, which will be used to improve the 2025 conference for enhanced attendee experience. While ensuring a positive experience for attendees is essential, the increasing costs of hosting venues necessitate a thorough review of conference expenses. Any committee member having any additional thoughts, should send to this chair and manager Flynn by December 17, 2024.

March 3, 2025, this chair emailed the conference committee with information from the BOT Winter Meeting and subsequent developments.

During the open session, the Board of Trustees discussed the high cost of meals and additional charges. The total cost per person for the 2024 conference, including three breakfasts, the welcome and awards, and the presidents banquet, was \$227.66. Other expenses included AV costs, room setup, speaker honorariums, printing, staffing, complimentary registrations, and hotel accommodations.

The BOT approved for the 2025 conference, the registration fees increase by \$50.00, for AAMA member full package meeting an early deadline of August 1, 2025. The other rates were adjusted accordingly but the student rate was not increased. There is a final registration date deadline of September 5, 2025, with an increase of \$50.00 for AAMA member full package. AAMA needs to meet the host hotel room block contract. Attendees not staying at the host hotel will pay an increase from the 2024 fees by \$75.00, for each deadline date.



This chair also reported that the conference registration go live goal is early March 2025, as it was in the final testing stage. A copy of the 2025 conference main logo was included.

This goal was met and the CVENT registration went live on March 3, 2025, and an e-blast to the AAMA members was sent the following day.

After reviewing the schedule and event space, adjustments were needed to accommodate lunch times and ensure hotel staff had time to prepare for all events. After consultation with CCETF Chair Ley, some CEU session times were reduced to 1.5 hours. All parties were informed and approved of the changes. This chair wishes to thank everyone for their cooperation. May 19, 2025, the Conference Committee met virtually.

Key timelines and committee members' needs were reviewed concerning their assigned events. Conference Education Chair Beamon reported that the Virginia State Society will use the two provided Ways and Means tables to sell items. CCETF Chair Ley provided updates on CEU topics, speakers, room monitors, and deadlines. All CEU topics and speakers were finalized before the July 3, 2025, deadline

The conference pin and charm design were created based on comments from conference attendees to go back to a pin much like previous conference years. After collaboration with Marketing Director Mokijewski, the design was created and approved. Other available purchasable items are being explored.

This chair has consistently communicated with Meeting Planner Basel and President Thomas via email, calls, and virtual meetings. Earlier meetings discussed menu options and confirmed conference space and logistics. Information was shared with committee members to gather input and meet requirements.

After recent renovations at the Hyatt Regency Crystal City, below is an update on current on-site dining options:

1. The Market – Now relocated from across the street to the lobby level of the hotel. It offers an all-day menu and is open daily from 6:00 AM to 12:00 AM, Monday through Sunday.
2. Cinnabar – Serves breakfast from 6:00 AM to 11:30 AM and lunch from 11:30 AM to 2:00 PM, Monday through Sunday.
3. LobbiBar – Offers dinner service from 5:00 PM to 12:00 AM, Monday through Sunday.

Meeting Planner Basel also coordinated with hotel management to ensure adequate staffing is available during the event. Additionally, two new restaurants have opened nearby, providing more dining choices within close walking distance of the hotel.

.
As of this report, we have secured exhibitors, a Golden Apple Award sponsor, and a Welcome and Awards sponsor. To further increase revenue and offset costs, additional sponsorship opportunities are available. These include branded lanyards, a photo booth, and drawstring conference logo bags.

Exclusive state-level sponsorships are also available, such as the Welcome and Awards Celebration, the Presidents' Banquet, advertising in the printed onsite program, and—for the first time this year—digital advertising in the CVENT conference app. This information was provided to state leaders via e-blast communications.

The 2026 AAMA Annual Conference, celebrating the AAMA's 70th anniversary, was announced and will be held September 14–17, 2026, at The Grand Sierra Resort in Reno, Nevada. The conference education chair and committee were approved and have begun securing speakers. The chair has actively participated in virtual and in-person meetings and email discussions, sharing relevant information with the team. The group is enthusiastic about the event, and the chair remains available for any questions or concerns.

CCETF Chair Ley included this chair in communications with the hosting state education 2025 and 2026 chair. We collaborated via email and phone to address current needs related to the

3311 conference education and event schedules. Additionally, we developed standardized email
3312 templates and instructional materials outlining the responsibilities of the conference education
3313 committee chair and its members.
3314
3315 This chair will continue to maintain regular communication through email, virtual meetings, and
3316 ongoing coordination with Board Services Manager Flynn, President Thomas, MarCom Senior
3317 Director Mokijewski (leading efforts related to exhibitors and sponsors) and Director of
3318 Continuing Education Mickowski. Communication will continue with Meeting Planner Basel
3319 and President Thomas while keeping CEO Balasa and the committee members informed of the
3320 status of the 2025 conference as finalizing details are increasing.
3321
3322 This chair extends appreciation to the committee members for their valuable input, recognizing
3323 the unique role each plays in contributing to a successful conference. Thanks, are also extended
3324 to Board Services Manager Flynn, Meeting Planner Basel, and President Thomas for their
3325 continued support as planning for the 2025 conference progresses
3326
3327 Monica Case, CMA (AAMA), Chair
3328
3329 Members:
3330 Nina Beamon, CMA (AAMA)
3331 Clare Ley, CMA (AAMA)
3332 Candy Miller, CMA (AAMA)
3333 Jane Seelig, CMA-A (AAMA)
3334 Shannon Thomas, CMA (AAMA)
3335
3336 Staff Liaisons: Sharon Flynn, Board Services Manager
3337 Nick Mickowski, Director Continuing Education and Membership
3338 Gina Mokijewski, Sr. Director Marketing and Communications
3339

American Association of Medical Assistants® (AAMA)
Report of Awards Chair
For the Period Ending September 2025

The charge of the Awards Committee is to review the applications for the AAMA Excel Awards as well as to create a topic for the AAMA Student Essay Award. The additional responsibility of this committee is to plan and execute the Welcome and Awards Celebration event held at the Annual AAMA Conference.

This chair met regularly with MarCom Senior Director Mokijewski and Board Services Manager Flynn to discuss the need for assistance from staff regarding the aid in purchasing awards and planning of the activities for the Welcome and Awards night. The committee held in-person meetings during regularly scheduled Board of Trustees meetings as well as virtual meetings and email communications. After discussions, the committee along with staff decided to continue to collaborate with the vendor Baudville in Grand Rapids, Michigan. Other topics were e-blasts regarding reminders for submissions for the 2025 awards.

At the February 2025 Board of Trustees meeting the theme for the 2025 Welcome and Awards night was chosen “The Gatsby Gala”. The decision was made to not have a costume contest this year; however, the committee decided to have some giveaways at the Welcome and Awards night. The committee did discuss that since last year’s entertainment was such an enormous success that this year could be no different, the committee distributed to the Board of Trustees their assignments and will have a rehearsal once in Arlington, Virginia.

The committee developed the AAMA Student Essay prompt question with a consensus of the AAMA Board of Trustees. The prompt question for 2025 is “Describe your strategies for professional development as a medical assistant and how you will advocate for the profession’s essential role on the healthcare team.”

This committee will begin reviewing all the submissions after the deadline of July 15, 2025, deadline, with a goal to be completed by July 20, 2025. Winners will be announced on Friday evening at the Welcome and Awards.

This chair and committee will work closely with AAMA meeting planner Kathy Basel in finding the menu for the Welcome and Awards event. We do not have a final determination at the time of this report; however, it is a fact that food and beverage costs along with the required gratuities and taxes are at an all-time high. A key point is that this is not a meal, as attendees should have dinner prior to the event.

This chair would like to thank the committee members for their contributions of ideas for this year’s events. This chair would also like to thank the staff, MarCom Senior Marketing and Communications Director Mokijewski, Director of Communications Miranda Sanks-Korenchan, Board Services Manager Flynn, and Communications Manager Laura Niebrugge who aided this committee through projects, brainstorming and presentations. This chair would also like to thank President Thomas for giving me the opportunity to serve as this committee’s chair.

3388 Shannon Thomas, CMA (AAMA)
3389 Chair
3390
3391 Committee Members
3392 Monica Case, CMA (AAMA)
3393 Cameron Smith, CMA (AAMA)
3394 Virginia Thomas, CMA (AAMA)
3395
3396
3397 Staff Liaisons,
3398 Gina Mokijewski, Senior Marketing and Communications Director
3399 Miranda Sanks-Korechan, Communications Director and Managing Editor
3400 Sharon Flynn, Board Services Manager
3401

American Association of Medical Assistants® (AAMA)
Report of the Bylaws and Resolutions Committee
For the Period Ending September 2025

The Bylaws and Resolutions Committee is responsible for officially notifying each constituent society of all changes to the Bylaws of the American Association of Medical Assistants (AAMA) and explaining how the changes may impact constituent society bylaws. If there are AAMA Bylaws changes that a constituent society is mandated to include in its bylaws, this committee must notify the constituent societies and provide a deadline by which each society must provide its revised bylaws to this committee to review for compliance with AAMA Bylaws.

State Society Bylaws:

This Committee Chair conferred with previous Bylaws Chair Candy Miller regarding complete state Bylaws review. As no complete review was conducted in recent years, the 2024-2025 Bylaws and Resolutions Committee agreed to conduct a comprehensive review of all states' Bylaws. The individual state's Bylaws were divided into groups and reviewed by Bylaws and Resolutions Committee members with a deadline of February 15, 2025. A guide/worksheet was created for Committee members to follow while reviewing the various state Bylaws.

Board Services Manager, Sharon Flynn created a spreadsheet listing both compliant and non-compliant Bylaws by state society. Compliant state Bylaws will be placed on a 3-year review schedule unless mandates originate in the HOD, and state mandated Bylaws occur.

Memos of compliance were submitted via email to state society Presidents during the month of March 2025. Memos of non-compliance were submitted to state society Presidents during the month of March 2025. Areas requiring revisions were outlined in the non-compliance memos with a return date by August 20, 2025 (30 days prior to the 2025 AAMA HOD). A reminder was included that any state not meeting compliance with AAMA Bylaws will be prohibited to seat Delegates in the 2025 HOD.

In late March/early April, a reminder email was sent to state society Presidents to submit required Bylaw revisions to Board Services Manager Sharon Flynn and Bylaws and Resolutions Chair Loxie Kistler by the August 20, 2025, deadline.

Following personal phone calls and reminder email communications and at the time of this report, thirty-nine of forty requested sets of state Bylaws have been submitted and are compliant with AAMA Bylaws. All have received memos of compliance and are on a three-year review plan unless mandated Bylaw changes originate in the HOD or a state implements state level Bylaw changes. Communications continue with the one non-compliant state via emails.

This Committee Chair is in communications with a contact in West Virginia and a contact in Maryland regarding proposed Bylaws as West Virginia and Maryland are contemplating forming/re-forming state societies. Sample Bylaw templates were sent to both contacts via email.

Proposed Resolutions and Bylaws:

3450 This Committee Chair has fielded many emails and phone calls with questions regarding current
3451 AAMA Bylaws. All communications have been answered after consulting with CEO and Legal
3452 Counsel Don Balasa. Communications took place among all Bylaws and Resolutions Committee
3453 members regarding proposed Bylaw amendments (PBAs). After much discussion and viewing of
3454 various AAMA Bylaws, the Committee decided to develop 3 PBAs dealing with officer
3455 qualifications and the election of officers and one Resolution that addresses partnerships and the
3456 role of the medical assistant. CEO and Legal Counsel Don Balasa was included in all
3457 communications regarding the PBAs.

3458
3459 This Committee received 4 PBAs from the Texas Society. Several email communications took
3460 place among Bylaws Committee members. A summary of all PBAs and one proposed
3461 Resolution was distributed to all Committee members on May 13, 2025.

3462
3463 This Committee prepared one proposed resolution and seven proposed Bylaws amendments
3464 which were presented for discussion at the June board meeting in Reno, Nevada, during the
3465 Executive Session. All 7 PBAs and one proposed Resolution were approved for advancement to
3466 the BOT. The Texas State Society was notified that 4 PBAs originating from Texas will be
3467 presented at the 2025 HOD and in the 2 virtual sessions. All 7 PBAs and one resolution will be
3468 presented at the 2 virtual Bylaw orientation sessions and the 2025 HOD in Arlington, Virginia,
3469 for delegate adoption or rejection.

3470
3471 This committee has scheduled 2 virtual orientations (informational only) for proposed
3472 resolutions or Bylaw amendments for AAMA Delegates and Alternate Delegates. The dates and
3473 times for the orientations are as follows:

- 3474
- 3475 • Saturday, August 16, 2025, at 11 am EST via Microsoft Teams
 - 3476 • Monday, August 25, 2025, at 9 pm EST via Microsoft Teams
- 3477

3478 At the time of this report, the Committee continues to respond to questions/suggestions for PBAs
3479 from state societies. CEO and Legal Counsel Don Balas continues in all communications.

3480
3481 This Committee chair wishes to thank Don Balasa, CEO and Legal Counsel, and Sharon Flynn,
3482 Board Services Manager, for guidance and support throughout the year. Also, thank you to all
3483 Committee members for volunteering your time and hard work on this Committee.

3484
3485
3486 Respectfully submitted,

3487
3488 Loxie Kistler, CMA (AAMA), Chair, Bylaws and Resolutions Committee

3489
3490 Members:
3491 Loxie Kistler, CMA (AAMA), Chair
3492 Debra Benson, CMA (AAMA), Member
3493 Julie Flaatten, CMA (AAMA), Member
3494 Donna Gibbins, CMA (AAMA), Member
3495 Aimee Quinn, CMA (AAMA), Member
3496 Shirley Sawyer, CMA (AAMA), Member
3497 Cameron Smith, CMA (AAMA), Member

Staff Liaisons:
Donald A. Balasa, CEO
Fred Lenhoff, Director Special Projects
Sharon Flynn, Board Services Manager

**Report of the Bylaws and Resolutions Committee
For the Period Ending September 2025
ADDENDUM -Dated August 3, 2025**

This addendum is due to the resignation of Loxie Kistler on July 21, 2025, and this new Chair being appointed on July 22, 2025.

After review of the three AAMA Proposed Bylaws Amendments and four proposed bylaws submitted by the Texas Society, this chair met with CEO Donald Balasa and Board Services Manager Sharon Flynn to discuss how they will be presented for the upcoming virtual bylaws review. With some questions and concerns that were discussed, Speaker Seelig, Vice Speaker Houghton, and the Bylaws Committee joined the meeting.

1. Texas PBA #1 and AAMA PBA #1 are similar; Do both need to be presented and voted on during the House of Delegates?
2. Texas PBA #3 was an editorial change that did not need to be approved so it was incorporated into the AAMA Bylaws on May 3, 2025.
3. Texas PBA #4 had verbiage that CEO Balsa and a few of the committee members were not comfortable with and asked to be reworded.

This Chair reached out to the Texas Society President to discuss the three matters at hand and the following is what was agreed on:

The Texas Society decided to withdrawal their original PBA#1 due to it being the same as the Bylaws Committee PBA#1 and they decided that the original PBA #3 didn't need to be voted on since it was an editorial change only, and that PBA #4 needed to be reworded to the following:

Article X: Officers and Trustees: Term of Office, Vacancy in Office Failure to Perform Duties

Section 1: Term of Office

Fiscal impact: None

Current Wording:

- A. The term of office for the President, Vice President, and Immediate Past President shall be one year or until successors are elected. The elected Officer shall not serve more than one consecutive term in the same office (except for the 2020-2021 AAMA year).

Proposed Wording:

- A. The term of office for the President, Vice President, and Immediate Past President

shall be one year or until successors are elected. **If there are no successors to one or more of the offices of President, Vice President, or Immediate Past President, the House of Delegates may authorize the current President, Vice President, or Immediate Past President for whom there is no successor to serve one additional AAMA year.**

Rationale:

This by-law could be perceived as contradicting as the first sentence states that the position is a one-year term or until successor is elected; however, the second sentence states that they cannot serve more than one consecutive term. By stating that, if there are no successors to any of these three offices, the House of Delegates may authorize the President, Vice President, or Immediate Past President to serve an additional AAMA year clarifies what happens if there is no successor for any of the three offices.

Therefore, the Texas Society has presented two Proposed Bylaw changes that will be voted on in the House of Delegates.

Respectfully submitted,

Cameron Smith, CMA (AAMA), Chair

Members:

Debra Benson, CMA (AAMA), Member
Julie Flaatten, CMA (AAMA), Member
Donna Gibbins, CMA (AAMA), Member
Aimee Quinn, CMA (AAMA), Member
Shirley Sawyer, CMA (AAMA), Member

Staff Liaisons:

Donald A. Balasa, CEO and Legal Counsel
Fred Lenhoff, Director Special Projects
Sharon Flynn, Board Services Manager

American Association of Medical Assistants® (AAMA)
For the period ending September 2025
Report of the Documents Committee

The Documents Committee is charged with reviewing AAMA documents to ensure such documents are up to date as well as consistent with other documents.

This chair sent out emails to the committee members, updating the members with which documents are needing to be reviewed.

This committee has several documents that they recommend the Board of Trustees approve so that they may be placed on the website for the membership to use.

- DEI Statement – Completed and approved November 2024 Planning Session
- Appointed Volunteers Policy – Completed and approved November 2024 Planning Session
- Started Excel worksheet for all AAMA Documents – ongoing
- Editorial changes to the Volunteer Leadership Position Descriptions
- Policy and Procedure Manual – Completed and Approved February 2025
- Representative Bureau Manual – Completed and Approved
- Membership Manual – Completed and Approved
- Guidelines on Submitting a resolution to the AAMA House of Delegates- Completed and Approved
- Creating labels from Excel to Word – Completed and Approved
- Power Points on Membership Recruitment and Retention – Completed and Approved
- Editorial changes to the Volunteer Leadership Position Descriptions (This document was sent to the Chairs of the Continuing Education Board and Certification Board.) -Completed
- Power Point on Membership Matters – In progress
- AAMA Lifetime Membership scoresheet – in progress

This committee met while at the planning session in Chicago, IL November 2024. This committee met while at the Board of Trustee meeting in Chicago, IL in February 2025.

This committee has had virtual meetings on December 16, 2024, January 21, 2025, and April 28, 2025. At that time, we reviewed multiple documents to prepare for review by the Board of Trustees.

Chair Houghton has also been in contact with the chairs of Educators Collaborative Task Force, Social Media, Mentoring, Awards, Membership and Bylaws to have their committees look at their documents and make updates to the documents that they are responsible for. Chair Houghton would like to thank those chairs for their assistance in getting these documents reviewed and updated.

Chair Houghton has been in contact with Staff Liaison Sanks-Korechan and has been working with her to update the documents list that we both have. These Excel spreadsheets will be added

3630 to the documents folder in Teams. Chair Houghton would also like to thank Staff Liaison
3631 Lenhoff and Staff Liaison Sanks-Korechan for helping with formatting and branding of the
3632 documents as needed.

3633

3634

3635 Claire M. Houghton, CMA (AAMA) – Chair

3636

3637 Members:

3638 Jane Seelig, CMA-A (AAMA)

3639 Aimee Quinn, CMA (AAMA)

3640

3641 Staff liaison:

3642 Sharon Flynn, Board Services Manager

3643 Fred Lenhoff, Director Special Projects

3644 Miranda Sanks-Korechan, Communications Director and Managing Editor

3645

American Association of Medical Assistants® (AAMA)
Report of Editorial Advisory Committee
For the Period Ending September 2025

The Editorial Advisory Committee is charged with developing topics for Medical Assisting Today in the following three categories: Quick Clinic, Practice Manager, and Educator Topic. Deadlines for the assignments were December 1, March 1, and June 1. The committee also reviewed articles for content before the articles were published in Medical Assisting Today.

This Chair emailed all committee members an outline of what topics were needed and was available to answer questions about their assignments.

This Chair received topics for all deadlines. Some of the topics received were:

- Effective Medical Billing and Coding Practices
- Streamlining Patient Scheduling and Appointment Management
- HIPAA Compliance for Medical Office Staff
- Optimizing Medical Record Documentation and Organization
- Implementing Efficient Inventory Management in the Medical Workplace
- Strategies for Effective Medical Office Customer Service
- Best Practices for Medical Office Supply Procurement and Budgeting
- Navigating the Complexities of Medical Insurance Claims Processing
- Continuing Education Opportunities for Medical Administrative Professionals
- Embracing Technology: Digital Tools to Enhance Medical Office Efficiency
- AI in healthcare
- Encouraging active patient participation
- Women and health care – inadvertent gender bias
- Health equity
- Stackable credentials
- Workplace violence and potential threats
- Blood pressure review
- Diabetic medications being used for weight loss
- Health screenings
- Common skin rashes, irregular moles/blemishes
- Parvovirus B19 in pregnancy & fetal risks
- Social Media & Pediatric mental health
- Hospital Infections and preventions
- Healthcare Economics
- Role of MA in emergency codes/1st aid situations
- Geriatric Depression & Anxiety
- Trypanophobia (fear of needles)
- Chronic ear infections and hearing loss
- Common Skin Disorders

This Chair also sent an email to the members thanking them for their work this year and encouraging them to volunteer next year for this committee or another committee.

3694 This Chair would like to thank the committee for their hard work and the AAMA staff members
3695 Miranda Sanks-Korechan, Communications Director & Managing Editor and Laura Niebrugge,
3696 Communications Manager & Senior Editor.

3697
3698 Cameron Smith, BS, CMA (AAMA), PBT (ASCP), HITCM-PP, Chair

3699
3700 Members:

3701 Lisa Lee, CMA (AAMA)

3702 Danille Bodoh, CMA (AAMA)

3703 Elizabeth Street, CMA (AAMA)

3704 Karla Hunter, CMA (AAMA)

3705 Katja Stine, CMA (AAMA)

3706 Melody Gibson, CMA (AAMA)

3707
3708 Staff Liaison:

3709 Miranda Sanks-Korechan, Communications Director & Managing Editor

3710 Laura Niebrugge, Communications Manager & Senior Editor.

3711

**American Association of Medical Assistants® (AAMA)
Report of the House of Delegates Minutes Committee
For Period Ending September 2025**

The HOD Minutes Committee is charged with reviewing the minutes for the AAMA House of Delegates (HOD) for accuracy.

The minutes were reviewed and posted to the AAMA website. Any member wishing to view the AAMA HOD minutes may access them from the “News” tab on the menu bar of the website home page. You must be an AAMA member and log in to access the minutes.

A memorandum and a copy of the minutes were emailed by the Speaker of the 2024 AAMA HOD to the Delegates and Alternate Delegates of the 2024 AAMA HOD.

The information was also emailed to the 2024-2025 and 2024-2025 AAMA Board of Trustees; AAMA Society of Past Presidents, 2024-2025 AAMA State Society Presidents and Presidents-Elect/Vice Presidents and AAMA Staff Directors and Managers.

The Chair wishes to thank the members of this committee for their time and service.

Chair: Sherry Bogar, CMA (AAMA), CN-BC

Members:

Natasha Geno, CMA (AAMA) -Vice Speaker

Claire Houghton, CMA (AAMA)

Shirley Sawyer, CMA (AAMA)

American Association of Medical Assistants®
Report of the Nominating Committee
For the Period Ending September 2025

The Nominating Committee is responsible for soliciting, screening, and presenting a slate of nominees for officers and trustees in accordance with Articles VIII and IX of the AAMA Bylaws.

This Chair contacted the members of this committee via email, welcoming them to the committee. The committee members should begin thinking about anyone they feel is qualified and should consider running for the Board of Trustees.

This chair provided the following documents, to review and become familiar with. The deadline for submissions is May 1, 2025. If there are any questions, please contact this chair.

- AAMA Officer Qualifications
- AAMA Officer and Trustee Nomination Form
- Copy of Memorandum sent to State Society Presidents and Presidents-Elect/Vice Presidents
- *Medical Assisting Today* Platform and Vital Stats Form

On January 22, 2025, an email containing a memorandum was sent to the Presidents and Presidents-Elect/Vice Presidents of the State Societies. This memorandum detailed the eight elective offices available for the 2025-2026 year and specified the submission deadline of May 1, 2025. Additionally, the email included the AAMA Officer and Trustee Nomination Form, the AAMA Officer Qualifications Document, and the *Medical Assisting Today* Platform and Vital Stats Form. The following are the nine elective offices open for the 2025-2026 term:

- President (one-year term)
- Vice President (one-year term)
- Secretary (one-year term completing an unexpired two-year term)
- Speaker (two-years term)
- Vice-Speaker (two-years term)
- Trustee-four positions (two-years terms)

A copy of this information was also sent to the current members of the AAMA Board of Trustees for consideration of the open positions and submission deadline.

Notifications regarding open positions, qualifications, and submission deadlines will be communicated through eblasts, details in the Leaders Insider, other official communication methods, and postings on the Leaders Facebook page.

The Nominating Committee met virtually on February 23, 2025. During this meeting, the committee chair reviewed the group's responsibilities, which include:

- Recruiting and encouraging qualified individuals to apply for AAMA officer and trustee positions.
- Reviewing the qualifications of all submitted nomination applications.

Committee members were reminded that all discussions and information reviewed are strictly confidential. Members must refrain from commenting on any confidential material or engaging in any conduct that could influence others or cast judgment on the character of any nominee. Maintaining confidentiality and impartiality is essential to the integrity of the nominating process.

The Nominating Committee discussed and finalize a communication strategy targeting state leaders. A formal email was developed and would be sent to state presidents, presidents-elect, and/or vice presidents and providing important information regarding:

- Open officer and trustee positions
- Submission deadlines
- Encouragement to run for the AAMA Board of Trustees
- A request to share the information with their state leaders and members

This chair assigned committee members specific states and provided emails for state presidents, president elects/vice presidents to contact. They were instructed to also include the following documents in their outreach:

- 2025 AAMA Officer and Trustee Nomination fillable form
- 2025 AAMA Officer Qualifications document
- *Medical Assisting Today* Platform and Vital Stats form

This chair reminded the committee members of President Thomas's memorandum dated February 18, 2025, of the resignation of AAMA Secretary, Loxie Kistler, CMA (AAMA), to be effective at the closing of the 2025 House of Delegates. This opens the secretary's position for a one-year term to finish the one year left of a two-year term.

This chair would send a memorandum in March 2025 to State Society Presidents and President-Elect/ Vice Presidents reminding them of President Thomas' memorandum and there are now nine elective offices open for the 2025-2026 year including the Secretary (one-year term). All communications were sent by mid-March 2025, and all assignments were completed as scheduled.

On April 20, 2025, this chair emailed the Nominating Committee with key communication updates regarding the officer and trustee nomination process. The update included the following would be sent out:

- An e-blast to all AAMA members reminding them of the open officer and trustee positions and the nomination deadline of May 1, 2025.
- A link to downloadable Volunteer Leadership Position Descriptions (pages 31–38), which outline the duties and time commitments associated with each role.
- Encouragement for members who may not yet be eligible to run to use the AAMA Officer Qualifications document as a roadmap for their leadership development and future eligibility to serve on the Board of Trustees.

Committee members were also encouraged to follow up with their assigned state societies, reiterating the open positions, required qualifications, and submission deadlines to ensure maximum outreach and participation.

The nominating committee met virtually on May 22, 2025. During the meeting, this chair reviewed all submitted candidate documents and explained the Candidate Evaluation Form, which each committee member was to complete for every candidate. The deadline for submitting evaluations was May 29, 2025.

The committee discussion emphasized the importance of providing AAMA members with opportunities to hear from candidates prior to the House of Delegates, enhancing transparency and member engagement in the election process.

The committee also discussed the next steps in the nomination process and dates:

- Notifying candidates once they are deemed qualified- Prior to the BOT Summer Meeting
- Announcing open positions and qualified candidates- During the BOT Summer Meeting
- Virtual Meet the Candidates' sessions-

- 1st Session will be on Thursday, August 28, 2025, at 9:00 pm (EST)

- 2nd Session will be on Saturday, September 6, 2025, at 12:30 pm (EST)

During this session, candidates will answer questions submitted to the Nominating Chair via email by Sunday, August 17, 2025.

- In person, Meet the Candidates session will be immediately following the morning session of the AAMA House of Delegates on Saturday, September 20, 2025, at the Hyatt Regency Hotel in Arlington, Virginia. At this session candidates will present their candidate speech/platform which will be followed by an open Q & A with the candidates.
- Nominations from the House of Delegates Floor- The deadline for all required paperwork sent to the AAMA Speaker of the House, with a copy to the Nominating Committee Chair, is on or before Wednesday, August 20, 2025

All committee members completed assignments. This chair notified the candidates they were deemed qualified, announced during the BOT Summer Meeting there were nine elected offices, the slate of candidates who had met all eligibility requirements per the AAMA Bylaws Article VIII and announced the two virtual Meet the Candidates sessions.

Nominations for 2025-2025 AAMA Officers and Trustees

AAMA President	Open	1-year term
AAMA Vice President	Sherry Bogar, CN-BC, CMA (AAMA)	1-year term
AAMA Secretary	Shirley Sawyer, CMA (AAMA), CPC	1-year term
<i>(This 1-year Secretary Term is to complete the unexpired 2-years term)</i>		
AAMA Speaker	Claire Houghton, CMA (AAMA)	2-years term
	Jane Seelig, CMA-A (AAMA)	2-years term
AAMA Vice Speaker	Aimee Quinn, BHA, CMA (AAMA)	2-years term
There are 4 open Trustee positions for election:		
AAMA Trustee	Christa Smith, CMA (AAMA)	2-years term

3878	AAMA Trustee	Jeanette Tyler, BAS, CMA (AAMA)	2-years term
3879	AAMA Trustee	Sandra Williams, CMA (AAMA)	2-years term
3880	AAMA Trustee	Open	2-years term
3881			
3882	June 12, 2025, this chair emailed and informed the committee members the slate officers and		
3883	trustees were presented during the BOT Summer Meeting and confirmed the two virtual Meet		
3884	the Candidates dates and times.		
3885			
3886	July 3, 2025, this chair emailed and notified each candidate:		
3887	<ul style="list-style-type: none"> • They could officially begin their campaign 		
3888	<ul style="list-style-type: none"> • 1st Virtual Meet the Candidates session Thursday, August 28, 2025, at 9:00 pm 		
3889	EST		
3890	<ul style="list-style-type: none"> • 2nd Virtual Meet the Candidates date of Saturday, September 6, 2025, at 12:30 pm 		
3891	EST		
3892	<ul style="list-style-type: none"> • In person, Meet the Candidates session will be immediately following the 		
3893	morning session of the AAMA House of Delegates on Saturday, September 20, 2025,		
3894	at the Hyatt Regency Hotel in Arlington, Virginia		
3895			
3896	July 3, 2025, a memo was sent to State Society Presidents, State Society Presidents-Elect/Vice		
3897	Presidents, and 2025 AAMA Delegates & Alternates, and a copy was sent to AAMA BOT and		
3898	Society of Past Presidents:		
3899	<ul style="list-style-type: none"> • Announcing the slate of officers, trustees, and open positions. 		
3900	<ul style="list-style-type: none"> • Meet the Candidates virtual and in-person sessions dates and times 		
3901	<ul style="list-style-type: none"> • Submit questions for the candidates to this chair by August 17, 2025 		
3902	<ul style="list-style-type: none"> • Nominations from the HOD floor paperwork sent to Speaker of the House and 		
3903	Nominating Chair, on or before August 20, 2025		
3904			
3905	This chair received several inquiries from individuals expressing interest in running for the		
3906	AAMA Board of Trustees. In response, detailed information regarding eligibility requirements		
3907	and the nomination process was provided. Additionally, phone and in-person conversations were		
3908	conducted to guide prospective candidates in understanding the qualifications and creating a		
3909	timeline for meeting them. All correspondence was handled promptly and thoroughly to ensure		
3910	everyone received the necessary support and guidance.		
3911			
3912	This chair proactively reached out to qualified AAMA members to discuss qualifications and to		
3913	encourage them to consider running for the Board of Trustees. Ongoing communication with		
3914	committee members will continue, and this chair remains available to all AAMA members for		
3915	any questions or guidance related to the nomination process.		
3916			
3917	This officer would like to extend a thank you to the members of this committee for their		
3918	persistent hard work and devotion to the process. This officer also wishes to thank President		
3919	Thomas, and staff liaison CEO and Legal Counsel Balasa for their guidance and support. Also, to		
3920	Board Services Manager Flynn for her involvement in the process and the countless hours she		
3921	dedicated.		
3922			
3923	Monica Case, CMA (AAMA)		
3924	Nominating Committee Chair 2024-2025		
3925			

3926 Members:
3927 Debby Houston, CMA (AAMA), CPC
3928 Todd Lasher, CMA (AAMA)
3929 Patty Licurs, CMA (AAMA), CPC
3930 Christina Sears, CMA (AAMA)
3931 Staff Liaisons:
3932 Donald Balasa, JD, MBA, CEO and Legal Counsel
3933 Sharon Flynn, Board Services Manager
3934
3935

American Association of Medical Assistants® (AAMA)
Report of the Social Media Committee
For the Period Ending September 2025

The Social Media Committee is charged with developing new and creative ways to increase visibility and active participation with LinkedIn, Twitter, Facebook, and Instagram, as well as developing, implementing, and maintaining all strategic social media communications, public relations, outreach, and event activities and materials that align with the 2024-2025 Strategic Issues Plan Goals #2 and #3.

Goal #2: Increase membership of medical assistants with the AAMA Organization

- Develop focus groups of all age groups to gain more knowledge of what they need and want – open to members, medical assistants with other credentials, non-members CMAs (AAMA) and students.
- Assist educators and practitioners to inspire AAMA membership to all medical assistants of all credentials.

Goal #3: Enhance engagement and communications.

- Utilize digital platforms to share information and encourage meaningful conversations.

The committee has continued to advance its discussions and ongoing initiatives in alignment with the goals outlined in the Strategic Issue Plan. Under the leadership of the current chair, all communications—including discussions, requests, and timeline updates—have been facilitated through email and virtual meetings to maintain consistent progress.

The chair has ensured regular communication with all committee members, including follow-up emails and distribution of meeting minutes outlining discussion topics and assigned tasks.

Virtual committee meetings were conducted on the following dates:

- November 21, 2024
- December 19, 2024: Canceled due to conflict (email communication)
- January 23, 2025
- February 27, 2025
- April 24, 2025
- May 22, 2025
- June 26, 2025

Upcoming meetings (after report submission)

- July 24, 2025
- August 28, 2025

Discussions during these meetings focused on the continuation of prior-year projects as well as the exploration of new opportunities. The committee collectively prioritized three main projects for the current term.

Project #1: Weekly Questions with “Reel” Answers

This ongoing project targets a new audience—working medical assistants—through social media engagement. The committee compiled a series of light-hearted and relatable questions intended to generate interest and participation, such as “What is your favorite type of pen?” or “What is your favorite work snack?”

The finalized list of questions had been submitted to the Social Media Manager on April 24, 2025. These questions will be used to create posts across AAMA’s social media platforms, with the goal of increasing visibility and interaction among medical assistants. The members of this committee have interacted with these posts in hopes of spreading the word and getting them noticed.

Project #2: Continue with Representative assignments and Highlighting the States

The committee aimed to complete this initiative by late summer, following the completion of all representative assignments. A reusable template has been developed to detail representative assignments and enhance consistency.

To support this initiative, each state has been provided with a unique QR code for the submission of images and updates, which may include:

- Highlights from representative visits
- Group photos
- Memorable experiences
- Brief introductions to new individuals met during visits, including their professional background and a fun fact

The QR code method has proven effective for collecting content and will continue to be used throughout the year. States without a representative assignment are encouraged to request a QR code to participate. All representatives’ assignments completed were posted by June 11, 2025.

This committee has been diligently working on our last project, as listed below.

Project #3: Mini Mics

This project builds on efforts initiated at the previous year’s national conference. The committee has developed fresh concepts for this year’s conference and plans to set up a dedicated table where members can create their own “Mini Mic Reels” using AAMA-branded props. Several committee members will be in attendance to facilitate this initiative.

Other Small Projects:

A list of monthly, weekly, and daily awareness topics has been compiled to guide content creation and promote awareness while boosting member engagement across social media channels. Additionally, the committee intends to continue its monthly Board of Trustees (BOT) photo series, each themed around a cause relevant to that month.

February 7: National Wear Red Day with the BOT

March 7: Dress in Blue Day for Colorectal Awareness with BOT meeting attendees

March 21: World Down Syndrome Day – BOT Socks Photo

June 9: Cancer Survivor Photo with BOT meeting attendees

July: Patriotic picture with the BOT

4032 This committee chair also took pictures of all the in-person meetings and posts were made for
4033 social media.

4034

4035 **Social Media Committee Restructure:**

4036

4037 The Social Media Committee is actively looking at ways to restructure the committee to make it
4038 more relevant to the needs of the organization. The Social Media Committee was formed before
4039 the AAMA had a Social Media Manager; this committee wants to restructure the social media
4040 committee to an engagement and outreach committee.

4041

4042 The chair extends sincere appreciation to the committee members for their ongoing dedication
4043 and creativity. Special thanks are also extended to AAMA staff member Gina Mokijewski for
4044 her support, and to Felicia Eldridge for her work in posting the BOT awareness photos. These
4045 posts received positive feedback from the membership and contributed to the committee's
4046 outreach success.

4047

4048 Aimee Quinn, BHA, CMA (AAMA), Chair

4049

4050 Members :

4051 Cameron Smith, CMA (AAMA), Trustee

4052 Kelly Emmons, CMA (AAMA)

4053 Natasha Geno, CMA (AAMA)

4054 Melody Gibson, CMA (AAMA)

4055 Amanda Harris, CMA (AAMA)

4056 Alexandria Holcomb, CMA (AAMA)

4057 Christina Sears, CMA (AAMA)

4058

4059 Staff Liaison:

4060 Gina Mokijewski, Senior Marketing and Communications Director

4061

American Association of Medical Assistants® (AAMA)
Report of the Strategic Issues Planning Committee
For the Period ending September 2025

This committee is charged with advancing the goals and objectives of the association, the profession, and the CMA (AAMA) credential.

This committee has been meeting via email.

This committee chair has updated the excel form in the Teams file to reflect this year's goals. Each committee that has been assigned to one of the goals is requested to fill in the progress of that committee. Chair Houghton used a form that was created to track the updates of the committees assigned to each goal. This form will then feed into an excel spreadsheet to be able to track the progress of our goals.

The SIP was then sent to Sharon Flynn to be posted to the website in the members' section.

The current Strategic Issues Plan Goals are as follows:

Goal 1: Strengthen the market share of the AAMA Membership and CMA (AAMA) Credential

- Assigned to: ADVISORY SERVICE, MARKETING COMMITTEE, and MARCOM

- Progress made at the time of this report as follows:

- Educators Collaborative Task Force has implemented an AAMA Educators Facebook page.
- Medical Assistant Recognition week campaign slogan has been approved.
- Increase in advertising for items for sale (years of service pins, etc.)
- Attended MGMA, and AMGA contacts have been made.
- Podcast on Proper Resume Creation and Interview Hints while seeking employment.
- Increased e-blasted and Social Media post about what is available to purchase on the website.
- Power Point Why Hire a Credentialed Medical Assistant

Goal 2: Increase membership of medical assistants within the AAMA Organization

- Assigned to: EDUCATORS COLLABORATIVE TASK FORCE, SOCIAL MEDIA AND MEMBERSHIP

- Progress made at the time of this report as follows:

- The Educators Collaborative Task Force created Medical Assisting Student Groups Tip Sheet – approved June 2025.
- Conducted a Membership Focus group on why they continue to join. Then one for delinquent members to see what they would like to see from AAMA.
- Membership has challenged IT to find a way to be able to have payment options for the membership renewal and new membership.

- 4109 ▪ Updating an outline for Mentoring: Focus on the needs of
- 4110 members needing mentoring as new leaders.
- 4111 ▪ Reviewing the current benefits.
- 4112

4113 Goal 3: Enhance engagement and communications.

- 4114 • Assigned to: MEMBERS OF BOARDS, DOCUMENTS, SOCIAL
- 4115 MEDIA, LEADERSHIP DEVELOPMENT, MEMBERSHIP, SPECIAL
- 4116 PROJECTS DIRECTOR, and BOARD SERVICES MANAGER
- 4117 ○ Progress made at the time of this report as follows:
- 4118 ▪ With the AAMA leaders and educators Facebook pages.
- 4119 ▪ Increased E-blast to members and non-members.
- 4120 ▪ Staff are updating the marketing materials and working
- 4121 with the documents committee to ensure the correct document is
- 4122 online for members to utilize.
- 4123 ▪ Wait times for being on hold at the AAMA office have
- 4124 shortened.
- 4125 ▪ Working with staff to provide appropriate responses to a
- 4126 question or for that staff member to know where the phone call
- 4127 should be directed.
- 4128 ▪ Working with staff to make sure that all documents that
- 4129 have been created by all the boards of AAMA are up to date and
- 4130 available on the website.
- 4131 ▪ Updating Power Points to have current information in
- 4132 them.
- 4133 ▪ Utilization of digital platforms to share information
- 4134 between the Boards.
- 4135 ▪ Updating all boards of the other boards' decisions that will
- 4136 affect them.
- 4137 ▪ Continued contact with NCCRT members, AMGA leaders,
- 4138 and MGMA leaders.
- 4139 ▪ Increased Board of Trustee visibility on the Facebook
- 4140 Leaders page answering questions that have been posted.

4141 Goal 4: Educate the decision makers on the value and utilization of credentialed medical

4142 assistants

- 4143 • Assigned to: ADVISORY SERVICES, MARKETING, MEMBERSHIP,
- 4144 LEADERSHIP, and PARTNERSHIP
- 4145 ○ Progress made at the time of this report as follows:
- 4146 ▪ Leader survey to collect employer information.
- 4147 ▪ Completion of Why Hire a Credentialed Medical Assistant
- 4148 Power Point.
- 4149 ▪ Continue contacts with NCCRT/ACS, AMGA,
- 4150 CASAT/FASD/MAP, NAHUC, and new contacts with SUN Bus,
- 4151 and Exact Sciences' Health Equity.
- 4152 ▪ AGMA President to help promote AAMA and advocate for
- 4153 medical assistants.

4154 Goal 5: Launch AAMA Website

- 4155 • Assigned to: MSC, IT Consultant, and AAMA STAFF
- 4156 ○ Progress made at the time of this report as follows:

- 4157 ▪ Website has launch Phase I of rebuild
- 4158 ▪ Working out issues
- 4159 ▪ Working on phase II

4160

4161 Goal 6: Expand Educational Opportunities

- 4162 • Assigned to: CAREER PROFESSIONAL ACHIEVEMENT,
4163 MARKETING, MARCOM, Board of Trustees and CEO
- 4164 ○ Progress made at the time of this report as follows:
 - 4165 ▪ Increased promotion of the approved education as an
4166 enhancement to medical assistants with credentials.
 - 4167 ▪ Educators Collaborative Task Force is working with
4168 current educators to find ways to enhance the educators and
4169 school knowledge of AAMA.
 - 4170 ▪ Increased posts on Social Media outlets.
 - 4171 ▪ Looking at avenues to provide more mentoring education.
 - 4172 ▪ Review what education opportunities other credentials
4173 have.

4174

4175 Goal 7: Be the leading resource for medical assisting scope-of-practice.

- 4176 • Assigned to: LEADERSHIP, CEO, and AAMA STAFF
- 4177 ○ Progress made at the time of this report as follows:
 - 4178 ▪ CEO Balasa gets updates on any legal issues and supports
4179 each state

4180

4181 This Chair would like to thank the members of the committee for their work and continued
4182 work.

4183

4184

4185 Claire M. Houghton, CMA (AAMA) – Chair

4186

4187 Members:

4188 Pam Neu, CMA (AAMA)

4189 Shannon Thomas, CMA (AAMA)

4190

4191 Staff Liaison:

4192 Donald Balasa, JD, MBA, CEO and Legal Counsel

4193 Sharon Flynn, Board Services Manager

4194

STRATEGY
TEAMS'
REPORTS

**American Association of Medical Assistants® (AAMA)
Report of Leadership Development Strategy Team
For the Period Ending September 2025**

This team is charged with developing the State Leaders session at the 2025 AAMA Annual Conference in Arlington, Virginia. They are also responsible for deciding the direction, projects, and activities for the team while keeping in mind the AAMA Strategic Plan.

The Leadership Development Strategy Team met at the Meet-and-Greet in Grand Rapids, MI, on Monday, September 23, 2024. At this meeting, discussion was held with the team members present to consider our charges and focus points from the BOT for this year. Ideas and thoughts were presented and the team started working.

At the time of this writing, the LDST has met on eight occasions and as a complete team since October 2024. The strategy team members plan to meet as needed in preparation for the State Leaders Session at the AAMA Conference in Arlington, Virginia.

VIRTUAL CEU SESSIONS

This team decided they would create three virtual CEU sessions to be held this year. They decided the general topic would be Mentoring. Chair Miller formed the committee into three teams to work on these presentations. Miller helped with all sessions.

12/14/24

Team Green – Sandra Williams-LEAD, Debby Houston, Casie Cornelison, Pam Neu Speaker Jenn Wilson; Topic – Mentoring in the Workplace. 1.5 CEUs
This was an informative presentation with approximately 60 people in attendance.

03/01/25

Team Blue – Sherry Bogar-LEAD, Claire Houghton, Deniece Jozefiak, Jeanette Tyler Speakers Holly West, DHed, PA-C and Amanda Persons, PhD; Topic – Basics of Building Mentoring Relationships. 1.0 CEU. Jorge DeLaGarza, M.S., SCC; Topic – Building Successful Mentoring Programs. 1.0 CEU. A lot of information with approximately 34 people in attendance.

07/12/25

Team Yellow – Karla Hunter-LEAD, Jazmin Feuerstein, Shirley Sawyer, Christa Smith Speakers Darlene Wilson, MSN, MBA, RN and Sue Hawes, CMA (AAMA), MBA, FACMPE, RHIA; Topic – Goal Setting. 2.0 CEUs. Great speakers with valuable information. Approximately 38 people were in attendance. A link to this session went out in the July Leaders Eblast which will link to the AAMA You Tube channel. This is available for all to watch, but no CEUs will be awarded.

This Chair appreciates the work of these teams for their creation of these virtual CEU sessions.

FOCUS GROUPS

The LDST held six Focus Groups between May 4th and May 17th. There were two categories: Group 1 (40 and under) and Group 2 (41 and above). These Focus groups were quite informative and quite a variety of members took part. Also, attending the different sessions were BOT members, AAMA Past Presidents, and CEO Balasa. Essential information was captured in these sessions. Some of this information was used in the creation of the Leadership Session in Virginia. This team also compiled a list of suggestions and other information that will be shared with the BOT and the 2025-2026 LDST Chair. These focus groups were formed to help us find out what our leaders (any level) need from the AAMA to help them grow or enhance their leadership skills.

Below are the questions that were asked. Attendees also had the opportunity to ask questions.

Questions for both groups

- Do you see yourself as a leader, if so what kind of leader are you?
- What qualities do you gravitate towards in a leader?
- What is your idea of leadership – what does it entail?
- What support do you need as a current or future leader?
- What would you like for the AAMA to accomplish in the future?

Questions Group I-for 40 and under

- What qualities/characteristics are leaders missing?
- How do you balance priorities in your personal and professional life?
- Are there any challenges holding you back from seeking additional roles?
- Do you or have you had a mentor in your journey and what value did you get from having one?
- Where do you see yourself in five and/or ten years within this organization?

Questions Group II- for 41 and above How can you help others succeed?

- Do you consider yourself a leader or a mentor or both?
- What steps have you taken to continue your development as a leader?
- What tools or support would help you in elevating your leadership role?
- What is the best and worst advice you were given as a leader? What is the best and worse advice you have provided others?

Miller appreciates all the work the team did in the formation, facilitation, and compilation of this important data from these sessions. Sherry Bogar LEAD, Casie Cornelison, Claire Houghton, Shirley Sawyer, and Jeanette Tyler, managed the sessions professionally and very efficiently, thanks to you all.

LEADERSHIP SPOTLIGHT

The first “Spotlight in Leadership Insider” Christina Sears, CMA (AAMA), was highlighted in June. These members are “Past and Present Guiding Lights”. The goal is to have these published in the AAMA Leaders Insider and AAMA Social Media Platforms. The team working on this project are Sherry Bogar, Casie Cornelison, and Christa Smith. Your work on this project is appreciated. Recognizing our members is especially important!

Here are the questions the participants were being asked:

- 4291 1. Are you a morning person or night owl?
4292 2. If you could create a slogan for medical assistants, what would it be?
4293 3. Favorite book or movie with author/director?
4294 4. If you could have dinner with a historical figure, who would it be and why?
4295 5. If your leadership style was a TV character, who would it be and why?
4296 6. What are the three most unusual items you have at your workstation/desk?
4297 7. Coffee or tea?
4298 8. In 20 words or less-If you could improve/change one aspect of the AAMA,
4299 what would it be and why?
4300

4301 The Focus Groups and Spotlight in Leadership Insider fall under the AAMA Strategic Issues
4302 Plan Goal 3: *Enhance engagement and communications*. This was assigned to the LDST by the
4303 BOT.
4304

4305 **2025 LEADERSHIP SESSION IN VIRGINIA**

4306

4307 The LDST is extremely excited with this opportunity to “go outside of the box” in creating a
4308 unique, fun, interactive, and informative session.
4309

4310 The team has decided not to offer CEUs at this session. The goal is to go back to the original
4311 reason the session was created, which is to help our members develop leadership skills and/or
4312 strengthen the leadership skills they already have.
4313

4314 This Chair has assigned two teams to work on the specific details of the sessions. These teams
4315 are developing a session that will meet the needs/requests of attendees from the focus groups.
4316 Team Casie: Casie Cornelison LEAD, Debby Houston, Karla Hunter, and Jeanette Tyler. This
4317 team is responsible for developing the structure of the session. This includes all that will be
4318 happening during the session. Some information has been presented to the committee, and they
4319 are very enthusiastic about the direction.

4320 Team Shirley: Shirley Sawyer, Sherry Bogar, Claire Houghton, Deniece Jozefiak, and Christa
4321 Smith. They are responsible for the “Scavenger Hunt,” which is going to be amazing!!

4322 This Team has decided on giveaways to all attendees of the session and the LDST will be
4323 wearing matching scarves to go along with their theme.

4324 Miller is working closely with both teams and shares details with the rest of the team when
4325 available.

4326 You don’t want to miss this session. To share a quote from Cornelison, “DUCKs of a feather
4327 flock together, and strong leaders help them fly farther”!
4328

4329 **LEADERSHIP INSIDER EBLAST**

4330

4331 This chair has provided messages for the monthly eblasts informing members of information and
4332 upcoming events,
4333

4334 February 20th was National Leadership Day. All amazing AAMA leaders were recognized for
4335 their dedication and commitment to the AAMA. Chair Miller worked with MARCOM in
4336 developing a special acknowledgment that was delivered electronically.
4337

4338 April was National Volunteer Month and the LDST wanted to thank leaders on all levels. With
4339 the help of LDST team member Cornelison, a message with the heading “Celebrating Our
4340 Volunteers: The Heart of AAMA, Our Organization,” was sent as an E-Blast. Thank you, Casie,
4341 for your assistance in the creation of this wonderful message!

4342
4343 This Chair thanks the members of the LDST for the time and energy they have committed to this
4344 team and the mission they have been assigned. This is a formidable group! We have had a busy,
4345 productive and successful year. THANK YOU AGAIN!

4346
4347 She also thanks Staff Liaisons; Sharon Flynn and Miranda Sanks-Korechan for their help, CEO
4348 Don Balasa, JD MBA and President Virginia Thomas, CMA (AAMA) and Immediate Past
4349 President Monica Case for their comments and participation. She also thanks the other AAMA
4350 MARCOM staff for their aid in the creation and sharing of the projects this team has asked them
4351 to help with.

4352

4353

4354 Candy Miller, CMA(AAMA) Chair

4355

4356 Members:

4357 Sherry Bogar, CMA (AAMA)

4358 Casie Cornelison, CMA (AAMA)

4359 Jazmin Feuerstein, CMA (AAMA)

4360 Claire Houghton, CMA (AAMA)

4361 Debby Houston, CMA (AAMA)

4362 Karla Hunter, CMA (AAMA)

4363 Deneice Jozefiak, CMA (AAMA)

4364 Pam Neu, CMA (AAMA)

4365 Shirley Sawyer, CMA (AAMA)

4366 Christa Smith, CMA (AAMA)

4367 Jeanette Tyler, CMA (AAMA)

4368 Sandra Williams, CMA (AAMA)

4369

4370 Staff Liaisons:

4371 Donald Balasa, JD, MBA, CEO and Legal Counsel

4372 Miranda Sanks-Korechan, Communications Director and Managing Editor

4373 Sharon Flynn, Board Services Manager

4374

**American Association of Medical Assistants® (AAMA)
Report of the Marketing Strategy Team
For the Period Ending September 2025**

The marketing committee is charged with branding the AAMA as the resource for the profession by developing tools that assist members with promoting the profession and the AAMA. Also, it is charged with developing ways to promote the AAMA to the public, including employers, health agencies, and medical assisting programs.

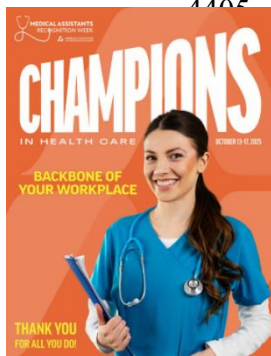
This team has maintained focus on the current AAMA Strategic Issues Plan. The charge of the Marketing Strategy Team is to increase the market share of the AAMA membership and the CMA (AAMA) credential and educate decision makers on the value and utilization of credentialed medical assistants.

The team members at the 2024 conference met in person for a brainstorming session on Monday, September 23, 2024. Virtual meetings were held on October 31, 2024, November 20, 2024, January 15, 2025; February 19, 2025; March 19, 2025; April 16, 2025, May 21, 2025, and to be held July 23, 2025. Discussion centered upon creation of a Power Point, MAR Week theme development, development of a video for state and chapter use, items to offer at the AAMA conference with staffing of the sales table by team members and other marketing projects.

POWER POINT

A team subcommittee chaired by Claire Houghton completed the Power Point development recommended by the 2023-2024 team. The subcommittee team members are Lisa Humbertson, Laura McClain, Deb Novak and Paula Purdy. The completed project **“Why Hire a Credentialed Medical Assistant”** is posted on the AAMA website for member, chapter and society use. Appreciation to Special Projects staff member Fred Lenhoff for his contributions on this project.

MAR WEEK THEME



The team brainstormed during multiple meetings before recommending the MAR Week theme of **Medical Assistants – VALUED CHAMPIONS OF HEALTHCARE**. This was presented at the November Planning Session and was approved by the BOT. Appreciation to staff members Mokijewski and Satterlee for their hours of work in developing the perfect poster to promote the theme. They have also developed a variety of MAR Week promotion materials which will be available at the conference and on the website. Additionally, a poster background will be available for members to insert photos of themselves.

CONFERENCE SALES TABLE

It was decided to offer the AAMA bling pin instead of a logo pin and iron on patches with a focus on reducing the inventory of marketing materials and promotion of the conference shirt. Kuhls clothing items will be on display as well. An order form will be developed for onsite item purchase efficiency. One staff member will be assigned for payment processing with a backup individual for breaks. One or two team members will also be assigned to staff the table. For future ordering convenience cards with a QR code will be available with a direct link to the Store section of the

4422 website. Table Hours will be Thursday 3:00 pm – 7:00 pm; Friday, Saturday and Sunday 9:00 am
4423 – 4:00 pm.
4424



4425

4426

4427

4428

4429 FUTURE MARKETING PROJECTS

4430

4431 1. Expand the employer information provided by members when renewing their

4432 membership for both the Marketing Team and Advisory Service Committee to use in

4433 marketing to employer groups and associations.

4434 2. Development of a video for social media posting and member use based upon the
4435 power point **“Why Hire a Credentialed Medical Assistant”**.

4436 3. The 2023-2024 team received approval for funds to be used for small padfolios as
4437 an item for member purchase. A survey of the membership this year indicated
4438 continued interest in this item.
4439

4440 Appreciation to President Thomas, Immediate Past President Case, and Director Mokijewski for
4441 their guidance, valuable contributions and support. Deepest appreciation to the team members
4442 who gave their time and thoughtful consideration to achieving our objectives.
4443

4444

4445

4446 Jane Seelig, CMA-A (AAMA) Chair

4447

4448 Members:

4449 Paula Cooke, CMA (AAMA)

4450 Rebecca Eldridge, CMA (AAMA)

4451 Claire Houghton, CMA (AAMA)

4452 Lisa Humberston, CMA (AAMA)

4453 Laura McClain, CMA (AAMA)

4454 Deborah Novak, CMA (AAMA)

4455 Christy Oldenstadt, CMA (AAMA)

4456 Paula Purdy, CMA (AAMA)

4457 Shannon Thomas, CMA (AAMA)

4458 Heather Wines, CMA (AAMA)

4459 Staff Liaison – Gina Mokijewski, Senior Marketing and Communications Director

**American Association of Medical Assistants® (AAMA)
Report of Membership Development Strategy Committee
For the Period Ending September 2025**

The Membership Development Strategy Team is charged with developing new and creative ways to increase and retain membership.

The membership team was very busy this year and the committee did a great job meeting the challenges. The team held two sets of Focus groups. On May 27 and 28, 2025 we hosted a virtual meeting that included Member Engagement and Retention Insights. The age group was 41–50-year-old long-term members with active CMA (AAMA) certifications. Each of the participants has extensive experience and leadership within the AAMA. The results of the focus group include:

Key Motivations for Membership Renewal

- *Credential Maintenance: Primary motivation cited by all was avoiding recertification exams and maintaining active CMA (AAMA) status
- *Professional Value: Members appreciate the AAMA magazine, conference discounts, and continuing education opportunities
- *Identify and Recognition: Membership is seen to preserve and elevate the role of CMAs (AAMA) in healthcare settings

What Members Appreciate:

- **Medical Assisting Today* Magazine: A consistent favorite, valued for legal articles, updates, and professional news
- *Discounts and Perks: Especially for certification, recertification, and events
- *Networking and Leadership: Opportunities to serve in local/state leadership and attend the national conference
- *Support from the AAMA Staff: Noted as professional and helpful, especially during the recertification process

Suggestions to Strengthen Member Engagement

- *Clarify “Exclusive Resources”
 - Members are unclear what qualifies as exclusive. Recommendations include clearly promoting resources like the *Medical Assisting Today* magazine, Beneplace discount portal, and member-only CEU access
- *Improve Visibility and Usability of Benefits
 - Better advertise Beneplace and other perks
 - Educate members on how to access and use member benefits
 - Highlight CEU availability and convenience through membership
- *Expand Holistic and Career-Relevant Education
 - Develop resources on payor systems, leadership, research, and non-clinical pathways
 - Include training for Mas working in restricted-scope states
- *Enhance Employer Awareness
 - Launch an “Employer Partnership Program” to promote CMA (AAMA) value
 - Equip members to act as CMA (AAMA) ambassadors in their workplaces
 - Use member testimonials to advocate with employers
- *Targeted Student Outreach

- Promote AAMA involvement and benefits in college MA programs, particularly in final semester courses.
- Consider incentives for new grads joining as members
- *Support in Restricted States
 - Create peer groups and offer guidance for Mas in states with limited scope of practice
 - Provide legal clarity, alternative role training, and community support
- *Connect Non-Renewing Members:
 - Invite them to feedback groups
 - Address their concerns in real-time to encourage re-engagement
- *Strategic Takeaways for AAMA Leadership
 - Clear communication and Return On Investment messaging are critical “What am I getting for my membership?”
 - Provide targeted resources for members in non-traditional or restricted roles
 - Strengthen employer partnerships and awareness campaigns
 - Utilize current members as advocates and educators
 - Continuing to enhance conference experiences and accessible CEU content

This group expressed their appreciation for the session’s depth and alignment with AAMA’s future planning, the legal updates from our Legal Counsel Donald Balasa, JD, MBA, CEO, regarding the pending legislation in New York. There are follow-up efforts underway to apply the focus group insights to upcoming strategic initiatives.

The next focus group was held July 14-17, 2025, and the main topic was AAMA Membership Non-Renewal. This group was a very diverse group that gave a variety of answers as to why they did not renew their membership.

*Reasons for Non-Renewal

- Financial Hardship-Many are students, unemployed, or managing other expenses, making the annual fee difficult to justify
- Limited Use of Benefits-Members often only renew during recertification years and do not consistently engage with available resources or local chapters
- Confusion between Certification and Membership-Some joined due to school program requirements without understanding the membership’s purpose or benefits
- Perceived Lack of ROI-Members didn’t feel that belonging to the AAMA led to career advancement, pay increases, or practical support
- Website and Access Challenges-Difficulty navigating the website and locating CEUs or certification renewal information discouraged engagement

*Common Suggestions to Help

- Offer Flexible Payment Options-Monthly or quarterly dues could improve accessibility, especially for students and those between jobs
- Lower or Tiered Dues-Proposals included student or military discounts and annual fees ranging from \$50-75
- Clarify Membership Value-Visual aids, school presentations, and clearer onboarding materials were recommended to explain benefits

4554 Enhance CEU Access-More affordable, unlimited CEU options and better
4555 communication on how to access them
4556 Improve Communication-Members prefer email and postal mail, with optional
4557 text reminders for CEUs or deadlines
4558 Stronger Outreach to Schools-Educational programs should clearly and explain
4559 the value of membership and guide students through the certification/membership
4560 distinction
4561

4562 The participants stated that they desire to stay connected and acknowledged the professional
4563 value of the credential. Some of the participants were unaware of the benefits like discounts,
4564 free CEUs, or leadership opportunities. There was an appreciation for the respectful,
4565 informative tone of the focus group discussions and a desire for more accessible, supportive
4566 engagement. Many of the participants still view the CMA (AAMA) as the gold standard, but
4567 to retain and attract members, the AAMA must address affordability, clarity of value, and
4568 consistent communication. Members want to feel supported and understood—especially
4569 during transitional or financially challenging times.
4570

4571 The membership committee has talked about several options with discounts for members and
4572 free CEUs. Don Balasa, JD, CEO, and Legal Counsel, Nick Mickowski, Director of
4573 Continuing Education and Membership, Gina Mokijewski, Senior Marketing Director, has
4574 presented a variety of discounts and CEU options that we are continuing to discuss along
4575 with the teams options.
4576

4577 The membership team also addressed several states that asked for help reorganizing their
4578 societies. West Virginia and Maryland Societies of Medical Assistants wanted to reestablish
4579 their societies. Nick Micowski provided the members emails from both states and letters
4580 were sent to all of the members extending our help with updating their bylaws and locating
4581 their founding documents. Loxie Kisler, CMA (AAMA), AAMA Secretary and Chair of the
4582 Bylaws Committee, offered to help with the development of updating the bylaws to be
4583 compliant with AAMA. Unfortunately, the West Virginia member had a family emergency,
4584 and she had to delay the re-establishment of that state society. Mayland is continuing to
4585 work with the membership committee to re-establish that state society.
4586

4587 The Kansas State Society of Medical Assistants has been notified that their society's bylaws
4588 need to be updated and again Loxie Kistler and membership committee member Julie Benson
4589 have offered their services to help the society. We are waiting for a response.
4590

4591 This committee chair would like to thank all the members of the team for their hard work this
4592 year. They have responded with wonderful work on all the projects and should be
4593 commended. This chair would also like to thank the MSC-Virginia Thomas, CMA (AAMA),
4594 Monica Case, CMA (AAMA), Loxie Kistler, CMA (AAMA), Donald A. Balasa, JD, MBA,
4595 CEO and Legal Counsel, and Nick Mickowski, Director of Continuing Education and
4596 Membership with their assistance and expertise.
4597

4598 Pamela L. Neu, CMA (AAMA), MBA
4599 Membership Development Strategy Committee Chair
4600
4601

4602 Membership Development Committee:
4603 Loxie Kistler, CMA (AAMA)
4604 Candy Miller, CMA (AAMA)
4605 Aimee Quinn, CMA (AAMA)
4606 Cindy Baird, CMA (AAMA)
4607 Marsha Benedict, CMA (AAMA)
4608 Julie Benson, CMA (AAMA)
4609 Leann Buneta, CMA (AAMA)
4610 Stephanie Hodgins, CMA (AAMA)
4611 Kellie Humma, CMA (AAMA)
4612 Laura Lander, CMA (AAMA)
4613 Linda Metcalf, CMA (AAMA)
4614 Christy Oldenstadt, CMA (AAMA)
4615 Summer O'Neal, CMA (AAMA)
4616 Marilyn Reeder, CMA (AAMA)
4617
4618 Staff Liaisons:
4619 Donald Balasa, JD, MBA, CEO and Legal Counsel
4620 Nick Mickowski, Continuing Education and Membership Director

***TASK
FORCES'
REPORTS***

**American Association of Medical Assistants® (AAMA)
Report on the Educators' Collaborative Task Force
For the Period Ending September 2025**

The objective of this task force is to educate/encourage educators regarding the benefits of association with the AAMA. Determine the resources needs of educators and where to locate information related to the profession, provide educators and their prospective societies with tools to establish State Society Educator Groups if there are none, and determine how to reach out to current and recent graduates to join AAMA and know the benefits of becoming a member.

A virtual meeting was held on January 23, 2025. The items covered were.

1. Reviewed the objectives of the Task Force for returning and new members of the task force.
 - A. Educate/encourage educators regarding the benefits of association with AAMA.
 - B. Determine the needs of educators and where to find resources related to the profession.
 - C. Provide educators and their respective societies with tools to establish a State Society Educator Group and their programs.
 - D. Determine how to encourage current and recent graduates to join the AAMA
2. Creating AAMA Facebook Page for Educators
 - A. Establish this page to look like the AAMA leader's page.
 - B. Committee members send in Prompts for post to page.
 - C. How and who will manage the page
 - D. Establishing rules for joining the page.

March 20th virtual meeting.

1. Facebook page was created and at that time 50 members had joined.
2. The committee asked that the committee review the following: Student Ambassador and Student Medical Assistant Organization.
3. After careful review the Task Force along with Don Balasa, JD, MBA, CEO, Legal Counsel, deemed the Student Ambassador document to no longer be valid and asked that it be removed from the documents and website altogether.
4. The committee will take some time and send recommendations to the chair for a shorter updated Tip Sheet for the Student Medical Assisting Organization document.

May 22, 2025, Virtual meeting

1. Facebook page has 131 members and weekly post and questions that are engaging.
2. The chair took all the recommendations and had sent them out prior to the meeting; the sheet was approved by the committee and sent to the documents committee. This was approved by the Board of Trustees at the June meeting in Nevada.

- 4668 3. We are continuing to have discussions regarding the Educators tab for the website
4669 and those are being passed to the Board of Trustees and Michael Knight in IT.
4670 4. Discussion around student membership and how to best transfer to a full membership
4671 once this is up. Don Balasa, JD, MBA, CEO, Legal Counsel, did share information
4672 with the chair regarding a proposal from years past that the committee will discuss
4673 at the July virtual meeting.
4674

4675
4676 At the writing of this report the Educators Facebook Page has 262 members in total and is
4677 continuing to create collaborations across the United States.

4678
4679 This Chair would thank the committee members for their hard work and valuable insights
4680 that have focused on providing relevant information for all educators in medical assisting
4681 programs. Great appreciation to Don Balasa, JD, MBA, CEO, Legal Counsel, for his
4682 insightful contributions to this committee. I would also like to thank President Thomas for
4683 the opportunity to chair this Educators Collaborative Task Force.

4684
4685 Shannon Thomas, CMA (AAMA), Chair

4686
4687 Members,

4688 Julie Benson, CMA (AAMA)
4689 Toni Coffman, CMA (AAMA)
4690 Jolene Guenthner, CMA (AAMA)
4691 Starra Herring, CMA (AAMA)
4692 Claire Houghton, CMA (AAMA)
4693 Loxie Kistler, CMA (AAMA)
4694 Shawn Molnar, CMA (AAMA)
4695 Lisa Nash, CMA (AAMA)
4696 Pam Neu, CMA (AAMA)
4697 Marilyn Reeder, CMA (AAMA)
4698 Daine VanderPloeg, CMA (AAMA)
4699 Rebecca Walker, CMA (AAMA)
4700 Annette Wilhelm, CMA (AAMA)
4701
4702

American Association of Medical Assistants® (AAMA)
Report of the Partnership Task Force
For the Period Ending September 2025

The Partnership Task Force is charged to develop and research partnership opportunities with outside allied health organizations, governmental agencies, corporations, and/or associations in which a partnership would provide mutual benefits and market our organization.

The purpose of a partnership is to promote and market our organization while keeping in mind the AAMA mission statement and the current Strategic Issue Plan.

This chair's goal is to not only enhance our partnerships but for the task force members to have an understanding about our partnerships. We need to work more closely with our partnerships to mutually promote each other.

The AAMA continues to be active in the current partnerships with the Center for the Application of Substance Abuse Technologies out of the University of Nevada, Reno, CASAT/FASD, the National Colorectal Cancer Round Table (NCCRT), the American Cancer Society (ACS) which includes HPV, and the National Association of Health Unit Coordinators (NAHUC).

The Partnership Task Force actively communicates with our partnerships, keeps current with initiatives, provides collaborative feedback and information to our AAMA members. The AAMA's recognition and marketing opportunities are vast as we reach a wide range of audiences.

Listed below are our current partnerships with information to better understand their initiatives, the AAMA's role, and resources available for our AAMA members.

CASAT/FASD

Since 2014, the American Association of Medical Assistants (AAMA) has worked collaboratively with the Center for the Application of Substance Abuse Technologies (CASAT) located in the School of Public Health at the University of Nevada, Reno (UNR) as part of coordinated national efforts to promote healthy pregnancy and prevent fetal alcohol spectrum disorders (FASDs). This work has been implemented through the Medical Assistant Practice Improvement Collaborative (MA-PIC) and Mountain Plains FASD Practice and Implementation Center (Mountain Plains PIC). The MA-PIC and Mountain Plains PIC have worked with the AAMA to prepare medical assistants to reduce alcohol-exposed pregnancies (AEPs) and intervene with patients who engage in excessive alcohol use. AAMA/MA-PIC and AAMA/Mountain Plains PIC partnerships were supported by cooperative agreement funding from the Centers for Disease Control and Prevention (CDC).

CDC funding will allow for the continued collaboration between the AAMA and UNR through 2026. This collaboration, known as the Medical Assistant Partnerships for Healthy Pregnancies and Families (MAP) will build on the work started by the MA-PIC and Mountain Plains PIC by developing, delivering, disseminating, and evaluating trainings and materials for medical assisting pre-service students and practitioners on how to promote alcohol- and illicit substance-free pregnancies, prevent FASDs, and support families living with FASDs. These activities will

4751 teach medical assistants to identify patients' excessive drinking and/or substance misuse
4752 behaviors and provide health education to change those behaviors, especially among women of
4753 childbearing age to prevent AEPs and FASDs. The MAP is expanding to polysubstance use
4754 including cannabis, opioids, and stimulants, which are all associated with poor neonatal,
4755 perinatal, and maternal outcomes.

4756
4757 FASD Toolkit: Enhancing the Role of Medical Assistants. This downloadable toolkit is a
4758 "Toolkit To Increase The Capacity Of Primary Care Practices To Reduce Risky Alcohol Use
4759 And Promote Alcohol-Free Pregnancies." Visit [https://fasdmap.org/fasd-toolkit-enhancing-the-](https://fasdmap.org/fasd-toolkit-enhancing-the-role-of-medical-assistants/)
4760 [role-of-medical-assistants/](https://fasdmap.org/fasd-toolkit-enhancing-the-role-of-medical-assistants/). Visit the AAMA e-Learning Center for CEU courses
4761 <https://learning.aama-ntl.org/Public/Catalog/Home.aspx> .
4762

4763 CASAT, as an AAMA Partnership, will be exhibiting and presenting a CEU session, titled
4764 "**Ethical Considerations and Effective Strategies for Preventing Excessive Alcohol Use**"
4765 during the AAMA 69th Annual Conference in Arlington, VA, with no honorarium provided.
4766

4767 NCCRT

4768 The AAMA 80% in Every Community pledge is to increase colorectal cancer screening to 80%
4769 or higher across the nation. Over 1800 organizations have committed to work toward the goal
4770 of 80% of eligible adults being regularly screened for colorectal cancer. There are more than
4771 200-member national organizations including the AAMA. Our shared efforts are working.
4772 Community health clinics, health plans, employers, counties, and others are achieving 80%
4773 screening rates and higher.
4774

4775 ACS NCCRT's 2025 Priority Areas has been established

- 4776 1. Mobilize national and community-level efforts that will lead to health equity across the
4777 colorectal (CRC) continuum
- 4778 2. Improve timely action for early-age onset CRC signs and symptoms
- 4779 3. Support on-time CRC screening as soon as eligible and continued participation per
4780 screening recommendations.
- 4781 4. Promote timely colonoscopy follow up to positive (abnormal) non-colonoscopy tests
4782 Identify areas to ensure timely initiation of quality CRC treatment
4783

4784 CRC is the third most commonly diagnosed cancer and the third most common cause of cancer-
4785 related death in both men and women in the United States. However, it ranks second in cancer-
4786 related deaths overall and is the leading cause of cancer death in men younger than 50 years of
4787 age. 2025 estimated new cancer cases for colorectum cancer at 154,270 and cancer deaths from
4788 colorectum cancer at 52,900.
4789

4790 To learn more visit <https://nccrt.org/>. There is a new Colorectal Cancer Data Dashboard which
4791 offers an interactive geospatial view of data pertaining to colorectal cancer in the United States.
4792 Explore the CRC Data Dashboard at <https://nccrt.org/colorectal-cancer-data-dashboard/>.
4793 For Continuing Educational opportunities, visit the AAMA's e-Learning [https://learning.aama-](https://learning.aama-ntl.org/Public/Catalog/Home.aspx?Search=colorectal&Tab=Course&LearningTrackId=15)
4794 [ntl.org/Public/Catalog/Home.aspx?Search=colorectal&Tab=Course&LearningTrackId=15](https://learning.aama-ntl.org/Public/Catalog/Home.aspx?Search=colorectal&Tab=Course&LearningTrackId=15).
4795

4796 The ACS NCCRT 2025 Annual Meeting will be held at the Double Tree by Hilton in Nashville,
4797 TN on November 19-21, 2025.
4798

AAMA NCCRT Panel Discussion CEU: Experts Discuss Colorectal Cancer Screening and Early Detection Barriers- Total course completions: 5,764 and Revenue: \$18,075.

ACS

Latest ACS Cancer Prevention and Early Detection Report: Smoking Rates Continue Historic Drop, but Cervical Cancer Prevention is Lagging. American Cancer Society report also shows HPV vaccination rates stall and disparities continue.

The latest updates from the ACS include Cervical Cancer and Pregnancy: The Latest Research (Cervical cancer treatment can impact fertility); Cancer Rates in Men Expected to Rise Significantly by 2050: (Global cancers cases in men are expected to increase by 84% and cancer deaths are expected to increase by 93%) What Asian American, Native Hawaiian, and Pacific Islander People Should Know About Cancer Risk (For people in these communities, it is important to know how their cancer risk can differ from the general U.S. population); What Gen-Xers and Millennials Should Know About Cancer Risk (May be at a higher risk for 17 different types of cancer, including cancers of the kidney, pancreas, and small intestine); Young People with Cancer Are at High Risk of Financial Hardship (Learn how cancer-related financial distress impacts young adults and what resources are available to help pay for treatment). For these and more news visit <https://www.cancer.org/cancer/latest-news.html>.

HPV

HPV (human papillomavirus) is known to cause many types of cancer in adults including cancers of the mouth and throat, cervix, vulva, vagina, penis, and anus. More than 37,000 people get HPV-related cancers in the United States every year. About 47,984 new cases of cancer are found in parts of the body where human papillomavirus (HPV) is often found: 26,280 among females, and 21,704 among males. HPV causes about 37,800 of these cancers in the United States every year.

HPV vaccines can prevent more than 90% of HPV cancers when given at the recommended ages. To learn more about HPV visit <https://www.cancer.org/cancer/risk-prevention/hpv.html>.

NAHUC

The AAMA has reciprocity with NAHUC for educational opportunities. NAHUC is a professional association for health unit coordinators and other frontline healthcare professionals performing similar tasks.

The AAMA has partnered with NAHUC regarding continuing education presentations of interest to both professions and associations. Their meetings are open to AAMA members who would like to attend and earn AAMA CEUs. The 2025 NAHUC 43rd Annual Education Conference, Bridging Education and Networking is August 18-19, 2025, in Dallas, Texas. For conference information visit <https://nahuc.org/annual-education-conference/>. Visit Save the Date Flyer at <https://nahuc.org/wp-content/uploads/2025/01/Save-the-Date-and-Booking-Info-NAHUC-Conference-2025.pdf>.

This chair sent a welcoming email to the task force members and included the current AAMA partnerships and building relationships. Additional information included background about this task force, its charge, purpose, and the Strategic Issues Plan Section Recommended Action assigned to the Partnership Task Force. This chair also included links to the websites for our

partnerships as it is important to understand these relations. Our first virtual meeting was scheduled, and assignment was given to visit and review links about NCCRT, the 2024 ACS NCCRT Annual Meeting, key video sessions from the Annual Meeting, and the 80% in Every Community National Achievement Awards information.

Partnership Task Force and Liaisons Virtual Meeting December 30, 2024

AAMA Secretary Kistler was invited to learn more about our Partnerships. This chair discussed the charge, purpose and the current Strategic Issue Plan goal and recommended action assigned to Partnership. Also, shared and discussed the Partnership Analysis Document for use when considering new or evaluating current partnerships. The document was sent to meeting attendees for comments and would be discussed during the next meeting to continue being utilized going forward. While this chair's goal was to not only enhance our partnerships but for the task force members to have an understanding about our partnerships. We need to work more closely with our partnerships to mutually promote each other. The area of focus for this meeting was understanding NCCRT, the 2024 Annual Meeting and 80% in Every Community initiative.

This chair attended the NCCRT Annual Meeting November 20-22, 2024, in Ft Worth, Texas. Information was shared about sessions, discussions, testimonials from survivors, and connections made during the conference. Many were interested and agreed to collaborate with the AAMA on magazine articles, CEUs, Podcasts, etc. to promote colorectal cancer awareness. Follow up emails and meetings will take place, and updates will be shared with this task force. After reviewing documents and the website links, the task force agreed to work towards a goal to submit for the 80% in Every Community National Achievement Awards Honorees Category: Professional Association. To begin our goal, it was agreed to recognize and promote Colorectal Cancer Awareness Month which is in March and Colorectal cancer awareness in relation to medical assistants. This was promoted throughout 2025.

Agreed plan:

Collaborative article, CEU, testimonials for March edition of AAMA *Medical Assisting Today*
Utilize contacts made at NCCRT Annual Conference
CEU for the AAMA eLearn Center
AAMA Social Media platforms full campaign
Utilize NCCRT social media branded toolkit to include but not limited to only March awareness
Blue Day to include collaborating with AAMA Social Media Committee
Board Services Manager Flynn to contact NCCRT Marketing Department
Podcast to include cancer survivor testimonials for March 2025 and Colorectal Cancer Awareness throughout 2025
AAMA Social Media utilization
NCCRT exhibiting opportunity AAMA Conference 2025

CEO Balasa, partnership liaison, suggested a meeting with MarCom to see if these are reasonable and achievable AAMA goals from the task force and staff. A meeting was scheduled.

SUN Bus partnership discussion. The MOU (Memorandum of Understanding) was pending and discussed how to be prepared for the release and campaign. Plan was for liaison Flynn to contact SUN Bus for marketing information and logo; create a document/ template for a guide

to promote our new and current partnerships; assigned task force members to contribute ideas for the document.

Partnership Task Force Virtual Meeting January 10, 2025

This chair previously shared the e-update from NCCRT and discussed NCCRT documents submitted for the 2021 80% in Every Community National Achievement Award Honoree given to the AAMA. This was discussed and the assignments from the previous meeting. The Partnership Analysis Document was shared with NAHUC for updating information about our partnership and feedback was positive. This was shared with the attendees, felt to be beneficial, and will continue to be utilized and an official AAMA document will be created for the task force.

This chair gave updates from the meeting with MarCom directors, liaisons CEO Balasa, Flynn, and Lenhoff. This chair shared all information and initiatives agreed by the task force. Input given by MarCom was the AAMA writer and NCCRT representative are working on the article but with a short deadline for the *Medical Assisting Today* March/April issue, a CEU article could not be completed. This chair suggested a CEU for the eLearning Center for March as this would allow more time to be completed. This is achievable and a keynote speakers' presentation will be reviewed for CEU content. Podcast recordings and content include testimonials from colorectal cancer survivors and limiting to around 30 minutes. Social media opportunities should be achievable.

Another update included, this chair and liaison Flynn met January 10, 2025, virtually with NCCRT Annual Meeting contact Exact Sciences Health Equity Lead on Health Professional Engagement and Director of Health Equity Programs & Strategy. It was shared; this meeting was timely as they are advancing on the other side to expand health equity through public health and focus on health care providers and health systems to improve screenings. The goal is to be able to equip individuals to help patients understand screenings and it was stated the AAMA could be a potential collaborator. Discussed a magazine article for the March/April issue of *Medical Assisting Today*; AAMA will look at educational opportunities from the health equity programs learning resources and provide information in the AAMA updates the BOT Representative Bureau shares during their assignments. Exact Sciences to explore AAMA Conference 2025 exhibiting opportunities. Will schedule another meeting post BOT Winter meeting but would continue to explore the magazine article. Task force members agreed.

This meeting included discussion about NAHUC history and reciprocity for the task force members to have a better understanding of the relationship. AAMA Secretary Kistler has been involved with NAHUC since 1996, and this chair asked her to provide background, CEU, and conferences information. This chair provided information received from the Executive Director of NAHUC, Patty Rice, from the partnership analysis document. The task force agreed information will be included for the AAMA updates the BOT Representative Bureau shares during their assignments, AAMA Leaders Insider and AAMA social media platforms. NAHUC marketing will be contacted, connected with AAMA MarCom and the task force will further discuss content received.

ACS was discussed, which includes HPV and the possibility to pursue this on a national level. A task force member will explore the HPV roundtable and provide information during the next meeting.

4943 Partnership Task Force Members Virtual Meeting January 20, 2025

4944 Members met and discussed the document created for campaign outlined suggestions. Each
4945 section was thoughtfully discussed in relation to meeting the purpose and goals and this will be
4946 shared and discussed for BOT document approval. The members also discussed how to
4947 highlight “Dress in Blue Day” to promote Colorectal Cancer Awareness month of March. The
4948 task force will collaborate with the Social Media Committee on this project.
4949

4950 Partnership Task Force Virtual Meeting March 4, 2025

4951 The Chair shared updates on colorectal cancer awareness initiatives led by the task force and
4952 communicated to AAMA staff. A podcast recorded on February 28, 2025, features John
4953 Kennedy, MD, discussing partnerships with NCCRT and the AMGA Foundation. AAMA
4954 Marketing Director, Gina Mokijewski, is finalizing the podcast intro and edits, with release
4955 expected mid-March. A testimonial from a colorectal cancer survivor prep called scheduled;
4956 and another is in the scheduling phase.

4957 An article for *Medical Assisting Today* by Joseph Perez, MD, is complete, though his podcast
4958 remains unscheduled. The free eLearn CEU, “**Panel: Timely Colonoscopy Follow-Up to**
4959 **Positive (Abnormal) Non-Colonoscopy Tests,**” is available and features panelists John
4960 Kennedy, MD, President of the AMGA Foundation and CMO of AMGA and Joseph Perez,
4961 MD, Associate Medical Director of Quality Assurance and Patient Safety at Lehigh Valley
4962 Health Network and Assistant Professor of Family Medicine at University of South Florida,
4963 Morsani College of Medicine.

4964 <https://learning.aamantl.org/Users/LearningActivityInformation.aspx?LearningActivityID=1%2fMVMmxdbxcPSdjJ5ZyTYA%3d%3d>
4965 The task force members decided this free CEU would
4966 be available until the end of the year. Total course completions as of this report is 3,752.
4967

4968 Also, Social Media Manger Eldridge, would be posting AAMA colorectal cancer awareness
4969 initiatives including NCCRT postings/ hashtags, 3,628 Facebook views. Working with Social
4970 Media Chair Quinn, an AAMA BOT “Dress in Blue” picture, previously arranged, with the
4971 committee posting and encouraging AAMA members to participate in the Dress in Blue
4972 awareness campaign, 4,508 Facebook views. Partnership Task Force Liaison Flynn will be
4973 sharing Dr. Perez’s *Medical Assisting Today* article and the BOT picture with Emily Bell, MPH
4974 Director, NCCRT. NCCRT will not be able to provide a speaker for the AAMA 2026 Arlington
4975 conference.
4976

4977 No new updates from the SUN Bus. Task force member Quinn is now a member of the OPPC
4978 Round Table for Ohio. The other ask force members are reaching out and exploring other areas
4979 of interest. Exact Sciences provided colorectal screening posters and informational packets to
4980 be included for the BOT representative assignments. The partnership campaign document was
4981 discussed and final input from the members’ due date was set and will be finalized during the
4982 next meeting.
4983

4984 Partnership Task Force Virtual Meeting May 8, 2025

4985 This chair shared updates relating to colorectal cancer and NCCRT; Dr. Perez’s article was
4986 published in the March /April edition of the *Medical Assisting Today* magazine; ELC Free
4987 CEU, NCCRT video will be available until the end of the year; Exact Sciences materials and
4988 discussion are ongoing. The podcast with Dr. Kennedy and cancer survivor, Trevor Maxwell
4989 from Man Up to Cancer completed and posted on April 4, 2025.

<https://aamapodcast.buzzsprout.com/2314257/episodes/16898072-colorectal-cancer-screening-initiatives-collaboratives-and-support-groups> Total views of this podcast as of this report is 253.

This chair discussed the exploration of Project C.U.R.E as a BOT project and exhibiting presence at the AAMA annual conference. A project where bags are filled with personal hygiene and basic “medicine cabinet” items that are scarce in under-resourced communities and children impacted by crisis. Follow up meetings with the Director of Kits Program provided a better understanding of the process and cost incurred for the AAMA of about \$12,000 donation, which is more funding than previously communicated. This information was relayed to the MSC, suggested not moving forward and the task force members agreed.

AMGA updates included contacting the leads obtained from the AMGA conference where AAMA exhibited and two virtual sessions were scheduled for scope of practice and Q&A session. Those representing AAMA will be CEO Balasa, AAMA staff including Nick Mickowski Director of Continuing Education, Gina Mokijewski, Marketing Director and Liaison, Sharon Flynn, Board Services Manager and Liaison, AAMA President Thomas, AAMA Secretary Kistler and AAMA Immediate Past President Case (Partnership Task Force Chair).

CASAT/FASD updates included, they will be exhibiting at the AAMA Arlington Conference and providing a CEU session speaker and no honorarium provided by AAMA. Discussion of the members reviewing the links for their website and reviewing the MAP applications to apply for the train-the-trainer session.

The partnership campaign document was reviewed, approved and will be provided to the BOT for the June meeting. Member Quinn, with updates from the OPPC-HPV round table, indicated that she is receiving updates and the AAMA should consider pursuing more on a national level. Member Miller reported follow-up with the Shriners with phone calls and emails; has received no responses. NAHUC was discussed and AAMA will promote their conference.

Updates on Additional Relationships and Connections:

The AAMA continues to have relationships with Medical Group Management Association (MGMA) and American Medical Group Association (AMGA) and continuing speaker and exhibiting opportunities. There is also communication with the Ohio Partners for Cancer Control (OPPC). We are continuing our efforts with the SUN Bus, receiving the Memorandum of Understanding (MOU), the 2025 events schedule, waiting on marketing and logo information, paperwork for participants and press release to move forward.

MGMA- While exhibiting at the Leaders Conference, conversations were with Andrew Hajde, Director of Content & Consulting and Daniel Williams, Senior Editor. Follow-up conversations were to take place with Mr. Hajde as to what other opportunities could be considered and Mr. Williams wanted to collaborate on another MGMA/AAMA podcast. There are no updates currently.

AMGA- AAMA did exhibit at the AMGA 2025 Annual Conference, March 26-29, 2025. John W. Kennedy MD, President AMGA Foundation, Chief Medical Officer, AMGA, did visit our booth. This chair previously met Dr. Kennedy while attending the NCCRT Annual Conference.

Introductions were made with CEO Balasa, AAMA Secretary Kistler, and AAMA Social Media and Marketing Manager Eldridge. Conversations led to how the two organizations can collaborate in joint efforts. Dr. Kennedy mentioned setting up a meeting with his leadership and the AAMA leadership; he mentioned a grant proposal and would like to include AAMA on the project. The last update was still waiting on the proposal response. AMGA leads included sixteen states and forty-three contacts, and two virtual meetings took place.

SUN Bus- The SUN Bus will be exhibiting and presenting a CEU session, titled “**Skin Cancer Prevention**” during the AAMA 69th Annual Conference in Arlington, VA, with no honorarium provided. Progress to move forward with connecting states for SUN Bus screening events has been slow mainly due to changes within the SUN Bus staff, one as recently as April 2025 and the bus was in the shop in early summer. This year’s event opportunities are less than the previous year. A meeting was held with AAMA and SUN Bus marketing teams and Board Services Manager Flynn. Discussions including branding, logos, and advertising took place. A press release is being formulated and an AAMA agreement document with attendees representing AAMA is being created with input from CEO Balasa. The task force members agree to move forward when all legal documents have been finalized.

NCCRT- As of this report, the 2nd podcast with Dr. Perez and the cancer survivor testimonial has not been recorded.

Updates on connections that have been made during the AAMA exhibiting opportunities or events attended. These include the following:

Exact Sciences- This task force chair and liaison Flynn have had virtual meetings and email exchanges with contacts from Exact Sciences Health Equity Lead on Health Professional Engagement and Director of Health Equity Programs & Strategy. Discussing educational opportunities from the health equity programs learning resources and how those could fit into AAMA colorectal awareness campaign educating the medical assistant and CEU opportunities. Exhibiting at the 2025 Annual AAMA Conference discussions are ongoing and would like to provide, in conjunction with NCCRT or separately, a speaker for the 2026 AAMA Annual conference. Conversations will be ongoing. AAMA Staff also met with Exact Sciences representatives in May 2025 and discussed potential partnership opportunities, particularly in the realm of continuing education. Exact Sciences is currently working on putting internal guidance together that will help direct future potential education opportunities with the AAMA

Man Up to Cancer- This is a non-profit organization dedicated to helping men avoid isolation during their cancer journeys. Offering a peer-to-peer support, an annual retreat, chemo care backpack program, and local chapters—all geared toward improving the quality of life of their members and changing the way men go through cancer. This organization inspires men to connect and avoid isolation during their cancer journeys. Founder & CEO, Trevor Maxwell, is one of the cancer survivor testimonials for the colorectal cancer awareness campaign AAMA podcast.

Other updates will be forthcoming during the Open Session of the Board of Trustees meeting, September 19, 2025, during the AAMA Annual Conference in Arlington, Virginia.

5085 This task force will explore ways to promote the vital role medical assistants play in preventive
5086 care and population management. This task force will continue to explore meaningful
5087 partnerships, and the work ahead to achieve the goals and purpose of this task force.
5088

5089 This chair would like to thank the task force members for their collaboration, ideas, hours spent
5090 on research for this task force and responding to emails and attending lengthy meetings.
5091

5092 This chair thanks Partnership Task Force Liaison CEO Balasa, for his contributions and legal
5093 counseling; Board Services Manager Flynn for her enthusiasm, ideas, open communication with
5094 this chair and scheduling and setting up meetings; and Marketing Director Mokijewski, for her
5095 input and work as a liaison. To all the liaisons a special thanks for all their help, research,
5096 follow-up, and willingness to respond to emails, conference calls and meetings. This chair
5097 would also like to thank AAMA President Thomas for allowing me the opportunity to chair this
5098 task force.

5099 Co-Chair Monica Case, CMA (AAMA)
5100 Co-Chair Shirley Sawyer, CMA (AAMA)
5101

5102 Members:
5103 Candy Miller, CMA (AAMA)
5104 Aimee Quinn, CMA (AAMA)
5105

5106 Staff Liaisons:
5107 Donald Balasa, JD, MBA, CEO and Legal Counsel
5108 Sharon Flynn, Board Services Manager
5109 Gina Mokijewski, Marketing Director
5110

***BOARDS
AND
COUNCILS***

**American Association of Medical Assistants® (AAMA)
Report of the Certifying Board Chair
For the period ending September 2025**

The Mission of the Certifying Board (CB) is to certify medical assistants in order to validate the knowledge, critical thinking, and problem-solving skills required by employers and patients. This is accomplished by 1) overseeing the preparation, administration, and evaluation of the CMA (AAMA) Certification Exam and 2) by overseeing the recertification process for the CMA (AAMA) credential.

The Purpose of the CB is to protect public safety by upholding the currency, reliability, and validity of the CMA (AAMA) credential. The CB shall strive to ensure that the CMA (AAMA) Certification Exam is delivered in a professional, secure, ethical, valid, and reliable manner. The CB focuses on ensuring that the quality of the CMA (AAMA) Certification/Recertification process leads to the best patient care possible.

The Certifying board continues to build on initiatives that will make certification more accessible and foster collaboration across committees to ensure our initiatives align with the broader goals of the American Association of Medical Assistants.

Since this Chair's last report the following initiatives have been launched by the Certifying Board:

Educator Pathway

The Educator Pathway officially launched on May 1, 2025. As of July 25, 2025, seven candidates have taken and passed the exam. An additional twenty-eight candidates are registered for the exam.

Remote Online Proctoring

Remote Online Proctoring was launched on May 10, 2025. When meeting certain criteria, candidates now have the option to take the CMA (AAMA) Certification remotely.

Certifying Board activities and meetings:

Fall Virtual Certifying Board Meeting, October 5, 2024

This CB Chair facilitated the first virtual meeting of the board. During the Executive Session the board discussed marketing strategies for new initiatives.

Pool Review, October 9, 2024, Olathe, Kansas

The CB, with the exception of the public member, met to evaluate the performance of new items placed on the CMA (AAMA) Certification Exam. This meeting is facilitated by PSI psychometricians at their headquarters in Olathe, Kansas.

Task Force for Test Construction, October 10-11, 2024, Olathe, Kansas

The Certifying Board oversees the Task Force for Test Construction annual meeting. Together, members of the Task Force and the Certifying Board analyze exam items for accuracy, ensuring that the item is testing to current practices and presented at an entry-level skill set. In addition, they ensure that items are appropriately mapped to the Content Outline.

Fall CEB/BOT Meeting, November 8, 2024, Chicago, Illinois

Sue Hawes, Continuing Education Board (CEB) Chair, invited the CB to attend the fall CEB meeting to present Item Writing Basics to the members of the CEB. The presentation was

carried out by this Chair, Vicki Sokolnik, Immediate Past CB Chair, and Katie Gottwaldt, AAMA Director of Certification.

2025 BOT Winter Meeting, February 7-8, 2025, Chicago Illinois

This CB chair along with Second Vice Chair Diane Vander Ploeg attended the Winter BOT meeting held in Chicago. It was an informative and productive meeting. The CB appreciated the inclusive atmosphere at this meeting.

2025 Forms Review Meeting, February 19-20, 2025, Chicago Illinois

During this meeting the Board reviewed forms prior to distribution. Review of items includes relevancy to current practice and technical accuracy plus overall content and balance of the form.

2025 CB Winter Meeting, February 21-22, 2025, Chicago Illinois

The CB was successful in completing the entire meeting agenda during this meeting. In attendance for Open Session was BOT President Virginia Thomas and Immediate Past President Monica Case.

2025 Occupational Analysis

The Occupational Analysis (OA) identifies and updates the performance domains and associated tasks, knowledge, and skills necessary for an entry-level medical assistant. The CB utilizes the results of the OA in the development of the Content Outline for the CMA (AAMA) Certification Exam.

The first OA meeting was held May 2-3, 2025; the in-person meeting was very productive, with a thoughtful and engaged 11-member panel. The panel has since met twice virtually to finalize the survey and review the results of the pilot survey. A sub-panel met virtually in mid-July to review biographical data. The final OA meeting was held July 27-28, 2025. During this meeting members of the panel reviewed 851 submitted survey responses and made recommendations to the Certifying Board regarding revisions to the Content Outline.

2025 BOT/CEB Summer Meeting, June 6-8, 2025, Reno Nevada

This chair and Second Vice Chair Diane Vander Ploeg were invited to attend the BOT Open Session as well as the Open Session of the Continuing Education Board (CEB). We enjoyed a small preview of the 2026 AAMA Annual Conference venue. Both meetings were productive and informative. It was a pleasure to have been invited to attend.

Request for Proposal (RFP)

The Certifying Board is exploring the possibility of establishing an add-on credential to the CMA (AAMA) in intravenous initiations, maintenance, and discontinuation. At the current time the board has received two responses to the Request for Proposal (RFP) and we look forward to receiving more responses by fall 2025. To be considered, a course would require didactic instruction and demonstration of clinical competence. See Report of the Chief Executive Officer and Legal Counsel, Don Balasa, for further details.

Current CMAs (AAMA)

As of June 30, 2025, there were a total of 69,078 CMAs (AAMA).

5207 Respectfully submitted,
5208 Carolyn Fuller, CMA (AAMA), Chair
5209
5210 Members of the CB:
5211 Carolyn Fuller, CMA (AAMA), Chair
5212 Diane Vander Ploeg, CMA (AAMA), MS, Second Vice Chair
5213 Nikal Redwine, CMA (AAMA), RN, BSN, TFTC Co-Chair
5214 Alisha Harris, CMA (AAMA), TFTC Co-Chair
5215 India Simpson, CMA (AAMA), MHA
5216
5217 Other Professional Member:
5218 Aribell McRae-Spencer, MSN, FNP-C
5219
5220 Public Member:
5221 Beth Jaeger, SPHR
5222
5223 AAMA Staff Liaison:
5224 Katie Gottwaldt, Director of Certification
5225

**American Association of Medical Assistants® (AAMA)
Continuing Education Board
House of Delegates 2025**

Chair Hawes facilitated the meeting of the Continuing Education Board (CEB) on February 9 and 10, 2025 in Chicago, Illinois. The Chair and Vice Chair also attended the meeting of the Board of Trustees on February 7 and 8, 2025, in a conference room of the Civic Opera Building, where the AAMA Executive Office also resides. It was two full days of orientation, education, and planning for the coming year. The summer meeting of the Continuing Education Board was held in Reno, Nevada, on June 8 and 9. This meeting was facilitated by Chair Hawes remotely due to staffing shortages and resulting work travel restrictions. The Chair also attended remotely the Board of Trustees meeting on June 6 and 7, 2025. Vice Chair Ley attended these meetings in person.

The Continuing Education Board had several remote meetings this year. The first was January 25, 2025, and was reported on at the February meeting. The others were held on April 19, 2025, May 17, 2025, and July 20, 2025. The Board discussed and decided that we would invite our Task Force members to attend these meetings in the future in the hope they would feel more involved and engaged in the process. The CEB has also invited the Certifying Board leadership to attend the Winter and Summer Meetings in person and any or all of the virtual meetings, as we believe that working together and not working in a silo is crucial to the work that we do. The Board of Trustees President Thomas, Immediate Past President Case, and Chief Executive Officer and Legal Counsel Balasa have attended all meetings. The full Continuing Education Board attended all meetings unless excused due to work or illness.

Just a few of the agenda items that were worked on included AAMA E-Learning Center pricing, a review of E-Learning Center topics and monographs for updating purposes, CCETF Topic Submissions, and a new award from the Career Professional Development Task Force (CPDTF). Stay tuned for the following that are coming in 2026: internal documents are being revised and updated, a joint project with the Certifying Board, and more to come.

Additionally, the Continuing Education Board developed three new monographs which launched in the past year:

Foundations of Medical Law for Medical Assistants – 25 Admin/Gen AAMA CEUs (launch date 12/19/24)

Foundations of Medical Ethics for Medical Assistants – 15 Admin/Gen AAMA CEUs (launch date 12/19/24)

Introduction to Nutrition – 16 Clin/Gen AAMA CEUs (launch date 5/2/25)

All three monographs are available in both print through the AAMA Store and digitally through the AAMA E-Learning Center.

The Continuing Education Board is in the process of systematically reviewing continuing education content. As part of this process, Continuing Education Board members have reviewed 19 E-Learning center articles for the purpose of updating their content. Director of Special Projects Lenhoff has been implementing the content updates as identified by CEB members and with input from Director of Continuing Education and Membership Mickowski. This is an ongoing project.

The Practice Managers Task Force (PMTF) held a virtual meet and greet meeting, facilitated by Chair Deborah Novak, CMA (AAMA), which included a review of our task force charge and assignments for the year. PMTF members were assigned to submit a total of six Practice Management/Administrative Topics and objectives per task force member for the 2027 AAMA Annual Conference.

Additionally, PMTF members have been planning the Practice Managers Task Force Forum for the 2025 Annual Conference to be held on Sunday, September 21, 2025, from 3:30-5:50 p.m. This session will be a roundtable forum and will address topics facing practice managers including building trust, team building, retainment strategies, employee reviews, and delegation. Rebecca Walker, CMA (AAMA), will be the presenter and facilitator for this session and attendees will be asked to discuss and develop strategies and solutions for each of the above topics. This will be an interactive session and has been approved for 2 AG CEUs.

The Conference Continuing Education Task Force (CCETF), through Chair Ley, has communicated regularly with the 2025 Conference Education Chair Nina Beaman, CMA (AAMA), assisting and advising on educational sessions previously provided by the task force. The Chair participated in the Annual Conference Committee virtual meetings throughout the year. The Chair has additionally been in contact with the 2026 Conference Education Chair, Heather Mendy, CMA (AAMA), providing guidance with conference topics, outlines, and documents related to scheduling education sessions.

This task force has been actively developing topics, objectives, descriptions, and speakers for the 2027 AAMA Annual Conference.

The Leaders in Education and Practice Task Force, (LEAP), chaired by Frances Mooney, CMA (AAMA), meet every month to plan and discuss topics for the Educator Pre-conference Workshop on Thursday, September 18, and the LEAP Forum on Friday, September 19. Topics were decided on and great discussions were had about future events. Topics were submitted for the national conference.

The work of this Board has been completed in a thoughtful and prompt manner, always keeping the quality of the products and benefit to the AAMA members of this association in mind.

Vice Chair Ley kept in contact with Chair Hawes and has responded to emails on all issues presented to the CEB. Chair Hawes is still in contact with Vice Chair Ley and continues to proceed with the work of the Continuing Education Board.

5320 Chair Hawes wants to thank Director Mickowski for all his hard work and help whenever
5321 asked. Also, thanks to the Continuing Education Board Members for their dedication and
5322 hard work; you are all very appreciated
5323
5324 Submitted July 27, 2025
5325
5326 Sue Hawes, CMA (AAMA)
5327 CEB Chair

**American Association of Medical Assistants® (AAMA)
Report of the Judicial Council
For the Period Ending September 2025**

The Judicial Council exercises jurisdiction in all questions involving membership interpretation as well as any controversies arising from the interpretation of the AAMA Bylaws and/or the Code of Ethics of the association.

No issues were presented to the Judicial Council for consideration during the 2024-2025 association year.

Patty Licurs, CMA (AAMA), CPC – Chair
Deborah Novak, CMA (AAMA) – Vice Chair

Members:

Susan Hawes, CMA (AAMA), MBA, RHIT, FACMPE
Lisa Lee, CMA (AAMA)
Debby Houston, CMA (AAMA), CPC-I

Staff Liaison: Donald Balasa, JD, MBA, CEO and Legal Counsel

**American Association of Medical Assistants® (AAMA)
Supplemental Report of the Judicial Council
For the Period Ending September 2024**

The Judicial Council exercises jurisdiction in all questions involving membership interpretation and any controversies arising from interpreting the AAMA Bylaws and/or the Code of Ethics of the Association.

An issue was presented following the first session of the 2024 House of Delegates (HOD), and a called meeting was held. All members of the Judicial Council and Staff Liaison were in attendance.

Question 1: What does our organization (AAMA) use as guidelines in this matter?

Answer: The AAMA uses our own Bylaws, and they supersede Robert Rules of Order. We abide by the Bylaws

Debby B. Houston, CMA (AAMA), CPC-I – Chair
Patty Licurs, CMA(AAMA), CPC – Vice Chair

Members:

Sue Hawes, CMA (AAMA), MBA, RHIT, FACMPE
Lisa Lee, CMA (AAMA)
Julie Flaatten, CMA (AAMA), RN, CPC

Staff Liaison: Donald Balasa JD, MBA, CEO and Legal Counsel

***PROPOSED
RESOLUTION
AND
BYLAWS
ADMENDMENTS***

American Association of Medical Assistants® (AAMA)
RESOLUTION 25-01

INTRODUCED BY: 2024-2025 American Association of Medical Assistants Bylaws and Resolutions Committee

SUBJECT: Increased Awareness and Utilization of Credentialed Medical Assistants Through Community Health and Safety Partnerships

WHEREAS: The American Association of Medical Assistants (AAMA) is the only professional membership organization solely dedicated to the profession of medical assisting; and

WHEREAS: The AAMA has begun to develop a number of collaborative activities with various nonprofit organizations, such as the National COLORECTAL Cancer Round Table (NCCRT) and the Center for the Application of Substance Abuse Technologies (CASAT), that address specific medical conditions, illnesses, diseases and comorbidities;

WHEREAS: The AAMA provides professional development for medical assistants through certification and continuing education; and

WHEREAS: The AAMA aligns with health care employers to emphasize the value of employing credentialed medical assistants in today's outpatient medical office setting; and

WHEREAS: The credentialed medical assistant is trained to handle both clinical and administrative tasks, excel at patient communication, lessen the risk of allegations of negligence, improve quality outcomes through patient education and customer service, and demonstrate a strong foundation of knowledge and skills; and

WHEREAS: The role of the credentialed medical assistant, according to evidence-based practice, is vital to the interdisciplinary team model best suited to treat today's patient's illnesses, diseases, and co-morbidities; therefore, be it

RESOLVED, That the AAMA, where appropriate and advantageous, enter into partnerships with professional organizations addressing common medical conditions, illnesses, diseases, and co-morbidities; and be it further

RESOLVED, That the AAMA encourage all credentialed medical assistants to play a role in said partnerships through volunteering for events, undertaking continuing education on the specific medical conditions being addressed and help improve the quality of care offered by themselves and their practices through appropriate screening of patient and

5424 sharing resources for care, where appropriate and as delegated by the
5425 practice's licensed independent provider.

**American Association of Medical Assistants® (AAMA)
Proposed Bylaws Amendment 25-01**

Article VIII: Qualification of Officers and Trustees

Section 4: Additional qualifications for specific offices shall be:

As per the current AAMA Bylaws, the officers of the AAMA shall be a President, a Vice President, a Secretary, a Speaker of the House, a Vice Speaker of the House, and an Immediate Past President.

Fiscal impact: None

Current Wording:

Section 4: Additional qualifications for specific offices shall be:

- A. A candidate for Vice President shall:
 - 1. have served as an AAMA elected officer.
 - 2. have been an elected member of the Board of Trustees for two complete AAMA years (an AAMA year is from annual meeting to annual meeting of the House of Delegates)
 - 3. have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

Proposed Wording:

Section 4: Additional qualifications for specific offices shall be:

- A. A candidate for **President** or Vice President shall:
 - 1. have served as an AAMA elected officer **for a minimum of one AAMA year (an AAMA year is from annual meeting to annual meeting of the House of Delegates**
 - 2. have been a elected member of the Board of Trustees for two complete AAMA years
 - 3. have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

Rationale:

Clarification of qualification for officers: As the Vice President moves into the office of President, the qualifications for the office of President are implied in the Bylaws. Adding the word President to Section 4 clarifies that qualifications for both offices are the same. The qualifications for the office of President are now listed and not inferred.

American Association of Medical Assistants® (AAMA)
Proposed Bylaws Amendment 25-02

Article IX: Nominations and Elections

Section 2: Elections D.

Fiscal impact: None

Current Wording:

If any candidate does not receive a majority vote after two ballots by the House of Delegates, on all subsequent ballots the candidate receiving the lowest number of votes will be eliminated.

Proposed Wording:

If any candidate **among a slate of candidates for an open position** does not receive a majority vote after two ballots by the House of Delegates, on all subsequent ballots the candidate receiving the lowest number of votes will be eliminated.

Rationale:

The addition of the proposed wording clarifies that the open office is opposed and more than one candidate is running for the open position. The candidate with the lowest number of votes in the third vote and all subsequent votes will be eliminated. This narrows down the field of candidates to decrease the number of revotes required.

American Association of Medical Assistants® (AAMA)
Proposed Bylaws Amendment 25-03

Article IX: Nominations and Elections

Section 2: Elections

Fiscal impact: None

Current Wording:

None.

Proposed Wording:

E. An unopposed officer or trustee candidate not receiving a majority ballot for an open position is considered defeated after two votes. The candidate has the right to decline a second vote.

Rationale:

The addition of the proposed wording clarifies that an unopposed candidate not receiving a majority vote is considered defeated after a second vote. On the first ballot, a delegate may not vote for a candidate to express general dissatisfaction or opposition. However, some delegates may vote in favor of the sole candidate on the second ballot because they may conclude that it is more important to have a leader in the office rather than allow that office to remain vacant.

This eliminates the possibility of multiple votes in an unopposed election for the same position to obtain different results. The proposed wording clarifies that voting for an unopposed position may occur twice if needed and the results are final.

American Association of Medical Assistants® (AAMA)
Texas State Society
Proposed Bylaws Amendment 25-01

Article VIII: Qualifications of Officers and Trustees

Section 4: Additional qualifications for specific offices shall be:

Fiscal impact: None

Current Wording:

- E. A candidate for Trustee shall:
1. have attended at least two previous AAMA meetings as a Delegate or served as Chair of the Certifying Board or Continuing Education Board;
 2. have served as one of the following: President, Vice President, President-Elect, Speaker or Vice Speaker of a Constituent Society;
 3. have actively served for one full year on: (1) a national committee; (2) a national board (i.e., the Certifying Board or Continuing Education Board) or one of its committees, task forces or strategy teams; or (3) a national task force or strategy team whose medical assistant members are appointed or approved by the Board of Trustees.

Proposed Wording:

- E A candidate for Trustee shall:
1. have attended at least two previous AAMA meetings as a Delegate or served as Chair of the Certifying Board or Continuing Education Board;
 2. have served as one of the following: President, Vice President, President-Elect, **Secretary, Treasurer**, Speaker or Vice Speaker of a Constituent Society;
 3. have actively served for one full year on: (1) a national committee; (2) a national board (i.e., the Certifying Board or Continuing Education Board) or one of its committees, task forces or strategy teams; or (3) a national task force or strategy team whose medical assistant members are appointed or approved by the Board of Trustees.

Rationale:

Adding Secretary and Treasurer as a means of meeting one requirement for serving as a AAMA Trustee is recommended as they too are elected officers of the Constituent societies and support the same mission as the other officers do of their state society and the AAMA. This will also open the leadership ladder of the AAMA to all those serving the membership who may wish to serve on the AAMA Board of Trustees but are not provided every opportunity at their state level. If this is approved, it should be carried forward to all BOT positions.

American Association of Medical Assistants® (AAMA)
Texas State Society
Proposed Bylaws Amendment 25-02

Article X: Officers and Trustees: Term of Office, Vacancy in Office Failure to Perform Duties

Section 1: Term of Office

Fiscal impact: None

Current Wording:

- A. The term of office for the President, Vice President, and Immediate Past President shall be one year or until successors are elected. The elected Officer shall not serve more than one consecutive term in the same office (except for the 2020-2021 AAMA year).

Proposed Wording:

- A. The term of office for the President, Vice President, and Immediate Past President shall be one year or until successors are elected. **If there are no successors to one or more of the offices of President, Vice President, or Immediate Past President, the House of Delegates may authorize the current President, Vice President, or Immediate Past President for whom there is no successor to serve one additional AAMA year.**

Rationale:

This by-law could be perceived as contradicting as the first sentence states that the position is a one-year term or until successor is elected; however, the second sentence states that they cannot serve more than one consecutive term. One consecutive term can be read as one year versus one term with an additional term, which is what the intent is. By removing the second sentence, removing one consecutive term and simplifying the term definition of the President, IPP and Vice President term it will lead to less confusion about the length of the term of these positions.

APPENDIX

5606
5607
5608
5609
5610
5611
5612
5613
5614
5615
5616
5617
5618
5619
5620
5621
5622
5623
5624
5625
5626
5627
5628
5629
5630
5631
5632
5633
5634
5635
5636
5637
5638
5639
5640
5641
5642
5643
5644
5645
5646
5647
5648
5649
5650
5651
5652
5653
5654
5655
5656
5657

American Association of Medical Assistants® (AAMA)
2025 Delegates and Alternates
(Current as of August 1, 2025 – Subject to later revision)

<u>State</u>	<u>Delegates</u>	<u>Alternates</u>
Alabama	Brandy Owen, CMA (AAMA) Melanie Strain, CMA (AAMA) Crystal Gersh, CMA (AAMA)	Ashley Faulkner, CMA (AAMA) Tracie Fuqua, CMA (AAMA)
Alaska	Erma Milspaugh, CMA (AAMA) Tamarack Brottem, CMA (AAMA) Lisa Nash, CMA (AAMA)	Robin Wahto, CMA (AAMA)
Arkansas	Melinda Rhynes, CMA (AAMA) Traci Noblett, CMA (AAMA)	Misty Ross, CMA (AAMA)
California	Nancy Lizon, CMA (AAMA) Virginia Marquette, CMA (AAMA) Julie Thomas, CMA (AAMA)	
Colorado	Chris Hollander, CMA (AAMA)	
Connecticut	Rebecca Parry, CMA (AAMA) Susan Klos, CMA (AAMA) Pia Benedek-Simone, CMA (AAMA)	
Florida	Jeanette Tyler, CMA (AAMA) Christina Sears, CMA (AAMA) Deniece Jozefiak, CMA (AAMA) Linda Vitzthum, CMA (AAMA)	
Georgia	Victoria Cottrill, CMA (AAMA) Emilee Aldridge, CMA (AAMA) Frankie Summerville, CMA (AAMA)	
Hawaii	Jennifer Au Hoy, CMA (AAMA) Mae Dorado, CMA (AAMA)	
Idaho	Jessica Hunter, CMA (AAMA) Holly Weatherston, CMA (AAMA) Shaeli Christiansen, CMA (AAMA)	Colleen Conklin, CMA (AAMA) Rebecca Van Orden, CMA (AAMA)
Illinois	Katherine Schoonhoven, CMA (AAMA) Sharon Strutzenberg, CMA (AAMA) Donna Radzun, CMA (AAMA) Lydnise House, CMA (AAMA)	

5658	Indiana	Paula Schubert, CMA (AAMA)	
5659		Heidi Sisson, CMA (AAMA)	
5660		Joyce Edds, CMA (AAMA)	
5661		Brandi Gaumer, CMA (AAMA)	
5662		Karen Pershing, CMA (AAMA)	
5663		Katja Stine, CMA (AAMA)	
5664	Iowa		
5665		Katie Wahl, CMA (AAMA)	
5666		Jacquelyn Hellyer, CMA (AAMA)	
5667		Michele Sears, CMA (AAMA)	
5668		Lucinda Wilson, CMA (AAMA)	
5669		Lillian Young-Shillak, CMA (AAMA)	
5670	Kentucky		
5671		Rina Weekley, CMA (AAMA)	Ame Lumpkins, CMA (AAMA)
5672		Jessica Moore, CMA (AAMA)	Sharon Shannon, CMA (AAMA)
5673		Tammy Yates, CMA (AAMA)	
5674	Maine		
5675		Barbara Marchelletta, CMA (AAMA)	
5676		Dominic Sanchez, CMA (AAMA)	
5677	Massachusetts		
5678		Dawn Jordan LeBlanc, CMA (AAMA)	Sheryl Wales, CMA (AAMA)
5679		Patricia Mascis, CMA (AAMA)	Nicholas Kelliher, CMA (AAMA)
5680		Ramona Sterczala, CMA (AAMA)	
5681	Michigan		
5682		Kathy Stuut, CMA (AAMA)	
5683		Christa Smith, CMA (AAMA)	
5684		Mary Dey, CMA-AC (AAMA)	
5685		Nicole Burris, CMA (AAMA)	
5686		Amber Durst, CMA (AAMA)	
5687	Minnesota		
5688		Denise Schmitz, CMA (AAMA)	
5689		Rhonda Samborski, CMA (AAMA)	
5690	Missouri		
5691		Rachel Clifford, CMA (AAMA)	Martha Johaningsmeir, CMA (AAMA)
5692		Juanita Paul, CMA (AAMA)	Jennifer Griffith, CMA (AAMA)
5693		Linda Langford, CMA (AAMA)	Daniel Embree, CMA (AAMA)
5694	Montana		
5695		Lori Schalk, CMA (AAMA)	Morganna Holgerson, CMA (AAMA)
5696		Joleen South, CMA (AAMA)	
5697		Susan Cox, CMA (AAMA)	
5698	Nebraska		
5699		Angela Eytcheson, CMA (AAMA)	Shannon Kibbee, CMA (AAMA)
5700		Terrie King, CMA (AAMA)	Stephani Richards, CMA (AAMA)
5701		Barb Carter, CMA (AAMA)	Jennifer Kocian, CMA (AAMA)
5702	New Hampshire		
5703		Todd Magee, CMA (AAMA)	Jennifer Depiano, CMA (AAMA)
5704		Sandra Monty, CMA (AAMA)	Richard Bento, CMA (AAMA)
5705		Courtney Insley, CMA (AAMA)	Linda Prince, CMA (AAMA)
5706	New Jersey		
5707		Janet Shriver, CMA (AAMA)	
5708		Nitza Sheehan, CMA (AAMA)	
5709		Patricia Ott, CMA (AAMA)	
5710			

5711	New Mexico	Jennifer Benton, CMA (AAMA)	Karla Delgado, CMA (AAMA)
5712		Toni Coffman, CMA (AAMA)	
5713	New York	Todd Lasher, CMA (AAMA)	Carrie Gravelle, CMA (AAMA)
5714		Karen Roward, CMA (AAMA)	
5715		Kim Battaglini, CMA (AAMA)	
5716	North Carolina	Maria VanDeBovenkamp, CMA (AAMA)	Patricia Clark, CMA (AAMA) Stephanie Hodgin, CMA (AAMA)
5717		Summer O'Neal, CMA (AAMA)	
5718		Casie Cornelison, CMA (AAMA)	
5719		Paula Cooke, CMA (AAMA)	
5720		Monica Barwick , CMA (AAMA)	
5721		Rebecca Eldridge, CMA (AAMA)	
5722		Linda Metcalf, CMA (AAMA)	
5723		Faith Burke, CMA (AAMA)	
5724		Heather Wines, CMA (AAMA)	
5725			
5726	Ohio	Rhonda Lazette, CMA (AAMA)	Mary Elizabeth Regis, CMA (AAMA)
5727		Amy McMasters, CMA (AAMA)	
5728		Lora Wilson, CMA-A (AAMA)	
5729		Natasha Geno, CMA (AAMA)	
5730		Aimee Wicker, CMA (AAMA)	
5731		Judie Alessi, CMA (AAMA)	
5732			
5733	Oklahoma	Julie Benson, CMA (AAMA)	
5734		Vicki Weigt, CMA (AAMA)	
5735	Oregon	Christy Oldenstadt, CMA (AAMA)	
5736		Paula Purdy, CMA (AAMA)	
5737		Kelly Charland, CMA (AAMA)	
5738		Shawn Molnar, CMA (AAMA)	
5739	Pennsylvania	Kellie Humma, CMA (AAMA)	
5740		Sherri Steele, CMA (AAMA)	
5741		Mary Lou Ninehauser, CMA (AAMA)	
5742		Lori Bisbing, CMA (AAMA)	
5743	South Carolina	Patty Licurs, CMA (AAMA)	Stephanie Pruitt, CMA (AAMA)
5744		Sandra Williams, CMA (AAMA)	
5745		Lisa Kianos, CMA (AAMA)	
5746		Annette Lee Kerr, CMA (AAMA)	
5747	South Dakota	Susan Hookie, CMA (AAMA)	Erica Arends, CMA (AAMA)
5748		Christina Anderson, CMA (AAMA)	
5749		Alexius Plooster, CMA (AAMA)	
5750			
5751	Tennessee	Dawn Alter, CMA (AAMA)	
5752		Tonya Miliam, CMA (AAMA)	
5753	Texas	Dina Harrett, CMA (AAMA)	Charlene Couch, CMA (AAMA)
5754		Sherry Bogar, CMA (AAMA)	
5755		Donna Gibbins, CMA (AAMA)	
5756			
5757			
5758			
5759			
5760			
5761			
5762			
5763			

5764	Utah	Crystal Spackman, CMA (AAMA)	Lisa Lee, CMA (AAMA)
5765		Suzette Johnson, CMA (AAMA)	
5766		Michelle Butler, CMA (AAMA)	
5767	Virginia		
5768		Amanda Harris, CMA (AAMA)	
5769		Terry Harris, CMA, (AAMA)	
5770			
5771	Washington	Sandra Erlewine, CMA (AAMA)	
5772		Diane Goracke, CMA (AAMA)	
5773		Brandy Rohaly, CMA (AAMA)	
5774			
5775	Wisconsin	Barbara Cumberland, CMA (AAMA)	Kelly Emmons, CMA (AAMA)
5776		Danielle Bodoh, CMA (AAMA)	Julie Flaatten, CMA (AAMA)
5777		Rene' Puetz, CMA (AAMA)	
5778		Donna Center, CMA (AAMA)	
5779		Kimberly Cooper, CMA (AAMA)	
5780		Marissa Graveen, CMA (AAMA)	
5781			

INFORMATION
ONLY

**American Association of Medical Assistants® (AAMA)
Report of the Maxine Williams Scholarship Committee
For the Period Ending September 2025**

The charge of the Maxine Williams Scholarship (MWS) Committee is to review applications and qualifications submitted to the AAMA.

The following were the activities of this committee.

This officer was appointed chair of the committee and approved by the 2024-2025 Board of Directors (BOD) of the Maxine Williams Scholarship Corporation at its Post HOD Executive Session on September 23, 2024. The BOD also approved members of the committee: Monica Case, CMA (AAMA), Loxie Kistler, CMA (AAMA), and Jane Seelig, CMA-A (AAMA).

This chair set up a virtual meeting for the committee members to discuss the changes to the application and scoring rubric that were suggested by the 2023-2024 committee and approved by the 2023-2024 Maxine Williams Board of Directors. The committee members were sent a copy of the updated application and scoring rubric by Manager of Board Services and staff liaison Sharon Flynn. The committee agreed with the application and scoring rubric and had no further suggestions.

This committee was also charged with creating the new scholarship, the Maxine Williams Scholarship in honor of Crystal Coleman, CMA (AAMA). Discussion was previously held for suggestions for this scholarship at the Board of Trustees/Directors breakfast with the Society of Past Presidents Sunday, September 22, 2024. Suggestions and thoughts were shared with the committee members by this chair. After discussion, the decision was made for committee members to take the current application, review, and send suggested changes to Ms. Flynn by February 17, 2025.

This chair met virtually with committee members and Ms. Flynn February 25, 2025, to discuss the suggested changes and make corrections to the Maxine Williams Scholarship in honor of Crystal Coleman, CMA (AAMA). All corrections were made during the meeting by Ms. Flynn and were sent to CEO Balasa for review and to answer the question if CMA (AAMA) could be used after Crystal Coleman's name. It was determined that Ms. Coleman did obtain the CMA (AAMA) credential and it could be used on the scholarship application. The next step was to begin to create the scoring rubric for the scholarship. Committee member Kistler volunteered to create the first draft.

This chair set up a virtual meeting for the committee members and Ms. Flynn for April 28, 2025, to discuss the Maxine Williams Scholarship in honor of Crystal Coleman, CMA (AAMA) scholarship to discuss the application deadline and scoring rubric. The decision was made to set the deadline for December 15 for winners to be reviewed, selected, and announced at the winter Board of Trustees meeting annually. Suggested updates to the scoring rubric were discussed and the final rubric was approved by the committee. The committee plans to present the application and scoring rubric to the Maxine Williams Board of Directors for approval. If approved, the Maxine Williams Scholarship Committee plans to announce the new

scholarship at the Open Session Pre-Conference board meeting, the Awards and Welcome event, and the President's Banquet at the annual AAMA Annual Conference in Arlington, Virginia. There will be applications available for members to pick up at the registration desk Friday through Monday, as well as on the AAMA website.

The deadline for the Maxine Williams Scholarship was May 15, 2025. A total of seventy-five (75) applications were submitted, with sixty-two (62) complete applications. Each committee member was assigned fifteen to sixteen (15-16) applications to review and score using the provided rubric, which was updated by the 2023-2024 Maxine Williams Board of Directors. The committee met on May 31, 2025, to discuss the applicants scores and choose winners for 2025. The winners were announced at the summer Board of Trustees meeting. The committee selected seven (7) winners. Each will receive a one (1) year AAMA membership as well as a \$2,000 scholarship.

1. Danielle Carroccia – Bryant & Stratton College, Orchard Park, NY
2. Layla Carvajal – El Paso Community College, El Paso, TX
3. Jennifer Kelly – Chattanooga State TCAT, Chattanooga, TN
4. Cheyene Koop – UAF Community & Technical College, Fairbanks, AK
5. Jennifer Maikrantz – Anne Arundel Community College, Arnold, MD
6. Mallorie Quiring – Clark College – Vancouver, WA
7. Dorie Sue Walker - Greater Altoona Career & Technology Center – Altoona, PA

Following the board meeting, this Chair and Director of Board Services Flynn notified all recipients that were chosen they would receive their scholarship award via mail along with scholarship tax information, a free one (1) year AAMA student membership, and their photo and brief biography would be in a future issue of *Medical Assisting Today* magazine and future marketing materials. Scholarship applicants that were not selected to receive a scholarship received an email thanking them for their interest in the scholarship program and encouraging the student to continue to pursue a medical assisting career.

The committee sent suggestions to the Maxine Williams Board of Directors Chair to discuss the approval of the Maxine Williams Scholarship in honor of Crystal Coleman, CMA (AAMA) application and scoring rubric as well as staff having a practice in place for notifying the scholarship recipients and activating their one (1) year AAMA membership moving forward. The Maxine Williams Scholarship Committee met with the Maxine Williams Board of Directors June 5, 2025, and presented both suggestions. The Maxine Williams Board of Directors approved both.

This Chair would like to thank the committee members for their collaboration. This Chair would also like to thank Sharon Flynn and Erika Mercado, MWS Committee staff liaisons, for their help and assistance through this process.

Virginia Thomas, CMA (AAMA), Chair

Members

Monica Case, CMA (AAMA)

Loxie Kistler, CMA (AAMA)

Jane Seelig, CMA-A (AAMA)

5879 Staff Liaisons:
5880 Sharon Flynn, Board Services Manager
5881 Erika L Mercado, Customer Service Manager
5882

***AAMA
FINANCIAL
REPORTS***



Costabile & Steffens P.C. Certified Public Accountants

INDEPENDENT AUDITOR'S REPORT

To: The Board of Directors
American Association of Medical Assistants, Inc.
Chicago, Illinois

Opinion

We have audited the accompanying financial statements of American Association of Medical Assistants, Inc. (a non-profit organization), which comprise the statement of financial position as of June 30, 2024, and the related statements of activities and changes in net assets, cash flows and functional expenses for the year then ended and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of American Association of Medical Assistants, Inc. as of June 30, 2024, in accordance with accounting principles generally accepted in the United States of America.

Basis of Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of American Association of Medical Assistants, Inc. and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America. Management is also responsible for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about American Association of Medical Assistant's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Frank J. Costabile

Members
American Institute
of Certified Public
Accountants
and Illinois
Society of CPAs

1805 Hicks Road • Rolling Meadows, Illinois 60008 • (847) 776-3700 FAX (847) 776-3775



Costabile & Steffens P.C. Certified Public Accountants

The Board of Directors
American Association of Medical Assistants, Inc.
Chicago, Illinois

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of American Association of Medical Assistants, Inc. internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about American Association of Medical Assistants, Inc. ability to continue as a going concern for a reasonable period of time.



Costabile & Steffens P.C. Certified Public Accountants

The Board of Directors
American Association of Medical Assistants, Inc.
Chicago, Illinois

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Costabile & Steffens PC

COSTABILE & STEFFENS PC
Certified Public Accountants

Rolling Meadows, Illinois 60008
November 15, 2024

American Association of Medical Assistants, Inc.
STATEMENT OF FINANCIAL POSITION
June 30, 2024

ASSETS

CURRENT ASSETS	
Cash and cash equivalents	\$ 13,744,863
Prepaid Expenses	56,140
Total Current Assets	<u>13,801,003</u>
PROPERTY AND EQUIPMENT, NET	205,924
RIGHT-OF-USE ASSET	<u>563,574</u>
Total Assets	<u>\$ 14,570,501</u>

LIABILITIES AND NET ASSETS

CURRENT LIABILITIES	
Accounts Payable and Accrued Expenses	\$ 611,361
Deferred Revenue	878,922
Due to Other Organizations	26,465
Lease Liability, Current	39,386
Total Current Liabilities	<u>1,556,134</u>
LEASE LIABILITY, LONG-TERM	682,225
NET ASSETS	
Without Donor Restrictions	<u>12,332,142</u>
Total Liabilities and Net Assets	<u>\$ 14,570,501</u>

American Association of Medical Assistants, Inc.
SCHEDULE OF ACTIVITIES AND CHANGES IN NET ASSETS
Year Ended June 30, 2024

	<u>Without Donor Restrictions</u>
REVENUE AND OTHER SUPPORT	
Membership Dues	\$ 1,638,798
Exam Fees	1,388,815
Recertification Application Fees	648,470
ABR - OE Courses	167,175
ABC - G Revenue	355,484
Other CE Revenue	1,927,090
CMA Today	62,075
Shipping Fees	51,743
Conferences	258,374
CASAT Donation	28,380
Miscellaneous Income	13,524
Interest Income	286,308
Total Revenue and Other Support	<u>6,826,236</u>
EXPENSES	
Programs	3,250,668
General and administrative	2,698,032
Fundraising	75,594
Total Functional Expenses	<u>6,024,294</u>
Increase in Net Assets	801,942
Net Assets - Beginning of the Year	11,530,200
Net Assets - End of Year	<u><u>\$ 12,332,142</u></u>

BUDGET OVERVIEW SHEET FOR FISCAL YEAR 2026 FOR BOARD OF TRUSTEES
FOR JUNE 2025 MEETING

Donald A. Balasa, JD, MBA, CEO and Legal Counsel

AMERICAN ASSOCIATION OF MEDICAL ASSISTANTS
General Fund—Revenue

Revenue

	Year ended 6/30/2024 (Audited)	Year ending 6/30/2025 (Projected)	Year ending 6/30/2026 (Budgeted)
Dues	1,638,798	1,325,000	1,200,000
C.E.	2,526,692	2,100,000	1,850,000
MAToday	36,875	36,875	36,875
Conf	258,374	203,000	230,000
CASAT	28,380	28,380	28,380
Misc	13,524	14,000	14,000
Interest	214,731	220,000	224,000
<i>* Membership Retention and Recruitment Reserve</i>			200,000
	4,717,374	3,927,255	3,783,255
<i>Projected expenses from other sheet</i>			<u>3,742,353</u>
Budgeted excess revenue over expense			40,902

*The suggested Membership Retention and Recruitment Reserve would give the Board of Trustees the leeway to enact changes to the dues collection process that are permitted by the AAMA Bylaws.

For fiscal year 2026, total revenue is projected to be 3,783,255. Total expense is projected to be 3,742,353. Excess revenue over expense is projected to be 40,902.

Notes for General Fund—Expense

Projected expenses for the fiscal year ending June 30, 2025, are budgeted for the fiscal year ending June 30, 2026, with the following exceptions.

1. Staff Salaries, Payroll Texas, and Group Insurance are being reduced because Virginia Bermea of the Certification Department has retired and will not be replaced. Her work will be assigned to outsourced mailroom staff at no extra cost to the AAMA. Virginia has taught her work to mailroom staff, and their performance has been deemed satisfactory.

All travel line items are being increased by 5% because of increases in air fares.

General Fund Expense Budget
American Association of Medical
Assistants FY26

Distribution account	FY2025 (Annualized)	BudgetFY26
610000 General Fund Expenses		
50000 Staff Salaries- General	1,387,125.64	\$1,317,769.36
51000 Payroll Taxes -General	100,462.16	\$ 95,439.05
52000 Group Insurance - General	197,492.52	\$ 187,617.89
530000 Misc Employee Benefits	7,277.91	\$ 7,277.91
54000 401K Retirement General	4,495.19	\$ 4,495.19
550000 Prof Staff Development-General	947.53	\$ 947.53
600310 Prof Service Texting Software	6,601.33	\$ 6,601.33
600400 Auditors Fees - General	11,585.00	\$ 11,585.00
600700 Outsource Accounting-General	9,819.47	\$ 9,819.47
600800 Outsource Mailroom - General	153,102.39	\$ 153,102.39
601000 Office Equipment Maintenance Gen	142,254.36	<u>\$ 142,254.36</u>
601200 Prof Services - Conference	98,003.09	\$ 78,000.00
601300 Prof Services - BOT	4,547.27	\$ 4,547.27
601600 Prof Services-IT Michael Knight	131,226.67	\$ 131,226.67
603100 Insurance General	18,488.76	\$ 18,488.76
610100 Professional Services-General	28,594.13	\$ 28,594.13
620100 Rent General	79,403.44	\$ 79,403.44
620700 Electricity - General	2,034.52	\$ 2,034.52
621100 Telephone - General	16,714.96	\$ 16,714.96
650010 Postage - General	84,884.76	\$ 84,884.76
650200 Postage - Membership	17,138.63	\$ 17,138.63
650600 Printing - Membership	17,909.84	\$ 17,909.84
670010 Printing - General	2,742.13	\$ 2,742.13
670700 Printing - Conference	22,550.53	\$ 22,550.53
680100 Travel - General	48,041.33	\$ 50,443.40
680200 Travel - Cont Educ	41,295.56	\$ 43,360.34
680300 Travel - Conference	27,346.71	\$ 28,714.04
680400 Travel - BOT	68,206.00	\$ 71,616.30
680500 Travel Representative Bureau	6,182.73	\$ 6,491.87
680700 Travel - Planning Session	23,089.79	\$ 24,244.28
691800 MGMA Exhibit Expenses	25,117.59	\$ 25,117.59
740100 Speakers Honorarium Conference	16,000.00	\$ 16,000.00
740400 Exhibit Expense-General	15,682.56	\$ 15,682.56
740800 Hotel Expense - Conference	153,503.41	\$ 143,000.00
741700 Equipment Rental - Conference	54,871.13	\$ 44,000.00
741800 Office Supplies - Conference	266.53	\$ 266.53
741900 Conference Technology	5,552.16	\$ 5,552.16
920110 Office Supplies-General	6,261.43	\$ 6,261.43
920610 Dues and Subscriptions-Gen	5,408.00	\$ 5,408.00
930010 Bank Charges - General	80,649.99	\$ 80,649.99
950110 Misc Expense - General	12,793.99	\$ 9,000.00
960800 ADA, EEOC, State Net	28,464.19	\$ 28,464.19
otal for 610000 General Fund Expenses	3,827,883.72	\$3,742,353.62

***ADDITIONAL
INFORMATON***

AAMA Organizational Structure

Established in 1955, the American Association of Medical Assistants® (AAMA) continues to be the premier organization dedicated to serving the interests of medical assistants. In fact, it is the only association in the world devoted exclusively to the medical assisting profession.

AAMA members include practicing medical assistants (administrative, clinical, and practice managers), medical assisting educators, students, and others interested in the profession. In addition, scores of physicians serve the AAMA at the chapter, state, and national levels.

The AAMA is a trilevel organization comprising national, state, and local levels. The national association maintains the Executive Office in Chicago. State societies are chartered by and affiliated with the national association. Local chapters are chartered by and directly affiliated with their state society. Members are required to belong to all three levels unless there is no local chapter or state society available.

The governing body of the AAMA is the House of Delegates (HOD). The HOD convenes each year at the AAMA Annual Conference and comprises members of the Board of Trustees (BOT), AAMA past presidents, and delegates from each of the constituent state societies. It is the responsibility of the HOD to determine the policies of the AAMA, amend its Bylaws, conduct the election of officers and trustees, and act upon any proposals brought forth.

Resolutions to be submitted to the HOD are reviewed by the BOT. The BOT is composed of the following:

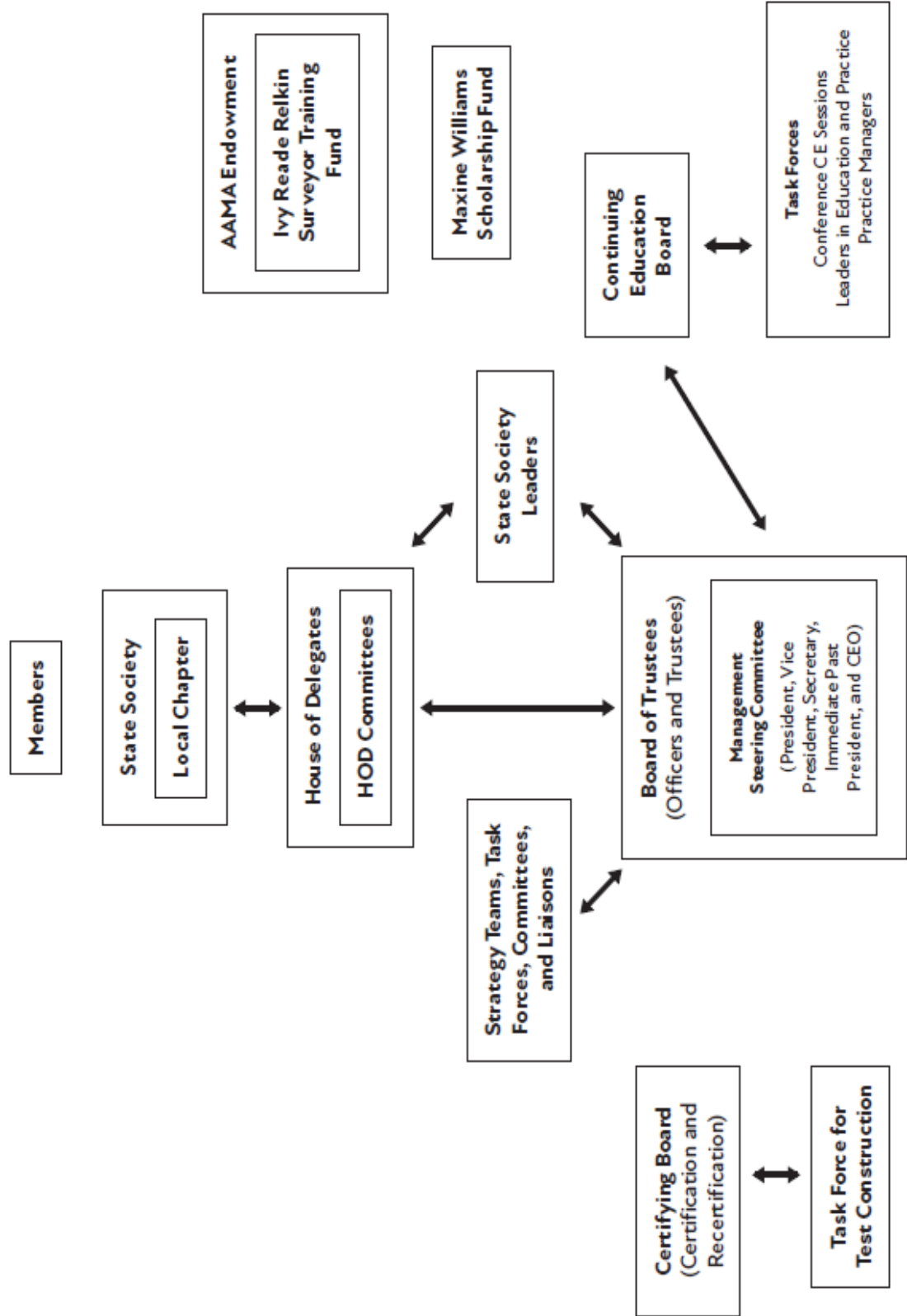
- President
- Vice President
- Secretary
- Speaker of the House
- Vice Speaker of the House
- Immediate Past President
- Seven Trustees

The BOT is responsible for overseeing the financial affairs of the association, conducting the business of the AAMA between annual meetings of the HOD and appointing members to boards, strategy teams, task forces, and committees. Their work is guided by the AAMA Strategic Issues Plan, the blueprint of the future of the association.

There are two educational boards: the Certifying Board (CB) and the Continuing Education Board (CEB). It is the responsibility of the CB to prepare, administer, and evaluate exams for certification and recertification and certify or recertify successful candidates. The CEB administers the continuing education program, which includes continuing education articles, conference educational sessions, and self-study products.

The AAMA Occupational Analysis is the cornerstone of the work performed by the education boards. The Occupational Analysis is the basis for the medical assisting curriculum, content of the CMA (AAMA) Certification Exam, and topics approved for continuing education. For a copy of the Occupational Analysis or the AAMA Strategic Issues Plan, visit the [AAMA website](#).

Organizational Chart



Initialisms and Acronyms

Initials	Description
AAFP	American Academy of Family Physicians
AAMA	American Association of Medical Assistants
AAMAE	American Association of Medical Assistants Endowment
AAPC	American Academy of Professional Coders
ABHES	Accrediting Bureau of Health Education Schools
ACS	American Cancer Society
ACCSC	Accrediting Commission of Career Schools and Colleges
ACICS	Accrediting Council for Independent Colleges and Schools
ADA	American Dental Association
ADAA	American Dental Assistants Association
AFC	Association Forum of Chicagoland
AHDI	Association for Healthcare Documentation Integrity
AHIMA	American Health Information Management Association
AMA	American Medical Association
AMT	American Medical Technologists
ASAE	American Society of Association Executives
ASMT	American Society of Medical Technicians
BOT	Board of Trustees
CAAHEP	Commission on Accreditation of Allied Health Education Programs
CASAT	Center for the Application of Substance Abuse Technologies
CB	Certifying Board (AAMA)
CCETF	Conference Continuing Education Task Force (CEB)
CEB	Continuing Education Board (AAMA)
CEU	Continuing Education Unit
CMA (AAMA)	Certified Medical Assistant (AAMA)
CMA-A (AAMA)	Certified Medical Assistant (AAMA) – Administrative
CMA-C (AAMA)	Certified Medical Assistant (AAMA) – Clinical
CMA-P (AAMA)	Certified Medical Assistant (AAMA) – Pediatric
CPC	AAPC-Certified Professional Coder
DOE	United States Department of Education
FSMB	Federation of State Medical Boards
HOSA	Health Occupations Students of America
HPN	Health Professions Network
I.C.E.	Institute for Credentialing Excellence
LEAP	Leaders in Education and Practice
MAERB	Medical Assistant Education Review Board
MARWeek	Medical Assistants Recognition Week
MSC	Management Steering Committee
MWSC	Maxine Williams Scholarship Committee
NACCLS	National Accrediting Agency for Clinical Laboratory Sciences
NCSBN	National Council of State Boards of Nursing
NCCA	National Commission for Certifying Agencies

Medical Assisting Creed

The Medical Assisting Creed of the AAMA sets forth medical assisting statements of belief:

- **I believe in the principles and purposes of the profession of medical assisting.**
- **I endeavor to be more effective.**
- **I aspire to render greater service.**
- **I protect the confidence entrusted to me.**
- **I am dedicated to the care and well-being of all people.**
- **I am loyal to my employer.**
- **I am true to the ethics of my profession.**
- **I am strengthened by compassion, courage, and faith.**

PROPOSED MOTION FORM

Clearly write down the motion.

I move

Motion made by: _____

Second by: _____

PASSED

FAILED

PROPOSED MOTION FORM

Clearly write down the motion.

I move

Motion made by: _____

Second by: _____

PASSED

FAILED



**AMERICAN ASSOCIATION
OF MEDICAL ASSISTANTS®**

20 N. WACKER DR., STE. 3720
CHICAGO, ILLINOIS 60606

www.aama-ntl.org

800/228-2262