

2026 DELEGATES PACKET



AMERICAN ASSOCIATION
OF MEDICAL ASSISTANTS®



AMERICAN ASSOCIATION OF MEDICAL ASSISTANTS
70th ANNUAL HOUSE OF DELEGATES
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American Association of Medical Assistants®
GRAND SIERRA RESORT
RENO, NEVADA
Preliminary Agenda

TUESDAY, SEPTEMBER 15, 2026

8:30 AM HOUSE OF DELEGATES

Presentation of the Colors

National Anthem

Pledge of Allegiance

Mary Dyer, CMA-A(AAMA)

Call to Order

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

Introductions

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

Report of the Credentials Chair

Kathy Stuut, CMA (AAMA)

Approval of Agenda

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

Orientation of Delegates

Aimee Quinn, CMA (AAMA)
Vice Speaker of the House

Adoption of Rules of the House

Aimee Quinn, CMA (AAMA)
Vice Speaker of the House

Appointment of Reference Committees and Tellers

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

Supplemental Report

Virginia Thomas, CMA (AAMA)
AAMA President

Annie Storey, CAE
AAMA Executive Director

Report of the Nominating Committee

Monica Case, CMA (AAMA)

Nominations from Floor

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

Announcements

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

Special Announcement

Rebecca Walker, CMA (AAMA)

Recess

Meet the Candidates will follow the morning session of the House with an estimated start time of 10:15 am.

The Reference Committee Hearings will follow Meet the Candidates, and a lunch break with a start time of 1:15 PM.

Reference Committee Schedule

1:15 PM

Reference Committee Hearings
Reports, Bylaws

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

6:30 PM HOUSE OF DELEGATES RECONVENES

Call to Order

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

Report of the Credentials Chair

Kathy Stuut, CMA (AAMA)

Moments of Remembrance and Reflection

Mary Dyer, CMA-A (AAMA)

Report of the Reference Committees:
Reports

Aimee Quinn, CMA (AAMA)
Vice Speaker of the House

Bylaws

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

Election of Officers and Nominating Committee

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

Unfinished Business

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

New Business

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

Good and Welfare Statements *(Please note only 15 minutes will be allowed)*

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 2026 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 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 Tuesday morning please be prepared to make CHANGES to delegates or alternates from their original submissions. Proxies will be issued at Tuesday morning credentials check in.

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

On Tuesday, 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:

Tuesday, September 15, 2026, 7:15-8:15 AM

Tuesday, September 15, 2026, 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 Reno!

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

Aimee Quinn, BHA, 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

1. 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***

The American Association of Medical Assistants® (AAMA)
Report of the Board of Trustees
For the Period Ending September 2026

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 2025-2026 BOT consists of six officers and six trustees. The two education board chairs and the first vice chairs, and the chair of the Provider Liaison Board, may attend the BOT meetings with voice but without vote.

The 2025-2026 BOT has met numerous times (in person and virtually) since the 69th AAMA Annual Conference held in Arlington, Virginia.

- AAMA Post Conference Board of Trustees Executive Session – September 22, 2025
- AAMA Virtual MSC meeting – October 26, 2025
- AAMA Virtual MSC meeting – October 28, 2025
- AAMA Virtual MSC meeting – October 30, 2025
- AAMA Virtual MSC meeting – November 3, 2025
- AAMA Virtual MSC meeting – November 4, 2025
- AAMA BOT Planning session/ Executive session – Chicago, Illinois – November 9-10, 2025
- AAMA Virtual MSC meeting – November 19, 2025
- AAMA Virtual MSC meeting – November 21, 2025
- AAMA Virtual Executive session – November 23, 2025
- AAMA Virtual Executive session – December 12, 2025
- AAMA Virtual MSC meeting – January 6, 2026
- Winter Board of Trustees MSC meeting/ Budget and Finance meeting -Chicago, Illinois – January 29, 2026
- Winter Board of Trustees Open and Executive sessions – Chicago, Illinois – January 30-31, 2026
- AAMA Virtual MSC meeting – February 12, 2026
- AAMA Virtual Executive session – March 8, 2026
- AAMA Virtual MSC meeting – March 11, 2026
- AAMA Virtual Executive session – April 20, 2026
- AAMA Virtual MSC meeting – May 28, 2026
- Summer Board of Trustees MSC meeting/ Budget and Finance meeting – Lombard, Illinois – June 4, 2026
- Summer Board of Trustees Open and Executive sessions – Lombard, Illinois – June 5-6, 2026

The BOT approved the appointments of committee/ strategy team/ task force chairs, board chairs, and staff liaisons for 2025-2026.

Committee
Annual Conference

Chair
Monica Case, CMA (AAMA)

46	Awards	Candy Miller, CMA (AAMA)
47	Bylaws and Resolutions	Cameron Smith, CMA (AAMA)
48	Documents	Jane Seelig, CMA-A (AAMA)
49	Editorial Advisory	Sandra Williams, CMA (AAMA)
50	Engagement and Outreach	Cameron Smith, CMA (AAMA)
51	HOD Minutes	Jane Seelig, CMA-A (AAMA)
52	Maxine Williams Scholarship	Sherry Bogar, CMA (AAMA)
53	Nominating	Monica Case, CMA (AAMA)
54	Strategic Issues Planning	Pam Neu, CMA (AAMA)
55		
56	<u>Strategy Team</u>	<u>Chair</u>
57	Leadership Development	Shirley Sawyer, CMA (AAMA)
58	Marketing	Sherry Bogar, CMA (AAMA)
59	Membership Development	Aimee Quinn, CMA (AAMA)
60		
61	<u>Task Force</u>	<u>Chair</u>
62	Educators Collaborative	Pam Neu, CMA (AAMA)
63	Partnership	Monica Case, CMA (AAMA) Co-chair
64		
65	<u>Educational Boards and Councils</u>	<u>Chair</u>
66	Certifying Board	Carolyn Fuller, CMA (AAMA)
67	Continuing Education Board	Sue Hawes, CMA (AAMA)
68	Judicial Council	Patty Licurs, CMA (AAMA)
69		
70	The following represents a partial list of the actions and decisions of the 2025-2026 BOT:	
71	• Approved appointment of AAMA members to AAMA committees, strategy teams, and	
72	task forces	
73	• Approved appointment of AAMA members and chairs to Continuing Education Board	
74	(CEB) Task Forces	
75	• Approved purchase of booth to the 2026 AMGA Conference	
76	• Approved extending Executive Director position to Annie Storey	
77	• Approved 2026 AAMA Conference logo	
78	• Approved update to the AAMA Mission Statement and Vision Statement	
79	• Approved to pilot a tiered employer-sponsored membership discount.	
80	• Approved incentive for non-current members who sign up for membership on or after	
81	July 1.	
82	• Approved membership renewal incentive allowing current renewing AAMA members to	
83	receive up to two (2) free CEUs at the time of renewal until December 31.	
84	• Approved the opening of the Educator Facebook page to all Medical Assistant Program	
85	Directors and instructors.	
86	• Approved not doing a student essay competition	
87	• Approved changes to the CEB Policy and Procedures Manual	
88	• Approved Kansas City, Missouri, September 13-16, 2027, as the site for the 72 nd Annual	
89	AAMA Conference.	
90	• Approved new student Excel Award – Medical Assistant Student Group Excellence in	
91	Community Service.	

- Approved CEB request to change the name of Practice Management Task Force (PMTF) to Practice Leadership Task Force (PLTF).
- Approved updates to the Volunteer Leadership application.
- Approved Leadership Development Strategy Team to create focus groups.
- Approved Medical Assistant Student Group Excellence in Community Service Excel Award application.
- Approved 2026 AAMA Annual Conference pin.
- Approved Provider Liaison Board of Trustees Member Role document.
- Approved change to House of Delegates credentials desk.
- Approved proposed Bylaws amendments for the 2026 House of Delegates.
- Approved AAMA Artificial Intelligence (AI) Use by Volunteer Leaders policy.
- Approved fiscal year 2027 budget.
- Approved MARWeek 2026 logo design.
- Approved CEB appointments/ reappointments for the 2026-2027 term.
- Approved the following documents throughout the 2025-2026 term:
 - New Chapter Checklist
 - Tip Sheet for Student Groups
 - Guidelines for State Societies on the Conversion from an HOD to a General Assembly
 - State travel expense voucher
 - Volunteer Leadership Position Description document
 - Chapter Management Guide
 - Guidelines for State and Chapter Secretary
 - State Management Guide

The BOT has worked hard for the AAMA membership for the year 2025-2026. This President is thankful for their dedication, hard work, and time spent representing AAMA members. This officer is grateful to have the opportunity to work alongside these dedicated board members. The BOT appreciates the challenging work of the Certifying Board and the Continuing Education Board, as well as their willingness to collaborate among the boards and the members we serve. The BOT is thankful to CEO Balasa, Executive Director Storey, Board Services Manager Scarborough, and the AAMA staff for their dedication and support.

Virginia Thomas, CMA (AAMA)
AAMA President 2024-2026

American Association of Medical Assistants® (AAMA)
Report of the President
For the Period Ending September 2026

The AAMA President serves as chair of the Board of Trustees (BOT), the Management Steering Committee (MSC), the Budget and Finance Committee, and as the Chair of the AAMA Maxine Williams Board of Directors. The President also serves ex officio on 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 Arlington, Virginia, on September 20, 2025.

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

Representatives Bureau Assignments:

- This officer collaborated with Vice President Bogar on all AAMA Representative Bureau assignments. Vice President Bogar presented all assignments to the BOT members at the winter BOT meeting.
- Maine Society of Medical Assistants – Saturday, October 17, 2026 – Eastern Maine Community College, Bangor, ME

Meetings Attended

- AAMA 2025 Annual Conference- Arlington, Virginia, September 18-22, 2025
 - Board of Trustees Pre-HOD Executive Session –September 18, 2025
 - First Timers and Students Reception –September 19, 2025
 - Board of Trustees Open Session Meeting – September 19, 2025
 - Knowledge Bowl – September 19, 2025
 - Welcome and Awards Celebration – September 19, 2025
 - 69th AAMA House of Delegates – September 20, 2025
 - Meet the Candidates – September 20, 2025
 - House of Delegates Reference Committee Hearings: Reports, Bylaws, Resolutions – September 20, 2025
 - House of Delegates Reconvene and Voting –September 20, 2025
 - AAMA Board of Trustees Meeting with the Society of Past Presidents (SoPPs) – September 21, 2025
 - AAMA State Leaders Session – September 21, 2025
 - AAMA Presidents Banquet – September 21, 2025
 - Post Conference Board of Trustees Executive Session/ Orientation/ Maxine Williams Board of Directors Meetings – September 22, 2025
 - AAMA 2025-2026 Committees, Strategy Teams, and Task Forces Meet and Greet – September 22, 2025

Other Meetings as AAMA President

- MGMA Conference Exhibitor Booth – Orlando, Florida – September 28-30, 2025
- CEB Planning Session – Chicago, Illinois – November 7-8, 2025
- BOT Planning Session – Chicago, Illinois – November 9-10, 2025

- Executive Session – Chicago, Illinois November 9-10, 2025
- Maxine Williams Board of Directors – Chicago, Illinois – November 9, 2025
- BOT Winter Meeting – Chicago, Illinois – January 29-31, 2026
 - MSC – January 29, 2026
 - Open Session – January 30, 2026
 - Executive Session – January 30-31, 2026
- CEB Winter Meeting – Chicago, Illinois – February 1-2, 2026
- CB Winter Meeting – Atlanta, Georgia, February 28, 2026
- AMGA Conference Exhibitor Booth – Las Vegas, Nevada – April 16-18, 2026
- BOT Summer Meeting – Lombard, Illinois – June 4-6, 2026
 - MSC – June 4, 2026
 - Maxine Williams Board of Directors – June 4, 2026
 - Open Session – June 5, 2026
 - Executive Session – June 6, 2026
- CEB Summer Meeting – Lombard, Illinois – June 7-8, 2026
- CB Summer Meeting – Chicago, Illinois – July 11, 2026

Virtual Meetings

- BOT Executive Sessions: November 23, 2025, December 12, 2025, March 8, 2026, April 20, 2026
- Management Steering Committee (MSC): October 16, 2025, October 28, 2025, October 30, 2025, November 3, 2025, November 4, 2025, November 19, 2025, November 21, 2025, December 2, 2025, December 8, 2025, January 6, 2026, February 12, 2026, March 11, 2026, March 23, 2026, May 28, 2026
- CEB: January 17, 2026, March 21, 2026, April 25, 2026
- BOT meeting with CB Chair Fuller: June 1, 2026
- BOT meeting with CEB Chair Ley: June 30, 2026
- Committee/ Task Force/ Strategy Team:
 - Annual Conference: October 10, 2025, January 14, 2026, March 21, 2026, April 25, 2026
 - Awards: December 11, 2025, January 6, 2026, March 4, 2026, March 18, 2026, April 2, 2026, May 6, 2026, June 16, 2026, June 29, 2026
 - Bylaws: January 8, 2026, May 27, 2026
 - Documents: March 9, 2026
 - Educators Collaborative: February 5, 2026, May 7, 2026, June 18, 2026
 - Leadership Development: January 5, 2026, February 3, 2026, March 5, 2026, May 5, 2026, June 2, 2026, July 7, 2026
 - Leadership CEU session – March 7, 2026
 - Brunch with the BOT (Eastern and Central time zones) – June 13, 2026
 - Brunch with the BOT (Mountain/ Pacific/ Alaska/ Hawaii) – June 20, 2026
 - Marketing: November 24, 2025, December 9, 2025, January 7, 2026, January 12, 2026, February 16, 2026, March 15, 2026, May 18, 2026, June 15, 2026
 - Maxine Williams Scholarship: January 15, 2026, January 25, 2026, April 29, 2026, May 30, 2026
 - Member Engagement and Outreach: January 22, 2026

- Membership: January 6, 2026, February 17, 2026, March 17, 2026, May 19, 2026
- Partnership: December 8, 2025, January 12, 2026, March 26, 2026
- Strategic Issues Planning: January 18, 2026, January 23, 2026, February 18, 2026, March 23, 2026, March 29, 2026, April 12, 2026
- 70th Anniversary Project: November 22, 2025, December 3, 2025, January 15, 2026, February 23, 2026, May 20, 2026

As of the date of this report, this President anticipates attending the following virtual meetings:

- BOT Virtual Executive Session – July 19, 2026
- Marketing Committee – July 20, 2026
- Membership Committee – July 21, 2026
- Meeting with CEB Chair Ley – July 28, 2026
- Leadership Committee – August 3, 2026
- Meet the Candidates #1 – August 13, 2026
- CEB Virtual meeting – August 15, 2026
- Marketing Committee – August 17, 2026
- Membership Committee – August 18, 2026
- House of Delegates Orientation #1 – August 26, 2026
- House of Delegates Orientation #2 – August 26, 2026
- Meet the Candidates #2 – August 29, 2026
- House of Delegates Orientation #3 – August 29, 2026
- House of Delegates House Committee Orientation – September 9, 2026
- House of Delegates Reference Committee Orientation – September 9, 2026

Committee Appointments

- All volunteer leadership forms were reviewed by this President, Immediate Past President Case, and Vice President Bogar the evening before the post-conference BOT meeting. 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.
- 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 2024-2025 chairs to upload all information from their term into TEAMS for the 2025-2026 chair to access. The newly appointed chair should contact the 2024-2025 chairs and discuss the status of pending projects. Pending projects need to be followed through and completed. A brief orientation and BOT packet were given to all members of the BOT, and documents were discussed by Board Services Manager Scarborough and CEO Balasa. These documents were completed, signed, and returned to Manager Scarborough. All BOT members were to be familiar with the documents before 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 member yearly.
- This officer announced the BOT Planning Session dates were November 9-10, 2025, in Chicago, Illinois and more information was sent via email. This officer assigned each BOT member a task during lunch. 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 announced availability via email/ phone for the 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 announced ~~will be~~ availability via email/ phone to the newly elected Secretary to go over the new procedure for all virtual meeting minutes. This office was also available via email/ phone to the newly elected Vice President to answer any questions and provide guidance. Any new and unfinished business was reviewed and addressed as needed.

2025-2026 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 – Orlando, Florida – September 28-30, 2025

- This President, along with CEO Balasa, Immediate Past President Case, 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, and AAMA products for their employees to grow their knowledge, as well as continuing education opportunities at the AAMA Annual Conference. Ms. Eldridge recorded a short video for each MSC member in attendance, wishing all AAMA members a happy Medical Assistants Week

CEB (Continuing Education Board) Planning Session – Chicago, Illinois – November 7-8, 2025

- As AAMA President and Ex Officio, this officer attended the CEB Planning Session held in Chicago, Illinois. This was a very productive meeting, including presentations by Certifying Board (CB) Chair Fuller, Vice Chair Harris, and Director of Certification Gottwaldt on item writing and Rebecca Walker on Strategic Issues Planning. Chair Hawes reached out to this officer prior to the planning session with an invitation to any BOT member interested in the Strategic Issues Planning presentation. All BOT members were in attendance for this presentation.

BOT (Board of Trustees) Planning Session/ Executive Session – Chicago, Illinois – November 9-10, 2025

- This President presided over the BOT Planning Session. An orientation session was conducted, and presentations were made by CEO Balasa, including the differences

between 501c3 and 501c6 entities. It was asked if CEO Balasa would create and send a memo to state society leaders on this distinction, especially for those states with scholarship programs. CEO Balasa stated he would create this memo.

- CEO Balasa provided a financial update.
- The Educator Collaborative Task Force was charged with working with Director Gottwaldt on information that could be shared with all programs to let non-CAAHEP and non-ABHES program directors know about/ remind them about the Alternate Pathway for CMA (AAMA) certification.
- The BOT voted and approved the following:
 - Reappointment of Karla Hunter to the Conference Continuing Education Task Force.
 - Rescission of appointment of Linda Vitzthum as Practice Managers Task Force Vice Chair and reappointment as a member of PMTF.
 - Recission of appointment of Deborah Novak as Career Professional Development Task Force chair and reappointment as a member of Career Professional Development Task Force (CPDTF).
 - Appointment of Linda Vitzthum as CPDTF Chair.
 - Appointment of Claire Houghton as Practice Managers Task Force (PMTF) Vice Chair.
 - Appointment of Cassie Cornelison as CPDTF Vice Chair.
 - Purchase a 10x10 exhibit booth for the American Medical Group Association annual conference, April 15-18, 2026.
 - Appointment of Claire Houghton to the Marketing Strategy Team
- The BOT, along with key staff members, held a roundtable discussion on November 10th to discuss suggestions and/or changes. The chairs of the CEB and CB were also invited to attend and participate so all boards are working together with staff.
- The Maxine Williams Board of Directors met to appoint the 2025-2026 AAMA President as chair and all 2025-2026 BOT members as members of the board of directors.
- Any new and unfinished business was reviewed and addressed as needed
- The BOT, with CEO Balasa and Board Services Manager Scarborough met with two candidates for the Executive Director position.

AAMA BOT -Virtual Meeting- November 23, 2025

- Senior Director of Marketing and Communications Mokijewski, Director of Membership and Education Mickowski, Board Services Manager Scarborough, Director of Certification Gottwaldt, and CEB Vice Chair Ley were in attendance. Strategic Issues Planning Chair Neu presented a possible revision to the AAMA Vision Statement and Mission Statement, as well as suggested edits to the current Strategic Issues Plan. After discussion, Chair Neu stated she and her committee would take it back for review and present at a later date. All guests were excused from the meeting. Discussion was had regarding the executive director's position search. The BOT approved extending the position to Annie Storey. The MSC will meet to discuss the offer details and ask Howe & Hutton to begin work on a contract. Membership Chair Quinn gave information on the 70th Anniversary Project that the following committees/ strategy teams will be

collaborating on with staff: Membership, Marketing, Leadership, Engagement and Outreach, and Educator Collaborative.

Resignation of CEB Chair Hawes – December 31, 2025

- This President received the resignation notification of CEB Chair Hawes on December 31, 2025, to be effective immediately.

E-Votes (prior to Winter BOT meeting)

- November 18, 2025 – appointment of Kayla Fletcher to the Conference Continuing Education Task Force (CCETF) – approved.
- January 14, 2026 - appointment of Clare Ley as CEB Chair – approved.
- January 18, 2026 – request from Vice President Bogar and Engagement and Outreach Chair Cameron Smith for funds for Representative Assignments presentation at BOT winter board meeting – approved.
- AAMA Winter BOT meeting – Chicago, Illinois – January 30-31, 2026
- The winter BOT open session had members in attendance from one (1) state society, Michigan. Director of Continuing Education and Membership Mickowski reported that as of January 31, 2026, there are 14,676 total members. Director of Marketing Mokijewski reported that the Marketing and Communications Departments are doing a page-by-page audit of the AAMA website to improve the user experience, refine design within their capabilities, and update images. Director of Communications Sanks-Korenchan reported that text messages regarding discounts on CEU products are going well. The Maxine Williams Scholarship Committee announced the first winners for the scholarship in honor of Crystal Coleman. Partnership Task Force is exploring an educational partnership. The AAMA will not be renewing its membership with MGMA and will research the benefits of membership with AMGA. Executive Director Storey was added as a liaison to Bylaws, Membership, and Strategic Issues Planning.
 - The BOT voted and approved the following:
 - 2026 AAMA Conference logo.
 - No longer produce MARWeek packet due to cost.
 - Update to the AAMA Mission Statement and Vision Statement
 - Pilot a tiered employer-sponsored membership discount presented by the Membership Committee.
 - Incentive for non-current members who sign up for membership on or after July 1 to receive membership through the following calendar year, presented by the Membership Committee.
 - Membership renewal incentive allowing current renewing AAMA members to receive up to two (2) free CEUs at the time of membership renewal until December 31 as a value-added benefit that aligns with the July 1 incentive for non-current members presented by the Membership Committee.
 - The Educator Facebook page will be open to all Medical Assistant Program Directors and instructors, rather than being limited to AAMA member Program Directors and instructors.
 - No Student Essay contest (Awards Committee will research and develop a new student Excel Award option).

- Approved the CEB Policies and Procedures.
- Approved Kansas City, Missouri, September 13-16, 2027, as the site and dates for the 71st Annual AAMA Conference.

CEB Winter Meeting – Chicago, Illinois – February 1-2, 2026

- As AAMA President and Ex Officio, this officer attended the CEB winter meeting held in Chicago, Illinois. This was a productive meeting with great conversations and discussions on continuing education for the AAMA members and non-members. This officer applauds the magnificent work that the CEB members are doing for the AAMA.

CB Winter Meeting – Atlanta, Georgia – February 28, 2026

- As AAMA President, this officer attended the Certifying Board (CB) winter meeting held in Atlanta, Georgia. This was a productive meeting with great conversations and discussions. This officer received a suggestion for a TEAMS backdrop that would be available to all members during MARWeek and possibly a downloadable poster. This information was shared with Marketing Director Mokijewski. This officer was also made aware that the CDC Speakers Bureau has returned and is available to the AAMA, state societies, and chapters. There is no charge for speakers, and there is an option for virtual presentations. Additional thoughts were shared with this officer and Vice President Bogar. This officer emailed information to individual chairs or staff immediately following the meeting.

AAMA BOT – Virtual Meeting- March 8, 2026

- Executive Director Storey introduced a document created to note IT concerns. All concerns are to be emailed to Ms. Storey. Vice President Bogar stated she received an email from a state that submitted their request for a representative. This would mean shifting around a few of the assigned virtual assignments. Documents announced they will have some documents soon and will send them to this officer for BOT E-vote.
- The BOT voted and approved the following:
 - New student Excel Award – Medical Assistant Student Group Excellence in Community Service

AMGA (American Medical Group Association (AMGA)– Las Vegas, Nevada – April 16-18, 2026

- This officer, along with Executive Director Storey, and Immediate Past President Case, staffed the AAMA's booth during this conference. With over 1,500 attendees, the booth saw good traffic. This officer was available to attendees to answer questions about the AAMA, state societies, and AAMA products available to help their employees grow their knowledge, as well as about the AAMA Annual Conference in Reno this September. This officer attended a few sessions and found immense value in the General Session led by Dethra Giles titled *Leading Through Change: A Roadmap for Energized and Resilient Leadership*, and Mark Cuban titled *Cost, Care, and Common Sense – A Conversation with Mark Cuban*. Along with Immediate Past President Case, this President engaged with attendees and had good conversations about the value of medical assistants, membership, and continuing education.

AAMA BOT – Virtual Meeting – April 20, 2026

- The Strategic Issues Planning Committee presented the proposed Strategic Issues Plan for review and possible vote. This officer thanks this committee for their hard work on the presented plan. The recent AMGA meeting was discussed as to whether there is value in attending the meeting. A thought to consider: Would it be better to have more attend the AMGA meeting? These attendees could go out and engage with the meeting attendees. This officer reminded BOT members that all reports are due Monday, May 18, 2026, for the summer meeting.
- The BOT voted and approved the following: Accept the presented Strategic Issues Plan.

E-Votes (prior to summer BOT meeting)

- February 7, 2026 – change the name of Practice Managers Task Force (PMTF) to Practice Leadership Task Force (PLTF) – approved.
- February 12, 2026 – purchase of Executive Corporate membership with AMGA – approved.
- March 1, 2026 – edit to the AAMA Vision Statement – approved.
- March 14, 2026 – update to AAMA Volunteer Leadership application – approved.
- March 19, 2026 – updates to the following documents: New Chapter Checklist, Tip Sheet for Student Groups, and Guidelines for State Societies on the Conversion from an HOD to a General Assembly – all approved
- April 27, 2026 – Medical Assistant Student Group Excellence in Community Service Excel Award application – approved.
- May 12, 2026 – 2026 AAMA Annual Conference pin – approved.

Maxine Williams Board of Directors – Lombard, Illinois – June 4, 2026

- Approved for the Articles of Incorporation to be amended, and for the name to be changed to the Maxine Williams Scholarship and Advancement Fund. This will take approximately three to four weeks to complete. Staff will work with outside legal counsel.

AAMA Summer BOT meeting – Lombard, Illinois – June 5-6, 2026

- Director of Membership Mickowski reported the total number of members as of May 31, 2026 – 20,004.
- Speaker of the House Seelig reported that the Delegates' packet would be delivered electronically on August 1, 2026, to all state Delegates and Alternate Delegates. Bylaws compliance deadline for all states is August 16, 2026. All dates for Delegate Orientation and House and Reference Committee Orientation were announced.
- Annual Conference Committee Chair Case reported one hundred fifty-nine (159) currently registered for the annual conference.
- Maxine Williams Scholarship Committee Chair Bogar announced the winners of the 2026 student scholarship. Each winner, ten in total, 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.
- Marketing Committee Chair Bogar announced the AAMA will work to trademark the AAMA MARWeek logo, as well as the term MARWeek.

- Nominating Chair Case reported the open positions for the 2026-2027 BOT and provided the slate of candidates. Chair Case noted the deadline to run from the floor is August 16, 2026. Virtual Meet the Candidates dates/ times were presented. See the report of the Nominating Committee Chair for the slate of candidates and the Meet the Candidates dates/ times.
- The following were approved:
 - Documents Committee: State travel expense voucher, Volunteer Leadership Position and Description, Chapter Management Guide, Guidelines for State and Chapter Secretary, and the State Management Guide.
 - Pursuing a technology assessment presented by Executive Director Storey.
 - Proposal for office furniture presented by Executive Director Storey.
 - Provider Liaison Board of Trustees Member Role.
 - Questions to become a member of the Educators Facebook page.
 - Change to the House of Delegates credentials desk - Tuesday, September 15, 2026, 7:15-8:15 AM and 5:30-6:15 PM.
 - Bylaws and Resolutions Committee – Proposed Bylaws amendments for the 2026 HOD.
 - AAMA Artificial Intelligence (AI) Use by Volunteer Leaders policy.
 - Fiscal year 2027 budget.

CEB Summer Meeting – Lombard, Illinois – June 7-8, 2026

- This President attended the summer meeting of the CEB and presented updates from the summer BOT meeting. CEB discussed reappointments/appointments to the CEB, as well as chairs/vice chairs for: CEB, Conference Continuing Education Committee Task Force (CCETF), Career Professional Development Task Force (CPDTF), and Practice Leaders Task Force (PLTF). A list will be sent to this President to present to the BOT for approval after discussion. Please see the report of CEB Chair Ley.

CB Summer Meeting – Chicago, Illinois – July 10, 2026

- This President attended the summer meeting of the CB. There was great discussion that will be discussed among the CB members. Please see the report of CB Chair Fuller.

E-Votes (prior to AAMA Annual Conference)

- May 29, 2026 – Announcement of transition for CEO Balasa and Executive Director Storey – approved.
- June 15, 2026 – MARWeek 2026 logo design – approved.
- June 30, 2026 – CEB appointments/reappointments – approved.

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.
- Beginning in October 2025, this President, along with the members of the MSC, met multiple times to discuss candidates for the Executive Director position and conduct interviews. Two candidate interviews were shared with BOT members before the Planning Session to prepare for two in-person interviews with final candidates. All

information regarding follow-up interviews, negotiations, and contracts was presented to the BOT, keeping them informed during the process of hiring the executive director.

This officer has participated in meetings with Vice President Bogar to review and discuss updates, status of projects, information, and representative assignments and/or changes. This officer participated in a virtual question-and-answer meeting on March 2, 2026, with Trustees Christa Smith and Jeanette Tyler to answer any questions they had regarding representative assignments. This officer met with Vice President Bogar as requested throughout the year and will continue to be available to answer questions.

This officer was asked to record a podcast with Felicia Ethridge as a kick-off to the 70th Anniversary project. The podcast was recorded on May 11, 2026.

This President, along with Vice President Bogar, were asked to participate in voice recordings at the AAMA home office for MARWeek 2026 on July 10, 2026, before the open session of the CB.

This officer has also remained available to the MSC, members of the Board of Trustees, AAMA CEO Balasa, Executive Director Storey, 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, ICE-CCP, and Executive Director Annie Storey, MS, CAE, for their availability, willingness to answer questions, provide counsel, and support. This officer would also like to thank Board Services Manager, Sharon Scarborough and all AAMA staff for their willingness to support the efforts and ideas of the entire Board of Trustees. This officer thanks the Board of Trustees for their dedication to the AAMA, the profession of medical assisting, and the AAMA membership. Lastly, this officer would like to thank the AAMA membership for their support throughout the year. We are all stronger together.

Virginia Thomas, CMA (AAMA)
AAMA President, 2024-2026

American Association of Medical Assistants® (AAMA)
Report of the Immediate Past President
For the Period Ending September 2026

The duties of the Immediate Past President are as follows:

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

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

- Partnership Task Force- Chair
- Awards Committee- Member
- CASAT-FASD- Member
- Maxine Williams Scholarship Fund- Member

MEETINGS ATTENDED:

AAMA 2025 Annual Conference- Arlington, VA- September 18-22, 2025

- AAMA Board of Trustees Pre-HOD Executive Session- September 18, 2025
- First Timers and Students Reception –September 19, 2025
- AAMA Board of Trustees Open Session Meeting – September 19, 2025
- Knowledge Bowl - September 19, 2025
- Welcome and Awards Celebration – September 19, 2025
- AAMA 69th House of Delegates – September 20, 2025
- Meet the Candidates – September 20, 2025
- House of Delegates Reference Committee Hearings: Reports, Bylaws, Resolutions – September 20, 2025
- House of Delegates Reconvene and Voting –September 20, 2025
- AAMA Board of Trustees Meeting with the Society of Past Presidents (SoPPs) – September 21, 2025
- AAMA State Leaders Session – September 21, 2025
- AAMA Presidents Banquet – September 21, 2025
- AAMA Post Conference Board of Trustees Executive Session/Orientation/Maxine Williams Board of Directors meetings –September 22, 2025
- AAMA 2025-2026 Committees, Strategy Teams, and Task Forces Meet and Greet – September 22, 2025

OTHER MEETINGS ATTENDED:

- MGMA Leadership Conference Exhibitor Booth- Orlando, Florida- September 28-October 1, 2025
- Annual Conference Committee- Virtual meeting- October 10, 2025

- 614 • MSC- Virtual meeting- October 16, 2025, October 26, 2025, October 28, 2025, October
- 615 30, 2025, November 3, 2025, November 4, 2025
- 616 • CEB Planning Session- Strategic Planning Presentation, Rebecca Walker, CMA
- 617 (AAMA)-Chicago, Illinois-November 9, 2025
- 618 • BOT Planning Session – Chicago, Illinois-November 9-10, 2025
- 619 • BOT Executive Session – Chicago, Illinois-November 9, 2025
- 620 • Maxine Williams Board of Directors- Chicago, Illinois- November 9, 2025
- 621 • MSC-Virtual meeting - November 19, 2025, November 21, 2025
- 622 • BOT Executive Session -Virtual Meeting- November 23, 2025
- 623 • MSC- Virtual meeting - December 2, 2025, December 8, 2025
- 624 • Partnership Task Force- Virtual meeting- December 8, 2025
- 625 • Awards Committee- Virtual Meeting- December 11, 2025
- 626 • BOT Executive Session -Virtual Meeting- December 12, 2025
- 627 • MSC- Virtual meeting - January 6, 2026
- 628 • Awards Committee- Virtual meeting- January 6, 2026
- 629 • Partnership Task Force- Virtual meeting- January 12, 2026
- 630 • Annual Conference Committee- Virtual meeting- January 14, 2026
- 631 • Maxine Williams Scholarship Committee- Virtual meeting- January 15, 2026
- 632 • Strategic Issues Planning Committee- Virtual Meeting- January 18, 2026
- 633 • Maxine Williams Scholarship Committee- Virtual meeting- January 19, 2026
- 634 • CASAT-FASD Steering Committee Virtual meeting- January 22, 2026
- 635 • Maxine Williams Scholarship Virtual meeting -January 25, 2026
- 636 • BOT Winter Meeting- January 29-31, 2026- Chicago, Illinois
- 637 ○ MSC Meeting- January 29, 2026- Chicago, Illinois
- 638 ○ BOT Open Session- January 30, 2026
- 639 ○ BOT Executive Session- January 30-31, 2026
- 640 • MSC Virtual Meeting- January 29, 2026, February 12, 2026
- 641 • Nominating Committee Virtual Meeting- February 16, 2026
- 642 • Maxine Williams Scholarship Committee- Virtual meeting- February 25, 2026
- 643 • Awards Virtual Meeting- March 4, 2026
- 644 • Leadership Virtual CEU session – March 7, 2026
- 645 • MSC Virtual Meeting- March 7, 2026
- 646 • BOT Virtual Executive Session -March 8, 2026
- 647 • Annual Conference Committee Chair, AAMA Staff, President Thomas, Vice President
- 648 Bogar Virtual Meeting- March 9, 2026
- 649 • MSC Virtual Meeting March 11, 2026
- 650 • Awards Committee Virtual Meeting- March 18, 2026
- 651 • Strategic Issues Planning Virtual Meeting- March 23, 2026
- 652 • MSC Virtual Meeting March 23, 2026
- 653 • Partnership Task Force Virtual Meeting- March 26, 2026
- 654 • Annual Conference Committee Virtual Meeting- March 27, 2026
- 655 • Conference Liaison Scarborough and Annual Conference Chair Virtual Meeting–
- 656 Conference Schedule-March 27, 2026
- 657 • Awards Virtual Meeting- April 2, 2026, May 6, 2026

- American Medical Group Association (AMGA) Conference/ AAMA Exhibitor Booth- April 16-18, 2026 - Las Vegas, Nevada
- BOT Virtual Executive Session- April 20, 2026
- Maxine Williams Scholarship Virtual Meeting -April 29, 2026
- AAMA Staff Mickowski/CCETF Chair Stimpson/Conference Education Chair Mendy Virtual Discussion- May 11, 2026
- Nominating Committee Virtual Meeting- May 26, 2026
- MSC Virtual Meeting -May 28, 2026
- Maxine Williams Scholarship Virtual Meeting -May 30, 2026
- CB Chair Fuller/ BOT Virtual Meeting- June 1, 2026
- BOT Summer Meeting - June 4-6, 2026– Lombard, Illinois
 - MSC Meeting- June 4, 2026- Lombard, Illinois
 - Maxine Williams Board of Directors Meeting- June 4, 2026-Lombard, Illinois
 - BOT Open Session- June 5, 2026- Lombard, Illinois
 - BOT Executive Session- June 6, 2026-Lombard, Illinois
- Brunch with the BOT Virtual Meeting- June 13, 2026
- Awards Virtual Meeting- June 16, 2026
- Brunch with the BOT Virtual Meeting- June 20, 2026
- Awards Virtual Meeting- June 29, 2026
- CEB Chair Ley/ President Thomas Virtual Meeting- June 30, 2026, July 8, 2026
- Leadership Virtual CEU Session #2- July 11, 2026
- Annual Conference Committee Virtual Meeting- July 15, 2026

As of this report, this Immediate Past President anticipates attending the following virtual meetings:

- BOT Virtual Executive Session- July 19, 2026
- Nominating Committee Virtual Meeting- July 27, 2026; next meeting TBD
- CEB Chair Ley/ CCETF Chair Stimpson and Vice Chair O’Neal/ AAMA Staff Mickowski/Executive Director Storey/ President Thomas Virtual Meeting- July 28, 2026
- Meet the Candidates Virtual Meeting- August 13, 2026
- HOD Orientation Virtual Meeting #1– August 26, 2026; #2- August 26, 2026
- Meet the Candidates Virtual Meeting #2- August 29, 2026
- HOD Orientation Virtual Meeting #3- August 29, 2026
- HOD House Committee Orientation Virtual Meeting- September 9, 2026
- HOD Reference Committee Orientation Virtual Meeting- September 9, 2026

REPRESENTATIVES BUREAU ASSIGNMENT:

- **Florida Society of Medical Assistants Annual Conference, April 24–25, 2026**

The 73rd Annual Conference of the Florida Society of Medical Assistants (FSMA) was held in Orlando, Florida, at the Holiday Inn Resort Orlando Lake Buena Vista. The theme, “Leading the Way,” drew 52 registrants, including members, nonmembers, educators, students, and this officer. Attendees represented CMA (AAMA), CCMA, and RMA credentials.

The conference was well organized and offered up to seven CEUs through sessions on Misinformation in Healthcare, Hyperbaric Therapy, Alzheimer’s and Dementia Basics, and



Epilepsy First Aid. The Epilepsy Foundation hosted a live Seizure Recognition and First Aid training session. After completing the course and online assessment, this officer earned the Seizure Recognition and First Aid Certification (ILT) – CEP v 2.1, valid for two years. Following a 2025 vote, FSMA transitioned to a bi-level organizational structure, eliminating chapters and replacing the House of Delegates with a General Assembly.

On Friday, FSMA convened the Executive Board meeting, Reference Committee meeting, General Assembly orientation, and General Assembly. FSMA approved advertising in the AAMA 2026 conference brochure and sponsored the AAMA Welcome Celebration at the 2026 conference.

This officer served as Chief Teller of the General Assembly, joined by medical assisting students from Eastern Florida State College. Voting was by ballot to elect FSMA officers and AAMA delegates. The state is entitled to four delegates to the AAMA House. The General Assembly proceeded efficiently.

On Saturday morning, this officer presented the AAMA PowerPoint, recent national updates, and this officer's medical assisting journey. National-level volunteer opportunities were discussed, and volunteer forms were provided. Attendees were encouraged to volunteer for AAMA committees and participate in the AAMA 70 Share Your Story initiative.

The FSMA Awards and Installation Luncheon honored newly elected officers. Maria Wiegehmman, CMA (AAMA), received FSMA Life Membership, and retiring educator Patty Rock, LPN, was recognized for her dedication to educating medical assistants and promoting FSMA membership. The 2026–2027 FSMA officers were officially installed, and this officer encouraged members and new officers to support one another and maintain open communication.

The conference featured four exhibitors and the popular "Pat's Country Store," offering FSMA Ways and Means raffle items and merchandise. The store also featured the new AAMA bag and backpack. Proceeds benefited FSMA Ways and Means.

Throughout the conference, this representative engaged with attendees, encouraged participation, and answered questions. Informative discussions were held with students. The state society benefits from experienced leadership, including three AAMA National Presidents.

No concerns were brought to this representative. Attending this in-person meeting was an honor, and reconnecting with longtime colleagues while meeting new ones was especially rewarding. Engaging with attendees, including students, was a highlight of the event. This officer thanks the Florida state leaders and members for the opportunity to attend and represent the AAMA.

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

- Annual Conference Committee- See separate report
- Nominating Committee- See separate report
- Partnership Task Force- See separate report
- Awards Committee-
 - Met with chair and committee members virtually when requested

- Discussed the Welcome and Awards Celebration and the Student Essay Question
 - Assigned to evaluate the Awards portion of the celebration
 - Assigned to send suggestions for the Student Essay
 - Gave feedback and approved a new student award and criteria
 - Discussed the AAMA 70th Anniversary and Celebration
 - Assigned to explore new avenues of entertainment and engaging activities
 - Assigned to explore giveaway items
 - Assigned to develop and present an engaging portion of the event
 - Provided feedback for a new schedule of events
 - Participated in all emails and attended all requested virtual meetings
 - All assignments are completed
 - Refer to the report of the chair
- Maxine Williams Scholarship Committee-
 - Assigned to review the Maxine Williams application and scoring rubric
 - Assigned to review Maxine Williams Scholarship in Honor of Crystal Coleman, CMA (AAMA), application and scoring rubric
 - Assigned to review Maxine Williams Scholarship applications
 - Participated in the decision-making process of scholarship amount awarded
 - All assignments are completed
 - Refer to the report of the chair
 - Participated in all emails and attended all requested virtual meetings
 - Strategic Issues Planning Committee- BOT, CEB and CB Leaders invited and staff- Virtual meeting- January 18, 2026
 - Assigned to review the Vision and Vision Statement and Summary
 - Assigned to review the Strategic Issues Plan Goals and Actions for which committees should be assigned to the Actions
 - Attended the virtual meeting and participated in discussions

ADDITIONAL MEETINGS ATTENDED:

- **Medical Group Management Association (MGMA) Leadership Conference Exhibitor Booth- Orlando, Florida- September 28-October 1, 2025**

This officer assisted President Thomas and Social Media Manager Eldridge in setting up and staffing the AAMA exhibitor booth, along with CEO Balasa. The conference hosted more than 1,300 attendees, including over 500 exhibitor participants, resulting in significant visibility and engagement for the AAMA booth.

As in previous years, the most frequently asked question was, “*Where can I find medical assistants or qualified medical assistants?*” The high level of booth traffic provided valuable opportunities to share information about the AAMA, including promotional materials related to membership, continuing education, career and professional development, CMA (AAMA) certification, *Medical Office Basics*, and scope of practice.

This officer engaged with fellow exhibitors to explore potential opportunities for collaboration with the AAMA, collected their contact information, and gathered contact information from

attendees who visited the booth. There were no engagements or conversations with MGMA high-level leadership, nor did any MGMA leaders visit the booth. During the conference, this officer also noted MGMA's involvement in external medical assistant training resources offered through outside partners; this information was observed solely for situational awareness.

Additionally, this officer participated in a video recording conducted by Social Media Manager Eldridge, extending wishes for a "Great Medical Assistants Week." Please refer to the report of President Thomas for further details.

- **CASAT-FASD- Medical Assistant Partnership for Healthy Pregnancies and Families Steering Committee (MAP) - Virtual Meeting- January 22, 2026**

As a steering committee member, this officer attended this virtual meeting. An overview of MAP's completed/in progress/planned activities were discussed. New AAMA current CEU training course on the AAMA eLearning Center are "Ethical Considerations and Effective Strategies for Preventing Excessive Alcohol Use" and "Stimulants and Pregnancy." CASAT is attending the AAMA Conference in Reno, Nevada, and presenting a CEU session titled "Supporting Individuals and Families with Lived Experiences" and will also be exhibiting. They are developing a social media toolkit for Alcohol Awareness Month and FASD Awareness Month and drawing inspiration from the AAMA MARWeek toolkit and the Substance Abuse and Mental Health Service Administration (SAMHSA) toolkits.

- **American Medical Group Association (AMGA) Conference/AAMA Exhibitor Booth- April 16-18-, 2026 - Las Vegas, Nevada**

This officer assisted President Thomas and Executive Director Storey in setting up and staffing the AAMA exhibitor booth. It was a privilege to attend alongside Executive Director Storey, as this was her first AAMA exhibiting experience. Her prior experience exhibiting with other associations will be invaluable to future AAMA efforts. The conference hosted more than 1,500 attendees, including over 500 exhibitor participants, resulting in substantial visibility and engagement for the AAMA booth.

As in previous years, the most frequently asked question was, "*Where can I find medical assistants or qualified medical assistants?*" The significant booth traffic provided valuable opportunities to share information about the AAMA, including promotional materials related to membership, state societies, continuing education, career and professional development, CMA (AAMA) certification, scope of practice, and the 2026 AAMA Annual Conference in Reno, Nevada.

This officer engaged with fellow exhibitors to explore potential opportunities for collaboration with the AAMA, collected their contact information, and gathered contact information from attendees who visited the booth. This officer and President Thomas also had the privilege of meeting several AMGA staff members, including reconnecting with John Kennedy, MD, President of the AMGA Foundation and Chief Medical Officer of AMGA. Contact information was exchanged and follow-up communication will occur.

This officer attended several valuable sessions featuring outstanding presenters and made meaningful connections while networking. Sessions included:

- General Session: *Leading Through Change: A Roadmap for Energized and Resilient Leadership* presented by Dethra Giles, Executive Leadership & HR Strategist
- *Creating a Triad: The Value of an Advanced Practice Leadership Structure*
- General Session: *Cost, Care and Common Sense — A Conversation with Mark Cuban*, cofounder of Cost-Plus Drugs, moderated by AMGA Board Member Dr. Anil Keswani.

This officer, along with President Thomas and Executive Director Storey, engaged in productive conversations with attendees and look forward to continuing follow-up and feedback from these connections.

This Immediate Past President has participated in meetings and discussions with President Thomas to review and discuss updates and has been available as an advisor. This officer has also been available and participated in meetings and discussions with President Thomas, Vice President Bogar and Secretary Sawyer as needed. This officer has remained available to BOT members, CEO Balasa, ED Storey, AAMA staff, and all AAMA members.

This officer participated in E-Ballots from President Thomas.

This officer extends sincere appreciation to CEO and Legal Counsel Donald Balasa, JD, MBA, and Executive Director Annie Storey, MS, CAE, for their availability and invaluable support to this officer and to the entire Board of Trustees. Gratitude is also expressed to Board Services Manager Sharon Scarborough for her assistance since joining the AAMA organization as well as to all AAMA staff members for their continued willingness to support the efforts and initiatives of this officer and the Board of Trustees.

This officer extends sincere appreciation to the Continuing Education Board (CEB) and the Certifying Board (CB) for their collaborative efforts and substantive dialogue throughout this officer's tenure on the Board of Trustees. Their continued collective engagement and steadfast support will further advance the greater good of the AAMA and the medical assisting profession.

As Immediate Past President, this officer extends sincere appreciation to President Thomas for her guidance and leadership over the past year. This officer also expresses gratitude to Vice President Bogar for her thoughtful and intuitive questions throughout her year of preparation to assume the role of AAMA President. This officer remains fully available to provide advice and guidance to President Thomas and to Vice President Bogar as she prepares for the 2026–2027 year.

This officer extends sincere appreciation to the Board of Trustees for their dedication and unwavering commitment to enhancing, advancing, and promoting the AAMA and the medical assisting profession. Finally, this officer expresses gratitude to the AAMA members for the privilege of serving on the Board of Trustees; it has been an honor to do so.

Monica Case, CMA (AAMA)
Immediate Past President 2024-2026

American Association of Medical Assistants® (AAMA)
Report of Vice President
For the Period Ending September 2026

The AAMA Vice President serves as an officer of the Board of Trustees and is available to assist the President and BOT members or staff upon need or request. Duties of the Vice President include the following:

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

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

- Chair of the Maxine Williams Scholarship Committee
- Chair of Marketing Strategy Task Force
- Awards Committee– Member
- Leadership Committee - Member

MEETINGS ATTENDED:

- AAMA 2025 Annual Conference - Arlington, Virginia, September 18-22, 2025
 - AAMA Board of Trustees Meeting with the Society of Past Presidents - September 21, 2025
 - AAMA State Leaders Session - September 21, 2025
 - AAMA Presidents Banquet - September 21, 2025
 - Post Conference Board of Trustees Executive Session/ Orientation - September 22, 2025
 - AAMA 2025-2026 Committees, Strategy Teams, and Task Forces Meet and Greet - September 22, 2025
- Continuing Education Board (CEB) Planning Session - November 7-8, 2025 - Chicago, Illinois
- Board of Trustees (BOT) Planning Session - Chicago, Illinois
 - Executive Session November 9-10, 2025
 - Maxine Williams Board of Directors – November 9, 2025
 - Virtual meeting - January 5, 2026
- BOT Winter meeting – Chicago, Illinois – January 29-31, 2026
 - MSC – January 29, 2026
 - Open Session – January 30, 2026
 - Executive Session – January 30-31, 2026
- CEB Winter meeting – Chicago, Illinois – February 1-2, 2026
- Certifying Board Winter Meeting – Atlanta, GA – February 28, 2026
- BOT Summer Meeting – Lombard, Illinois
 - Management Steering Committee – June 4, 2026
 - Maxine Williams Board of Directors – June 4, 2026

- Open BOT Session – June 5, 2026
- Executive Session – June 6, 2026
- Continuing Education Board Summer Meeting – Lombard, Illinois- June 7-8, 2026
- Certifying Board Summer Meeting – Chicago Illinois – July 11, 2026

Virtual Board Meetings

- BOT Executive Sessions: November 23, 2025, December 12, 2025, March 8, 2026, April 20, 2026
- Management Steering Committee (MSC) -October 16, 2025, October 26, 2025, October 28, 2025, October 30, 2025, November 3, 2025, November 4, 2025, November 19, 2025, November 21, 2025, December 2, 2025, December 8, 2025, January 6, 2026, February 12, 2026, March 11, 2026, March 23, 2026, May 28, 2026
- BOT Meeting with Certifying Board Chair Fuller – June 1, 2026
- Continuing Education Board (CEB): January 17, 2026, March 21, 2026, April 25, 2026
- BOT Meeting with CEB Chair Ley – June 30, 2026
- Transition Meeting with President Thomas and Annie Storey, ED – July 16, 2026

Virtual Committee/ Task Force/ Strategy Team Meetings -

- Annual Conference Committee-Vice President
 - Virtual meeting - October 10, 2025, January 14, 2026, : March 9, 2026, July 15, 2026
- Awards Committee- Member (See Report of Chair)
 - December 11, 2025, January 6, 2026, March 4, 2026, March 18, 2026, April 2, 2026, May 6, 2026, June 16, 2026, June 29, 2026
- Bylaws Committee -Vice President- January 8, 2026, May 27, 2026
- Documents Vice President: March 9, 2026
- Educators Collaborative Vice President: February 5, 2026, May 7, 2026
- Member Engagement and Outreach-Vice President: January 22, 2026, May 4, 2026
 - Strategic Issues Planning: January 23, 2026, February 18, 2026, March 23, 2026, March 29, 2026
- Leadership Development Strategy Team-Member (See Report of Chair)
 - January 5, 2026, February 3, 2026, March 5, 2026, May 5, 2026, June 2, 2026, July 7, 2026
 - Leadership CEU session – March 7, 2026
 - Brunch with the BOT (Eastern and Central time zones) – June 13, 2026
 - Brunch with the BOT (Mountain/ Pacific/ Alaska/ Hawaii) – June 20, 2026
 - Leadership CEU session – July 11, 2026 -unable to attend due to attendance at CB Meeting
- Maxine Williams Scholarship Committee-Chair (See Report)
 - Virtual meeting - January 15, 2026, January 15, 2026, January 25, 2026, April 29, 2026, May 30, 2026
- Membership Strategy Team-Vice President
 - Virtual meeting - January 6, 2026
- Partnership Task Force-Vice President

- Virtual meeting - December 8, 2025, January 12, 2026
 - Strategic Issues Planning-Vice President
 - January 18, 2026, January 23, 2026, February 18, 2026, March 23, 2026, March 29, 2026, April 12, 2026
- As of the date of this report, this officer anticipates attending the following virtual meetings:
- BOT Executive Meeting - July 19, 2026
 - Membership Development Strategy Committee - July 21, 2026
 - Leadership Development Strategy Team-- August 4, 2026
 - Meet the Candidates - August 13, 2026, and August 29, 2026
 - Membership Development Strategy Committee - August 18, 2026
 - HOD Orientation - August 27, 2026 and August 29, 2026
 - House Committee Orientations | September 9, 2026

REPRESENTATIVE BUREAU ASSIGNMENTS:

After the deadline of December 1, 2025, this officer sent out additional communication on December 3, 2025, to the states that submissions were not received from requesting forms be returned even if representative was not being requested. This would ensure that the states' conference dates would be published on the AAMA Website.

Assignments were then made based on representatives' availability. This officer worked with Chair Cameron Smith of Engagement and Outreach on a project to be utilized during rep assignments. In conjunction with this project, this officer announced representative assignments during the Winter AAMA BOT meeting, and each representative was given something representing the state they will be visiting. Communications were then sent to each state president to introduce their representative and coordinate their travel arrangements.

This officer and President Thomas met with Trustees Smith and Tyler to answer any questions regarding representative assignments they may have had and ensure that they were properly prepared with the AAMA Power Point

State	Type	Date of Event	Location	Representative
Alaska	Virtual	March 26, 2026	Virtual	Candy Miller
New Hampshire	Virtual	April 17, 2026	Virtual	Sandra Williams
New York	Virtual	April 15, 2026	Virtual	Jane Seelig
Wisconsin	In-Person	April 25, 2026	Neenah, WI	Jane Seelig
Maine	In-Person	October 17, 2026	Bangor, ME	Virginia Thomas
Nebraska	In-Person	April 16-19, 2026	Council Bluff, IA	Aimee Quinn
Kentucky	In-Person	April 17-18, 2026	Lexington, KY	Shirley Sawyer
Indiana	In-Person	April 17-19, 2026	New Harmony, IN	Sherry Bogar
Alabama	In-Person	April 24-25, 2026	Decatur, AL	Pam Neu
Florida	In-Person	April 24-25, 2026	Lake Buena Vista, FL	Monica Case
Montana	In-Person	April 24-26, 2026	Helena, MT	Candy Miller
Michigan	In-Person	April 30-May 3, 2026	Grand Rapids, MI	Shirley Sawyer

Ohio	In-Person	April 9-11, 2026	Lockbourne, OH	Sandra Williams
Oregon	In-Person	April 9-11, 2026	Portland, OR	Jeanette Tyler
Idaho	In-Person	April 9-11, 2026	Twin Falls, ID	Cameron Smith
North Carolina	In-Person	March 19-22, 2026	Concord, NC	Christa Smith

REPRESENTATIVE ASSIGNMENT

Indiana State Medical Association – New Harmony, In – April 17-19, 2026

For this officer, attending the Indiana State Medical Association (ISMA) conference in New Harmony, Indiana, was both a memorable and humbling experience. Being welcomed into the community where the Indiana Society originated provided a meaningful connection to the organization's history and legacy of service to the medical assisting profession. Throughout the conference, ISMA members demonstrated exceptional hospitality, creating an atmosphere that was warm, professional, and inviting. It was truly an honor to be included in their celebration and to experience firsthand the pride their members have in their organization and its accomplishments.

The strong presence and engagement of educators at the conference was especially encouraging. This officer had several meaningful conversations with educators who are passionate about advancing the profession and supporting the next generation of medical assistants. Many shared ideas on ways to better support students, including offering certification testing opportunities on campus to make the exam more accessible and encourage completion. Educators also expressed interest in additional volunteer opportunities within the AAMA that better fit academic schedules, such as short-term projects during summer and winter breaks rather than year-long commitments. These conversations reflected educators' commitment to the profession and their desire to remain actively involved in supporting both students and the future success of the AAMA.

Members were also reintroduced to Beneplace and shared concerns regarding its placement on the AAMA website. While recognizing its value as a member benefit, several attendees felt it would be more appropriately located within the Membership Benefits section rather than under Partnerships. They believed this would make it easier for members to discover and utilize the benefits.

Additional conversations were held regarding the AAMA Conference schedule change to a Monday-through Thursday format. Several members expressed concerns that the revised schedule requires four full weekdays away from work and does not provide the same flexibility that existed in previous years. Some attendees noted that they had previously been able to travel on the weekend and attend only weekend educational sessions to obtain CEUs, whereas the new format limits attendance to Monday through Thursday. This officer discussed the rationale behind the change, including efforts to explore potential cost savings and improved scheduling efficiencies for participants. While the revised schedule still requires four days away from the workplace, it generally impacts only one traditional work week for employers rather than extending across portions of two separate work weeks. Although concerns regarding flexibility

remain, members appreciated the opportunity to discuss the reasoning behind the change and gain a better understanding of the considerations involved.

Overall, the conference highlighted ISMA's dedication to promoting and elevating the medical assisting profession throughout Indiana while supporting the growth and development of its members. The organization demonstrated a strong commitment to recognizing the accomplishments of dedicated volunteers and leaders, celebrating the contributions of educators, and fostering the next generation of medical assisting professionals. This officer left the conference inspired by ISMA's passion for honoring its past, investing in its members, and cultivating future leaders who will continue to advance the profession. This officer would also like to extend sincere appreciation to the entire ISMA Board, conference planning team, and all those in attendance for their warm hospitality and for making this officer feel welcomed as part of the ISMA family

COMMITTEES/STRATEGY TEAM ASSIGNMENTS

AWARDS: This officer participated in all meetings and completed all tasks as requested by Chair Miller. See Report of the Chair

LEADERSHIP DEVELOPMENT STRATEGY TEAM-MEMBER: This is officer participated in all committee meetings and completed all assignments as requested by Chair Sawyer. See Report of the Chair.

CONTINUING EDUCATION PROJECT: This officer has had the privilege of collaborating with the Career Professional Development Task Force on an exciting new initiative focused on advancing career advancement opportunities and professional awareness and enhancement for medical assistants. It has been a great learning experience to serve alongside such a dedicated group of professionals and witness firsthand the time, effort, and thoughtful consideration they invest in every project they undertake.

The members of the Career Professional Development Task Force have consistently demonstrated a deep commitment to the medical assisting profession and the need to put out quality products to enhance medical assistants' knowledge and their skills. Their passion is evident in their ongoing efforts to create meaningful resources and innovative opportunities that support both personal and professional growth. Through thoughtful planning and collaboration, they continually seek ways to enhance the knowledge, skills, and success of medical assistants across the nation.

Working alongside this talented and forward-thinking group has reinforced the importance of collaboration, innovation, and service. Their commitment to excellence and professional development serves as an inspiration, and this officer is grateful for the opportunity to contribute to a project that will support and strengthen the medical assisting community for years to come.

This officer participated in all e-votes requested by President Thomas and stayed engaged in Board activities throughout the year. Committee correspondence was reviewed when copied, and virtual meetings were attended when invited. This officer also participated in virtual meetings with President Thomas to help prepare for the upcoming year, discuss priorities, and support a

smooth transition. These opportunities helped this officer remain informed, engaged, and prepared to support the continued work of the Association.

This officer would like to thank President Thomas for her guidance and leadership throughout the year. President Thomas was always available to discuss questions and concerns and took the time to ensure this officer understood the purpose behind organizational updates and project activities. She provided valuable guidance, encouragement, and mentorship throughout the year. President Thomas also showed a strong commitment to creating a more collaborative, transparent, and engaged Board culture. Her efforts have helped set the stage for positive progress, and this officer appreciates her dedication to moving the organization forward and inspiring others to continue that momentum in the years ahead.

This officer would like to thank President Thomas, Past President Case, and Secretary Sawyer for their support and willingness to share ideas for elevating the AAMA, advancing the medical assisting profession, and supporting the membership. Throughout the year, we had many meaningful conversations that allowed us to exchange ideas openly while staying true to the strong foundation on which the Association was built. These discussions highlighted the importance of honoring our history and the contributions of those who came before us while exploring new ways to strengthen the AAMA and restore its position as the leading voice of the medical assisting profession. This officer greatly appreciates their collaboration, insight, and commitment to moving the Association forward while respecting its legacy and creating opportunities for future growth and success.

This officer would like to extend heartfelt thanks to CEO Donald Balasa, Executive Director Annie Storey, and Board Services Manager Sharon Scarborough for their support, guidance, and encouragement throughout the year. Their willingness to answer questions, share their knowledge, and provide perspective has been greatly appreciated. This officer is grateful for the time, dedication, and care they bring to the Association each day, as well as their commitment to helping Board members succeed. Their partnership and support have made a meaningful difference and continue to contribute to the strength and future success of the AAMA.

Sherry Bogar, CMA (AAMA), CN-BC
Vice President 2025-2026

American Association of Medical Assistants® (AAMA)
Report of the Secretary
For period ending September 2026

The duties of a Secretary are as follows:

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

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

- Leadership Development Strategy Team, Chair
- Awards Committee, Member
- Annual Conference Member

MEETINGS ATTENDED:

- AAMA 2025 Annual Conference - Arlington, Virginia, September 18-22, 2025
- Board of Trustees Pre-HOD Executive Session - September 18, 2025
- First Timers and Students Reception - September 19, 2025
- Board of Trustees Open Session - September 19, 2025
- Knowledge Bowl - September 19, 2025
- Awards and Welcome Celebration - September 19, 2025
- 69th Annual House of Delegates - September 20, 2025
- Meet the Candidates - September 20, 2025
- House of Delegates Reference Committee Hearings: Reports, Bylaws, Resolutions - September 20, 2025
- House of Delegates Reconvene and Voting - September 20, 2025
- AAMA Board of Trustees Meeting with the Society of Past Presidents (SoPPs) - September 21, 2025
- AAMA State Leaders Session - September 21, 2025
- AAMA Presidents Banquet - September 21, 2025
- Post Conference Board of Trustees Executive Session/ Orientation - September 22, 2025
- AAMA 2025-2026 Committees, Strategy Teams, and Task Forces Meet and Greet - September 22, 2025
- Management Steering Committee (MSC)
 - Virtual meeting - October 16, 2025, October 26, 2025, October 28, 2025, October 30, 2025, November 3, 2025, November 4, 2025, November 19, 2025, November 21, 2025, December 2, 2025, December 8, 2025, January 6, 2026, January 29, 2026, March 11, 2026, March 23, 2026, May 28, 2026
- Board of Trustees (BOT) Executive Sessions
 - Planning Session - November 9-10, 2025 - Chicago, Illinois,
 - Winter meeting, Chicago, IL– January 31, 2026
 - Summer in Lombard, IL – June 6, 2026
- Board of Trustee (BOT) Open session
 - January 30, 2026, Chicago, IL

- 1169 ○ June 5, 2026, Lombard, IL
- 1170 • Maxine Williams Board of Directors - November 9, 2025 - Chicago, Illinois
- 1171 • Maxine Williams Board of Directors- June 4, 2026
- 1172 • Virtual BOT Executive Session - November 23, 2025, December 12, 2025, March 8,
- 1173 2026, April 20, 2026
- 1174 • Annual Conference Committee - Virtual meeting - October 10, 2025, January 14, 2026,
- 1175 July 15, 2026
- 1176 • Awards Committee - Virtual meeting - December 11, 2025, January 6, 2026, March 4,
- 1177 2026, May 6, 2026, June 16, 2026, June 29, 2026
- 1178 • Leadership Development Strategy Team – Virtual meeting – January 5, 2026, February 3,
- 1179 2026, March 5, 2026, May 5, 2026, June 2, 2026, July 7, 2026
- 1180 • 70th Anniversary Project -Virtual meeting - November 22, 2025, December 3, 2025,
- 1181 January 15, 2026, May 17, 2026
- 1182 •

1183 As of the date of submitting this report, this Secretary anticipates attending the following virtual
1184 meetings.

- 1185 • July 19, 2026 – BOT executive meeting
- 1186 • August 4, 2026 – Leadership Committee Meeting
- 1187 • August 13, 2026 – Meet the Candidates
- 1188 • August 26, 2026 - HOD Orientation #1
- 1189 • August 26, 2026 – HOD Orientation #2
- 1190 • August 29, 2026 - Meet the Candidates #2
- 1191 • August 29, 2026 – HOD Orientation #3
- 1192 • September 9, 2026 – House Committee Orientation
- 1193 • September 9, 2026 – Reference Committee Orientation

1195 **REPRESENTATIVES BUREAU ASSIGNMENTS:**

1196 Kentucky – The state meeting was held on April 17-19, 2026, at the Clarion Hotel in Lexington,
1197 KY. There were approximately 42 members present. The theme was the Past, Present and
1198 Future. A total of 16 CEUs were available. Interesting topics: Beyond the Lesion- MS as a
1199 snowflake disease. Brain on Fire- A patient perspective. Immunization update, How to listen so
1200 people know you hear them. Many more very good topics. Membership was concerned about
1201 hospital systems and doing mini programs to teach medical assistants. The Kentucky Society has
1202 an active Facebook page and website, and they keep all of their members informed of upcoming
1203 events.

1205 Michigan- The meeting was held May 1-3, 2026, at the Sheraton in Grand Rapids. Total of 38
1206 members were present for the HOD and 25 for the CEU sessions. Some interesting topics were:
1207 Practical Mindfulness and Nervous System care at work, Connecting the dots from patient care
1208 to collections, Gift of Life, Algorithm of Human Trafficking, and everyone participated in
1209 Complete Respiratory care by putting on nasal cannulas and trying different oxygen tanks and
1210 delivery of that oxygen. There was a total of 11 CEUs offered. The members were concerned
1211 with the number of nonrenewing members. The Michigan Society has an active Facebook page
1212 and website.

COMMITTEE/STRATEGY TEAM ASSIGNMENTS:

- Leadership Development: See separate report
- Awards Committee: Participated in the virtual meetings and discussion on the Student Essay award, discussion with the Awards and Welcome Party.
- Annual Conference: responsible for the Leadership session at conference, all final decisions were made and presented to the committee.
- 70th Anniversary Project: Interview members on their journey in becoming a medical assistant, gather stories in January and February.

This officer reviewed the following minutes submitted by Board Services Manager Scarborough: Executive meeting in Arlington, VA, Open session minutes in Arlington, VA, Post-HOD minutes Executive Meeting, Arlington, VA. November Planning Meeting, Open session and Executive meetings in Chicago, IL. Both sets of minutes were sent to the MSC and BOT for approval. Minutes from the Open BOT and Executive meetings on January 30 and 31, 2026. Minutes completed from the virtual executive meetings from November 23, 2025, December 12, 2025, March 8, 2026, April 20, 2026.

This officer sent the following virtual minutes for review and approval to the MSC and BOT: November 2025, December 2025, March 2026, and April 2026 (as mentioned above). All were approved by the BOT and filed for future reference.

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

Shirley Sawyer, CMA (AAMA), CPC
2025-2026 Secretary

American Association of Medical Assistants® (AAMA)
Report of the Speaker of the House
For Period Ending September 2026

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

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

- Conference Committee - member
- Documents Committee – chair
- House of Delegates minutes committee - chair
- Leadership Strategy Team – member
- Strategic Issues Committee - member

MEETINGS ATTENDED:

In person:

- AAMA 2025 Annual Conference - Arlington, VA, September 18-22, 2025
 - Board of Trustees Pre-HOD Executive Session
 - First Timers and Students Reception
 - Board of Trustees Open Session
 - Knowledge Bowl
 - Welcome and Awards Celebration
 - 69th AAMA House of Delegates
 - Meet the Candidates Session
 - Reference Committees Hearings – Reports, Resolutions & Bylaws
 - AAMA SoPPs Breakfast
 - AAMA State Leaders Session
 - AAMA Presidents Banquet
 - AAMA BOT Post Conference Executive Session/Orientation/Maxine Williams
 - Board of Directors Meeting
 - AAMA 2025-2026 Committee, Strategy Teams & Task Forces Meet and Greet
 - CEB Strategic Planning Presentation - Chicago Illinois November 8, 2025
 - AAMA BOT Planning Session – Chicago, Illinois, November 9-11, 2025
 - BOT Executive Session
 - Maxine Williams Board of Directors
 - AAMA Winter BOT meeting – Chicago Illinois January 29-31, 2026
 - AAMA Summer BOT meeting – Lombard, Illinois June 3-7, 2026
- This officer participated in virtual meetings called by President Thomas:
- BOT Executive Meeting – November 23, 2025
 - BOT Executive Meeting – December 12, 2025
 - BOT Executive Meeting – March 8, 2026
 - BOT Executive Meeting – April 20, 2026
 - BOT Meeting with CEB Chair Ley – June 30, 2026

COMMITTEE/STRATEGY TEAM ASSIGNMENTS:

Strategic Issues Planning Committee: Met 11/18/25, 1/2/26, 1/18/26, 2/18/26, 3/29/26, 4/12/26, 6/22/26

Participated in discussion

Refer to the report of the chair

Conference Committee: Met 1/14/26, 7/14/26

Participated in discussion

Refer to the report of the chair

Leadership Committee: Met 03/05/26, 5/5/26, 6/2/26, 7/7/26

Participated in discussion

Refer to the report of the chair

Attended virtual CEU session, 3/7/26

Attended virtual Brunch with the BOT, 6/13/26 & 6/20/26

House of Delegates Minutes Committee – Transcribed minutes were reviewed, edited and approved

As of the date of this report, this officer anticipates attending the following virtual meetings:

BOT meeting, July 19, 2026

Leadership Committee, August 4, September 1, 2026

Meet the Candidates, August 13, 2026

Marketing Strategy Committee, August 17, 2026

HOD Orientation, August 26, 2026

HOD Orientation, August 29, 2026

Meet the Candidates, August 29, 2026

House Committee Orientation, September 9, 2026

Reference Committee Orientation, September 9, 2026

As of the date of this report, this officer anticipates attending an in-person meeting with Vice Speaker Quinn, August 8, 2026

REPRESENTATIVE BUREAU ASSIGNMENTS:

New York Society of Medical Assistants - April 15, 2026, Virtual General Assembly

There were 15 members in attendance who provided reports and participated in discussions. The meeting was well conducted by President Lasher. There was discussion about the scheduled CEU session which was postponed and will be rescheduled for a future date. This officer was able to participate in discussions regarding how to find speakers for virtual education, parliamentary procedure, and the AAMA Conference schedule. There is concern about the reduction of accredited programs which is impacting membership. There was also discussion about updating the procedure manual to provide clarity on procedures and guidance for future leadership. Appreciation to the NYSSMA leadership for their positive acceptance of this officer's participation in their meeting.

Wisconsin Society of Medical Assistants April 24-25, 2026, In person conference

The General Assembly was held on Friday with 39 members in attendance, 23 were eligible to vote. The meeting was well conducted by Speaker of the General Assembly Bodoh. A nomination from the floor for Vice President completed the incoming board. This officer was happy to serve the General Assembly as Timekeeper. The leadership is focused on increasing membership and

1333 developing new leaders. They are in the process of updating their procedure manual. WSMA is
1334 sending members with mentors to the June BOT meeting to develop their future leaders. The
1335 WSMA is hosting the Mid-Regional Conference in Madison WI June 25-26 at the Doubletree
1336 Hotel Madison East. The registration form will be available following the conference. There is a
1337 registration discount for WSMA members. Education and Installation of Officers was on Saturday.
1338 The 61 attendees were active participants during the excellent education sessions. The speakers
1339 were familiar with WSMA and the medical assisting scope of practice. This officer was able to
1340 recognize student members, new committee chairs, and others with AAMA items. The hospitality
1341 extended to this officer was exceptional and very welcoming.

1342
1343 This Officer was appointed to Chair the Documents Committee and the report is in the committee
1344 reports.

1345
1346 BOARD OF TRUSTEES DUTIES:
1347 This officer participated in e-ballots from President Thomas.
1348 All correspondence has been responded to in a timely manner and all deadlines have been met.

1349
1350 HOUSE OF DELEGATES:
1351 A Guide for Speaker and Vice Speaker developed following the 2025 House of Delegates has been
1352 very useful this year. A new vendor for the voting devices was selected as our previous vendor
1353 was not offering rental any longer. A revised schedule to condense House activities has been
1354 proposed and is being considered. One change implemented this year is to have the credentials
1355 desk open only on HOD day for changes and distribution of proxy votes at the same time as
1356 delegate and alternate check in for seating in the House.

1357
1358 2026 HOD Virtual Orientation Times

1359			
1360	Meet the Candidates	Thursday August 23	9:00 pm EST
1361		Saturday August 29	12:00 noon EST
1362	Delegates and Alternates		
1363	Evening	Wednesday August 26	8:00 pm EST
1364	Late Evening	Wednesday August 26	9:30 pm EST
1365	Afternoon	Saturday August 29	following Meet the Candidates
1366	House Committees	Wednesday September 9	8:00 pm EST
1367	Reference Committees	Wednesday, September 9	9:00 pm EST

1368
1369 Appreciation to Vice Speaker Quinn for her valuable support, counsel of CEO and Legal Counsel
1370 Balasa, Immediate Past President Case, and President Thomas. Special appreciation to Sharon
1371 Scarborough for her efficiency, always available assistance and support.

1372
1373 Jane B Seelig, CMA-A (AAMA)
1374 2024-2026 Speaker of the House
1375

American Association of Medical Assistants® (AAMA)
Report of Vice Speaker Quinn
For the Period Ending September 2026

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

- Serve as an officer of the AAMA Board of Trustees
- Serve as a member of the Maxine Williams Board of Directors
- Serve as a member of the AAMA Representative Bureau

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

- Membership Development Strategy Committee - Chair
- Leadership Development Strategy Team - member
- Marketing Strategy Team – member
- Engagement and Outreach Committee - member
- HOD Meeting Minutes Committee - member

MEETINGS ATTENDED:

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

- AAMA 2025 Annual Conference | Arlington, Virginia, September 18-22, 2025
 - Board of Trustees Pre-HOD Executive Session | September 18, 2025
 - First Timers and Students Reception | September 19, 2025
 - Board of Trustees Open Session | September 19, 2025
 - Knowledge Bowl | September 19, 2025
 - Awards and Welcome Celebration | September 19, 2025
 - 69th Annual House of Delegates | September 20, 2025
 - Meet the Candidates | September 20, 2025
 - HOD Reference Committee Hearings: Reports, Bylaws and Resolutions | Sept 20, 2025
 - HOD Reconvene and Voting | September 20, 2025
 - AAMA BOT Meeting with the Society of Past Presidents (SoPPs) | Sept 21, 2025
 - AAMA State Leaders Session | September 21, 2025
 - AAMA Presidents Banquet | September 21, 2025
 - Post Conference BOT Executive Session/ Orientation | September 22, 2025
 - AAMA 2025-2026 Committees Meet and Greet | September 22, 2025
- CEB Strategic Planning Presentation | Chicago, IL, November 8, 2025
- AAMA Planning Session | Chicago, IL, November 9-11, 2025
 - BOT Executive Session | November 9-10, 2025, Chicago, Illinois
 - Maxine Williams Board of Directors | November 9, 2025, Chicago, Illinois
- AAMA Winter Board Meeting | Chicago, IL, January 29-31, 2026
 - Open Session | January 29, 2026
 - Executive Session | January 30-31, 2026
- AAMA Summer Board Meeting | Lombard, IL, June 4-6, 2026
 - Maxine Williams Board of Directors, June 4, 2026
 - Open Session | June 5, 2026
 - Executive session | June 6, 2026

1422 As of the date of this report, this officer attended the following virtual meetings:

1423 How Associations are Positioning for Engagement | November 20, 2026

1424 BOT Joint Committee Meeting for 70th Anniversary Project | November 23, 2025

1425 BOT Executive Meeting | November 23, 2025

1426 BOT Joint Committee Meeting for 70th Project with MarCom Department | December 3,

1427 2025

1428 Marketing Strategy Team | December 9, 2025

1429 BOT Executive Meeting | December 12, 2025

1430 Leadership Development Strategy Team | January 5, 2026

1431 Membership Committee | January 6, 2026

1432 Marketing Strategy Team | January 12, 2026

1433 BOT Joint Committee Meeting for 70th Project | January 15, 2026

1434 Strategic Issues Planning Meeting | January 18, 2026

1435 Engagement & Outreach Committee Meeting | January 22, 2026

1436 Leadership Development Strategy Team | February 3, 2026

1437 Marketing Strategy Team | February 16, 2026

1438 Membership Development Strategy Committee | February 17, 2026

1439 70th Anniversary Project | February 23, 2026

1440 Membership/CEB Discussion | February 25, 2026

1441 Leadership Development Strategy Team | March 5, 2026

1442 Leadership CEU, Stressed, Blessed and Wellness Obsessed | March 7, 2026

1443 BOT Executive Meeting | March 8, 2026

1444 Marketing Strategy Team | March 15, 2026

1445 Membership Development Strategy Committee | March 17, 2026

1446 HOD Discussion | March 19, 2026

1447 Nebraska Representative Assignment | April 17-18th, 2026

1448 BOT Executive Meeting | April 20, 2026

1449 Engagement & Outreach Committee Meeting | May 4, 2026

1450 Leadership Development Strategy Team | May 5, 2026

1451 Membership Development Strategy Committee /Tool Kit Discussion | May 11, 2026

1452 Meeting w/Executive Director Storey | May 13, 2026

1453 Marketing Strategy Team | May 18, 2026

1454 Membership Development Strategy Committee | May 19, 2026

1455 70th Anniversary Project | May 20, 2026

1456 BOT Meeting with CB Chair Fuller | June 1, 2026

1457 Leadership Development Strategy Team | June 2, 2026

1458 Leadership Development

- 1459 • Brunch with the BOT (Eastern and Central time zones) | June 13, 2026
- 1460 • Brunch with the BOT (Mountain/ Pacific/ Alaska/ Hawaii) | June 20, 2026

1461 Marketing Strategy Team | June 15, 2026

1462 BOT meeting with CEB Chair Ley | June 30, 2026

1463 Leadership Development Strategy Team | July 7, 2026

1464 Leadership CEU, Mentorship as a Leadership Strategy | July 11, 2026

1465

1466 As of the date of this report, this officer anticipates attending the following virtual meetings:

1467 BOT Executive Meeting | July 19, 2026

1468 Marketing Strategy Team | July 20, 2026
1469 Membership Development Strategy Committee | July 21, 2026
1470 Leadership Development Strategy Team | August 4, 2026
1471 HOD meeting with Speaker Seelig | August 8, 2026
1472 Meet the Candidates | August 13, 2026
1473 Marketing Strategy Team | August 17, 2026
1474 Membership Development Strategy Committee | August 18, 2026
1475 HOD Orientation #1 | August 26, 2026
1476 HOD Orientation #2 | August 26, 2026
1477 Meet the Candidates #2 | August 29, 2026
1478 HOD Orientation #3 | August 29, 2026
1479 House Committee Orientation | September 9, 2026
1480 Reference Committee Orientation | September 9, 2026

1481
1482 **Representatives Bureau Assignments:**

1483 *Nebraska Society of Medical Assistants | Council Bluffs, IA – April 17-18, 2026*
1484

1485 This Officer attended the 60th annual Nebraska Society of Medical Assistants Conference April
1486 17-18. There was a decrease in the number of attendees this year: 43 full registrations, 6 Friday
1487 only, 2 Saturday only, and 1 student. There was a total of 10.5 CEUs offered. The CEU sessions
1488 were well liked by all the attendees. The speakers were informative and knowledgeable. On
1489 Saturday morning, this officer presented “Documentation on Trial: Would your Chart Survive”, a
1490 1.5 CEU. Also presented was the AAMA PowerPoint, which included slides on benefits and
1491 AAMA resources. Congratulations to the newly installed officers for NSMA. Special
1492 Recognition went to Jerome “Jerry” Walters for his “Heart for Learning.” He wanted to give
1493 back to the community that helped him after he received a heart transplant, so in his 70’s he went
1494 back to school for Medical Assisting. Awards were also handed out to the thirteen first time
1495 attendees as well as those that recertified this past year. This trustee thanks NSMA for their
1496 overwhelming hospitality while attending the conference.

1497
1498 **Committee/Strategy Team Assignments:**

1499 *Engagement and Outreach Committee*

1500 This officer was available for meetings and discussions with the committee and the chair through
1501 multiple emails as well as virtual meetings. Please see the Engagement and Outreach Committee
1502 report.

1503
1504 *HOD Meeting Minutes Committee*

1505 This officer was available for discussions with the committee and the chair through multiple
1506 emails. Please see the HOD Meeting Minutes Committee Report.

1507
1508 *Leadership Development Strategy Team*

1509 This officer was available for meetings and discussions with the committee and the chair through
1510 multiple emails as well as virtual meetings. Please see the Leadership Development Strategy Team
1511 Report.

1514 ***Marketing Strategy Team***

1515 This officer was available for meetings and discussions with the committee and the chair through
1516 multiple emails as well as virtual meetings. Please see the Marketing Strategy Team Report.

1517
1518 ***Membership Committee***

1519 This officer was available for meetings and discussions with the committee members through
1520 multiple emails. This officer has met with the committee via Teams or Email to work on finalizing
1521 the committee's goals for the year. Please see the Membership Committee Chair report.

1522
1523 **Other Assignments:**

1524 Upon assuming the office, this officer received numerous reference materials to assist in carrying
1525 out the responsibilities of the position, including the current Volunteer Leadership Position
1526 Descriptions, AAMA Bylaws, past AAMA House of Delegates (HOD) scripts, previous HOD
1527 minutes, and the Guidelines for Reference Committees.

1528
1529 During the November planning session, this officer met with Speaker Seelig to begin preparations
1530 for the 2026 AAMA House of Delegates. Discussions included Delegate Orientations,
1531 development of the HOD timeline, and overall planning. Additional coordination continued
1532 through email correspondence.

1533
1534 Following the Winter Board of Trustees meeting, this officer again met with Speaker Seelig by
1535 phone to continue planning for the 2026 AAMA House of Delegates. Topics included Delegate
1536 Orientations, refinement of the HOD timeline, voting devices, and HOD layout. Planning efforts
1537 also continued through ongoing email communication.

1538
1539 This officer plans to meet with Speaker Seelig on August 8 to finalize preparations for the 2026
1540 AAMA House of Delegates. The meeting will focus on reviewing final logistics, confirming House
1541 procedures, and ensuring all materials and preparations are in place for a successful House of
1542 Delegates.

1543
1544 For a comprehensive summary of all House of Delegates activities and work completed, please
1545 refer to Speaker Seelig's full report.

1546
1547 All correspondence has been responded to in a timely manner and all deadlines have been met.

1548
1549 This officer participated in all e-ballots from President Thomas.

1550
1551 This Officer would like to thank President Thomas for her support and leadership this past year.
1552 CEO and Legal Counsel Donald Balasa for his dedication, guidance and willingness to answer
1553 questions. The AAMA staff for their support and the AAMA BOT for their assistance, guidance
1554 and support. This Officer also welcomes the guidance and leadership of Executive Director
1555 Annie Storey.

1556
1557 Aimee Quinn, BHA, CMA (AAMA)
1558 2025-2027 Vice Speaker of the House
1559

American Association of Medical Assistants® (AAMA)
Report of Trustee Miller
For the Period Ending September 2026

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:

- Awards Committee Chair
- Annual Conference Committee Member
- Documents Committee Member
- HOD Minutes Committee Member
- Maxine Williams Scholarship Member
- Partnership Task Force Member

Meetings Attended:

AAMA Annual Conference-Arlington, Virginia, September 18-22, 2025

- Board of Trustees Pre-HOD Executive Session –September 18, 2025
- First Timers and Students Reception –September 19, 2025
- Board of Trustees Open Session Meeting – September 19, 2025
- Knowledge Bowl – September 19, 2025
- Welcome and Awards Celebration – September 19, 2025
- 69th AAMA House of Delegates – September 20, 2025
- Meet the Candidates – September 20, 2025
- House of Delegates Reference Committee Hearings: Reports, Bylaws, Resolutions – September 20, 2025
- House of Delegates Reconvene and Voting –September 20, 2025
- AAMA Board of Trustees Meeting with the Society of Past Presidents (SoPPs) – September 21, 2025
- AAMA State Leaders Session – September 21, 2025
- AAMA Presidents Banquet – September 21, 2025
- Post Conference Board of Trustees Executive Session/ Orientation/ Maxine Williams Board of Directors Meetings –September 22, 2025
- AAMA 2025-2026 Committees, Strategy Teams, and Task Forces Meet and Greet – September 22, 2025

Other Meetings:

- BOT Planning Session – Chicago, Illinois
 - Executive Session – Chicago, Illinois, November 9-10, 2025
 - Maxine Williams Board of Directors – Chicago, Illinois – November 9, 2025
- BOT Winter Meeting – Chicago, Illinois
 - Open Session – January 30, 2026
 - Executive Session – January 30-31, 2026
- BOT Summer Meeting-Lombard, Illinois

- 1606 ○ Maxine Williams Board of Directors – June 4, 2026
- 1607 ○ Open Session – June 5, 2026
- 1608 ○ Executive Session – June 6, 2026

1609

1610 **Virtual Meetings:**

1611 BOT Executive Sessions: November 23, 2025, December 12, 2025, March 6, 2025, April 20,

1612 2026

1613 BOT meeting with CB Chair Fuller, June 1, 2026

1614 BOT meeting with CEB Chair Ley, June 30, 2026

1615 Committee/Task Force/Strategy Teams:

- 1616 ○ Annual Conference: October 10, 2025, January 14, 2026, March 21, 2026, April 25,
- 1617 2026, July 15, 2026
- 1618 ○ Awards: December 11, 2025, January 6, 2026, March 4, 2026, March 18, 2026, April 2,
- 1619 2026, May 6, 2026, June 16, 2026, June 29, 2026
- 1620 ○ Documents: March 9, 2026
- 1621 ○ Leadership CEU session – March 7, 2026
- 1622 ○ Brunch with the BOT (Eastern and Central time zones) – June 13, 2026
- 1623 ○ Brunch with the BOT (Mountain/ Pacific/Alaska/ Hawaii) – June 20, 2026
- 1624 ○ Leadership CEU session – July 11, 2026
- 1625 ○ Maxine Williams Scholarship: January 15, 2026, January 25, 2026, April 29, 2026, May
- 1626 30, 2026
- 1627 ○ Partnership: December 8, 2025, January 12, 2026, March 26, 2026

1628

1629 As of the date of this report, this Trustee anticipates attending the following virtual meetings:

- 1630 ○ BOT Executive Meeting | July 19, 2026
- 1631 ○ Meet the Candidates | August 13, 2026
- 1632 ○ HOD Orientation #1 | August 26, 2026
- 1633 ○ HOD Orientation #2 | August 26, 2026
- 1634 ○ Meet the Candidates #2 | August 29, 2026
- 1635 ○ HOD Orientation #3 | August 29, 2026
- 1636 ○ House Committee Orientation | September 9, 2026
- 1637 ○ Reference Committee Orientation | September 9, 2026

1638

1639 **Representative Bureau Assignments:**

1640 *Alaska State Society-April 18, 2026-Virtual*

1641 Trustee Miller attended the Alaska State Society Annual Meeting which was held virtually. They

1642 started the meeting with education and held their annual meeting in between educational

1643 sessions. There were twenty in attendance for the CEU sessions and Annual Meeting.

1644

1645 The following officers were elected; President Tamarack Brottem, CMA (AAMA), Vice

1646 President Tami Leroux, CMA (AAMA), Secretary Shaena Johnson, CMA (AAMA) Treasurer

1647 Lisa Nash, CMA (AAMA). Delegates to AAMA Tamarack Brottem, Tami Leroux, and Brenda

1648 Cook, CMA (AAMA). They accepted their minutes and budget.

1649 This Trustee had a few minutes to show the AAMA Representative PowerPoint and answer

1650 questions. An abbreviated presentation was done due to the time constraint.

They had 4 CEUs available with four different speakers. Dementia, Alaska Medicaid, Little Patients, Alaska Plant Medicine. These were highly informative and interesting sessions.

Trustee Miller enjoyed meeting with the attendees and hopes to see some of them in Reno. She thanks them for the hospitality and allowing her to represent AAMA.

Montana State Society-Helena, MT-April 24-27, 2026

There were eight members in attendance for their board meeting on Friday.

They had sixteen people in attendance on Saturday and Sunday for education and General Assembly and eight speakers.

Excellent educational sessions with 9 CEUs available. Topics on GLP-1, VA, Pancreatic cancer, Bone health, Spinal Motion sparing, Breast Cancer, and Weight management. They had a last-minute speaker cancel, so this Trustee presented Medical Bingo. They started the Board meeting and General Session with the AAMA Mission Statement. Minutes and Treasurer's report which were approved. They used Venmo for the conference which was new to them. They discussed the location for next year's conference, possibly in Missoula. They questioned the use of the \$500 grant the AAMA offers state as support. I clarified that it is only to assist in paying expenses for an AAMA Rep to their meeting.

This Representative had the honor to install the following officers: President Joleen South, CMA (AAMA), President Elect Angela Wood, CMA (AAMA), Secretary Morgana Holgerson, CMA (AAMA), Treasurer Susan Cox, CMA (AAMA), Immediate Past President Lori Schalk, CMA (AAMA), Trustees Jodee Geist, CMA (AAMA), Catie Giard, CMA (AAMA), Lalena Madman, CMA (AAMA), and Ashlee Ricks, RMA. She presented the AAMA PowerPoint and questions were answered. There were concerns regarding their declining membership and how they can recruit more members. Discussed that this is an issue across the states and there are tools available from AAMA to assist.

They have concerns with Montana having no CAAHEP- or ABHES- accredited programs and the non-accredited programs are not supporting AAMA. They had a question regarding AAMA conference costs and the use of Proxy votes. They asked that next year's state conference dates be posted earlier on FB to give members a better opportunity to attend. They also recommended posting conference announcements sooner and more than once for states hosting conferences. Trustee Miller appreciates the opportunity to visit Montana as AAMA representative and thanks them for their hospitality. It was an enjoyable experience.

Committee Strategy Team Assignments

Annual Conference

Attended and participated in all virtual meetings

Participated and contributed to conversations

Contributed to and finished all assignments given

Team kept updated on the status of the Welcome and Awards Ceremony to be held at the conference

Refer to the report of Chair Case

1697 *Awards*
1698 Attended and facilitated all meetings
1699 Assigned tasks to members
1700 Communicated with AAMA staff as needed
1701
1702 Refer to the report of Chair Miller
1703
1704 *Documents*
1705 Attended and participated in all meetings
1706 Contributed and finished all assignments
1707
1708 Refer to the report of Chair Seelig
1709
1710 *Maxine Williams Scholarship*
1711 Attended and Participated in all meetings
1712 Completed tasks and assignments
1713 Refer to the report of Chair Bogar
1714
1715 *Partnership*
1716 Attended all meeting
1717 Contributed and participated in assignments
1718 Continued to reach out to Shriner's Children's Hospital
1719 Attempted to reach out to Muscular Dystrophy Association
1720
1721 Refer to the report of Chair Case
1722
1723 **Other Assignment**
1724 Trustee Miller has responded to all requests and e-votes by the deadlines.
1725
1726 All correspondence has been responded to on time and all deadlines have been met.
1727
1728 Trustee Miller wishes to thank President Thomas, Vice President Bogar, and Immediate Past
1729 President Case for their support and leadership, CEO and Legal Counsel Donald Balasa, JD,
1730 MBA, for his guidance and ever-willingness to answer questions, Annie Storey, MS, CAE,
1731 Executive Director and Sharon Scarborough, Board Services Manager, for their assistance with
1732 so many issues, the AAMA Staff for their assistance and the entire AAMA BOT for their never-
1733 ending support for this Trustee.
1734
1735 It is an honor and pleasure to serve as an AAMA Trustee.
1736
1737
1738 Candy Miller, CMA (AAMA)
1739 2024-2026 AAMA Trustee
1740

**American Association of Medical Assistants® (AAMA)
Report of Trustee Neu
For the Period Ending September 2026**

The duties of the AAMA Trustee are as follows:

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

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

- Strategic Issues Planning Committee-Chair
- Educator Collaborative Task Force-Chair
- Bylaws and Resolutions Committee-Member
- Membership Development Strategy Committee-Member

Meetings Attended:

- AAMA 2025 Annual Conference-Arlington, Virginia, September 18-22, 2025
- Board of Trustees Pre-HOD Executive Session-September 18, 2025
- First Timers and Students Reception-September 19, 2025
- Board of Trustees Open Session Meeting-September 19, 2025
- Knowledge Bowl-September 19, 2025
- Welcome and Awards Celebration-September 19, 2025
- 69th AAMA House of Delegates-September 20, 2025
- Meet the Candidates-September 20, 2025
- House of Delegates Reference Committee Hearings:
 - Reports, Bylaws, Resolutions- September 20, 2025
- House of Delegates Reconvene and Voting-September 20, 2025
- AAMA Board of Trustees meeting with the Society of Past Presidents-September 21, 2025
- AAMA State Leaders Session-September 21, 2025
- AAMA Presidents Banquet-September 21, 2025
- Post Conference Board of Trustees Executive Session/Orientation/Maxine Williams Board of Directors Meetings-September 22, 2025
- AAMA 2025-2026 Committees, Strategy Teams, and Task Forces Meet and Greet-September 22, 2025
- BOT Planning Session-Chicago, Illinois
 - Executive Session-Chicago, Illinois, November 9-10, 2025
- BOT Winter Meeting Chicago, Illinois
 - Open Session-January 29, 2026
 - Executive Session-January 30-31, 2026
- BOT Summer Meeting-Lombard Illinois
 - Open Session-June 5, 2026
 - Executive Session-June 6, 2026

Virtual Meetings:

- BOT Executive Sessions
- November 23, 2025

1787 December 12, 2025
1788 March 8, 2026
1789 April 20, 2026
1790 BOT meeting with Certifying Board Chair Fuller
1791 June 1, 2026
1792 BOT meeting with Continuing Education Board Chair Ley
1793 June 30, 2026
1794
1795 As of the date of this report, this Trustee anticipates attending the following virtual meetings:
1796 BOT Executive Meeting | July 19, 2026
1797 Membership Development Strategy Committee | July 21, 2026
1798 Meet the Candidates | August 13, 2026
1799 Membership Development Strategy Committee | August 18, 2026
1800 HOD Orientation #1 | August 26, 2026
1801 HOD Orientation #2 | August 26, 2026
1802 Meet the Candidates #2 | August 29, 2026
1803 HOD Orientation #3 | August 29, 2026
1804 House Committee Orientation | September 9, 2026
1805 Reference Committee Orientation | September 9, 2026
1806

1807 **Committee/Strategy Team Assignments:**
1808

1809 Strategic Issues Planning Committee
1810 Attended and participated in all virtual meetings
1811 Reviewed all documents assigned and participated/completed all assignments
1812 Refer to the report of Chair Neu
1813 Educators Collaborative Task Force
1814 Attended and participated in all virtual meetings
1815 Reviewed all documents assigned and completed all assignments
1816 Refer to the report of Chair Neu
1817 Membership Development Strategy Team
1818 Attended and participated in all virtual meetings
1819 Completed and reviewed all assignments
1820 Refer to the report of Chair Quinn
1821 Bylaws and Resolutions Committee
1822 Attended and participated in all virtual meetings
1823 Completed and reviewed all assignments
1824 Refer to the report of Chair Cameron Smith
1825

1826 **Representative Bureau Assignment:**
1827

1828 This trustee had the privilege of attending the Alabama Annual Conference held April 24–25,
1829 2026. The conference featured outstanding speakers who were both engaging and interactive,
1830 creating an enjoyable and informative experience for all attendees.
1831 A total of 33 individuals registered for the conference; however, one attendee reported an illness,
1832 resulting in 32 participants on Friday and then there were 28 participants on Saturday.

The silent auction was a tremendous success, raising a significant amount of money for the society. Members were eager to volunteer wherever needed, demonstrating their commitment and teamwork throughout the event.

Like many state societies, Alabama is facing challenges with membership renewals, but the leadership is actively exploring new ideas and strategies to encourage growth and retention. Their experienced leadership team remains dedicated and willing to step up to ensure the continued success of the state society.

It was a pleasure to attend this conference, reconnect with members, and meet many new faces. The warm hospitality, enthusiastic volunteers, and positive atmosphere of the members made this a truly enjoyable and rewarding experience.

Additional Assignments:

All e-ballots from President Thomas were answered

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

This trustee would like to extend sincere thanks to President Virginia Thomas, CMA (AAMA); Vice President Sherry Bogar, CMA (AAMA); Immediate Past President Monica Case, CMA (AAMA); Secretary Shirley Sawyer, CMA (AAMA); my fellow members of the Board of Trustees; Don Balasa, JD, MBA, CEO and Legal Counsel; Annie Storey, MS, CAE Executive Director; and the entire AAMA staff for an outstanding year. Your contributions, hard work, and unwavering dedication to the AAMA are what make this organization so successful.

It has been an honor to serve alongside such a dedicated group of individuals over the past four years. Together, we have worked tirelessly to support the members of the AAMA and strengthen our organization. Every committee I have had the privilege of serving with demonstrated the commitment, professionalism, and passion of our members.

Through the Representative Bureau, I have had the opportunity to visit many outstanding state societies that truly represent the backbone of the AAMA. Their dedication and service continue to inspire me.

As I conclude my service on the Board of Trustees, my hope is that every member will consider volunteering their time and talents to this remarkable organization. Serving the AAMA has been a rewarding experience, and I am grateful for the friendships, memories, and opportunities to make a meaningful contribution. Thank you for allowing me the privilege of serving.

Pamela L. Neu, CMA (AAMA), MBA
Trustee 2024-2026

**American Association of Medical Assistants® (AAMA)
Report of Trustee Cameron Smith
For the Period Ending September 2026**

The duties of a Trustee are as follows:

- Serve as member of the Board of Trustees and 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:

- Engagement and Outreach Chair
- Bylaws and Resolutions Chair
- Educators Collaborative Task Force member
- Mentorship Committee member

MEETINGS ATTENDED:

- September 18-22, 2025 - AAMA 2025 Annual Conference – Arlington, VA
- September 18, 2025 – Pre HOD BOT Executive Session – Arlington, VA
- September 19, 2025 – First Timers and Student Reception – Arlington, VA
- September 19, 2025 – Board of Trustees Open Session – Arlington, VA
- September 19, 2025 – Knowledge Bowl – Arlington, VA
- September 19, 2025 – Awards and Welcome Celebration – Arlington, VA
- September 20, 2025 - 69th Annual House of Delegates – Arlington, VA
- September 20, 2025 – Meet the Candidates – Arlington, VA
- September 20, 2025 - House of Delegates Reference Committee Hearings: Reports, Bylaws and Resolutions – Arlington, VA
- September 20, 2025 - House of Delegates Reconvene and Voting - Arlington, VA
- September 21, 2025 - AAMA Board of Trustees Meeting with the Society of Past Presidents (SoPPs) – Arlington, VA
- September 21, 2025 - AAMA State Leaders Session – Arlington, VA
- September 21, 2025 - AAMA Presidents Banquet – Arlington, VA
- September 22, 2025 - BOT Post Conference Meeting, Arlington, VA
- September 22, 2025 - AAMA 2025-2026 Committees, Strategy Teams, and Task Forces Meet and Greet – Arlington, VA
- November 9-11, 2025 - BOT Planning Session in Chicago, IL
- November 22, 2025 – Virtual BOT Joint Committee meeting for the 70th Anniversary Project
- November 23, 2025 - Virtual BOT Meeting
- December 3, 2025 – Virtual BOT Joint Committee meeting for the 70th Anniversary Project
- December 9, 2025 – Virtual BOT Joint Committee Meeting for the 70th Anniversary Project with MarCom Department
- December 12, 2025 - Virtual BOT Meeting
- January 8, 2026 - Virtual Bylaws Committee Meeting
- January 15, 2026 – BOT Joint committee meeting for the 70th Anniversary Project
- January 18, 2026 – Virtual Strategic Issues Plan Meeting
- January 22, 2026 - Virtual Engagement and Outreach Committee Meeting
- January 29, 2026 – In-Person Winter BOT Meeting – Chicago, IL

1921 February 5, 2026 – Educators’ Collaborative Task Force – Virtual
 1922 February 23, 2026 – 70th Anniversary Story Collection Project – Virtual
 1923 March 7, 2026 – Virtual Leadership CEU – Virtual
 1924 March 8, 2026 – CEB/BOT Discussion – Virtual
 1925 March 8, 2026 – BOT Executive Session – Virtual
 1926 April 10-11, 2026 – Representative Bureau Assignment to Idaho Society of Medical
 1927 Assistants, Twin Falls, ID
 1928 April 20, 2026 – BOT Executive Session – Virtual
 1929 April 30, 2026 – Representative Bureau Recap w/MarCom Department – Virtual
 1930 May 4, 2026 – Engagement and Outreach Committee – Virtual
 1931 May 7, 2026 – Educators’ Collaborative Task Force – Virtual
 1932 May 20, 2026 – Bylaws Committee Meeting – Virtual
 1933 May 20, 2026 - 70th Anniversary Story Collection Project – Virtual
 1934 May 27, 2026 – Bylaws Committee Meeting – Virtual
 1935 June 1, 2026 – New Credential Discussion with CB Chair Fuller – Virtual
 1936 June 3-7, 2026 - Summer BOT Meeting – Chicago, IL
 1937 June 13, 2026 – Eastern Time zone BOT Townhall – Virtual
 1938 June 13, 2026 – Central Time zone BOT Townhall – Virtual
 1939 June 18, 2026 – Educators’ Collaborative Task Force – Virtual
 1940 June 20, 2026 – Mountain Time zone BOT Townhall – Virtual
 1941 June 30, 2026 – CEB Appointment Meeting with Chair Ley – Virtual

1942
 1943 As of the date of this report, this trustee anticipates attending the following virtual meetings:

1944 July 19, 2026 - BOT Executive Meeting
 1945 August 13, 2026 – Meet the Candidates
 1946 August 26, 2026 – HOD Orientation #1
 1947 August 26, 2026 – HOD Orientation #2
 1948 August 29, 2026 – Meet the Candidates #2
 1949 August 29, 2027 – HOD Orientation #3
 1950 September 9, 2026 – House Committee Orientation
 1951 September 9, 2026 – Reference Committee Orientation

1952
 1953 REPRESENTATIVES BUREAU ASSIGNMENTS:

1954 This Trustee attended Idaho Society of Medical Assistant’s Annual Conference that was
 1955 held in Twin Falls, Idaho, on the campus of College of Southern Idaho. There were twenty-
 1956 five members, eight non-members, and fourteen students present. Thirteen members, three
 1957 non-members and two students attended virtually. Making a total of sixty-five in attendance
 1958 during the 2 days of the meeting. The Twin Falls chapter did a wonderful job offering a
 1959 wide variety of CEU speakers and topics. Topics covered at this conference were No Static,
 1960 Just Rhythm, dealing with ECGs and how to read them, The Skinny on GLP’s, The
 1961 Neuroscience of Substance Disorders, The Compassion Reservoir: How to give without
 1962 Running Dry, and Women’s Health. The Idaho State Society of Medical Assistants held
 1963 their General Assembly session during lunch on Saturday and conducted the business of the
 1964 society. ISMA elected a new vice president and their ISMA delegates to National
 1965 Conference in Reno, NV this year. They also voted to extend \$8000 dollars in grants to help
 1966 members from all chapters to be able to attend National Conference this year. They also

1967 voted to add the Northern Idaho chapter back in the Annual meeting rotation, since that
1968 chapter has seen growth in members wanting to be more active in the state Society.
1969

1970 COMMITTEE/STRATEGY TEAM ASSIGNMENTS:

1971 Met with committee members during the 2025-2026 committee meet and greet held on
1972 September 22, 2025, at the Hyatt Regency in Arlington, VA

1973 This Trustee was appointed to Chair the Engagement and Outreach Committee and the
1974 reports of this assignment will be in the committee report.

1975 This Trustee was appointed to Chair the Bylaws and Resolutions Committee and the reports
1976 of this assignment will be in the committee report.

1977 Educators Collaborative Task Force—refer to Chair report.

1978 Mentorship Committee—refer to Chair report.
1979

1980 All correspondence has been responded to in a timely manner and all deadlines have been met.

1981 This trustee participated in all e-ballots from President Thomas.
1982

1983 Cameron Smith, BS, CMA (AAMA), CPC-A (AAPC), CRHCP (NARHC), HITCM-PP, PBT
1984 (ASCP)

1985 2024-2026 Trustee
1986

**American Association of Medical Assistants® (AAMA)
Report of Trustee Christa Smith
For the Period Ending September 2026**

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The duties of the AAMA 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:

- Marketing Committee
- Maxine Williams Scholarship Committee
- Strategic Issues Planning (SIP) Committee
- Partnership Task Force

MEETINGS ATTENDED:

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

- AAMA BOT Meeting with the Society of Past Presidents (SoPPs) | September 21, 2025
- AAMA State Leaders Session | September 21, 2025
- AAMA Presidents Banquet | September 21, 2025
- Post Conference BOT Executive Session/Orientation | September 22, 2025
- CEB Strategic Planning Presentation | Chicago, IL, November 8, 2025
- AAMA Planning Session | Chicago, IL, November 9-10, 2025
 - BOT Executive Session | November 9-10, 2025
 - Maxine Williams board of Directors | November 9, 2025
- AAMA Winter Board Meeting | Chicago, IL, January 29-31, 2026
 - Open Session | January 29, 2026
 - Executive Session | January 30-31, 2026
- AAMA Summer Board Meeting | Lombard, IL, June 4-6, 2026
 - Maxine Williams Board of Directors, June 4, 2026
 - Open Session | June 5, 2026
 - Executive Session | June 6, 2026

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

- Strategic Issues Planning (SIP) Committee Meeting | November 18, 2025
- BOT Executive Meeting | November 23, 2025
- Partnerships Task Force | December 8, 2025
- Marketing Committee Meeting | December 9, 2025
- BOT Executive Meeting | December 12, 2025
- SIP Committee Meeting | January 2, 2026
- Marketing Committee Meeting | January 7, 2026
- Partnership Committee Meeting | January 12, 2026
- Marketing Meeting | January 12, 2026

2031 Maxine Williams Scholarship Committee | January 15, 2026
2032 SIP Committee Meeting | January 18, 2026
2033 Marketing Strategy Team Meeting | February 16, 2026
2034 SIP Committee Meeting | February 18, 2026
2035 Representative Bureau Assignment discussion with President Thomas and Vice President
2036 Bogar | March 2, 2026
2037 BOT Executive Meeting | March 8, 2026
2038 Representatives Bureau Assignment; North Carolina State Society | March 19-22, 2026
2039 Partnership Task Force Meeting | March 26, 2026
2040 SIP Committee Meeting | March 29, 2026
2041 BOT Executive Session | April 20, 2026
2042 Maxine Williams Scholarship Committee | May 30, 2026
2043 Meeting with CB Chair Fuller | June 1, 2026
2044 Marketing Committee Meeting | June 15, 2026
2045 SIP Committee Meeting | June 22, 2026
2046 BOT Meeting with CEB Chair Ley | June 30, 2026
2047

2048 As of the date of this report, this Trustee anticipates attending the following virtual meetings:

2049 BOT Executive Meeting | July 19, 2026
2050 Marketing Strategy Committee | July 20, 2026
2051 Meet the Candidates | August 13, 2026
2052 Marketing Strategy Committee | August 17, 2026
2053 HOD Orientation | August 26, 2026
2054 HOD Orientation | August 29, 2026
2055 Meet the Candidates | August 29, 2026
2056 House Committee Orientation | September 9, 2026
2057 Reference Committee Orientation | September 9, 2026
2058
2059

2060 **REPRESENTATIVES BUREAU ASSIGNMENT**

2061 *North Carolina State Society of Medical Assistants | March 19 – 22, 2026*

2062
2063 This Trustee attended the NCSMA annual conference and the 59th Annual House of Delegates
2064 with the Union chapter hosting. They had 123 Registered, 10 first timers, 19 non-members and 2
2065 students. The conference started on March 19, 2026, with their Pre-Convention Board meeting.
2066 The House of Delegates was held on Friday March 20th. Rebecca Eldridge was the Speaker of
2067 the House and ran a very efficient HOD. NCSMA had a full slate of officers for election. This
2068 trustee was part of the tellers so was unable to attend most of the HOD due to counting votes.
2069 Friday evening was the awards and welcome party; “Luau at the Lodge.” President
2070 VandeBovenkamp honored her chapter presidents and board. Dr. Smith awarded the Mary
2071 Moody award. Although this award is not a state supported award, it is an award supported by
2072 Dr. Smith honoring a medical assistant. Shannon Thomas was the recipient of the Mary Moody
2073 Award. Fellow medical assistants nominate another medical assistant for their outstanding
2074 service to patients – like those qualities portrayed by Ms. Mary Moody. Paula Cooke won the
2075 new Becky Keller award. This is the first year for this award. Becky Keller is a past president
2076 and the family wanted to honor a recipient that represented Becky’s values during her life—

personal and professional. On Saturday March 21st, this Trustee attended the First Timers Session. This was clever as they paired up a board member or past president with a first timer and played bingo. This Bingo was about the history of the state and its chapters as well as location of chapters. Several bingos were called and award tokens were given. This was a great way to get the first timers involved. This Trustee did a Power Point presentation for the attendees and was available to answer any questions. The evening concluded with the President's Banquet and the officers for the year 2026-2027 were installed. The convention offered 15 CEUs to its attendees.

Committee /Strategy Team Assignments:

Marketing Committee

This Trustee was available for meetings and discussions with the committee and chair through multiple emails and virtual meetings. Please see Marketing Strategy Team Chair Report.

Partnership Task Force Committee

This Trustee was available for meetings and discussions with the committee and chair through email and virtual meetings. Please see Partnership Task Force Chair Report.

Strategic Issues Planning Committee (SIP)

This Trustee was available for meetings and discussions with the committee and chair through email and virtual meetings. Please see Strategic Issues Planning Committee Chair Report.

Maxine Williams Scholarship Committee

This Trustee was available for meetings and discussions with the committee and chair through email and virtual meetings. Please see Maxine Williams Scholarship Committee Chair Report.

BOARD OF TRUSTEES DUTIES

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

This Trustee participated in all E-ballots from President Thomas.

This Trustee is sincerely grateful to President Thomas for her steady leadership; Don Balasa for his dedication and thoughtful guidance; Annie Story for sharing her vision and leadership; and the AAMA staff for their continued commitment and support. To the AAMA BOT, thank you for your support. This Trustee would also like to extend heartfelt appreciation to Aimee Quinn and Cameron Smith for their encouragement and mentorship.

Christa Smith, CMA (AAMA)

Trustee 2025 - 2027

American Association of Medical Assistants® (AAMA)
Report of Trustee Tyler
For the Period Ending September 2026

The duties of a Trustee are as follows:

- Serve as an officer of the AAMA Board of Trustees
- Serve as a member of the Maxine Williams Board of Directors
- Serve as a member of the AAMA Representative Bureau

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

- Bylaws and Resolutions - member
- Engagement and Outreach Committee – member
- Maxine Williams Scholarship Committee – member
- Membership Development Committee - member

MEETINGS ATTENDED:

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

- AAMA 2025 Annual Conference | Arlington, Virginia, September 18-22, 2025
 - AAMA BOT Meeting with the Society of Past Presidents (SoPPs) | September 21, 2025
 - AAMA State Leaders Session | September 21, 2025
 - AAMA Presidents Banquet | September 21, 2025
 - Post Conference BOT Executive Session/ Orientation | September 22, 2025
 - AAMA 2025-2026 Committees Meet and Greet | September 22, 2025
- CEB Strategic Planning Presentation | Chicago, IL, November 8, 2025
- AAMA Planning Session | Chicago, IL, November 9-11, 2025
 - BOT Executive Session | November 9-10, 2025, Chicago, Illinois
 - Maxine Williams Board of Directors | November 9, 2025, Chicago, Illinois
- AMAA Winter Board Meeting | Chicago, IL, January 29-31, 2026
 - Open Session | January 29, 2026
 - Executive Session | January 30-31, 2026
- AAMA Summer Board Meeting | Lombard, IL, June 4-6, 2026
 - Maxine Williams Board of Directors, June 4, 2026
 - Open Session | June 5, 2026
 - Executive Session | June 6, 2026

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

- BOT Executive Meeting | November 23, 2025
- BOT Executive Meeting | December 12, 2025
- Membership Committee | January 6, 2026
- Bylaws and Resolutions Committee | January 8, 2026
- Maxine Williams Scholarship/Crystal Coleman Award Committee | January 15, 2026
- Strategic Issues Planning (SIP) Committee Meeting | January 18, 2026
- Engagement & Outreach Committee Meeting | January 22, 2026
- Maxine Williams Scholarship/Crystal Coleman Award Committee | January 25, 2026

2163 Membership Development Strategy Committee | February 17, 2026
 2164 BOT Executive Meeting | March 8, 2026
 2165 Membership Development Strategy Committee | March 17, 2026
 2166 BOT Executive Meeting | April 20, 2026
 2167 Membership Committee | April 21, 2026
 2168 Maxine Williams Scholarship/Crystal Coleman Award Committee | April 29, 2026
 2169 Engagement & Outreach Committee Meeting | May 4, 2026
 2170 Membership Development Strategy Committee /Tool Kit Discussion | May 11, 2026
 2171 Membership Development Strategy Committee | May 19, 2026
 2172 Bylaws and Resolutions Committee | May 27, 2026
 2173 Maxine Williams Scholarship/Crystal Coleman Award Committee | May 30, 2026
 2174 BOT Meeting with CB Chair Fuller | June 1, 2026
 2175 Leadership Development
 2176 • Brunch with the BOT (Eastern and Central time zones) | June 13, 2026
 2177 • Brunch with the BOT (Mountain/ Pacific/ Alaska/ Hawaii) | June 20, 2026
 2178 BOT meeting with CEB Chair Ley | June 30, 2026
 2179

2180 As of the date of this report, this trustee anticipates attending the following virtual meetings:

2181 Membership Development Strategy Committee | July 21, 2026
 2182 Meet the Candidates | August 13, 2026
 2183 Membership Development Strategy Committee | August 18, 2026
 2184 HOD Orientation #1 | August 26, 2026
 2185 HOD Orientation #2 | August 26, 2026
 2186 Meet the Candidates #2 | August 29, 2026
 2187 HOD Orientation #3 | August 29, 2026
 2188 House Committee Orientation | September 9, 2026
 2189 Reference Committee Orientation | September 9, 2026
 2190

2191 **Representatives Bureau Assignments:**

2192 *Oregon Society of Medical Assistants*

2193 This Trustee attended the Oregon Society of Medical Assistants Annual Conference April 9th-
 2194 11th, 2026, in Portland, Oregon. There were 108 participants in attendance, including students
 2195 from Clackamas Community College. Approximately 40% of the attendees were NOT AAMA
 2196 members. The education sessions offered 29 CEUs with two sessions running
 2197 concurrently. Topics included Equity and Access in Healthcare, Growing into
 2198 Leadership, Social Determinants of Health and the Role of the MA in Public Health,
 2199 Empowering Self-Advocacy for Medical Assistants, Building Vaccine Confidence in the Clinic,
 2200 Value-Based Care in the Real World, Responding to Abuse, Neglect, and
 2201 Trafficking, Cardiovascular Care for Medical Assistants, Developing Your Professional
 2202 Identity, Trauma-informed Leadership and Workplace Culture, Enhancing
 2203 Preparedness, Improving Mental Health Outcomes, Earning Trust in Healthcare, Resilience and
 2204 Career Longevity in Medical Assisting, and Mastering the Order of the
 2205 Draw. Keynote Speaker Rebecca Walker, CMA (AAMA), based her presentation on the book *In*
 2206 *the Doctor's Office: The Art of Being a Medical Assistant* by Esther Jane Parsons. The book was
 2207 written in 1945, and Rebecca highlighted that many of the points made in the book are still valid
 2208 today. Networking time was available and utilized. There were five exhibitors, including GSK,

three employers, and a jewelry/gift crafter, as well as raffle drawings for a designer purse, scrubs, and shoes with proceeds benefiting OSMA. The social event on Friday, casino-style gaming, was fun and engaging. Attendees were given \$1000 in “fun money” to spend on roulette, dice, blackjack, and Texas Hold’em. At the end of the event, chips were exchanged for raffle tickets used for prizes such as AAMA membership, conference registration, AAMA merchandise, and other items. Approximately fifteen Past Presidents of OSMA attended the President’s Luncheon on Saturday. The inaugural Johnny Adamson Service Award was given to its namesake, Johnny Adamson, CMA-AC (AAMA). This Trustee thanks the Oregon Society of Medical Assistants for the warm welcome and great hospitality.

Committee/Strategy Team Assignments:

Bylaws and Resolutions 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 Engagement and Outreach Committee report.

Engagement and Outreach 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 Engagement and Outreach Committee report.

Membership Committee

This trustee was available for meetings and discussions with the committee members and the chair through multiple emails. This trustee has met with the committee via TEAMS or email to work on finalizing the committee’s goals for the year. Please see the Membership Committee report.

Maxine Williams Scholarship/Crystal Coleman Award Committee

This trustee was available for meetings and discussions with the committee members and the chair through multiple emails. This trustee has met with the committee via TEAMS or email to work on finalizing the committee’s goals for the year. Please see the Maxine Williams Scholarship/Crystal Coleman Award Committee report.

Other Assignments:

This trustee received numerous documents including current Volunteer Leadership Position Descriptions, AAMA Bylaws, and numerous other documents in preparation for this role.

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

This trustee participated in all e-ballots from President Thomas.

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. This Officer also welcomes the guidance and leadership of Executive Director Annie Storey.

Jeanette Tyler, BAS, CMA (AAMA), CPPS
2025-2027 Trustee

American Association of Medical Assistants® (AAMA)
Report of Trustee Williams
For the Period Ending September 2026

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
- Serve as a member of the Maxine Williams Board of Directors

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

- Editorial Advisory Committee- chair, Bylaws, Documents,
- Partnership, Strategic Issues Planning Committee, and Centers for the Application of
- Substance Abuse Technologies (CASAT) Steering Committee.

MEETINGS ATTENDED:

- AAMA 2025 Annual Conference-Arlington, Virginia
- AAMA Board of Trustees Meeting with the Society of Past Presidents (SoPPs) September 21, 2025
- AAMA State Leaders Session-September 21, 2026
- AAMA Presidents Banquet- September 21, 2026
- Post Conference Board of Trustees Executive Session/Orientation/Maxine Williams Board of Directors Meetings- September 22, 2025
- Committee and Strategy Teams Meet and Greet September 22, 2025
- Board of Trustee Planning Session/Maxine Williams Board of Directors November 9-10, 2025- Chicago, Illinois
- Board of Trustee Winter Meeting January 29-31, 2026, Chicago, IL
- Board of Trustees Summer Meeting/Maxine Williams Board of Directors Meeting, June 4-6, 2026, Lombard, IL

VIRTUAL MEETINGS ATTENDED:

- Board of Trustees, November 23, 2025, December 12, 2025, March 8, 2026, April 20, 2026
- Bylaws - January 8, 2026, May 27, 2026
- CASAT Steering Committee - January 22, 2026, June 16, 2026
- Documents - March 9, 2026
- Partnership - December 8, 2025, January 12, 2026, and March 26, 2026
- Strategic Issues - November 18, 2025, November 20, 2025, January 2, and January 18, 2026, February 18, 2026, March 29, 2026, April 12, 2026, and June 22, 2026

This trustee anticipates attending the following virtual meetings between the time of this report and the AAMA Annual Conference:

- Board of Trustees meeting July 19, 2026
- Meet the Candidates August 13, 2026
- HOD orientation, August 26, 2026
- Meet the Candidates #2, August 29, 2026
- HOD Orientation, August 29, 2026

- House Committee Orientation, September 9, 2026
- Reference Committee Orientation, September 9, 2026

REPRESENTATIVE BUREAU:

This trustee was assigned and attended the following state conferences:

Ohio State Society Conference April 9-11, 2026, Lockbourne, OH

The Ohio State Society Conference was held at the Lockbourne Historical Event Center with most attendees staying at a nearby hotel. This was a new process to reduce conference expenses and increase revenue for the state. The theme for the conference was the 70's and many attendees dressed in 70's style attire. There were 57 in attendance. 13.5 CEUs were offered and two meals were included in the registration fee. one additional meal was offered by donation. The conference collected donations for a local organization, Center of Industry Discover Lockbourne (COSI). A total of \$162 was collected for this organization. There were also ways and means baskets available for raffle. The House of Delegates was conducted on Friday morning with the election of officers/delegates and several Bylaws changes being passed. This Trustee presented an educational session as requested and had the opportunity to present the AAMA Representative PowerPoint. Volunteer Leader Applications were available and at least one Ohio attendee expressed interest in volunteering. The 2026-2027 officers were installed during the President's luncheon on Saturday, which was followed by the Post Conference Board meeting at which 27 members were in attendance. It was a pleasure to attend this state conference.

New Hampshire State Society Virtual Conference April 18, 2026

This trustee attended the virtual meeting of the New Hampshire State Society. New Hampshire is a bilevel organization of the AAMA. The meeting was conducted from 8am -2pm. There were 35 in attendance and 4 CEUs available. The state offers three virtual meetings each year to provide 12 CEUs free of charge to NH members. There is a small fee collected for non-NH attendees. There was time allotted for business during 2026-2027 officer/delegate nominees were introduced and a link for voting was sent to the members in attendance. This Trustee was allotted 30 minutes during which the AAMA PowerPoint was shared. Key slides with QR codes were emailed to the president and vice president for distribution. New Hampshire has an ongoing concern with the right of medical assistants to practice, and the officers maintain an ongoing discussion with Don Balasa concerning this issue. There are a number of national level leaders in New Hampshire, particularly on the CEB. It was a pleasure to attend this annual meeting.

COMMITTEE/STRATEGY TEAM ASSIGNMENTS:

EDITORIAL ADVISORY-As Chair of this committee, Trustee Williams used email to maintain contact with her committee members to acquire topic suggestions for potential magazine articles for *Medical Assisting Today*. See separate report.

DOCUMENTS- This trustee participated in reviewing documents as assigned and suggested edits as appropriate. She attended the virtual meeting on March 9, 2026, during which the committee reviewed 2 large documents which required quite a number of revisions. See report of Chair Seelig.

2346 **STRATEGIC ISSUES-** This Trustee participated in all virtual meetings of this committee
2347 during which we created the new Strategic Issues Plan. See the report of Chair Neu.
2348 **BYLAWS-** This Trustee participated in all virtual meetings called by Chair Smith. See Report of
2349 Chair Smith
2350 **PARTNERSHIP-** This Trustee participated in all virtual meetings called by Chair Case. Several
2351 attempts were made to contact the American Diabetes Association to discuss a potential
2352 partnership with the AAMA. See the report of Chair Case.
2353 **CASAT Steering Committee-** This trustee attended both virtual meetings and received minutes
2354 from the organizer. This organization is working to improve awareness of the dangers of alcohol
2355 and drug use during pregnancy. They have provided several free CEUs available to AAMA
2356 members via the website. They will be attending the AAMA Annual Conference in Reno, NV.
2357
2358 All correspondence has been responded to in a timely manner and all deadlines have been met
2359 including e-votes.
2360
2361 Sandra Williams, CMA (AAMA)
2362 Trustee 2025-2027
2363

**American Association of Medical Assistants® (AAMA)
Report of the Chief Executive Officer (through July 31, 2026) and
Legal Counsel Donald A. Balasa, JD, MBA, ICE-CCP, CAE (1985-2002)
For the Period Ending (approximately) September 2026**

The following is a summary of Chief Executive Officer (CEO) and Legal Counsel Balasa's priorities and accomplishments, and an update on pertinent developments, since (approximately) the American Association of Medical Assistants (AAMA) 2025 Annual Conference in September of 2025 in Arlington, Virginia.

Mr. Balasa'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.

American Medical Association (AMA) STEPS Forward Toolkit

CEO Balasa received the following invitation from the head of the American Medical Association STEPS Forward program. He has been helping STEPS Forward staff with occasional legal questions for the last twelve years:

Hello Don,

Thanks again for your support of our new AMA STEPS Forward Toolkit "Celebrating Your Team's Training and Talent".

Would you be interested in being a contributing author for this toolkit (along with Dr Marie Brown and myself, as well as 2 additional external authors, 1 from AAPA and 1 from ANA), and possibly having AAMA listed as a collaborating organization on this toolkit? The AMA will provide a stipend of \$3500 for authorship on this toolkit (and possible contribution to follow up resources such as a podcast or webinar recording.) Jennifer Lilly or Matt Dominis from our team can help answer any additional logistical/timeline questions, and as always please reach out to Marie or myself if any other questions.

Warmly,

Jill

Jill Jin, MD, MPH

Clinical Associate Professor, Internal Medicine, Northwestern University Feinberg School of Medicine

Senior Physician Advisor, Professional Satisfaction & Practice Sustainability, AMA

The following is information about STEPS Forward:

About the AMA STEPS Forward® Practice Innovation Strategies

The AMA STEPS Forward practice innovation strategies allow physicians and their teams to thrive in the evolving health care environment by working smarter, not harder. For over a decade, physicians and leaders looking to refocus their practices have turned to STEPS Forward for proven, physician-developed strategies to address common challenges and devote more time to caring for patients.

Our collection of resources is designed for busy physicians and clinical teams, offering actionable content that can transform your practice, manage stress, prevent burnout and streamline workflows.

About STEPS Forward Toolkits

Toolkits are at the heart of the AMA STEPS Forward program. Toolkits provide practical, actionable information to help physicians and their teams work more efficiently and effectively, improving physician well-being.

Each toolkit emphasizes action over theory: we show physician leaders how to improve or implement a process, a workflow or area of their practice; we avoid lengthy definitions unless a standard description is needed to level-set a topic. Current toolkits cover a range of operational, financial and cultural change topics, emphasizing practical approaches that contribute to organizational and physician well-being.

Identifying and Responding to Human Trafficking: The Medical Assistant's Role

In January 2026 the American Association of Medical Assistants (AAMA) released a comprehensive and current self-study course *Identifying and Responding to Human Trafficking: The Medical Assistant's Role*.

The following is an excerpt from Module 5: “Appropriate Documentation and Reporting Protocols: Human Trafficking Laws, Information in the Electronic Health Record, and Protecting Patient Privacy.” Legal Counsel Balasa is the author of this module.

There is a strong consensus in the United States that trafficked persons should be protected to the fullest extent of the law. Researchers and policymakers, however, have pointed out the potential conflict between mandatory human trafficking (HT) reporting laws and laws that safeguard patient privacy (e.g., the Health Insurance Portability and Accountability Act, or HIPAA). In addition, the health care field continues to wrestle with the question of how much information should be included in the Electronic Health Record (EHR) of those patients who may be trafficked.

These issues confront medical assistants interacting with patients who are (or may be) ensnared in the insidious web of human trafficking.

In light of these encounters, the purposes of this module are to:

1. Summarize for medical assistants relevant provisions of federal and state HT laws;
2. Weigh the benefits of mandated reporting of suspected human trafficking versus guardrails around patient privacy (e.g., HIPAA);
3. Discuss how laws and regulations can both protect trafficked persons but (in some instances) inadvertently increase the possibility of harm; and
4. Consider both sides of the ongoing debate over the specificity of the HT information that should be included in the EHR.
- 5.

Texas Human Trafficking Training for Medical Assistants

A Texas bill enacted in 2025 requires human trafficking training for all medical assistants. The American Association of Medical Assistants and the Texas Society of Medical Assistants had submitted testimony in favor of this bill.

On June 15, 2026, the Texas Health and Human Services Commission (HHSC) issued proposed regulations implementing this legislation. The following are excerpts from these proposed regulations:

[A] human trafficking prevention training course must...include content on the following topics:

2457 • types of human trafficking, including definitions;
 2458 • victim vulnerability factors and health impacts;
 2459 • how to identify, assess, and respond to human trafficking; and
 2460 • resources to support victims.

2461 Medical assistants must complete an HHSC-approved human trafficking prevention
 2462 training course...

2463 Comments on the proposed regulations must be submitted by July 16, 2026. The American
 2464 Association of Medical Assistants will be submitting comments.

2465

2466 **Keynote Speaker for the Federation of Associations of Regulatory Boards (FARB) Summit**
 2467 Mr. Balasa was the Opening Plenary and Keynote Speaker for the *2026 FARB Summit on*
 2468 *Regulatory Excellence*, July 23 through 25, 2026, in Minneapolis, Minnesota. The following is a
 2469 description of his presentation:

2470

2471 ***Opening Plenary & Keynote - Leading Courageously During Times of Regulatory***
 2472 ***Challenge***

2473 *Presenter: Donald A. Balasa, JD, MBA, American Association of Medical Assistants*
 2474 *Courageous leadership includes the willingness to challenge oneself and those around*
 2475 *us to do better. Leaders also provide foresight on ways to navigate during times of*
 2476 *challenge while being humble and open to critiques. Recent public debate over*
 2477 *occupational licensing has intensified as arguments are presented stating that licensing*
 2478 *restricts workforce participation and increases costs for consumers.*

2479 *In this keynote session, Donald A. Balasa will examine major critiques of occupational*
 2480 *licensing, acknowledging where reform conversations may have merit while also*
 2481 *highlighting where key assertions are not supported by law, fact, or economic theory. The*
 2482 *session will explore how regulators can courageously and thoughtfully respond to the*
 2483 *growing movement toward deregulation and articulate the value of regulation and its*
 2484 *critical role in public protection.*

2485 *This presentation will help regulators lead with clarity and conviction in policy*
 2486 *discussions about professional regulation, while remaining grounded in the public*
 2487 *protection mission.*

2488

2489 **“Why is the New United States Department of Education Workforce Pell Grant Program**
 2490 **(Operational July 1, 2026) Relevant for Allied Health?”**

2491 CEO and Legal Counsel Balasa gave the above-titled virtual presentation for the *Health*
 2492 *Professions Network 2026 Spring Meeting*, May 26 through 28, 2026. His handout is attached.
 2493 The following is an excerpt from this handout.

2494

2495 NPRM, Federal Register/Vol. 91/No. 45/Monday, March 9, 2026

2496 1. “[T]he One Big Beautiful Bill Act (OB3) expanded Pell Grant eligibility to eligible
 2497 workforce programs. These programs are shorter in duration than the undergraduate
 2498 programs currently eligible for Pell Grants, and they must meet specific accountability
 2499 metrics related to graduate earnings, as well as indicia of employer demand—
 2500 requirements that are not applicable to other eligible programs.” (p. 11383)

2501 2. “Workforce Pell Grants. The [OB3] allows students to receive Pell Grants for eligible
 2502 workforce programs that are 150–599 clock hours in length or an equivalent number of

credit hours and that take at least 8 weeks but less than 15 weeks of instructional time to complete...4–15 semester or trimester hours, or 6–23 quarter hours ...” (pp. 11378 and 11379)

3. “codif[ies] statutory requirements for Governor [of a state or other jurisdiction] approval, including that the eligible workforce program provides an education aligned with the requirements of high-skill, high-wage, or in-demand industry sections or occupations, meets the hiring needs of employers, leads to: (a) a recognized postsecondary credential that is stackable and portable (or prepares students for employment for which there is only one recognized postsecondary credential); and (b) ensures that a student receives academic credit for the program for at least one certificate or degree program at one or more eligible institutions.” (p. 11379)

4. The fundamental thrust of the Workforce Pell Grant Program is to train people as expeditiously as possible for in-demand jobs. and to get these people employed as soon as possible.

5. Key question: *Will Workforce Pell Grant programs affect allied health education programs?*

“The Proposed United States Department of Education Earnings Accountability Rules and Possible Effects on Allied Health Education”

Mr. Balasa gave the above-titled virtual presentation for the *Health Professions Network 2026* Spring Meeting, May 26 through 28, 2026. His handout is attached. The following is an excerpt from this handout.

NPRM, Federal Register/Vol. 91, No. 75/Monday, April 20, 2026

“It is clear that the operative purpose of Section 102(b)–(c) is to use taxpayer funds to help support students in their quest to obtain more training such that they may enter a recognized occupation. The Department [of Education] thinks that this context is key in demonstrating that Congress only wants to fund programs that help make the student better off in their “gainful employment.” Gainful means “profitable,” so Congress wants students to get training that enables them to be more profitable than before they went to school. As such, the Department interprets the term “gainful employment” to mean that a program must, on average, make students better off financially than they would have been had they not attended the program. In other words, *institutions must ensure that the median student in a gainful employment program earns a premium, compared to what they would have earned if they had never gone to school.* This is the same earnings premium measure called for in the [One Big Beautiful Bill Act (OB3)], but the Department believes that the gainful employment statute calls for this type of accountability independent from the amendments made by OB3.” [Emphasis added.] (p. 21094)

State Society Scholarship Funds

CEO Balasa issued a memorandum to state society officers explaining important tax and operational requirements for scholarship funds of state societies. The following are the key points:

Donations made to scientific, educational, religious, literary, and other 501(c)(3) entities—including scholarship programs—are deductible by the donor as charitable

contributions. Most organizations seeking 501(c)(3) status must file Forms 1023 or 1023-EZ with the Internal Revenue Service (IRS). However, according to IRS Instructions for Form 1023-EZ (January 2025), “Any organization that has gross receipts in each taxable year of normally not more than \$5,000” is exempt from filing Form 1023-EZ to be considered tax exempt. I assume that most state society scholarship programs do not normally receive more than \$5,000 annually in contributions. State societies should keep scholarship funds in accounts separate from the general fund(s) of the society. Assets of the scholarship fund should not be commingled with other assets, and scholarships should be paid out of the assets of the scholarship fund, not out of the assets of any other fund of the society. Assets, income, and expenditures of the scholarship fund should be reported in a separate section of the financial statement of the society.

Presentation for NN2

Mr. Balasa gave a virtual presentation for the National Network of Health Career Programs in Two-Year Colleges (NN2) on September 26, 2025. His topics were the Workforce Pell program and federal student loan funding for higher education programs with “low earnings outcomes.”

Presentation on Mandatory Reporting under Michigan Law

On February 12, 2026, Counselor Balasa gave a virtual presentation for the Wayne County Chapter of the Michigan Society of Medical Assistants on mandatory reporting of child abuse and neglect under Michigan law.

Revised PowerPoint Presentations

Mr. Balasa revised two of his PowerPoint presentations:

- Bylaws Basics for Associations; Protocol for Member/Delegate Assemblies
- The Authority of Association Governance Documents and Governmental Law; Quorums; Houses of Delegates and General Assemblies; Other Questions

These PowerPoints are available for use by state societies and local chapters.

Scope of Practice Collaboration with American Association of Nurse Practitioners

Government relations staff of the American Association of Nurse Practitioners (AANP) informed Counsel Balasa that an increasing number of state nurse practitioner associations are working to ensure that state nursing laws permit nurse practitioners (NPs) to delegate to medical assistants certain tasks, such as administering certain types of injections—including vaccines. AANP staff has been working with Mr. Balasa to respond to opportunities to clarify and solidify the authority of NPs to delegate to medical assistants with appropriate education and credentialing.

Presentation for Northwest Cook Chapter

On May 9, 2026, Mr. Balasa presented “Illinois Medical Assisting Practice and General Legal Principles” at Harper College in Palatine, Illinois, for the Northwest Cook Chapter of the Illinois Society of Medical Assistants.

Presentation on the Importance of Civility in Board and Committee Meetings

CEO Balasa gave a brief, virtual presentation on the importance of volunteers exhibiting patience, kindness, and civility in not-for-profit board and committee meetings. He urged

volunteers to make it a high priority to listen to the opinions of their colleagues and to address points with which they disagree only after they have understood and evaluated the points. Avoiding rash judgments should be accompanied by speech that is courteous, restrained, and characterized by self-control and kindness.

Presentation for Annual Conference of the Association of Test Publishers

Legal Counsel Balasa co-presented with Mark Carlos Franco, Esquire, “President Trump’s DEI Executive Orders and their Impact on Testing Bodies” at the Annual Conference of the Association of Test Publishers (ATP), March 2, 2026.

Council on Licensure, Enforcement, and Regulation—Regulation 101

Mr. Balasa wrote the following modules for the self-study course “Regulation 101” to be provided by the Council on Licensure, Enforcement, and Regulation (CLEAR):

- Module 3: Differing Legal Authority of Statutes, Regulations, Policies, and Disciplinary Decisions
- Module 7: Separation of Associations and Regulators
- Module 16: Regulatory Structures and Schemes
- Module 18: Philosophies of Regulation

“Public Affairs” Articles for *Medical Assisting Today*

The following “Public Affairs” articles were published in *Medical Assisting Today*: “The CMA (AAMA) Credential: Important Legal and Ethical Guidelines” (November/December 2025); “An Overview of Health Care AI Legislation Enacted in 2025” (January/February 2026); “Medical Assistants’ Role in Improved Cancer Care” (March/April 2026); “Addressing Human Trafficking While Navigating the Potential Pitfalls of EHRs” (May/June 2026); “Outcomes Measures for Accreditation of Education Programs and the Significance of NCCA Accreditation of Certification Programs in the Occupation/Profession” (July/August 2026).

Assisting a Medical Assistant Meeting the Requirements for MA-C Status Under Washington State Law

Legal Counsel Balasa assisted a credentialed medical assistant who was having difficulty getting her prior medical assisting education recognized by the Washington Department of Health (DOH) to obtain the Medical Assistant-Certified (MA-C) designation. Mr. Balasa wrote a letter to the WA DOH and the matter was resolved favorably for this credentialed medical assistant.

Presentation for the Wisconsin Society of Healthcare Risk Managers

Mr. Balasa presented “Unlicensed Personnel, Scope of Work/Practice, and Liability for Negligence” at the September 26, 2025, Annual Fall Conference of the Wisconsin Society of Healthcare Risk Management in Delafield, Wisconsin.

Video Promoting the Work of the AAMA in Combatting Fetal Alcohol Spectrum Disorders (FASD)

Mr. Balasa was interviewed by FASD United about the impact of the partnership of the AAMA and the University of Nevada-Reno Centers for Substance Abuse Technologies (CASAT) in educating medical assistants on helping providers and their patients reduce the incidence of

alcohol- and drug-exposed pregnancies. The video of this interview will be promoted by the FASD National Partners Network.

New American National Standards Institute (ANSI) Workcred Appointment

In September of 2025 Mr. Balasa was invited to serve as a member of the *Workcred* Credentialing Body Advisory Council. Note the following description:

Comprised of nationally-accredited credentialing bodies and workforce organizations, the *Workcred* Credentialing Body Advisory Council serves as a neutral body to advance the industry of certification and certificates... Formed in 2014 as an affiliate of the American National Standards Institute (ANSI), *Workcred's* mission is to strengthen workforce quality by improving the credentialing system, ensuring its ongoing relevance, and preparing employers, workers, educators, and governments to use it effectively.

I.C.E. Recognition

Mr. Balasa and his co-chair, Carla Caro, MA, ICE-CCP, were recognized by the Institute for Credentialing Excellence (I.C.E.) during National Volunteer Week for their leadership of the *I.C.E. 1100* Standards Revision Main Committee.

AAMA Audit Report

The Audit Report for the American Association of Medical Assistants for the fiscal year ending June 30, 2025 (FY 2025), was conducted by Constabile & Steffens, PC, Certified Public Accountants. Total Revenue for FY 2025 was 6,542,654. Total Expenses were 5,826,749. Excess revenue over expenses was 715,905. Net Assets at the beginning of FY 2025 were 12,332,142. Net Assets at the end of FY 2025 were 13,048,047.

Presentation for Federation of State Massage Boards Summit

Counsel Balasa gave an April 24, 2026, presentation entitled "A Rebuttal to *The Licensing Racket* and Arguments that Licensing Boards Can Employ Against Deregulation" for the *Summit* of the Federation of State Massage Therapy Boards.

CAAHEP Planning and Development Committee and Outcomes Task Force

CEO Balasa is continuing to serve on the Commission on Accreditation of Allied Health Education Programs (CAAHEP) Planning and Development Committee, the CAAHEP Outcomes Task Force, and as Chair of the CAAHEP Bylaws Committee.

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.

Presentation of the Healthcare Leaders Association-Virginia Annual Conference

Mr. Balasa will present “CMS Reimbursement for Patient Navigation: How Medical Assistants Can Provide Reimbursable Patient Navigation Services” October 6, 2026, for the Annual Conference of the Healthcare Leaders Association (HLA) of Virginia. He has also submitted a speaking proposal on the same topic for the HLA of the Pacific Northwest and of Arizona.

AAACN Poster Submission

Counselor Balasa submitted an academic poster to the American Academy of Ambulatory Care Nursing (AAACN) entitled “Determining Medical Assistants’ Legal Scope of Work.” It was selected for presentation for AAACN’s inaugural *Virtual Summit: Excellence in Motion*, which will be held on Thursday, October 1, 2026.

Scope of Practice Presentation for the California Society of Medical Assistants

Mr. Balasa presented a virtual session on medical assistants’ scope of practice under California law for the California Society of Medical Assistants April 19, 2026.

Presentation for the National Board for Certification in Occupational Therapy (NBCOT) Leadership Forum

Mr. Balasa will give a virtual presentation “Safeguarding Credentialing in a Deregulatory Climate: Arguments that Licensing and Certifying Boards Can Employ” for the NBCOT for its September 22 and 23, 2026, *Occupational Therapy State Regulatory Leadership Forum*.

LinkedIn Posts and Articles

Mr. Balasa continued to post weekly comments and articles to his LinkedIn account.

American Medical Association House of Delegates (HOD) Annual Meeting in Chicago

Mr. Balasa monitored the livestream of the American Medical Association (AMA) House of Delegates June 5 through 10, 2026.

Illinois Medical Assisting Legislation

A bill addressing medical assistants was introduced into the Illinois Senate. Mr. Balasa spoke with a legislative assistant of the bill’s sponsor and pointed out language in the bill that needed to be reconsidered. He was asked whether he would be willing to testify regarding this bill, and he said that he was.

Legal Assistance for the South Carolina Medical Association

The South Carolina medical assisting law underwent a major change on July 15, 2026. Legal Counsel Balasa has been receiving many questions about unclear provisions of the new law. He received the following from the South Carolina Medical Association:

Good morning, Mr. Balasa:

I hope you are doing well!

We are currently compiling a verified list of Medical Assistant education programs that meet the requirements for Certified Medical Assistant (CMA) eligibility—specifically programs accredited by CAAHEP, ABHES, or another U.S. Department of Education-recognized accreditor and which include coursework in anatomy and physiology, medical terminology, pharmacology, medical laboratory techniques, and clinical experience.

Given the American Association of Medical Assistants' national leadership in certification and program standards, I am kindly requesting your assistance in helping us identify:

1. A current list of accredited programs (online, hybrid, or in-person) suitable for South Carolina medical assistants seeking rapid certification.
2. Any recommended national directories or validation tools we should reference when guiding physicians and medical assistants.
3. Any upcoming or existing AAMA-supported programs that may assist MAs needing to complete certification before the statutory deadline.

Your guidance would be invaluable as our physicians are urgently seeking reliable pathways for their staff to become certified. Thank you in advance for your time and assistance. I would be grateful for any direction or resources you can share.

Rebecca Brannon, Chief of Staff
South Carolina Medical Association

Virtual CEU Presentation for the South Carolina Society of Medical Assistants

Mr. Balasa virtually presented "The Workforce Pell Program and South Carolina Scope of Practice Law" August 8, 2026, for the South Carolina Society of Medical Assistants.

Awarded the ICE-CCP Credential

Legal Counsel Balasa passed the Institute for Credentialing Excellence "Certified Credentialing Professional" examination and was awarded the ICE-CCP credential June 5, 2026.

Co-presentation at E-ATP Conference and Co-authorship of AI White Paper

Mr. Balasa will co-present "Candidate (Mis)use of AI to Falsify or Fabricate Records: What Testing Organisations Need to Know" at the European Association of Test Publishers (E-ATP) conference in Rome in October. This invitation is a result of his co-authorship of a white paper "The Use of Artificial Intelligence (AI) to Fabricate Medical Documentation: What Disability Accommodations Professionals Need To Know" that is in the process of being published.

Reviewer of Testing Accommodations Guidelines

Counsel Balasa is serving as a reviewer of a paper on testing accommodations guidelines for licensing and certification programs under the Americans with Disabilities Act (ADA) and other laws.

American Association of Medical Assistants® (AAMA)
Report of the Executive Director
For the Period Ending September 2026

It is an honor to present my first report to the House of Delegates as Executive Director of the American Association of Medical Assistants (AAMA). Since joining the organization at the end of January 2026, my primary focus has been listening, learning, building relationships, and positioning the association for long-term success. During this time, I have attended meetings of the Board of Trustees (BOT), Continuing Education Board (CEB), and Certifying Board (CB), participated in committee and volunteer leadership meetings, attended the Mid Regional Conference in Wisconsin and connected with past AAMA presidents to better understand the rich history and traditions of our association. I have also represented AAMA at external healthcare and association management conferences to strengthen relationships and explore opportunities that advance the medical assisting profession.

Strategic Planning and Member Engagement

One of the most significant initiatives undertaken this year was the development and launch of a comprehensive membership survey designed to better understand member priorities, educational needs, and professional challenges. The survey results are being used by our volunteer leaders and staff to inform strategic planning discussions and to help shape the future direction of the AAMA. These findings have already contributed to strategic planning conversations with volunteer leaders and will continue to guide organizational decision-making in the coming year. In June, I facilitated a strategic planning discussion at the Board of Trustees meeting focused on identifying opportunities for organizational growth, member value, and long-term sustainability. The insights gained from these discussions have informed the AAMA's strategic priorities and initiatives.

Strengthening Organizational Operations

An important part of my first several months has involved evaluating AAMA operations and identifying opportunities to improve efficiency and effectiveness. This work has included comprehensive reviews of operational contracts, meetings with vendors and partners, and assessment of key business processes.

Several operational improvements have already been implemented, including accounting and budgeting procedures, realigning the mailroom operations internally, and implementing opportunities for staff to connect with and share information.

Technology and Innovation

Recognizing the increasing role technology plays in both association management and healthcare, AAMA introduced an Artificial Intelligence (AI) policy for staff and volunteer leaders and implemented the licensed Microsoft Copilot platform to support productivity and responsible innovation. These efforts are intended to ensure that AAMA remains forward-thinking while maintaining appropriate governance and operational standards.

Certification, Education, and Industry Research

To better understand the experiences of our members and credential candidates, I participated as

a "secret shopper" in the CMA (AAMA) examination process. This firsthand experience provided valuable insight into the candidate journey and opportunities for continuous improvement.

Additionally, AAMA collaborated with students from the Western Governors University School of Business to conduct a competitive analysis of continuing education and certification offerings. This work will help inform future discussions regarding educational programming, credentialing opportunities, and the association's value proposition to members and employers.

Governance and Leadership

I have worked closely with volunteer leaders, staff, and advisors to strengthen governance practices and organizational effectiveness. This included a review of AAMA bylaws, ongoing discussions regarding governance procedures, and collaboration with leadership across the Board of Trustees, Continuing Education Board, and Certifying Board.

I have also benefited greatly from regular collaboration with AAMA leadership and staff as I continue to build a strong understanding of the organization, its culture, and its mission.

The enthusiasm, dedication, and professionalism of AAMA members, volunteer leaders, and staff have made my transition into this role both rewarding and inspiring. As we move forward, our focus will remain on strengthening member value, advancing certification, and continuing education opportunities, enhancing operational excellence, and developing a strategic framework that positions AAMA for continued growth and relevance. I look forward to working alongside you as we continue building a strong future for AAMA and the profession.

Annie Storey, MS, CAE
Executive Director

COMMITTEES' ***REPORTS***

American Association of Medical Assistants® (AAMA)
Report of the Annual Conference Committee
For the Period Ending September 2026

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 70th Annual Conference and Celebration will be held in Reno, Nevada, at the Grand Sierra Resort on Monday, September 14th – Thursday, September 17th, 2026.

A welcoming email was sent to the AAMA Annual Conference Committee members which included the charge of the committee. This chair also reminded the members about receiving volunteer forms that need to be signed and returned. The members were to send this chair their availability for a virtual meeting. This chair also requested some 2025 conference-critiquing information with a deadline of January 11, 2026.

Virtual Committee Meeting Summary – January 14, 2026

A virtual meeting was held on January 14, 2026, with all committee members invited to attend. During this meeting, the committee's charge and structure were reviewed, and members introduced themselves.

Committee members will contribute input or engage in discussions related to the specific events or conference areas they oversee, as well as participate when decisions require full-committee involvement.

The roles of the Board of Trustees (BOT) committee members were outlined. Brian Stimpson, CMA (AAMA), Chair of the CCETF, reviewed his responsibilities and functions connected to the annual conference. The CCETF works collaboratively with Nick Mickowski, Director of Continuing Education and staff liaison, and Heather Mendy, CMA (AAMA), Conference Continuing Education Chair. Sharon Scarborough, Board Services Manager, will serve as the primary hotel contact, with updates provided to the Conference Chair.

It was noted that full-committee meetings will not be necessary for every conference-related discussion, as each member is responsible for different aspects of the event. Heather Mendy, CMA (AAMA), who serves as the Conference Education Chair, was excused from the meeting due to an unexpected work commitment. In her absence, the chair explained Mendy's responsibilities, which include coordinating with the House of Delegates (HOD), arranging a Honor Guard and a National Anthem singer, and overseeing conference operations such as room monitors. Additionally, CCETF Chair Brian Stimpson outlined CEB expectations for the hosting state, emphasizing responsibilities related to conference education, including securing and managing speakers.

The chair, along with conference committee members, AAMA staff, MSC, CCETF Chair Stimpson, and members of the CEB, reviewed the AAMA 2025 conference survey in detail. The chair held a conference call with CEB Chair Ley to discuss survey findings and potential schedule adjustments. In addition, the chair met virtually with CCETF Chair Stimpson and continued communication through email to evaluate how best to meet attendee needs, support

2889 networking opportunities, celebrate the 70th AAMA Annual Conference, and address other areas
2890 of interest identified in the survey.

2891
2892 This information was shared with the full committee. Members responded positively and offered
2893 constructive suggestions for enhancing the conference experience.

2894 The chair reported that CASAT/FASD and Exact Sciences have confirmed they will present
2895 CEU sessions and exhibit. Communication continues with other partners about exhibiting and
2896 speaking. The chair reminded the committee that partnership speakers receive no honorarium
2897 and volunteer their time.

2898
2899 This chair stated that all conference requirements such as room setups, AV needs, and special
2900 requests—should be sent to Conference Liaison Scarborough, with this chair copied.

2901 Speaker-related information will be directed to CCETF Chair Stimpson, with copies to Nick
2902 Mickowski, Director of Continuing Education, and to this chair as needed. This process will
2903 streamline communication, reduce confusion, and prevent duplicate requests. CCETF Chair
2904 Stimpson also reported that all speaker bios are due May 1, 2026.

2905
2906 Registration, including onsite registration, will again be managed through CVENT. Positive
2907 feedback continues as new features are added each year. The committee will explore additional
2908 CVENT capabilities to further streamline and enhance the conference. Liaison Mickowski noted
2909 that CVENT has significantly improved conference efficiency, particularly in entering speaker
2910 and topic information for the initial registration launch. This saves considerable time, and the
2911 goal is for registration to go live in early March 2026. Exhibitors are being explored. Please
2912 email any prospective contacts' information to Board Services Manager Scarborough and copy
2913 this chair on the correspondence.

2914
2915 The chair reported positive feedback on the 2025 conference T-shirt. After discussion, the
2916 committee agreed to explore producing a T-shirt or sweatshirt for the AAMA 70th Annual
2917 Conference and Celebration. Marketing Director Mokijewski's team is finalizing the conference
2918 logo.

2919
2920 The chair also noted that feedback from the 2025 conference will be used to improve the 2026
2921 event and enhance the attendee experience. However, rising venue costs require a careful review
2922 of conference expenses. Committee members with additional input were asked to send their
2923 suggestions to the chair and copy Liaison Scarborough by January 22, 2026.

2924
2925 The chair reported ongoing communication with CCETF Chair Stimpson and Conference
2926 Education Chair Mendy through email, phone, and virtual meetings to address current
2927 conference needs. The three convened a virtual meeting to review information from the previous
2928 session, dedicating significant time to the conference agenda, speaker allocations, and strategies
2929 to enhance the overall event experience. While business components are essential, the committee
2930 remains committed to ensuring attendees have opportunities to network, visit exhibits, earn
2931 CEUs, and enjoy a meaningful conference. Schedule adjustments are underway and depend on
2932 feedback from the Grand Sierra. Additional updates will be provided as more information
2933 becomes available.

The chair reported ongoing communication via email, text, phone, and both formal and informal virtual meetings with MSC, AAMA staff and liaisons, Conference Committee members, the Continuing Education Chair and members, the CCETF Chair, and the CEB Chair. Registration fees for the 2026 conference will remain the same as last year. AAMA members staying at the host hotel may register at the full rate of \$450, with discounted pricing available through August 1, 2026. Beginning August 2, 2026, that registration rate will increase by \$50. A complete list of pricing categories is available on the registration page.

Host Hotel – Grand Sierra Resort and Casino

Hotel room costs are lower than in previous conference years. A Two Queen or One King Room (double occupancy) is \$169.59 per night, inclusive of room tax, tourism surcharge, and resort fee.

The resort fee includes:

- Complimentary access to the 24-hour Fitness Center and Pool
- Unlimited local and toll-free phone calls
- Two bottles of water and daily in-room coffee
- Beverage refrigerator and in-room safe
- Boarding pass printing at the Bell Desk
- 24-hour Business Center computer access (with room key)
- Valet and self-parking
- Roundtrip airport shuttle service
- Virtual guest service assistance
-

At the time of booking, the first night's room rate will be charged. Early check-in prior to the standard 3:00 pm arrival time may be available starting at 11:00 am for a \$30 fee plus tax.

All attendees, exhibitors, sponsors, and speakers are welcome to take advantage of the AAMA room block rate. Reservations must be made by Friday, August 21, 2026 (midnight PT).

[Book your room at the Grand Sierra Resort and Casino](#)

CVENT registration and the hotel booking link went live on April 13, 2026, following resolution of initial hurdles, and an e-blast was sent to AAMA members the same day. The committee continues to explore additional CVENT features to further enhance the registration process. The approved main logo for the 2026 conference is now finalized.

Conference Schedule Updates

After reviewing attendee surveys from the past three years and consulting with MSC, the CCETF Chair, the Conference Education Chair, and conference liaisons, several schedule changes have been implemented to increase networking opportunities.

Key updates:

- CEU sessions are shortened to 90 minutes (1.5 CEUs each).
- Only two concurrent CEU sessions will run at a time, giving attendees more flexibility and time to connect.
- These changes will reduce the total number of CEUs available onsite.

Take-Home CEU Package

To offset the reduction in onsite CEUs, full-registration attendees will receive a take-home package of four pre-recorded CEU sessions totaling 6 CEU available after the conference. This ensures that delegates, alternates, leaders, and attendees who are pulled away for meetings or other obligations still have access to additional CEUs at their convenience.

Conference T-Shirt

The chair shared positive feedback regarding the 2025 conference T-shirt. After discussion, the committee agreed to commemorate the 70th Annual Conference and Celebration with a special-edition T-shirt. Marketing Director Mokijewski's team developed the design, priced at **\$25**, with pre-orders available through the CVENT registration site. T-shirts will be available for pickup at the conference.



Schedule Highlights

Based on attendee feedback, both the Welcome and 70th Anniversary Celebration and the President's Banquet will begin 30 minutes earlier than in previous years. Each morning will start with a Networking Breakfast, providing dedicated time for medical assistants, educators, and leaders to connect, engage with board members, reconnect with colleagues they see only at conferences, and build new professional relationships.

Exhibitors

Exhibitor spots are available for the 2026 conference. Packages are priced as follows: a two-day package is \$2,000 and a one-day package is \$1,000.

Monday, September 14, 2026:

Morning Exhibiting Hours: 9:00 AM – 11:00 AM | Lunch Break: 11:30 AM – 1:30 PM (optional exhibiting available) | Afternoon Exhibiting Hours: 1:30 PM – 5:30 PM | Dismantling (One-Day Exhibitors only): 6:30 PM

Tuesday, September 15, 2026:

Morning Exhibiting Hours: 9:00 AM – 11:00 AM | Lunch Break: 11:30 AM – 1:30 PM (optional exhibiting available) | Afternoon Exhibiting Hours: 1:30 PM – 5:30 PM | Dismantling (All Exhibitors): 5:30 PM

Sponsorship Opportunities are available during online exhibitor registration:

- Photo Booth Sponsor – \$500
- Lanyard Sponsor – \$1,000 - sponsored
- Drawstring Bag Sponsor – \$1,000 – sponsored

States are encouraged to support the conference through the following opportunities:

- Welcome and 70th Anniversary Celebration – \$500
- President's Banquet – \$800 (Sponsors may reserve one table for their state society; additional tables available for purchase at \$200 per table)

Campaign Advertising

Print advertising space was available in the Conference On-Site Program for candidates running for office or for recognizing leaders' contributions. Digital rotating banner ads are also available on the CVENT Conference App for \$300. Those interested in purchasing ad space or seeking more information should contact the AAMA Marketing Director.

AAMA Partnerships and Collaborative

SUN Bus will exhibit and provide a featured CEU session at no honorarium. CASAT/FASD will exhibit and present the CEU session "Improving Care for Individuals with an FASD: Guidance for Medical Assistants in Health Care Settings," also at no honorarium. Exact Sciences will exhibit and present the CEU session "Program to Educate, Empower, and Reach Communities (PEER): The Importance of Colorectal Cancer Screening," likewise at no honorarium.

Conference Education

CASAT offered several potential speakers from within their organization as well as contacts from the University of Nevada, Reno. Conference Education Chair Mendy, along with the committee, CCETF Chair Stimpson, and Staff Liaison Mickowski, Director of Continuing Education, have assembled a strong lineup of informative speakers for this year's conference. For more information visit [SUMMARY - 2026 AAMA Annual Conference](#)

Virtual Committee Meeting Summary – July 15, 2026

A virtual meeting invitation was sent to all committee members. Newly appointed Conference Continuing Education Co-Chair Dina Harrett, CMA (AAMA), attended, and CCETF Vice Chair Summer O'Neal, CMA (AAMA), was invited and participated.

The committee reviewed timelines and individual members' needs related to assigned events, AV requirements, room setups, and other logistics.

Conference Education Chair Mendy and Co-Chair Harrett provided updates, including securing a national anthem singer and noting that an Honor Guard is not yet confirmed. Liaison and Director of Continuing Education Mickowski shared updates on CEU topics and speakers, confirming 20 onsite sessions and 4 recorded sessions, with two speakers still needed and currently being secured, along with related deadlines.

The conference pin and charm were designed in response to attendee feedback requesting a return to a style similar to pins from previous conference years. After collaboration with Marketing Director Mokijewski, the design was finalized and approved by the BOT. Additional purchasable items are currently being explored.

The chair discussed new ways to elevate the conference experience. At the conclusion of the final CEU session, attendees are invited to gather for "***The Final Act: Celebrate, Connect, Continue.***" This new closing event is designed to wrap up the conference on a high note and build excitement for the 2027 conference.

Liaison Mickowski shared updates on discounts available at the Grand Sierra Resort. A list of participating shops and activities offering a 20% discount to conference badge holders includes

hotel retail stores and attractions such as Fun Quest, the Bowling Center, the Grand Bay Driving Range, and the White Rabbit Magic Theatre, among others.

Liaison Mokijewski provided exhibitor updates, noting that 13 of the 16 available exhibitor spots have been filled. Additional marketing efforts and targeted outreach to states surrounding Nevada are underway. An e-blast and social media reminders are also being issued regarding the upcoming early-bird registration discount ending August 1, 2026.

This chair, CCETF Chair Stimpson, and Conference Education Chair Mendy will continue communicating as needed to address ongoing conference requirements. As the event approaches, work is fully underway, with the coming months focused on finalizing all remaining details.

This chair will maintain consistent communication with Liaison Scarborough regarding conference-related matters, including the onsite schedule and this year's updates. Additional coordination with Executive Director Storey, President Thomas, and Vice President Bogar will continue as needed through email, conference calls, and virtual meetings.

This chair extends sincere appreciation to all committee members for their valuable input and contributions; each person plays an essential role in creating a successful conference experience. Special thanks are also given to CCETF Chair Brian Stimpson, CMA (AAMA); Conference Education Chair Heather Mendy, CMA (AAMA); Co-Chair Dina Harrett, CMA (AAMA); and Staff Liaison and Board Services Manager Sharon Scarborough for their continued collaboration and support as adjustments are made in preparation for the 2026 AAMA Annual Conference and 70th Anniversary Celebration.

Special thanks are also extended to Staff Liaisons Nick Mickowski, Director of Continuing Education, and Gina Mokijewski, Director of Marketing, as detailed work for the 2026 conference moves into full gear. The chair thanks all committee members in advance for their continued input and dedication in the days ahead.

Monica Case, CMA (AAMA), Chair

Members:

Candy Miller, CMA (AAMA)
Shirley Sawyer, CMA (AAMA)
Jane Seelig, CMA-A (AAMA)
Brian Stimpson, CMA (AAMA)
Heather Mendy, CMA (AAMA)

Staff Liaisons:

Nick Mickowski, Director Continuing Education and Membership
Gina Mokijewski, Director Marketing and Communications
Sharon Scarborough, Board Services Manager

American Association of Medical Assistants® (AAMA)
Report of the Awards Committee
For the Period Ending September 2026

The charge of the Awards Committee is to review 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 committee met virtually on December 11, 2025, January 6, March 18, April 2, May 6, June 16, and June 29, 2026. Other meetings are anticipated to complete all projects prior to the conference.

Because no information was available in the TEAMS folder from the previous year, this Chair reached out to Immediate Past President Case for guidance. Case provided valuable insight into the previous committee's accomplishments and helped identify a starting point for this Chair and committee.

This committee discussed their goals and ideas for the committee this year. They determined their priority was the Student Award. The application process was reviewed. This committee had concerns about the student essay using technology to assist in writing. This Chair tasked the team members to produce a new criteria/judging application. Chair Miller suggested they use the criteria from the other awards to assist them in this process.

The committee agreed that revising the Student Essay Award was more complex than expected. After careful consideration, the committee recommended not offering the award this year. This recommendation was based on low participation, lack of sponsorship, and the apparent increased use of AI in the writing of the essays. The committee also discussed the need for greater outreach to schools to help promote the award. In addition, members considered creating a new community service award for schools and students, with the goal of encouraging student involvement and supporting student membership and engagement.

At the Winter BOT meeting, the Student Essay Award was suspended due to low participation and the quality of applications received. The BOT also authorized the Awards Committee to explore developing a Community Service Award for program directors and students.

The committee reviewed the 2025 description, scoring criteria, and application form for the AAMA Community Service Award, then revised the description to align with the new award. The updated materials were sent to Director Sanks-Korenchan for mock-up and final review. The award, named the "Medical Assistant Student Group Excellence in Community Service Award," was approved by the BOT, posted on the AAMA website, and opened for 2026 submissions. The committee is enthusiastic about this new opportunity to increase student involvement.

The Awards Committee continues planning the 2026 Welcome Party. After reviewing ideas, the committee selected entertainment options and proposed giveaway items which were presented at

3157 the June BOT meeting. The committee wants the event to feel like a true celebration, without a
3158 specific theme. Several activities and prizes are planned for the evening.
3159

3160 As of this writing, the committee has not yet received award submissions for review. This Chair
3161 expects the review process to begin on July 25 and be completed by August 4. Winners will be
3162 announced on Monday evening during the Welcome and Awards event.
3163

3164 Throughout the year, Chair Miller communicated with MarCom Directors Mokijewski and
3165 Sanks-Korechan, as well as Board Services Manager Flynn, regarding award timelines, prizes,
3166 and related matters. This Chair appreciates their guidance, expertise, and support of the
3167 committee throughout the year.
3168

3169 The chair thanks the committee members for their input and dedication to the AAMA. She also
3170 thanks Staff Liaisons Miranda Sanks-Korechan and Gina Mokijewski, along with Board
3171 Services Manager Sharon Scarborough, for sharing their insights and providing information. In
3172 addition, she thanks President Virginia Thomas, CMA(AAMA), for attending the meetings and
3173 actively participating in the discussions.
3174

3175 Thank you for the opportunity to serve as chair of this committee and to work on behalf of the
3176 AAMA.
3177

3178
3179 Candy Miller, CMA (AAMA) Chair
3180

3181 Members:

3182 Sherry Bogar, CMA (AAMA)

3183 Monica Case, CMA (AAMA)

3184 Shirley Sawyer, CMA (AAMA)
3185

3186 Staff Liaisons:

3187 Miranda Sanks-Korechan, Director Communications & Managing Editor *MA Today*

3188 Gina Mokijewski, Director Marketing

3189 Sharon Scarborough, Board Services Manager
3190

**American Association of Medical Assistants® (AAMA)
Report of the Bylaws and Resolutions
For the Period Ending September 2026**

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 the previous Bylaws committee chair regarding the completed state bylaws review. All state bylaws were reviewed last year by the bylaws and resolutions committee members. Since the HOD had no mandated Bylaw changes this past year, all states are compliant and will remain on the three-year review plan unless there are mandated Bylaw changes in the HOD, or a state makes changes during their annual meetings. This Chair has reviewed any bylaws that were sent to the committee and deemed that all state societies are still in compliance. This Chair has looked at several different ways of making sure that state society bylaws are kept up to date with a rotating/monthly schedule. The chair looked at several different ways to do that and came up with the idea of doing a couple of states a month in alphabetic order. With this system there are only a few bylaws to review each month. As state societies change/update bylaws they can send them to the AAMA office and Bylaws Committee chair for filing until it is their month for review.

January

Alabama, Alaska, Arkansas

February

California, Colorado, Connecticut

March

Florida, Georgia, Hawaii, Idaho

April

Illinois, Indiana, Iowa

May

Kentucky, Maine

June

Massachusetts, Michigan, Minnesota

July

Missouri, Montana, Nebraska, Nevada

August

New Hampshire, New Jersey, New Mexico, New York

September

North Carolina, North Dakota, Ohio, Oklahoma

October

Oregon, Pennsylvania, South Carolina

3237 **November**
 3238 South Dakota, Tennessee, Texas, Utah
 3239 **December**
 3240 Virginia, Washington, Wisconsin
 3241
 3242 **Proposed Resolution and Bylaws:**
 3243 This chair, along with the committee, looked at the Bylaws and came up with the following five
 3244 Bylaws that needed to be changed to reflect the current practices. You can find the full proposed
 3245 Bylaw amendments in the delegates packet.
 3246
 3247 **PBA 26-01**
 3248 **Article IV: Constituent Societies, SECTION 2**
 3249
 3250 **PBA 26-02**
 3251 **Article IV: Constituent Societies, SECTION 7**
 3252
 3253 **PBA 26-03**
 3254 **Article X – Officers and Trustees: Terms of Office, Vacancy in Office Failure to Perform**
 3255 **Duties, Section 2B**
 3256
 3257 **PBA 26-04**
 3258 **ARTICLE XIII – Boards and Councils, SECTION 2A**
 3259
 3260 **PBA 26-05**
 3261 **Article XV – House of Delegates, Section 4B Meetings**
 3262
 3263 This chair along with the committee and Legal Counsel Don Balasa are working on a *How To*
 3264 *Guide for Proposing Bylaws Amendments*, that will hopefully help state societies have a better
 3265 understanding of how to correctly word a proposed Bylaw amendment.
 3266
 3267
 3268 Cameron Smith, BS, CMA (AAMA), CPC (AAPC), CRHCP (NARHC), HITCM-PP, PBT
 3269 (ASCP), Chair
 3270
 3271 **Members:**
 3272 Susan Marie Hawes, MBA, CMA (AAMA), RHIT, FACMPE
 3273 Stephanie Dawn Hodgins, CMA (AAMA)
 3274 Linda A. Vitzthum, CMA (AAMA)
 3275 Jeanette Tyler, BAS, CMA (AAMA)
 3276 Sandra Weir Williams, CMA (AAMA)
 3277 Pamela L Neu, MBA, CMA (AAMA)
 3278
 3279 **Staff Liaison**
 3280 Don Balasa, JD, MBA
 3281 Annie Storey, MS, CAE
 3282 Sharon Scarborough

American Association of Medical Assistants® (AAMA)
Report of the Documents Committee
For Period Ending September 2026

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

Staff Liaison Sanks-Korechan provided an updated spreadsheet with documents, review dates and website location to the team. Additionally, Chair Seelig created a spreadsheet indicating the location of all information and related documents on the website. A virtual meeting was held on 3/9/26 for document review prior to advancing documents through the completion process.

A tracking form was developed and used for following documents through the review process. Notification was sent to each AAMA Committee, Task Force, Strategy Team, and Board Chair listing the documents under their authority. They responded with editorial suggestions when needed.

The Certifying Board and Educators Collaborative Task Force removed the Sample Letter to Program Directors from the inventory.

The documents committee have completed their review of all assignments. The Life Membership Scoring Sheet has been approved by the committee and forwarded to the Awards Committee.

The following documents have been reviewed, edited and approved by the BOT:

- Chapter Management Guide
- Guide for State Societies to Convert House of Delegates to General Assembly
- Guidelines for State/Chapter Secretary
- Membership Manual
- New Chapter Check List
- State Management Guide
- State Society Travel Voucher
- Tip Sheet for Student Groups
- Volunteer Leadership application
- Volunteer Leadership Position Description

Chair Seelig would like to thank the committee members for all their thoughtful work as well as Miranda Sanks-Korechan and Sharon Scarborough for their support and assistance.

Jane Seelig, CMA-A (AAMA)

Members:

Candy Miller, CMA (AAMA)

Sandra Williams, CMA (AAMA)

Staff Liaison:

Miranda Sanks-Korechan, Director Communications & Managing Editor MA Today

American Association of Medical Assistants® (AAMA)
Report of the Editorial Advisory Committee
For the Period Ending September 2026

The Editorial Advisory Committee is charged with developing topics for “Medical Assisting Today” for Non-CEU articles in the following three categories: Quick Clinic, Practice Manager, and Educator Forum. Each member was assigned to submit three topics by each deadline. The category of topics requested was dependent on the current need for topics.

Deadlines for the assignments were December 10, March 10, and June 10. Members of the committee also reviewed articles for content before the articles were published in “Medical Assisting Today”. This Chair emailed all committee members a copy of the committee guidelines and the current Editorial Advisory form for use in submitting their topics. Additionally, the chair emailed reminders as deadlines were approaching and was available to answer questions about their assignments.

This Chair received topics for all deadlines. The list of topics received was:

- Precision Medicine and Genetic Testing: What Every Medical Assistant Should Know
- GLP1’s: After the Weight is Gone
- The Critical Role of Early Recognition and Intervention in Medical Emergencies
- Leveraging Data and Technology to Improve Patient Safety, Access, and Affordability in Healthcare
- Ethical Considerations
- Job Outlook: Understanding the job outlook for Medical Assistants
- Calls Impersonating Regulators and sophisticated phone scams
- Building A Resilient Healthcare Supply Chain: Preparing for the Next Public Health Crisis
- Workers Compensation
- Workplace Safety
- Supply Chain
- Patient Chart Navigation
- Concussion and Post-concussion symptoms
- How to balance home life and MA school successfully
- Recognizing and Dealing Effectively with difficult patients
- How to turn a MA externship into a job
- Uterine fibroids and heart disease
- Soft Skills & Communications in Students
- Dialysis
- Incontinence
- Pediatric anxiety depression
- March is MS Awareness Month
- Cultural Competency in Patient Care
- Growing into Leadership
- Soft Skills for Success

- 3375 • Teaching Medical Insurance Essentials for Medical Assisting
- 3376 • Cross-training staff within the office to manage staffing shortages.
- 3377 • Patient Chart Navigation
- 3378 • FMLA
- 3379 • How prior authorizations save money
- 3380 • Functional Medicine: How does it benefit the patient?
- 3381 • Pneumonia Vaccine: Which to give?

3382

3383 This Chair wishes to thank the members of this Committee for their work on this committee, as
3384 well as Miranda Sanks-Korechan for her assistance.

3385

3386

3387 Sandra W. Williams, CMA (AAMA), Chair

3388

3389 Amanda Harris, CMA (AAMA)

3390 Brandi Gaumer, CMA (AAMA)

3391 Katja Stine, CMA (AAMA)

3392 Karla Hunter, CMA (AAMA)

3393 Erica Arends, CMA (AAMA)

3394 Dawn Sexton, MBA, MSML, CMA (AAMA)

3395 Danielle Bodoh, CMA (AAMA)

3396

3397 Staff Liaison:

3398 Miranda Sanks-Korechan, Director Communications & Managing Editor *MA Today*

3399

3400

American Association of Medical Assistants® (AAMA)
Report of Engagement and Outreach Committee
For the Period Ending September 2026

Engagement and Outreach Committee is charged with fostering interactive communication with active members and external engagement through coordinated efforts in social media, outreach, and other means. The Engagement & Outreach Committee will foster relationships and communications that strengthen the AAMA's presence, build relationships with key audiences (members, prospective CMAs (AAMA), employers, healthcare providers), and enhance the overall visibility and impact of the organization.

By request of President Thomas, the Engagement and Outreach Committee along with Leadership, Membership, and Marketing Committees and the Educators Collaborative Task Force were asked to work on a joint project celebrating the 70th Anniversary of the American Association of Medical Assistants. The idea that President Thomas gave us was the theme of Macy's Christmas Season of "Wonderful Stories Start Here". The chairs of the E&O, Leadership, Membership, and Marketing got together and came up with a wonderful idea to celebrate not only the legacy of this Association but to celebrate the future as well.

Links for the different ways to record stories were set up and those were distributed to the committees to send to their members, so that they could go ahead and start getting people lined up to record their stories or their "whys." It was also discussed to find the stories about the CMA Pin that went to space in a NASA mission, and the history of the CMA pin that was worn by Marcus Welby's assistant on the television show "Marcus Welby, MD."

The committee has been liking and sharing all the social media posts that MarCom has sent out over the past couple of months. It was requested by MarCom that each of the trustees, as they were going out on their rep assignments, take photos of the meetings and with the members. They were to send the photos to Sharon Scarborough, Board Services Manager, and she would forward to MarCom so that Felicia Eldridge, Social Media Manager, could compile all the photos into one large recap video to be posted to all social media feeds. This chair had a quick meeting with MarCom once all the Representatives Bureau assignments were completed to make sure that everyone knew where to send photos and to give the deadline so that the recap video could be made as soon as possible. This chair then met with the Engagement and Outreach Committee and asked that all members interact with the social media post to make sure that it was seen by as many members as possible.

Cameron Smith, BS, CMA (AAMA), CPC-A (AAPC), CRHCP (NARHC), HITCM-PP, PBT (ASCP), Chair

Members:

Christina Sears, CMA (AAMA)

Kelly Emmons, CMA (AAMA)

Dawn Sexton, CMA (AAMA)

Jeanette Tyler, BAS, CMA (AAMA)

3447 Aimee Quinn, CMA (AAMA)
3448 Staff Liaisons:
3449 Annie Storey, MS, CAE, Executive Director
3450 Felicia Eldridge, Social Media Manager
3451

**American Association of Medical Assistants® (AAMA)
Report of the House of Delegates Minutes Committee
For the Period Ending September 2026**

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.

Appreciation to all committee members for their diligent attention to detail and especially to Board Services Manager, Sharon Scarborough, for her dedication, professional competence and always ready assistance.

Jane Seelig, CMA-A (AAMA), Chair
Claire Houghton, CMA (AAMA)
Candy Miller, CMA (AAMA)
Aimee Quinn, CMA (AAMA)

Staff Liaison: Sharon Scarborough

**American Association of Medical Assistants® (AAMA)
Report of the Nominating Committee
For the Period Ending September 2026**

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 report reflects the status of the Nominating Committee's work as of its preparation date.

This Chair contacted the members of this committee via email, welcoming them to the committee. The committee members were encouraged to identify qualified individuals who 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, 2026. 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

The Nominating Committee met virtually on February 16, 2026. During the meeting, the committee chair reviewed the group's responsibilities, including:

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

Committee members were reminded that all discussions and reviewed information are strictly confidential. They were directed not to comment on confidential material or take any action that could influence others or reflect judgment on a nominee's character. Maintaining confidentiality and impartiality is essential to the integrity of the nominating process.

The committee reviewed the following documents:

- 2026 AAMA Officer and Trustee Nomination Form
- 2026 AAMA Officer Qualifications
- 2026 *Medical Assisting Today* Platform and Vital Stats Form
- Nominations Formal Email 2026–2027 Template

The committee approved a revised 2026–2027 nominations email template for outreach.

The Nominating Committee discussed and finalized a communication strategy for state society leaders. The approved nominations email template would be sent to state presidents, presidents-elect, and/or vice presidents and would include:

- Open officer and trustee positions
- Submission deadlines

- 3520 • A link to the AAMA website with the following materials:
 - 3521 ○ 2026 AAMA Officer and Trustee Nomination Form
 - 3522 ○ AAMA Officer Qualifications document
 - 3523 ○ *Medical Assisting Today* Platform and Vital Stats Form
- 3524 • Encouragement to run for the AAMA Board of Trustees
- 3525 • A request to share the information with state leaders and members.

3526

3527 The committee also agreed to support outreach through e-blast notices, Leaders Insider
3528 information, and reminders on the Leaders Facebook page.

3529

3530 This chair assigned committee members specific states and provided contact information for
3531 each assignment. Members were instructed to copy this chair on all correspondence. All
3532 communications were to be sent by March 16, 2026, and all assignments were completed as
3533 scheduled.

3534

3535 On February 18, 2026, a memorandum was sent to State Society Presidents, Presidents-
3536 Elect/Vice Presidents, and the AAMA Board of Trustees announcing the six elective offices
3537 open for 2026–2027. The memorandum included the AAMA Officer and Trustee Nomination
3538 Form, the AAMA Officer Qualifications Document, and the *Medical Assisting Today* Platform
3539 and Vital Stats Form. All submissions were due by May 1, 2026. The 2026–2027 open positions
3540 were:

- 3541 • Vice President (one-year term)
- 3542 • Secretary (two-year term)
- 3543 • Trustee - three positions (two-year terms) _
- 3544 • Trustee - one position (one-year term to complete a two-year term)

3545

3546 On April 14, 2026, this chair contacted the Nominating Committee and encouraged members to
3547 continue outreach to qualified potential candidates. Members were also asked to follow up with
3548 their assigned state societies to increase awareness of the open positions, required qualifications,
3549 and the May 1, 2026, submission deadline.

3550

3551 On April 27, 2026, this chair notified committee members that a memorandum would be sent to
3552 the 2025–2026 AAMA delegates and alternates, state presidents, presidents-elect, and/or vice
3553 presidents announcing the resignation of Speaker of the House Jane Seelig, CMA-A (AAMA),
3554 effective at the close of the 2026 conference. As a result, a one-year Vice Speaker position was
3555 added to the slate of candidates. A committee meeting was scheduled for Tuesday, May 26,
3556 2026, at 7:30 p.m. EST.

3557

3558 On April 28, 2026, this committee chair sent a memorandum to State Society Presidents,
3559 Presidents-Elect/Vice Presidents, and the AAMA Board of Trustees announcing that, following
3560 Speaker Seelig’s resignation, the Nominating Committee was reissuing the slate of candidates
3561 with seven elective offices open for 2026–2027. Speaker Seelig will complete one year of her
3562 two-year term, and Vice Speaker Quinn will succeed to the office of Speaker at the close of the
3563 2026 AAMA House of Delegates in Reno, Nevada. Therefore, an election for Vice Speaker will
3564 be held at the 2026 House of Delegates to fill the remaining year of the current two-year term.
3565 The seven open offices for 2026–2027 are:

3566 • Vice President (one-year term)

3567 • Secretary (two-year term)

3568 • Vice-Speaker (one-year term to complete a two-year term)

3569 • Trustee-three positions (two-year terms)

3570 • Trustee- one position (one-year to complete a two-year term)

3571

3572 An e-blast was sent to all AAMA members reminding them of the open officer and trustee

3573 positions and the May 1, 2026, nomination deadline. The message included:

3574 • A link to downloadable Volunteer Leadership Position Descriptions, pages 31–38,

3575 outlining role responsibilities and time commitments.

3576 • Reasons to serve.

3577 • The AAMA Officer Qualifications document.

3578 • Encouragement for members who are not yet eligible to use the AAMA Officer

3579 Qualifications document as a leadership-development guide for future Board of Trustees

3580 service.

3581

3582 The Nominating Committee met virtually on May 26, 2026. During the meeting, this chair

3583 reviewed all submitted candidate documents and explained the Candidate Evaluation Form,

3584 which committee members were to complete for each candidate. Evaluations were due by May

3585 31, 2026. Next steps included notifying candidates and announcing the open positions and

3586 qualified candidates.

3587

3588 The committee discussed the importance of giving AAMA members opportunities to hear from

3589 candidates before the House of Delegates to promote transparency and member engagement in

3590 the election process. After discussion, the committee approved the following:

3591

3592 • Virtual Meet the Candidates sessions:

3593 ○ Thursday, **August 13, 2026**, at 9:00 p.m. EST

3594 ▪ Candidates will share information about themselves.

3595 ▪ A memorandum will be sent to AAMA members with the date,

3596 time, and calendar invitation.

3597 ▪ The session will be recorded, and a link will be provided for

3598 members unable to attend.

3599 ○ Saturday, **August 29, 2026**, at 12:00 p.m. EST

3600 ▪ This session will include a noninteractive candidate question-and-

3601 answer format.

3602 ▪ A memorandum will be sent to AAMA members with the date,

3603 time, calendar invitation, and instructions for submitting questions

3604 to the Nominating Committee chair.

3605 ▪ The session will be recorded, and a link will be provided for

3606 members unable to attend.

3607 • Final in-person Meet the Candidates session:

3608 ○ Tuesday, **September 15, 2026**, during the AAMA 70th Celebration

3609 Annual Conference in Reno, Nevada.

3610 ○ The session will follow the close of the morning House of Delegates

3611 session.

3612 ○ The committee agreed to follow a format similar to the 2025 session.
3613

3614 This chair reminded committee members that if a candidate is nominated from the floor, the
3615 nomination paperwork must be submitted to the Speaker of the House, with a copy to the
3616 Nominating Committee chair, in accordance with the AAMA Bylaws no later than 30 days
3617 before the House of Delegates convenes. The deadline is **August 16, 2026**. The next committee
3618 meeting is scheduled for **July 27, 2026**, at 7:00 p.m. EST.
3619

3620 All committee members completed their assignments. On June 6, 2026, this chair notified all
3621 candidates who were deemed qualified.
3622

3623 On July 1, 2026, this chair notified all candidates that the official memorandum announcing their
3624 candidacy would be sent no later than July 3, 2026. Candidates were informed that they could
3625 begin campaigning after the announcement was issued. This chair also provided the AAMA
3626 Officer and Trustee Candidate Guidelines for campaigning, information on the virtual and in-
3627 person Meet the Candidates sessions, and details about required conference meetings, including
3628 the Board of Trustees Planning Session dates if elected.
3629

3630 On July 2, 2026, a memorandum was sent to State Society Presidents, State Society Presidents-
3631 Elect/Vice Presidents, and 2026 AAMA delegates and alternates, with copies to the AAMA
3632 Board of Trustees and Society of Past Presidents.

- 3633 • Announcing the slate of officers, trustees, and open positions.
 - 3634 ○ AAMA Vice President Jane Seelig, CMA-A (AAMA) 1-year term
 - 3635 ○ AAMA Secretary Shirley Sawyer, CMA (AAMA) 2-year term
 - 3636 ○ AAMA Vice Speaker Cameron Smith, CMA (AAMA) 1-year term
- 3637 There are four open Trustee positions for election:
 - 3638 ○ AAMA Trustee Erica Arends, CMA (AAMA) 2-year term
 - 3639 ○ AAMA Trustee Rachel Ozburn, CMA (AAMA) 2-year term
 - 3640 ○ AAMA Trustee Terri Slinker, CMA (AAMA) 2-year term
 - 3641 ○ AAMA Trustee Open 1-year term
- 3642 • Dates and times for the virtual and in-person Meet the Candidates sessions.
- 3643 • Instructions to submit candidate questions to this chair by August 17, 2026.
- 3644 • Candidates seeking nomination from the House of Delegates floor must submit all
3645 required paperwork to the Speaker of the House and the Nominating Committee chair on
3646 or before August 16, 2026.
3647

3648 AAMA members were notified of open positions, qualifications, and submission deadlines
3649 through e-blasts, memorandums, Leaders Insider updates, other official communications, and
3650 posts on the Leaders Facebook page.
3651

3652 This chair received several inquiries from individuals interested in running for the AAMA Board
3653 of Trustees. In response, this chair provided detailed information about eligibility requirements
3654 and the nomination process. Phone and in-person conversations were also held to help
3655 prospective candidates understand the qualifications and develop timelines for meeting them. All
3656 correspondence was handled promptly and thoroughly to ensure individuals received the
3657 necessary support and guidance.

3658
3659 Further updates will be presented during the Board of Trustees Open Session at the AAMA
3660 Annual Conference in Reno, Nevada.
3661
3662 This chair proactively contacted qualified AAMA members to discuss eligibility requirements
3663 and encourage them to consider running for the Board of Trustees. Communication and meetings
3664 with committee members will continue, and this chair remains available to AAMA members for
3665 questions or guidance regarding the nomination process.
3666
3667 This chair thanks the members of the Nominating Committee for their dedicated work and
3668 commitment to the process. This officer also extends appreciation to President Thomas and staff
3669 liaison Donald Balasa, JD, MBA, CEO and Legal Counsel, for their guidance and support, and to
3670 Board Services Manager Sharon Scarborough for her involvement and the many hours she
3671 dedicated to the process.
3672
3673
3674 Monica Case, CMA (AAMA)
3675 Nominating Committee Chair, 2025-2026
3676
3677 Members:
3678 Todd Lasher, CMA (AAMA)
3679 Rhonda Lazette, CMA (AAMA)
3680 Christina Sears, CMA (AAMA)
3681 Lisa Kianos, CMA (AAMA)
3682
3683 Staff Liaisons:
3684 Donald Balasa, JD, MBA, CEO and Legal Counsel
3685 Sharon Scarborough, Board Services Manager
3686

American Association of Medical Assistants® (AAMA)
Report of the Strategic Issues Planning Committee
For the Period Ending September 2026

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

In November 2025, this Chair and committee attended a presentation by Rebecca Walker, CMA (AAMA), BS on Strategic Issue Plans. This presentation was comprehensive and provided valuable guidance to the committee. Following the presentation, the committee discussed potential revisions to the current Strategic Issues Plan (SIP), Mission Statement, and Vision Statement.

On November 23, 2025, the committee met with the Board of Trustees to review the Strategic Issues Plan. The discussion was productive and resulted in several recommendations for revisions. On December 2, 2025, the committee reconvened to review and refine the SIP, Mission, and Vision statements.

In 2026 the revised Mission Statement and Vision Statement were presented to the Board of Trustees and approved. Our Mission and Vision Statements are on the AAMA website.

AAMA Mission

The mission of the AAMA is to empower medical assistants by advancing education, certification, advocacy, and scope-of-practice protection.

AAMA Vision

The AAMA vision is to be the leading voice for medical assistants, setting the standard for excellence in education and certification while championing their value and empowering them as an essential role within the health care team.

In January the SIP committee met with the Association's new Executive Director, Annie Storey, MS, CAE, to begin developing a three-to-five-year strategic plan. The committee engaged in a productive discussion focused on identifying key strategic priorities, establishing action plans and determining accountability for each initiative. Ms. Storey guided the committee through the process of refining the proposed goals and developing actionable implementation strategies. During the June 2026 BOT meeting, members of the Board of Trustees and attendees participated in collaborative discussions to identify priorities and opportunities for the AAMA. The ideas and feedback gathered during this session were used to develop the following three strategic goals:

1. Position the AAMA as the indispensable driver of career growth and professional value for medical assistants.
2. The AAMA is the trusted authority and central hub that connects knowledge, community, and professional engagement across the medical assisting profession.
3. Strengthen the long-term sustainability and influence of the medical assisting profession by expanding the pipeline, partnerships, and positioning of the field with healthcare.

3733 These strategic goals, along with their intended outcomes were presented to the Board of
3734 Trustees for discussion and approval.

3735
3736 This Chair extends sincere appreciation to the committee members and staff liaison for their hard
3737 work and dedication to the SIP committee. Your thoughtful comments, insightful questions, and
3738 all the valuable materials submitted for the benefit of the AAMA members are greatly
3739 appreciated. Thank you all for your commitment and contributions to the success of the Mission
3740 and Vision Statements and the goals of the AAMA. Thank you!

3741
3742
3743 Pamela L. Neu, CMA (AAMA), MBA

3744
3745 Committee Members:
3746 Jane Seelig, CMA-A (AAMA)
3747 Christa Smith, CMA (AAMA)
3748 Sandra Williams, CMA (AAMA)

3749
3750 Staff Liaisons:
3751 Annie Storey, MS, CAE Executive Director
3752 Don Balasa, JD, MBA, CEO and Legal Counsel
3753

***STRATEGY
TEAMS'
REPORTS***

American Association of Medical Assistants® (AAMA)
Report of the Leadership Development Strategy Team
For the Period Ending September 2026

This team is charged with developing the State Leaders Session at the 2026 AAMA Annual Conference in Reno, NV. This team is also responsible for deciding the direction, projects, and activities for the team while keeping in mind the AAMA Strategic Plan.

The LDST had their initial meeting on January 5, 2026. The team discussed projects for the coming year. The LDST will host two virtual Leadership Sessions to be held on Saturday March 7, 2026, and July 11, 2026. Paula Purdy, CMA (AAMA), asked a member of the Oregon Society to lead one of the sessions. Chair Sawyer will secure the other speaker. Each session was one and one-half hours.

The two Leadership virtual sessions had good attendance. The first session was held on March 7, 2026, and the topic was Stressed, Blessed, and Wellness presented by Richard Wilson. The second session was held on July 11, 2026, and the topic was Mentorship as a Leadership Strategy, and the speaker was Sarah Parker, BS, CMA (AAMA) from Oregon. Each of these sessions were awarded 1.5 CEU each.

The committee also hosted Brunch with the BOT and Townhall. The purpose of this was to bring together leaders from around the country together to have a general discussion on leadership topics. The questions discussed were “What leadership tools do you think are most beneficial in a leadership role and how do you encourage members to grow into leadership roles?” Sessions were on a Saturday and lasted one hour. There was a great response to these sessions, and the committee will hold the meetings quarterly. Leadership topics will be brought to the session for general discussion with all leaders.

Chair Sawyer asked each member of the LSDT to get at least four medical assistants a month to participate in the Celebrating 70 Years of Milestones--your adventure awaits.

The LDST discussed the Leadership Session for Conference. Several things were discussed. Participants were asked to bring with them a future leader to the session. The committee members were asked to come up with questions for discussion at the session.

January was Mentorship Month. This Chair submitted an article thanking all Leaders and Mentors for all they do and continue to do for members.

February 20th is National Leadership Day. This Chair worked with MarCom to thank all the AAMA leaders for the tremendous amount of work they do for the AAMA.

The LDST meets monthly to check on progress of these assignments and to have further discussion about the Leadership Session at conference.

This chair thanks the members of the LSDT for their time and commitment to the committee. She also thanks Board Services Manager Scarborough and Director Sanks-Korenchan for their

3800 invaluable assistance, CEO Balasa, Executive Director Storey, and President Thomas for their
3801 participation and leadership. This chair also thanks President Thomas for allowing this Chair to
3802 lead this committee.

3803

3804

3805 Shirley Sawyer, CMA (AAMA), CPC - Chair

3806

3807 Members:

3808 Erica Arends, CMA (AAMA)

3809 Julie Benson, CMA-AC (AAMA)

3810 Sherry Bogar, CMA (AAMA)

3811 Toni Coffman, CMA (AAMA)

3812 Starra Herring, CMA (AAMA)

3813 Summer O'Neal, CMA (AAMA)

3814 Paula Purdy, CMA (AAMA)

3815 Aimee Quinn, CMA (AAMA)

3816 Jane Seelig, CMA-A (AAMA)

3817

3818 Staff Liaison:

3819 Miranda Sanks-Korechan, Director Communications & Managing Editor *MA Today*

3820 Sharon Scarborough, Board Services Manager

3821 Donald Balasa, CEO and Legal Counsel

3822

**American Association of Medical Assistants® (AAMA)
Report of the Marketing Strategy Team
For the Period Ending September 2026**

The Marketing Strategy Team 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; developing ways to promote the AAMA to the public, including employers, health agencies, and medical assisting programs; and strengthening the marketing behind the AAMA and medical assisting profession.

In alignment with the AAMA Strategic Issues Plan, the committee has continued to work on these three primary areas of focus for the 2026 term:

- Redesign of Medical Assistant Recognition Week (MARWeek) 2026
- Refresh of the AAMA Merchandise program and evaluate possible Bling vendor
- The 70th Anniversary Joint Project in partnership with Engagement & Outreach, Membership and Leadership Committees and Educators Collaborative.

Committee Structure and Teams

The Chair divided the committee into teams to make better use of their time and strengths, allowing the committee to work on each goal simultaneously. Each team is comprised of three to five members, and several members serve on multiple teams. The Chair emailed all committee members, welcomed them to the committee, requested their attendance at a meeting on December 3, 2025, and sent a preference form to identify their strengths and areas where AAMA marketing could improve. At this meeting regular meetings were scheduled for the remainder of the year for the third Monday of each month.

- MARWeek Team
 - Lead: Natasha Geno
 - Members: Christy Oldenstadt, Leann Buneta, Christa Smith
- Merchandise Project Team
 - Lead: Claire Houghton
 - Members: Bailey Gourde, Kelly Emmons, Aimee Quinn
- Other Marketing Team
 - Lead: Christa Smith & Aimee Quinn
 - Members: Marsha Benedict, Tonya Milam, Aimee Quinn, Bailey Gourde, Kelly Emmons

Medical Assistant Recognition Week (MARWeek) 2026 Redesign

The MARTeam was tasked with revamping MARWeek by developing ideas to celebrate all week long, including ideas for expanding Beneplace national discounts, utilizing thank-you notes, and ensuring merchandise availability with a MARWeek logo.

The committee's first task was discussion about how to celebrate the day differently and ensure that the celebration is more visual. The committee was provided with some options about possible ways to celebrate; discussion of the packets from past years was a huge part of the discussion. The team evaluated the use of packets versus alternative celebration methods. Packets cost approximately \$32,000.00, take several weeks to print, and require significant staff

time to distribute. In addition, the office often has 1000-2000 left from years past. Therefore, the recommendation came from the committee to forgo the packets and explore other options for ways to celebrate MARWeek. This recommendation was sent to the BOT for the Winter BOT Meeting where it unanimously passed.

As the team continued their work a recurring concern presented itself. The committee discovered with Medical Assistant Recognition Week is affiliated with other organizations rather than with the AAMA. The AAMA was the founding organization of Medical Assistant Recognition Day, therefore, the committee challenged Marketing Director Gina Mokijewski with coming up with a way to specifically align MARWeek with the AAMA. After research was completed, it was discussed and approved to move forward with the AAMA requesting a trademark of the term "MARWeek" as well as the AAMA Logo. The goal of this incentive is to further align the AAMA with the profession and recognition of the medical assisting profession.

Additional MARWeek Celebration Tools that were evaluated include:

- **Jim Coleman Merchandise:** The committee was provided with a preview of the Jim Coleman merchandise and new campaign in June, with a projected release date of mid-to-late July. The platform offers print-on-demand capabilities using the AAMA logo, requiring two weeks to set up the online store once items and logos are approved. It requires no money down and provides an opportunity to earn a 10% revenue share on professional items that can remain available year-round.
- **Employee engagement platforms** were shared with staff for review to add on as a possible benefit for MARWeek. One platform allows for the purchase of gift cards for individual medical assistants to show appreciation for a job well done. There is still discussion on how these platforms will best work for the AAMA.
- MarCom will once again work with **Beneplace** to secure member-only discounts that will only be available to AAMA Members on the Beneplace platform.

In addition to all the other changes, the committee recommended that a slogan would be a great way to bring national attention to the week. If a strong slogan is produced it will help inspire dialogue, engagement, and awareness. The team provided the committee with two choices. "Honoring the Helping Hands" and "Educated, Equipped, and Empowered." The committee voted to move forward with "Educated, Equipped and Empowered" and this slogan was sent to the BOT for a vote at the Winter 2026 meeting. The slogan was approved by the BOT. The team also provided a list of national, regional, and local vendors to MarCom to reach out to discuss potential national recognition opportunities.

The Chair extends sincere appreciation to the MARWeek Team for its creativity, flexibility, and unwavering dedication throughout the redesigning process. Team members remained focused on the project's objectives, welcomed innovative ideas, and readily adapted to changing priorities. Their efforts were instrumental in developing a fresh, member-focused vision for Medical Assistants Recognition Week.

Merchandise Project

This team was responsible for evaluating the current AAMA merchandise availability and

seeking outside opportunities for engagement with national brands and vendors. The team was asked to do the following assignments:

- Reviewing the Kuhls website for current items and pricing.
- Creating a wish list of desired items along with target pricing.
- Researching a Bling vendor.
- Reviewing alternative vendors (such as Custom Ink, Vista Print, and local options) to compare similar items and document vendor names, prices, and URLs against Kuhls.

At the March Meeting this list was compiled and sent to Gina Mokijewski and Annie Storey to seek out possible vendors and options to expand our merchandise and brand. Based on the committee's suggestions, a new vendor was secured. This new vendor will be available at the 2026 AAMA Conference, and merchandise options will include embroidery items as well as "sparkle" items.

The Chair extends sincere appreciation to the Merchandise Project Team for their thorough research, detailed comparisons, and thoughtful recommendations. Their diligence in evaluating vendors, pricing structures, and merchandise options helped identify opportunities to expand the AAMA brand while providing members with products that reflect pride in the profession. Their efforts contributed significantly to securing additional merchandise offerings for the 2026 AAMA Conference and beyond.

Seventy-Year Project

By request of President Thomas, the Marketing Committee collaborated with the Leadership, Membership, and Engagement and Outreach Committees, alongside the Educators Collaborative Task Force, on a joint project celebrating the 70th Anniversary of the American Association of Medical Assistants. The initiative utilizes President Thomas's suggested theme, inspired by the Macy's Christmas Season: "Wonderful Stories Start Here." The committee chairs collaborated to develop an approach celebrating both the legacy and the future of the Association.

On November 23, the Chair attended a joint meeting with the chairs of the Leadership, Engagement and Outreach, and Membership Committees to align the direction and scope of the association's 70-year anniversary initiative. Consensus was reached on the overall approach, and a follow-up meeting with the Marketing and Communications (MarCom) Department was scheduled to ensure feasibility and alignment with available resources.

The project relied on collecting written submissions, document uploads, voice recordings, and video stories from members and students. The Marketing Committee Chair developed two surveys (one for members and one for students) and one for the collection of stories related to attending the AAMA Conference. These links were to help us collect these narratives, which were shared across social media, *Medical Assisting Today*, e-blasts, and the AAMA website. Communications Director Sanks-Korenchan offered an 800-number to assist members with sharing video or voice stories.

The project team (consisting of Cameron Smith, Aimee Quinn, Shirley Sawyer, Director Mokijewski, Director Sanks-Korenchan, and Board Services Manager Scarborough) met on several occasions, to review story collection progress. Ultimately, the team collected 78 stories from AAMA members and 6 from students. Members from the Marketing Strategy Team reached out to members on the submission list to help obtain photos and additional information. Director Mokijewski noted that MarCom would conduct direct outreach for pending "legacy" stories. The current list of stories was provided to the team, and Director Sanks-Korenchan will follow up with individuals to help build their narratives.

In July, the team also helped put together a call out for conference photos and old photos that will help document the AAMA history. They also developed prompts for additional stories to continue with on members favorite conference memories. Prompts for this story collection included some of the questions below:

- What is your favorite memory from a AAMA Conference?
- What conference item can you NEVER forget to pack?
- What song should be on the official 70th Anniversary Conference Playlist?
- What is your Conference personality?
 - Coffee First
 - CEU Collector
 - Swag Hunter
 - Photo Queen
 - Networking Pro
- If AAMA Conferences had a signature cocktail/mocktail, what would it be called?

The project team's goal is for this collection to be used to build excitement for the Reno conference while also developing marketing tools for future conferences. Additionally, this list will be shared with the Awards Team to help create an impactful, tailored song list for the Welcome and Celebration Party in Reno.

The Chair extends heartfelt gratitude to the members of the Seventy-Year Project Team and collaborating committees for their creativity, dedication, and shared commitment to preserving the AAMA's legacy. Through story collection, outreach efforts, and cross-committee collaboration, the team helped capture meaningful experiences that celebrate both the history and future of the Association. Their work will have a lasting impact on the 70th Anniversary celebration and the members whose stories make the AAMA extraordinary.

Future Committee Scope and Strategic Alignment

A strategic proposal was drafted to rename and refocus the committee to better align volunteer efforts with organizational needs. At the upcoming meeting on July 20, 2026, the committee will formally evaluate its current charge alongside a newly proposed charge, which suggests transitioning the group into the Professional Awareness and Advancement Committee. This restructuring aims to move the committee away from tactical marketing operations and execution, allowing members to focus on high-level strategy, credential promotion, and profession-wide visibility. In keeping aligned with the future AAMA Strategic Plan, formal recommendations regarding these structural changes may be made to the Board of Trustees following the committee's evaluation.

4004 Regular meetings were held with committee members and staff liaisons to maintain this
4005 wonderful momentum on all goals. During the term, several committee members were unable to
4006 continue serving due to personal commitments. However, this team's energy is truly inspiring;
4007 their deep passion, creative minds, and shared commitment to lifting the medical assisting
4008 profession shine through in every single idea they bring to the table. It is an absolute privilege to
4009 collaborate with such a dedicated and warm-hearted group of individuals who pour so much of
4010 their time and care into advancing the AAMA's mission.

4011
4012 The Chair extends her deepest, most sincere appreciation to each committee member for their
4013 invaluable contributions, brilliant ideas, and tireless dedication. Special and heartfelt thanks also
4014 go to Marketing Director Gina Mokijewski, whose incredible collaboration, guidance, and
4015 creative vision continue to be a true blessing to this team.

4016
4017
4018 Sherry Bogar, CMA (AAMA), CN-BC, Chair
4019 2025-2026 Marketing Strategy Team Chair

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4021 MEMBERS:
4022 Marsha Benedict, CMA-A (AAMA)
4023 Leanne Buneta, CMA (AAMA)
4024 Natasha Geno, CMA (AAMA)
4025 Claire Houghton, CMA (AAMA)
4026 Tonya Milam, CMA (AAMA)
4027 Christy Oldenstadt, CMA (AAMA)
4028 Aimee Quinn, CMA (AAMA)
4029 Christa Smith, CMA (AAMA)

4030
4031 STAFF LIAISON:
4032 Gina Mokijewski, Director Marketing
4033

American Association of Medical Assistants® (AAMA)
Report of the Membership Development Strategy Team
For the Period Ending September 2026

The Membership Development Strategy Committee had a busy and productive year focused on finding new ways to increase the value of AAMA membership while supporting both recruitment and retention efforts. Throughout the year, the committee worked closely with the Board of Trustees, AAMA staff, the Continuing Education Board, Marketing and Communications, and other volunteer leaders to develop ideas that benefit our members today while helping position the Association for future growth.

This year was centered around developing meaningful member benefits, creating new recruitment opportunities, strengthening employer engagement, improving communication with members, and providing additional resources that state societies and local chapters can use in their own membership efforts. Several committee recommendations were approved by the Board of Trustees and are now moving into implementation.

Committee Planning

The committee began the year by discussing goals and priorities that aligned with the Board of Trustees Strategic Plan. Before our first meeting, committee members completed a short survey to share their ideas, expectations, and areas of interest. This allowed everyone to have input from the beginning and helped shape the direction of the committee for the year.

As we moved through the year, meetings focused on open discussion, reviewing membership data, evaluating current trends, and identifying opportunities where the committee could make the greatest impact.

Membership Initiatives

One of the committee's biggest accomplishments this year was the development of three membership initiatives that were approved by the Board of Trustees.

Membership Renewal CEU Incentive

The committee wanted to create a renewal incentive that would provide immediate value to members while also addressing a common need during the recertification cycle. After considerable discussion, the committee recommended developing a brand-new 2 Administrative CEU focused on “Prior Authorizations and Documentation: What Medical Assistants need to know.”

Rather than simply offering an existing course, the committee felt this topic would provide practical education that medical assistants use every day regardless of their practice setting. Working with the Continuing Education Board, the course was designed to cover prior authorizations, insurance documentation requirements, and how quality documentation directly impacts patient care.

The committee also felt it was important that this resource continue providing value after the promotional period ends. As a result, plans were made for the course to become available in the

AAMA e-Learning Center following the membership incentive so it can continue benefiting members while helping offset development costs.

Non-Current Member Incentive

Another initiative focused on individuals who are not current members of the Association. Historically, members joining later in the year received fewer months of membership, which often became a barrier to joining during the summer. To address this, the committee proposed allowing individuals who join on or after July 1 to receive membership through the end of the following calendar year.

This simple change provides additional value to new and lapsed memberships while helping encourage membership during a time of year when applications have traditionally slowed.

Employer-Sponsored Membership Program

The committee also spent a significant amount of time discussing ways employers can become partners in supporting professional development.

After discussing potential options, the committee recommended a tiered employer-sponsored membership discount pilot. The goal is to encourage employers to purchase memberships for their employees while keeping the program affordable and protecting state society funding. Since receiving Board approval, work has begun with staff to develop marketing materials, employer resources, and online enrollment options to make participation as simple as possible. The committee believes this program has tremendous long-term potential, not only to increase membership but also to strengthen relationships with healthcare employers while promoting the value of credentialed medical assistants.

Membership Resources

Throughout the year, the committee recognized that many state societies and local chapters spend valuable volunteer time creating their own membership materials.

To help address this, committee members began developing a library of customizable recruitment resources that can be used throughout the Association. These materials include membership flyers, postcards, letterhead, student recruitment pieces, new CMA flyers, and other marketing resources that can easily be customized with state and chapter information. Our goal is to provide consistent AAMA branding while reducing the amount of work required by volunteer leaders, allowing them to spend more time recruiting members and less time creating marketing materials from scratch.

Communication and Member Engagement

This year the committee also explored new ways to communicate with members. Working with staff, additional SimpleTexting credits became available to promote Medical Assistants Recognition Week, membership renewal, and member educational opportunities. The committee reviewed the campaign results, which showed increased engagement, strong click-through rates, increased CEU purchases, and higher membership renewal activity immediately following the text campaigns.

These results reinforced the importance of meeting members where they are and continuing to explore communication methods that are timely, relevant, and effective.

Beneplace Member Discount Program

The committee continued discussions regarding the AAMA's partnership with Beneplace and ways to maximize the value of this long-standing member benefit. During one committee meeting, members were joined by Isabelle Bode, Partnership Success Manager with Beneplace, who provided an update on the program, reviewed available promotional opportunities, and discussed strategies to increase member awareness and utilization of the discounts available through the platform.

Committee members worked with Isabelle to explore new promotional campaigns, seasonal offers, and additional ways to highlight the savings available to AAMA members. Discussions also focused on improving communication surrounding the benefit, identifying opportunities to feature Beneplace in membership marketing materials, and incorporating the program into recruitment and retention efforts. The committee recognizes that many members are unaware of the extensive discounts available through Beneplace, making increased promotion an important opportunity to enhance the overall value of AAMA membership.

By continuing to strengthen the visibility of this established benefit, the committee hopes to encourage greater member engagement while reinforcing the tangible, year-round value that accompanies AAMA membership.

70th Anniversary Celebration

The committee was proud to support the Association's 70th Anniversary through the 70 Stories campaign.

Committee members worked with Marketing, Leadership, and Engagement & Outreach to encourage members and students to share stories of how AAMA has impacted their lives and careers. Members also helped promote the campaign through state conferences, QR code resources, and personal outreach.

These stories have become a meaningful way to celebrate our profession while reminding current and future members about the value of belonging to AAMA.

Looking Ahead

While the committee accomplished a great deal this year, many of these initiatives are just getting started.

As we move into the next year, the committee will continue supporting implementation of the Board-approved membership initiatives, expanding employer engagement efforts, completing recruitment resources for state societies and local chapters, identifying additional member benefits, and exploring new ways to recruit, retain, and engage members. Membership is much more than numbers—it is about creating value that encourages individuals to join, stay involved, and remain engaged throughout their careers. Every initiative this committee discussed this year was centered around that goal, and we look forward to building on that work in the coming years.

4170 **Acknowledgements**

4171 This chair would like to thank the members of the Membership Development Strategy
4172 Committee for their willingness to share ideas, ask questions, and dedicate their time throughout
4173 the year. This chair would also like to thank the Board of Trustees, AAMA staff, the Continuing
4174 Education Board, and the many volunteers who collaborated with our committee on these
4175 initiatives.

4176

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4178 **Aimee Quinn, BHA, CMA (AAMA)**

4179 Membership Committee Chair

4180

4181 **Committee Members**

4182 Jeanette Tyler, BAS, CMA (AAMA), Trustee

4183 Pam Neu, CMA (AAMA), Trustee

4184 Marsha Benedict, CMA-A (AAMA)

4185 Marisol Boatwright, CMA (AAMA)

4186 Michelle Butler, CMA (AAMA)

4187 Casie Cornelison, CMA (AAMA)

4188 Denise Jozefiak, CMA (AAMA)

4189 Virginia “Gini” Marquette, CMA (AAMA)

4190 Christina Sears, CMA (AAMA)

4191 Kit Stein, CMA (AAMA)

4192

4193 **Staff Liaisons**

4194 Don Balasa, JD, MBA, CEO, and Legal Counsel

4195 Annie Storey, MS, CAE – Executive Director

4196 Nick Mickowski, Director of Continuing Education and Membership

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TASK FORCES' REPORTS

**American Association of Medical Assistants® (AAMA)
Report of the Educators Collaborative Task Force
For the Period Ending September 2026**

The objective of this committee is to educate/encourage educators regarding the benefits of association with the AAMA, determine the resource needs of educators and where to locate information related to the profession, provide educators and their respective societies with tools to establish a state society educator group if there is none, and determine how to reach out to current and recent graduates to join AAMA.

The Educators Collaborative Task Force (ECTF) met on February 5, 2026. During the meeting, members discussed updating the Facebook page with a new banner and membership questions. Each committee member was asked to compile a list of five to ten questions for prospective educator members to answer when joining the group.

The task force also discussed opening the Facebook page to all medical assisting educators even if they were not AAMA members. It is a way to introduce them to the American Association of Medical Assistants (AAMA) and encourage dialogue between AAMA educator members and nonmembers. The goal is to demonstrate the benefits of AAMA membership and encourage educators to discuss membership opportunities with their students.

This chair emailed the Maxine Williams Scholarship application to all the task force members to distribute to their students.

May 7, 2026, the Task Force met virtually and discussed the new Educators Page on the AAMA website. This page is under “Medical Assisting” on the website’s main menu, and provides educators with a wealth of valuable resources including:

- The Importance of Medical Assisting Educators and Program Directors
- 2025 Medical Assisting Educator Compensation and Benefits Report
- LegalEye on Medical Assisting Blog
- CMA (AAMA) Scoop e-Newsletter
- State Scope of Practice Laws
- Occupational Analysis
- Educators Forum Articles
- CMA (AAMA) Pin Bulk Order Form
- CMA (AAMA) Certification Exam Content Outline
- And many additional educational resources

On June 18, 2026, the task force met to discuss the questions that had been placed on the Facebook page and to review member responses. Carolyn Fuller, CMA (AAMA), presented information regarding the Clinical Support Medical Assistant (CSMA) credential and addressed several common misconceptions surrounding the credential.

The committee also reviewed the proposed Facebook banner. Nine questions were developed for Facebook members to answer with the goal of identifying common interests and matching

educators with relevant discussion topics. However, Facebook allows only three membership questions to appear on the group's front page. Felicia Eldridge presented alternative questions designed to better meet the platform's limitations while still gathering meaningful information from prospective members.

Don Balasa was asked to revise the article, "FAQs Regarding Workforce Pell and the CSMA Credential," to provide educators with clearer guidance and a better understanding of how these issues may affect them. Mr. Balasa wrote an informative, concise article for all members. The Educators Collaborative Task Force will continue working to enhance the Facebook community by providing timely information, answering questions, and encouraging the exchange of ideas among medical assisting educators. Through these efforts, the task force hopes to keep educators informed about the many benefits and resources available through the AAMA while supporting excellence in medical assisting education.

This Chair extends sincere appreciation to the members and staff liaison for their hard work and dedication to the ECTF. Your thoughtful comments, insightful questions, and valuable materials submitted on behalf of our AAMA members are greatly appreciated. Thank you for your commitment and contributions to the success of this effort.

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

Committee members:

Julie Benson, CMA-AC (AAMA)
Lythia Bynum, CMA (AAMA)
Toni Coffman, CMA (AAMA)
Carolyn Fuller, CMA (AAMA)
Shawn Molnar, CMA (AAMA)
Lisa Nash, CMA (AAMA)
Mary Regis, CMA (AAMA)
Dawn Sexton, CMA (AAMA)
Cameron Smith, CMA (AAMA)
Diane Vander Ploeg, CMA (AAMA)

Staff Liaison:
Donald Balasa, JD, CEO, and Legal Counsel

American Association of Medical Assistants® (AAMA)
Report of the Partnership Task Force
For the Period Ending September 2026

The Partnership Task Force is charged with developing and researching partnership opportunities with outside allied health organizations, governmental agencies, corporations, and associations in which a partnership would provide mutual benefits while promoting the AAMA and its mission.

Partnerships are evaluated with consideration of the AAMA Mission Statement and Strategic Issues Plan to ensure alignment with organizational priorities and member value, and the advancement of the medical assisting profession.

2025–2026 Year-in-Review

During the 2025–2026 reporting period, the Partnership Task Force strengthened existing collaborations, expanded continuing education and podcast resources, and explored new strategic partnership opportunities. These efforts enhanced member educational offerings, increased organizational visibility, and promoted the role of medical assistants in preventive care, population health, and patient education.

The task force continued active engagement with established partners, including the Center for the Application of Substance Abuse Technologies/Fetal Alcohol Spectrum Disorders (CASAT/FASD), the American Cancer Society National Colorectal Cancer Roundtable (ACS NCCRT), the American Cancer Society HPV initiative, and the National Association of Health Unit Coordinators (NAHUC). Additional collaborative efforts included the American Medical Group Association (AMGA), SUN Bus, Exact Sciences, while exploratory discussions were initiated with the Department of Veterans Affairs (VA) and other organizations.

Key Accomplishments

- Expanded CEU and podcast offerings through partnership initiatives.
- Strengthened relationships with CASAT/FASD, ACS NCCRT, ACS HPV resources, and NAHUC.
- Advanced collaborative efforts with AMGA, SUN Bus, and Exact Sciences through conference participation, exhibits, speakers, podcasts, and educational programming.
- Submitted an application for the 2026 ACS NCCRT National Achievement Award.
- Explored new collaborative opportunities with Veterans Affairs, ASHHRA, the American Diabetes Association, and other healthcare organizations.
- Increased opportunities for professional visibility, conference engagement, and educational resources for medical assistants.

The following sections provide partnership summaries, updates, available member resources, and activities conducted during the 2025 - 2026 reporting period.

Current Partnerships and Collaborative Relationships

CASAT/FASD

AAMA continues its partnership with the Center for the Application of Substance Abuse Technologies (CASAT) at the University of Nevada, Reno School of Public Health to support healthy pregnancies and prevent fetal alcohol spectrum disorders (FASDs). The collaboration, known as the Medical Assistant Partnership for Healthy Pregnancies and Families (MAP), is funded by the CDC through 2026 and equips medical assistants with resources to improve maternal and child health outcomes.

CDC grant funding sustains the AAMA-UNR collaboration through 2026. Through MAP, medical assistants gain educational resources to better recognize prenatal alcohol and substance use, including polysubstance use involving cannabis, opioids, and stimulants. The partnership also builds stronger ties between public health and clinical settings, improving access to resources for children and families affected by FASDs. Emphasis is placed on educating medical assistants who collaborate with women of childbearing age, to help prevent alcohol-exposed pregnancies (AEPs) and FASDs.

Member Resources and Educational Opportunities Toolkit

- FASD Toolkit: *Enhancing the Role of Medical Assistants*
- Visit <https://fasdmap.org/fasd-toolkit-enhancing-the-role-of-medical-assistants/>
- Free CEUs

AAMA members may also access five free CEU courses through the AAMA e-Learning Center at <https://learning.aama-ntl.org/Public/Catalog/Home.aspx?Tab=Course&LearningTrackId=38>

- Alcohol Awareness for Healthcare Workers: Screening, Stigma, and Support for Families
- Cannabis Use in the Perinatal Period – 2,304 completions
- Ethical Considerations and Effective Strategies for Preventing Excessive Alcohol Use – 6,583 completions
- Stimulant Use and Reproductive Health Considerations – 7,023 completions

Additional Resources

- Walk & Talk educational materials for medical assistants
- Visit [Walk & Talks Archives - Medical Assistant Partnership for Healthy Pregnancies and Families](#) for a list of available resources

. Partnership Highlights

- CASAT will exhibit at the AAMA 70th Annual Conference.
- CEU presentation: *Improving Care for Individuals with an FASD: Guidance for Medical Assistants in Health Care Settings* (provided without honorarium).

ACS National Colorectal Cancer Roundtable (ACS NCCRT)

The ACS NCCRT works to reduce colorectal cancer incidence and mortality through coordinated leadership, strategic planning, and advocacy. The AAMA remains committed to supporting colorectal cancer screening and awareness initiatives through participation in the coalition and the 80% in Every Community pledge. This initiative has mobilized over 1,800 organizations committed to ensuring that 80% of eligible adults receive regular colorectal cancer screening. As a member of this national coalition of more than 230 member organizations, the AAMA is well positioned to support efforts to reduce CRC mortality and disparities nationwide.

Now entering its 30th year, NCCRT is ACS's longest-running national roundtable. On April 1, 2026, it launched its 2026 - 2029 Strategic Roadmap, a shared vision developed with members and partners nationwide—which will guide work across the CRC continuum with an emphasis on reducing mortality, addressing disparities, and advancing health equity.

Colorectal cancer (CRC) is the third most commonly diagnosed cancer among both men and women in the United States and the second leading cause of cancer-related death. It is now the leading cause of cancer diagnosis in adults under fifty.

ACS NCCRT's Priority Areas

- Mobilize national and community-level efforts that will lead to health equity across the CRC continuum.
- Improve timely action for early-age onset (EAO) CRC signs and symptoms.
- Support on-time screening as soon as eligible and continue participation per screening recommendations.
- Promote timely colonoscopy follow-up to positive (abnormal) non-colonoscopy tests.
- Identify areas to ensure timely initiation of quality CRC treatment.

Member Resources and Educational Opportunities

Educational Resources

- NCCRT website- <https://nccrt.org/>
- Colorectal Cancer Data Dashboard- <https://nccrt.org/colorectal-cancer-data-dashboard/>.
- Free CEUs
- Panel: Timely Colonoscopy Follow-Up to Positive (Abnormal) Non-Colonoscopy Tests - 9,919 completions
 - [Panel: Timely Colonoscopy Follow-Up to Positive \(Abnormal\) Non-Colonoscopy Tests](#) Free Course.
- Experts Discuss Colorectal Cancer Screening and Early Detection Barriers - 5,939 completions, ROI \$19,795 and first purchase 4/3/2023
 - [Experts Discuss Colorectal Cancer Screening and Early Detection Barriers](#)

AAMA-Related Podcasts

- Colorectal Cancer Screening Initiatives, Collaboratives, and Support Groups - 325 downloads
John Kennedy, MD, president of the AMGA Foundation and chief medical officer of AMGA, and cancer survivor Trevor Maxwell, founder and chief medical officer of Man Up to Cancer, were featured in a podcast released April 4, 2025
 - [Colorectal Cancer Screening Initiatives, Collaboratives, and Support Groups](#)
- Colorectal Cancer Care: A Physician, A Survivor, and the Medical Assistants Who Bring It All Together - 313 downloads
Joseph Perez, MD, AAMA Board of Trustees physician liaison, and cancer survivor Esther Hyun were featured in a podcast released November 26, 2025.
 - [Colorectal Cancer Care: A Physician, A Survivor, and the Medical Assistants Who Bring It All Together](#)

Partnership Highlights

- AAMA submitted a nomination for the 2026 ACS NCCRT National Achievement Award.
 - The AAMA was not selected; nonetheless, the colorectal cancer awareness resources and CEU opportunities developed for medical assistants to share with patients and families proved highly valuable.
- Colorectal cancer awareness initiatives generated significant engagement through CEUs, podcasts, and educational resources.
- Discussions continue regarding future NCCRT educational articles, podcasts, and CEU presentations.

American Cancer Society (ACS) and HPV Resources

The AAMA continues to share educational resources from the American Cancer Society to support cancer awareness, prevention, and early detection efforts.

Member Resources and Educational Opportunities

Cancer Information

- Excluding non-melanoma skin cancers, an estimated 2.1 million new cancer cases will be diagnosed in the U.S. in 2026, with more than 626,000 deaths - about 1,700 per day. Cancer rates in men are expected to rise significantly by 2050.
- Breast cancer remains the most common cancer among women, diagnosed more than twice as often as lung cancer (ranked second), while liver, melanoma, and uterine corpus cancers are also rising. Among men, prostate cancer leads incidence - diagnosed twice as often as lung cancer - and continues to climb. Oral cavity and pancreatic cancer rates are increasing in both sexes.
- Cancer Connections:
 - <https://www.cancer.org>

HPV Resources

- Human papillomavirus (HPV) can cause several cancers in adults, including cancers of the mouth and throat, cervix, vulva, vagina, penis, and anus. HPV is common and the CDC estimates about forty-three million people in the U.S. are currently infected, with roughly thirteen million new infections occurring each year among teens and adults. When given at the recommended ages, HPV vaccines can prevent more than 90% of HPV-related cancers
- HPV Education and Prevention:
 - <https://www.cancer.org/cancer/risk-prevention/hpv.html>

Key Messages

- HPV vaccination can prevent more than 90% of HPV-related cancers.
- Medical assistants play an important role in patient education, vaccine awareness, and preventive care discussions.

National Association of Health Unit Coordinators (NAHUC)

The AAMA maintains a reciprocity agreement with NAHUC to expand educational

opportunities for members. The organizations collaborate on continuing education presentations and promote participation in educational programs of mutual interest.

Member Resources and Educational Opportunities

Organization Information

- NAHUC Homepage:
 - <https://nahuc.org/>

Conference Information

- Annual Education Conference:
 - <https://nahuc.org/annual-education-conference/>

Member Benefit

- AAMA members may attend NAHUC educational offerings and earn AAMA CEUs when applicable.
- The AAMA maintains a reciprocity agreement with NAHUC

Additional Collaborative Relationships:

American Medical Group Association (AMGA)

The AAMA maintains a relationship with the American Medical Group Association (AMGA) to promote collaboration, professional networking, educational opportunities, and greater awareness of the medical assistant profession among healthcare leaders and medical group executives.

Partnership Highlights

- AAMA exhibited at the AMGA Annual Conference.
- This chair and AAMA President Thomas established connections with healthcare leadership, including John Kennedy, MD, President of the AMGA Foundation and Chief Medical Officer of AMGA.
- Discussions regarding future collaboration opportunities are ongoing.

SUN Bus

The AAMA maintains a collaborative relationship with SUN Bus to advance awareness of skin cancer prevention, early detection, and patient education.

Partnership Highlights

- SUN Bus exhibited at the AAMA 69th Annual Conference.
- Karen Nern, MD, MBA, FAAD, presented a CEU session for conference attendees.
- SUN Bus has confirmed participation as an exhibitor and educational presenter at the AAMA 70th Annual Conference in Reno, Nevada.
- Ongoing discussions focus on expanding educational opportunities and increasing mutual visibility.

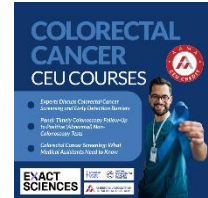
Exact Sciences

The AAMA continues its collaboration with Exact Sciences continues to advance through continuing education for medical assistants to promote colorectal cancer awareness, screening, and preventive care education.

Member Resources and Educational Opportunities

Free Podcast CEU

- AAMA-approved CEU Colorectal Cancer Screening: What Medical Assistants Need to Know with 2,699 course completions with first completion on March 31, 2026.
- Exact Sciences CEU podcast featuring Durado Brooks, MD, MPH, associate chief medical officer for screening at Exact Sciences, who brings decades of cancer prevention and early detection experience, including more than 20 years leading national screening initiatives at the American Cancer Society
- [Colorectal Cancer Screening: What Medical Assistants Need to Know](#)



Partnership Highlights

- Exact Sciences exhibited at the AAMA 69th Annual Conference.
- Exact Sciences will exhibit and provide a speaker at the AAMA 70th Annual Conference.
- Conference presentation:
 - *Program to Educate, Empower, and Reach Communities (PEER): The Importance of Colorectal Cancer Screening* without an honorarium.
- Educational resources were provided to support state representative outreach and colorectal cancer awareness efforts.
- The partnership continues to support preventive care initiatives and professional development for medical assistants.

Task Force Activities and Partnership Development

Throughout the 2025–2026 reporting period, the task force met regularly through virtual meetings and email communications to strengthen existing partnerships, explore new collaborative opportunities, promote educational resources, and support initiatives that advance the role of medical assistants. Key discussions and activities are summarized below.

Virtual Meetings and Key Activities

This chair sent task force members a welcome email outlining the task force's charge, purpose, and assigned Strategic Issues Plan recommendations, along with an overview of current AAMA partnerships and opportunities for building new relationships. The email included website links to help members understand AAMA's existing and potential roles, and members were asked to review the NCCRT materials ahead of the virtual meeting.

December 8, 2025, Virtual Meeting Highlights

The Partnership Task Force reviewed its charge, Strategic Issue Plan responsibilities, and current partnership portfolio. Members discussed the framework used to evaluate existing and prospective partnerships and reviewed opportunities to strengthen relationships with current partners.

Updates were provided regarding SUN Bus, Exact Sciences, AMGA, and ACS NCCRT activities. Members reviewed recent educational programs, conference participation

opportunities, podcast initiatives, and promotional activities designed to increase awareness of the medical assistant profession.

The task force also discussed future collaboration opportunities with nurse practitioners, ambulatory care nursing, and physician assistant organizations. Additional discussions focused on potential engagement with the American Diabetes Association and strategies for increasing outreach to healthcare employers and large health systems.

Members reviewed a new opportunity presented through a Department of Veterans Affairs inquiry and agreed to explore the potential for collaboration related to continuing education, marketing visibility, and resource sharing.

The task force also supported the submission of the AAMA's nomination for the 2026 ACS NCCRT National Achievement Award based on the organization's year-long colorectal cancer awareness efforts.

January 12, 2026, Virtual Meeting Highlights

During the January meeting, members reviewed progress on action items identified during the December meeting and received updates on current partnership initiatives.

An update was provided regarding the AAMA's successful submission of materials for the 2026 ACS NCCRT National Achievement Award. Members also reviewed progress related to Veterans Affairs discussions and opportunities for future collaboration. Initial conversations continued as the VA evaluated the proposal through internal leadership channels. SUN Bus partnership activities were reviewed, including plans for future conference participation and educational programming. Members also discussed outreach initiatives involving nurse practitioners, ambulatory care nursing, and physician assistant organizations for advertising opportunities.

The task force received updates regarding potential collaboration with the American Diabetes Association and the Muscular Dystrophy Association. Members reaffirmed their commitment to prioritizing educational and awareness-focused initiatives when evaluating new partnership opportunities.

Additional discussion focused on expanding professional relationships that could enhance member resources, continuing education opportunities, and visibility of the medical assistant profession.

March 26, 2026, Virtual Meeting Highlights

The March meeting focused on partnership progress updates, conference planning activities, and exploration of future collaborative opportunities.

Members reviewed ongoing work with SUN Bus, Veterans Affairs, Exact Sciences, and ACS NCCRT. Updates included conference participation plans, educational programming, CEU development, podcast initiatives, and collaborative awareness efforts.

The Exact Sciences collaboration has continued to expand through colorectal cancer screening education initiatives, including conference presentations, educational resources, and continuing education programming designed for medical assistants. Members also reviewed participation data related to colorectal cancer-focused educational offerings and podcasts.

The task force discussed advertising and outreach opportunities to increase visibility for the AAMA Annual Conference, medical assistants, and the medical assisting profession. Organizations, conferences, publications, and digital advertising platforms were evaluated to determine the most effective use of promotional resources. These included:

- NHA and AMT
- Nevada State Medical Association – Options include website and event advertising, featuring an event flyer posted one month in advance, a description with registration link, and inclusion in a weekly email blast reaching more than 2,900 subscribers.
- Social Media Platforms - Facebook, LinkedIn, and Instagram paid advertisements.
- Task force liaison will research and provide pricing for all options for task force consideration.

Following discussion, a majority of the task force members decided not to pursue previously considered advertising opportunities with several professional associations and instead shifted focus toward exploring opportunities with the American Society for Health Care Human Resources Administration (ASHHRA). This would include eblasts and the eNews Pulse Newsletter - an electronic newsletter reaching more than 9,000 healthcare HR professionals nationwide. Executive Director Storey will attend the ASHHRA conference on May 16-17, 2026, and provide feedback.

This strategy aligns with ongoing efforts to increase awareness of the medical assistant profession among healthcare employers and workforce decision-makers.

Status reports were also provided regarding outreach to:

- The American Diabetes Association- Task Force Member Williams received no response from her contact. Task Force Member Smith will reach out directly to the American Diabetes Association, as no contact information was available through the endocrinology office.
- The Muscular Dystrophy Association- Task Force Member Miller reported no recent updates but will continue to pursue the connection.
- Richard Wender, MD, the 2025 Lifetime Achievement Award recipient and Chair of Family Medicine and Community Health at the Perelman School of Medicine, University of Pennsylvania, as well as ACS NCCRT Chair Emeritus.
 - Presenter at the NCCRT Annual Meeting expressed strong appreciation for medical assistants and the key roles they play on the healthcare team, along with his high regard for the AAMA and its involvement with NCCRT.
 - Pursued for an article in the *Medical Assisting Today*, podcast, and CEU offering.
 - Liaison Scarborough reported that no response has been received to date and will continue outreach efforts.

4645 The meeting concluded with discussion of future partnership priorities and continued efforts to
4646 expand educational resources, conference engagement, and strategic relationships that support
4647 the profession.

4648

4649 **This chair shared the following updates with the task force via email:**

4650 Staff confirmed that Executive Director Storey will report back to the task force following the
4651 ASHHRA conference and are also researching advertising costs for the AAMA 2026 Conference
4652 with the Nevada State Medical Association (NSMA), NHA, and AMT, with findings to follow.

4653 The Partnership Task Force actively communicates with partners, stays current with initiatives,
4654 and provides collaborative feedback and information to AAMA members. The AAMA's
4655 recognition and marketing opportunities are vast as we reach a wide range of audiences.

4656

4657 This task force will continue to communicate through email and virtual meetings to promote the
4658 vital role medical assistants play in preventive care and population health management.

4659 Continued partnership development will focus on meaningful collaborations that support the
4660 goals and purpose of the task force and the AAMA while expanding educational resources,
4661 conference visibility, and member value.

4662

4663 This chair extends sincere gratitude to all task force members for their collaboration, innovative
4664 ideas, and the time dedicated to research, prompt email correspondence, and participation in
4665 virtual meetings.

4666

4667 Special thanks are extended to CEO Don Balasa, JD, MBA, Partnership Task Force Liaison,
4668 for his valuable contributions and legal counsel; Board Services Manager Sharon Scarborough
4669 for her dedication and enthusiasm; Executive Director Annie Storey, MS, CAE, for her insight
4670 and valuable contributions; MarCom staff for their promotion and branding support; and all
4671 liaisons for their research, follow-up, email responsiveness, and participation in conference calls
4672 and virtual meetings.

4673

4674 This chair also extends sincere appreciation to AAMA President Thomas for the opportunity to
4675 serve as chair of the Partnership Task Force.

4676

4677 Chair:

4678 Monica Case, CMA (AAMA)

4679

4680 Members:

4681 Candy Miller, CMA (AAMA)

4682 Christa Smith, CMA (AAMA)

4683 Sandra Williams, CMA (AAMA)

4684

4685 Staff Liaisons:

4686 Donald Balasa, JD, CEO, and Legal Counsel

4687 Sharon Scarborough, Board Services Manager

4688

BOARDS AND COUNCILS

**American Association of Medical Assistants® (AAMA)
Report of the Chair of the Certifying Board
For the Period Ending September 2026**

Current CMAs (AAMA)

As of July 1, 2026, there were a total of 65,818 CMAs (AAMA) as compared to 68,495 CMAs (AAMA) in January 2026. Of the 65,818 CMAs (AAMA), 18,491 hold AAMA membership.

2026 CMA (AAMA) Exam Content Outline

Following the 2025 Occupational Analysis of the medical assisting profession, the Certifying Board approved a new CMA (AAMA) Certification Exam content outline in November 2025. Work is underway with our testing partner, PSI, to update the exam item bank and materials according to this new outline.

The new content outline will take effect July 2027 for the CMA (AAMA) Certification Exam. Both the 2021 Exam Content Outline and the 2027 Exam Content Outline will be available on the AAMA website to facilitate a smooth transition. This approach provides program directors and educators with advance notice and ample time to review the upcoming changes and adjust curricula if needed.

Clinical Support Medical Assistant (CSMA) Credential and Exam

On May 12, 2026, the Certifying Board (CB) publicly announced the Clinical Support Medical Assistant (CSMA) credential to AAMA membership. This new credential, created in direct response to the Workforce Pell Grant Program, which went into effect July 1, 2026, is being developed as a limited-scope credential for individuals completing short-term, workforce-focused medical assisting programs which meet or exceed the length requirements of the Workforce Pell Grant Program.

The target launch of the CSMA Exam is approximately late 2027, pending completion of exam development. Updates will be provided as the project progresses.

IV add-on Micro-credential

The Certifying Board's initiative to offer an intravenous (IV) add-on micro-credential for CMAs (AAMA) is underway. To date, seven program proposals have been approved by the Certifying Board to provide the required IV curriculum. The following IV program applications have been approved by the CB.

1. Santa Fe Community College Medical Assisting Program, Santa Fe, NM
2. Central Oregon Community College Medical Assisting Program, Bend, OR
3. State Career College Medical Assisting Program, Chicago, IL
4. Lakeland Community College Medical Assisting Program, Lake County, OH
5. Terra State Community College Medical Assisting Program, Fremont, OH
6. Malcom X College Medical Assisting Program, Chicago, IL
7. Infusion Knowledge, Clearwater, FL
- 8.

The next mailing of Request for Proposals (RFP) will be sent to Program Directors in early Fall of 2026.

A current CMA (AAMA) who has successfully completed an approved course and submitted required documentation to the AAMA may display the designation CMA (AAMA), I.V., after their name to indicate the completion of an IV training program.

Self-Service Event-Based Testing

Self-Service Event-Based Testing is a testing model offered by PSI Services that allows groups of candidates, such as students from a medical assisting program, to test together at a scheduled location and time rather than individually scheduling appointments at PSI test centers. This model, recently approved by the CB, will be beneficial for program directors and students who have difficulty traveling to a test center or are unable to utilize live remote proctoring by allowing eligible students to test on campus. The model has been pilot-tested and is currently being evaluated. Additional information will be shared when the process is formally implemented following completion of testing and review.

Recertification

Between January 1, 2026, and June 1, 2026, a total of 5,444 CMAs (AAMA) have recertified. Of those, 4,776 were by Continuing Education (CE) and 668 were by exam.

Over 6,000 CMAs (AAMA) were due to recertify on June 30, 2026 from the COVID-19 certification extensions. Communications were increased to those with certifications expiring, including e-blasts, text messaging, voicemail drops, and targeted emails. As a result of these efforts, the Certification Department and Continuing Education Department have seen a noticeable increase in recertification applications.

Accreditation Maintenance and Renewal

The National Commission for Certifying Agencies (NCCA) annual report was submitted on May 28, 2026. The full reaccreditation application was submitted, and the second review of comments was received. Responses were submitted back. Final review by the Commission is underway.

Carolyn Fuller, CMA (AAMA), Certifying Board Chair

CB Members:

Carolyn Fuller, CMA (AAMA), Chair

Alisha Harris, CMA (AAMA), First Vice Chair

Diane Vander Ploeg, CMA (AAMA), MS, Second Vice Chair

Nikal Redwine, CMA (AAMA), MPA, RN, BSN, TFTC Co-Chair

India Simpson, CMA (AAMA), MHA, TFTC Co-Chair

Katherine Schoonhoven, CMA (AAMA), AAS, CPC

Provider Member:

Aribell McRae-Spencer, MSN, FNP-C

Public Member:

Beth Jaeger, SHRM-SCP

AAMA Staff Liaison:

Katie Gottwaldt, ICE-CCP, Director of Certification

American Association of Medical Assistants ® (AAMA)
Report of the Continuing Education Board
For the Period Ending September 2026

Chair Hawes directed the planning session of the Continuing Education Board (CEB) on November 7th and 8th, 2025 in Chicago, Illinois, in the Civic Opera Building meeting room where the AAMA Executive Office is located. The Chair and Vice Chair attended the meeting of the Board of Trustees (BOT) on November 9th and 10th. Chair Hawes submitted an email of resignation as Chair of the CEB due to personal reasons on December 31, 2025. After a vote by the BOT, Vice Chair Ley was appointed Chair of the CEB for the remainder of the 2025-2026 term.

Chair Ley headed the following board meetings:

- January 17, 2026 - Virtual
- January 31 & February 1, 2026 – Winter Board Meeting in Chicago, IL
- March 21, 2026 – Virtual
- April 25, 2026 - Virtual
- June 6 & 7, 2026 – Summer Board Meeting in Chicago, IL
- August 15, 2026 – Virtual (meeting scheduled at the time of this report)

President Thomas, Vice President Bogar, Chief Executive Officer and Legal Counsel Balasa, Executive Director Storey, and Director of Continuing Education and Membership Mickowski also attended all meetings prior to the submission of this report.

Chair Ley also attended the BOT winter and summer board meetings and several virtual meetings with the BOT as a whole or with its members.

The CEB released two (2) new educational products this year: *Identifying and Responding to Human Trafficking: The MA's Role* (10 CEUs) was released in January 2026 and *The Heart of the Matter: EKG Essentials for the Medical Assistant* (7 CEUs) was released in February 2026. Additional products are currently in development with anticipated release in early 2027. The board continues to research and review future trending topics to support the medical assistant's career advancement.

The CEB reviewed 2028 Conference and *Medical Assisting Today* topic suggestions at the winter and summer board meeting as well as several additional CEU topic suggestions for the 2026 conference by e-vote. The board members discussed and voted on each topic's suggestion to determine if the content was suitable for the conference or publication and would benefit the educational growth of the medical assistant.

The CEB voted to offer the following educational product discounts in 2025-2026: Medical Assistant Recognition Week – 5 administrative CEUs for 50% off and the Recert Ready Bundle (66 CEUs) for 26% off. They also voted to offer AAMA members only a monthly 30-40% discount on a course in the E-Learning center.

After discussing the value of the I.C.E. 1100 accreditation to educators for completing the ABC-

AHE course for their continuing education requirements, the CEB voted to discontinue the I.C.E. 1100 accreditation of the ABC-AHE due to the cost and effort to maintain.

Practice Leadership Task Force (PLTF)

Following the 2025 conference, Chair Novak and Vice Chair Houghton presented that the Practice Manager Task Force (PMTF) Forum at the annual conference had been declining in recent years and suggested there was a need to address the many leadership roles that play a part in the ambulatory setting. It was determined there was a need to be inclusive of all medical assistants in office leadership positions, not just the office manager position and the CEB voted to change the task force title from Practice Manager Task Force to Practice Leadership Task Force. The focus of this committee is to explore advanced education inclusive of all ambulatory leadership positions that will benefit more members who are currently in those leadership roles or inspiring to do so in the future.

The task force members submitted suggestions for educational topics for the 2028 Annual Conference as well as for articles in *Medical Assisting Today*, which will address a variety of office leadership roles. This task force continues to explore other possible practice leadership resources and/or events.

Conference Continuing Education Task Force (CCETF)

Members of CCETF, Leaders in Education and Practice (LEAP), PLTF, and Career Professional Development Task Force (CPDTF) submitted topic suggestions for the 2028 Annual Conference. The CCETF Chair and Vice Chair processed over 150 Conference topic submissions from 29 sources. The CEB then fully reviewed each topic and voted to approve, reject, or send back for rewrite and resubmission for next year. Those that were approved will be handed over to the 2028 Conference Education Committee to find speakers on these topics. Vice Chair O'Neal streamlined this process, saving many hours of processing time.

Chair Stimpson and/or Vice-Chair O'Neal attended the following meetings:

- CEB planning session on November 7-8, 2025
- CEB Winter BOT meeting in February 1st and 2nd
- CEB Summer BOT meeting on June 7th and 8th
- CCETF team virtual meeting on December 3, 2025
- CEB virtual meeting on TEAMS on January 17th, 3/21/26 and 4/25/26
- Special meeting of BOT and CEB called by President Thomas on 3/8/26.
- Virtual AAMA 2026 Conference Committee Meeting on 1/14/26, 2/22/26, and 4/23/26 via TEAMS.
- Attended several virtual meetings via TEAMS, phone calls, emails and text communications with Conference Chair and Conference Education Chair
- Special meeting of Conference leadership via TEAMS on 5/11/26
- Met with or communicated with multiple potential speakers at 2026 AAMA Annual Conference
- Communicated with CEB and Task Force members regarding Conference Topic suggestion submissions and deadlines
- Chair Stimpson communicated with Annual Host Conference Education Chair Heather Mendy, CMA (AAMA), on a regular basis via email, text, phone, and TEAMS meetings.

4868
4869 Leaders in Education and Practice (LEAP)
4870 The LEAP Committee meets monthly on Saturday mornings and communicates via email when
4871 needed. Chair Mooney and Vice Chair Regis worked with committee members to plan the
4872 Educator Preconference Workshop being held in Reno, Nevada. Topics that are relevant to
4873 educators in schools as well as practitioners in various ambulatory settings are scheduled. In
4874 response to past Preconference Workshop comments, the Educators Preconference Workshop
4875 will be from 12:00 to 4:00 pm instead of 12:00 to 5:00 pm.
4876
4877 The committee also worked on the plan for the LEAP Forum at the Annual Conference, where
4878 there will be a panel discussion on the topic “The State of Medical Assisting Education Today.”
4879 They are looking forward to sharing solutions to the current challenges facing educators.
4880
4881 The members of LEAP also submitted topic suggestions for the 2028 Annual Conference and
4882 *Medical Assisting Today*.
4883
4884 Career Professional Development Task Force (CPDTF)
4885
4886 The CPDTF committee is comprised of the CEB members as a whole. The duty of this task force
4887 is to provide AAMA members and non-members with Career Professional Development
4888 opportunities by way of advanced continuing education topics and completion certificates and/or
4889 digital badge achievement after completion and obtaining a passing score on the course
4890 quiz. The CPDTF developed the course *The Heart of the Matter: EKG Essentials for the*
4891 *Medical Assistant* which was released in February 2026. A new course outline was approved at
4892 the June meeting and is currently in production at the time of this report.
4893
4894 Chair Ley would like to thank Director Mickowski for his hard work, advice, and help whenever
4895 needed. She would also like to thank the CEB members for their dedication and hard work. They
4896 are a great team and all very appreciated.
4897
4898
4899 Clare Ley, CMA (AAMA)
4900 CEB Chair
4901
4902 Members:
4903 Casie Cornelison, CMA (AAMA)
4904 Claire Houghton, CMA (AAMA)
4905 Lisa Lee, CMA (AAMA)
4906 Francie Mooney, CMA (AAMA), ATA, PBT (ASCP)
4907 Deborah Novak, CMA (AAMA)
4908 Summer O’Neal, CMA (AAMA)
4909 Linda Prince, CMA (AAMA), COT, OCT-C
4910 Mary Elizabeth Regis, CMA (AAMA), MEd
4911 Brian Stimpson, Sr. CMA AAMA)
4912 Linda Vitzthum, CMA (AAMA)
4913

American Association of Medical Assistants ® (AAMA)
Report of the Judicial Council
For the Period Ending September 2026

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 2025-2026 association year.

Patty Licurs, CMA (AAMA), CPC – Chair
Deborah Novak, CMA (AAMA) – Vice Chair

Members:
Debby Houston, CMA (AAMA), CPC-I
Susan Hawes, CMA (AAMA), MBA, RHIT, FACMPE
Lisa Lee, CMA (AAMA)

Staff Liaison:
Donald Balasa, JD, CEO, and Legal Counsel

***PROPOSED
BYLAWS
ADMENDMENTS***

American Association of Medical Assistants® (AAMA)
Proposed Bylaws Amendment 26-01

Article IV: Constituent Societies, SECTION 2

Fiscal impact: None

Current Wording:

SECTION 2. When applying for affiliation, a society shall submit five copies of its Bylaws to the Chair of the Board of Trustees.

Proposed Wording:

SECTION 2: When applying for affiliation, a society shall ***email one copy of its Bylaws to the AAMA Executive Office.***

Rationale:

Multiple copies are not needed, as one copy is emailed to the AAMA Executive Office and will be distributed to the Bylaws Chair. Email is often better than regular mail because it is faster, more cost-effective and more convenient. Additionally, email supports quicker responses and more efficient communication for organizations and members alike.

American Association of Medical Assistants® (AAMA)
Proposed Bylaws Amendment 26-02

Article IV: Constituent Societies, SECTION 7

Fiscal impact: None

Current Wording:

SECTION 7. Constituent Society Bylaws must be in strict conformity with the mandated sections of the AAMA Bylaws: Name and Affiliation, Purpose, Organizational Policy, Membership, Dues, Reciprocity of Membership, Delegates/Alternates representation to the House of Delegates, Dissolution.

It will be the responsibility of the AAMA to notify Constituent Societies of any changes in those mandated Bylaws. It will be the responsibility of the Constituent Societies to make the mandated changes with copies of revised Bylaws returned to the AAMA within 30 days of notification. Any action taken by a State Society that is inconsistent with such mandated language shall be immediately null and void and of no effect.

Constituent Societies not in conformity with the mandated sections of the AAMA Bylaws 30 days prior to the opening of the AAMA House of Delegates shall not be allowed Delegate representation at the AAMA House of Delegates. Constituent Societies not in conformity with the mandated sections of the AAMA Bylaws shall be notified of the nonconformity 90 days prior to the opening of the House of Delegates.

Notification of the potential loss of Delegate representation shall be sent to the State Society's President, President-Elect, and Secretary- Treasurer (certified mail, return receipt requested).

For those State Societies that do not come into compliance at least 30 days prior to the opening of the AAMA HOD, notification of the loss of Delegate representation shall be sent to the State Society's President, President-Elect, and Secretary (certified mail, return receipt requested), and the AAMA President, Speaker of the House, Vice Speaker of the House, and the AAMA Chief Executive Officer by the Chair of the AAMA Bylaws Committee within five business days after the designated deadline.

Proposed Wording:

SECTION 7. Constituent Society Bylaws must be in strict conformity with the mandated sections of the AAMA Bylaws: Name and Affiliation, Purpose, Organizational Policy, Membership, Dues, Reciprocity of Membership, Delegates/Alternates representation to the House of Delegates, Dissolution.

It will be the responsibility of the AAMA to notify Constituent Societies of any changes

72 in those mandated Bylaws. It will be the responsibility of the Constituent Societies to make
73 the mandated changes with copies of revised Bylaws returned to the AAMA within 30
74 days of notification. Any action taken by a State Society that is inconsistent with such
75 mandated language shall be immediately null and void and of no effect.

76
77 Constituent Societies not in conformity with the mandated sections of the AAMA Bylaws
78 30 days prior to the opening of the AAMA House of Delegates shall not be allowed
79 Delegate representation at the AAMA House of Delegates. Constituent Societies not in
80 conformity with the mandated sections of the AAMA Bylaws shall be notified of the
81 nonconformity 90 days prior to the opening of the House of Delegates.

82
83 Notification of the potential loss of Delegate representation shall be sent to the State
84 Society's President, President-Elect/**Vice President**, and Secretary and/or Treasurer **by**
85 **email with read receipt**.

86
87 For those State Societies that do not come into compliance at least 30 days prior to the opening
88 of the AAMA HOD, notification of the loss of Delegate representation shall be sent
89 to the State Society's President, President-Elect, and Secretary (certified mail, return receipt
90 requested), and the AAMA President, Speaker of the House, Vice Speaker of the House, and
91 the AAMA Chief Executive Officer by the Chair of the AAMA Bylaws Committee within
92 five business days after the designated deadline.

93
94
95 ***Rationale:***

96
97 Email is often better than regular mail because it is faster, more cost-effective and more
98 convenient. Additionally, email supports quicker responses and more efficient communication
99 for organizations and members alike.

American Association of Medical Assistants® (AAMA)
Proposed Bylaws Amendment 26-03

Article X – Officers and Trustees: Terms of Office, Vacancy in Office Failure to perform Duties, Section 2B

Fiscal impact: None

Current Wording:

SECTION 2. Vacancies in office.

- B. In the event of a vacancy in any other office not provided for elsewhere in these Bylaws, the Board of Trustees may appoint a member to serve the unexpired term. This member shall meet the qualifications prescribed in Article VIII.

Proposed Wording:

SECTION 2. Vacancies in office.

- B. In the event of a vacancy in any other office not provided for elsewhere in these Bylaws, the Board of Trustees, **by majority vote**, may appoint a member to serve the unexpired term. This member shall meet the qualifications prescribed in Article VIII.

Rationale:

This is the current standard practice of the Board of Trustees, unless otherwise specified. A majority vote simplifies the process.

**American Association of Medical Assistants® (AAMA)
Proposed Bylaws Amendment 26-04**

ARTICLE XIII – Boards and Councils, SECTION 2A

Fiscal impact: None

Current Wording:

SECTION 2. Continuing Education Board.

- A. The Chair, Vice Chair and members of the Continuing Education Board shall be appointed by the Board of Trustees. Qualifications, term of office and number of members shall be in accordance with the Standing Rules and Policies and Procedures of the Continuing Education Board. The Chief Executive Officer or designee shall be a member ex officio, without vote.

Proposed Wording:

SECTION 2. Continuing Education Board.

- A. The Chair, Vice Chair and members of the Continuing Education Board shall be appointed by the Board of Trustees **by majority vote**. Qualifications, term of office and number of members shall be in accordance with the Standing Rules and Policies and Procedures of the Continuing Education Board. The **Executive Office Leadership** or designee shall be a member ex officio, without vote.

Rationale:

This is the current standard practice of the Board of Trustees, unless otherwise specified. A majority vote simplifies the process. Employees who constitute Executive Office Leadership shall be determined by the Board of Trustees.

**American Association of Medical Assistants® (AAMA)
Proposed Bylaws Amendment 26-05**

Article XV – House of Delegates, Section 4B Meetings

Fiscal impact: None

Current Wording:

Article XV – House of Delegates

SECTION 4. Meetings.

- B. Special meetings of the House of Delegates may be held at the call of the Board of Trustees by written notice mailed to each member of the House of Delegates at least 30 days in advance of such meetings. Notice will be sent by certified mail with return receipt requested.

Proposed Wording:

Article XV – House of Delegates

SECTION 4. Meetings.

- B. Special meetings of the House of Delegates may be held at the call of the Board of Trustees by written notice **sent** to each member of the House of Delegates at least 30 days in advance of such meetings. Notice will be sent by **email with read receipt**.

Rationale:

Email is often better than regular mail because it is faster, more cost-effective and more convenient. Additionally, email supports quicker responses and more efficient communication for organizations and members alike.

2026
DELEGATES
AND
ALTERNATES

American Association of Medical Assistants® (AAMA)

2026 Delegates and Alternates

(Current as of August 1, 2026 – Subject to later revision)

<u>State</u>	<u>Delegates</u>	<u>Alternates</u>
Alabama	Melanie Strain, CMA (AAMA) Crystal Gersh, CMA (AAMA) Brandy Owen, CMA (AAMA)	Regina Sadler, CMA (AAMA) Tracie Fuqua, CMA (AAMA) Ashley Faulkner, CMA (AAMA)
Alaska	Tamarack Brottem, CMA (AAMA) Tami Leroux, CMA (AAMA) Brenda M Cook, CMA (AAMA)	Kelly Lynn Mattson, CMA (AAMA) Lisa Nash, M.Ed., CMA (AAMA)
Arkansas	Melinda Rhynes, CMA (AAMA) Traci Noblett, CMA (AAMA)	
California	Virginia Marquette, CMA (AAMA) Nancy Lizon, CMA (AAMA) Cynthia Pilgrim, CMA (AAMA)	
Colorado	Chris Hollander, CMA (AAMA)	
Connecticut	Rebecca Parry, CMA (AAMA) Susan Klos, CMA (AAMA) Roxanne Sealing, CMA (AAMA)	
Florida	Marsha Benedict, CMA-A (AAMA) Christina Sears, CMA (AAMA) Mary Lou Allison, CMA (AAMA) Linda Vitzthum, CMA (AAMA)	
Georgia	Frankie Summerville, CMA (AAMA) Christina McRee, CMA (AAMA) Dean McRoberts, CMA (AAMA)	
Idaho	Colleen Conklin, CMA (AAMA) Jessica Hunter, CMA (AAMA) Holly Weatherston, CMA (AAMA)	Cindy Baird, CMA (AAMA) Angela Liffel, CMA (AAMA)
Illinois	Sharon Strutzenberg, CMA (AAMA) Lydnise House, CMA (AAMA) Donna Radzun, CMA (AAMA) Sara Baer, CMA (AAMA), CPC	
Indiana	Heidi Sisson, CMA (AAMA) Katja Stine, CMA (AAMA) Paula Schubert, CMA (AAMA) Dianne Wimsett, CMA (AAMA) Karen Pershing, CMA (AAMA) Brandi Gaumer, CMA (AAMA)	
Iowa	Jacquelyn Hellyer, CMA (AAMA) Valerie Hora, CMA (AAMA) Deanna Schnebbe, CMA (AAMA) Lucinda Wilson, CMA (AAMA) Katie Wahl, CMA (AAMA)	Lillian Young-Shillak, CMA (AAMA) Trina Menter, CMA (AAMA)

Kentucky	Jessica Moore, CMA (AAMA) Tracy Phillips, CMA (AAMA) Terri Slinker, CMA (AAMA)	Diana Carter, CMA (AAMA) Carol Gross, CMA (AAMA) Sharon Shannon, CMA (AAMA) Rina Weekley, CMA (AAMA) Joni Magness, CMA (AAMA)
Maine	Barbara Marchelletta, CMA (AAMA) Dominic Sanchez CMA (AAMA)	
Massachusetts	Dawn Jordan LeBlanc, CMA (AAMA) Patricia Mascis, CMA (AAMA) Abigail Carr, CMA (AAMA)	Christine Bergeron, CMA (AAMA) Sheryl Wales, CMA (AAMA) Ramona Sterczala, CMA (AAMA)
Michigan	Tracie Hardy, CMA (AAMA) Cathleen Marrow, CMA (AAMA) Cheryl Bouschor, CMA (AAMA) Mary Donahee-Rader, CMA (AAMA) Jaqueline Muske, CMA (AAMA)	
Minnesota	Denise Schmitz, CMA (AAMA) Courtney Mattson, CMA (AAMA)	
Missouri	Juanita Paul, CMA (AAMA) Rachel Clifford, CMA (AAMA) Vicki Sokolnik, CMA (AAMA)	Jennifer Griffith, CMA (AAMA) Eugenia Lynn Hinds, CMA (AAMA) Linda Langford, CMA (AAMA)
Montana	Joleen South, CMA (AAMA) Angela Wood, CMA (AAMA) Susan Cox, CMA (AAMA)	Morganna Holgerson, CMA (AAMA)
Nebraska	Terrie King, CMA (AAMA) Shannon Kibbee, CMA (AAMA) Angela M. Eytcheson, CMA (AAMA)	Barb Carter, CMA (AAMA) Stephani Richards, CMA (AAMA)
New Hampshire	Todd Magee, CMA (AAMA) Courtney Insley, CMA (AAMA) Jennifer Depiano, CMA (AAMA)	Sandra Monty, RMA Brian Stimpson, CMA (AAMA)
New Jersey	Janet Shriver, CMA (AAMA) Terry Silvia, CMA (AAMA) Patricia Ott, CMA (AAMA)	
New Mexico	Jennifer Benton, CMA (AAMA) Anita Gallegos, CMA (AAMA) Sara Lopez, CMA (AAMA)	
New York	Kim Battaglini, CMA (AAMA) Todd Lasher, CMA (AAMA) Cynthia Ryder, CMA (AAMA)	
North Carolina	Summer O'Neal, CMA (AAMA) Casie Cornelison, CMA (AAMA) Nancy Benckert, CMA (AAMA) Monica Barwick, CMA (AAMA) Heather Wines, CMA (AAMA) Maria VanDeBovenkamp, CMA (AAMA) Linda Metcalf, CMA (AAMA) Paula Cooke, CMA (AAMA)	Stephanie Hodgin, CMA (AAMA)

Ohio	Amy McMasters, CMA (AAMA) Laura Mizicko, CMA (AAMA) Mary Elizabeth Regis, CMA (AAMA) Rhonda Lazette, CMA (AAMA) Natasha Geno, CMA (AAMA)	Tabatha Gabbard, CMA (AAMA)
Oklahoma	Julie Benson, CMA (AAMA) Vicki Weigt, CMA (AAMA)	
Oregon	Paula Purdy, CMA (AAMA) Shawn Molnar, CMA (AAMA) Kelly Charland, CMA (AAMA) Leann Buneta, CMA (AAMA)	
Pennsylvania	Sherri Steele, CMA (AAMA) Kellie Humma, CMA (AAMA) Mary Louise Ninehauser, CMA (AAMA)	
South Carolina	Jack Hostettler, CMA (AAMA) Patty Licurs, CMA (AAMA)	
South Dakota	Susan Hookie, CMA (AAMA) Christina Anderson, CMA (AAMA) Chelsea Unzicker, CMA (AAMA)	Erica Arends CMA (AAMA)
Tennessee	Dawn M. Alter, CMA (AAMA) Katherine Rodgers, CMA (AAMA)	
Texas	Dina Harrett, CMA (AAMA) Claire Houghton, CMA (AAMA) Donna Gibbins, CMA (AAMA)	
Utah	Heather Mendy, CMA (AAMA) Suzette Johnson, CMA (AAMA) Crystal Spackman, CMA (AAMA)	
Virginia	Debby Houston, CMA (AAMA) Autumn Testerman, CMA (AAMA)	
Washington	Brandy Rohaly, CMA (AAMA) Francie Mooney, CMA (AAMA) Alison Vinson, CMA (AAMA) Patricia Hightower, CMA (AAMA) Sarah Kuzera, CMA (AAMA)	
Wisconsin	Danielle Bodoh, CMA (AAMA) Michelle Van Handel, CMA (AAMA) Kimberly Cooper, CMA (AAMA) Marissa Graveen, CMA (AAMA) Julie Flaatten, RN, CMA (AAMA) Marcia Renee Puetz, CMA (AAMA)	Veronica Hebert, CMA (AAMA) Kim Gropp, CMA (AAMA) Don Miller, CMA (AAMA)

***INFORMATIONAL
ONLY***

**American Association of Medical Assistants® (AAMA)
Report of the Maxine Williams Scholarship Committee
For the Period Ending September 2026**

The charge of the Maxine Williams Scholarship (MWS) Committee is to review applications and qualifications submitted to the AAMA on behalf of the Maxine Williams Scholarship and Crystal Coleman Scholarship.

The Chair was appointed by the 2025–2026 Board of Trustees (BOT). The BOT also approved the committee members: Monica Case, CMA (AAMA); Christa Smith, CMA (AAMA); Jeanette Tyler, CMA (AAMA); and Candy Miller, CMA (AAMA).

Crystal Coleman Scholarship

One of the committee's primary responsibilities during the year was administering the newly established Maxine Williams Scholarship in honor of Crystal Coleman, CMA (AAMA). A total of seventeen applications were received. Following review, six applicants were determined ineligible due to membership requirements and three applications were incomplete, leaving eight eligible candidates for consideration.

The committee met virtually on January 15, 2026, to review evaluation procedures and discuss the rubric process for scoring eligible applicants. Committee members independently reviewed all eight qualified candidates using the established scoring rubric. Following completion of the review process, the committee awarded four scholarships. Two recipients received AAMA ABCs resources, and two recipients received monetary awards to support their educational pursuits.

Crystal Coleman Scholarship Recipients

- Jessica Hunter, CMA (AAMA) — Tuition Scholarship Award
- Natasha Geno, CMA (AAMA) — Tuition Scholarship Award
- Nicole Waite, CMA (AAMA) — AAMA ABCs Award
- Kelsie Spetelunas, CMA (AAMA) — AAMA ABCs Award

Staff liaison Sharon Scarborough notified the recipients and coordinated recognition through AAMA marketing and communication platforms. The scholarship recipients were additionally recognized through AAMA social media channels and highlighted in *MA Today* magazine, further increasing awareness of educational opportunities available through the Association.

Maxine Williams Scholarship

Staff Liaison Sharon Scarborough distributed the Maxine Williams Scholarship application to all CAAHEP- and ABHES-accredited medical assisting programs. To increase awareness and promote participation, scholarship information was also shared with AAMA members and featured across AAMA social media platforms. The promotion campaign ran from early February 2026 through May 15, 2026.

The committee was pleased to receive 62 applications for consideration. Following an initial review, eight applications were determined to be ineligible due to missing required

4983 documentation or submission of an incorrect application, resulting in 54 eligible applicants
4984 advancing to the review process.

4985
4986 To ensure a thorough, fair, and objective evaluation, each committee member reviewed 11
4987 applications utilizing the established scoring criteria. Committee members carefully assessed
4988 each applicant's qualifications, accomplishments, and demonstrated commitment to the medical
4989 assisting profession.

4990
4991 The committee met on May 30, 2026, to discuss the results of the review process. During the
4992 meeting, each committee member presented their top two to three highest-scoring applicants for
4993 consideration. The discussion reflected the exceptional quality of the applicant pool and the
4994 committee's commitment to identifying deserving future medical assistants. Following review
4995 and discussion, the committee reached consensus that the top two applicants identified by each
4996 committee member would receive a scholarship award of \$2,000.

4997
4998 Maxine Williams Scholarship Recipients

4999	• Bilaal Alvi	Hunter Business School	Medford, NY
5000	• Sandra Coker	Bryant & Stratton College	Orchard Park, NY
5001	• Sharon Finco	College of Southern Idaho	Twin Falls, ID
5002	• Corey Finelli	Sussex Community College	Newton, NY
5003	• Jordan Harris	Gaston College	South Dallas, NC
5004	• Shania Harrison	ECPI University	North Charleston, SC
5005	• Crystal Parsons	College of the Albemarle	Elizabeth City, NC
5006	• Ashley Robles	Cape Fear Community College	Wilmington, NC
5007	• Natalie Rodriguez-Garcia	Tarrant County College	Fort Worth, TX
5008	• Briana White	College of Western Idaho	Boise, ID

5009
5010 The scholarship recipients were announced during the 2026 Summer Board of Trustees Meeting.
5011 One of the most memorable moments of the year occurred when an instructor of one of the
5012 scholarship recipients was present during the open session when the announcement was made.
5013 Witnessing the instructor's genuine excitement and pride for their student served as a powerful
5014 reminder of the impact these scholarships have not only on recipients, but also on the educators
5015 who help guide and inspire the next generation of medical assistants. For the committee, sharing
5016 in that moment was both meaningful and rewarding and reinforced the importance of continuing
5017 to invest in the future of the profession.

5018
5019 Following the committee's selection of scholarship recipients, Staff Liaison Sharon Scarborough
5020 contacted each winner, provided notification of their award, and coordinated the collection of all
5021 required documentation. This included requesting recipient headshots for promotional purposes
5022 and ensuring appropriate tax forms and scholarship-related documentation were completed and
5023 returned. Once all recipient information and photographs have been received, the scholarship
5024 winners will be recognized through *MA Today* magazine and featured across AAMA social
5025 media platforms, further highlighting their achievements and increasing awareness of the
5026 educational opportunities available through the Association.

5027
5028

5029 **Scholarship Application Review and Improvements**

5030 The committee conducted a comprehensive review of both the Maxine Williams Scholarship and
5031 Crystal Coleman Scholarship applications and eligibility requirements during the year. Initial
5032 review of the MWS application resulted in editorial recommendations and an agreement to
5033 further evaluate eligibility requirements to ensure alignment with all educational pathways
5034 leading to the CMA (AAMA) credential.

5035
5036 The committee met on April 29, 2026, to perform a more extensive review of both scholarship
5037 applications and supporting requirements. Several recommendations were developed for future
5038 revisions, including:

- 5039 • Updating language regarding administrative costs on both applications.
- 5040 • Clarifying that letters of reference should be professional references, including current or
5041 former employers, educators, and colleagues.
- 5042 • Expanding the Crystal Coleman application to provide additional details regarding the
5043 scholarship purpose and award.
- 5044 • Requiring documentation of educational costs within the Crystal Coleman application
5045 process.
- 5046 • Aligning Maxine Williams Scholarship eligibility requirements with all educational
5047 pathways to the CMA (AAMA) credential.

5048
5049 The committee also recommended development of an internal scholarship governance document
5050 to provide consistency in future scholarship administration. Suggested components include
5051 guidelines regarding monetary award distributions based upon the number and quality of
5052 applicants, as well as a formal review of scholarship applications, eligibility criteria, and scoring
5053 questions every two years to ensure continued relevance and fairness.

5054
5055 Additionally, the committee recommended to Executive Director Storey that all scholarship
5056 applications be transitioned to an online submission platform that would allow applicants to
5057 securely upload supporting documentation electronically. The committee further recommended
5058 development of a dedicated scholarship section within the AAMA website.

5059
5060 The committee believes these enhancements would significantly increase scholarship visibility,
5061 improve applicant accessibility, reduce staff time spent verifying and organizing application
5062 materials, and streamline the committee's review process. Moving to an electronic system would
5063 eliminate issues associated with photographed documents, incomplete submissions, and illegible
5064 handwriting while creating a more efficient and consistent experience for applicants, staff, and
5065 committee members.

5066
5067 Executive Director Storey will also research any legal considerations related to requesting
5068 financial need information or supporting financial documentation as part of future scholarship
5069 application processes. The committee believes this information will help ensure that future
5070 scholarship and advancement opportunities are structured in a manner that is both equitable and
5071 compliant with applicable legal requirements.

5072
5073 **Advancing the Profession**

5074 Throughout the year, the committee explored opportunities to strengthen the CMA (AAMA)

credential and support the continued advancement of the medical assisting profession. Discussions included the potential development of a grant program for eligible candidates taking the CMA (AAMA) Certification Exam. A preliminary grant concept honoring Donald Balasa was drafted, along with proposed eligibility criteria. In evaluating these and other future initiatives, the committee conducted research and reviewed the Maxine Williams Scholarship Articles of Incorporation in consultation with Executive Director Storey. This review determined that the current provisions may be limiting the use of MWS funds to individuals attending postsecondary institutions, prompting broader discussions regarding how the organization could support educational and future advancement opportunities while remaining consistent with its governing documents.

As a result of these discussions and findings, the committee recommended changing the corporation's name from the Maxine Williams Scholarship Corporation to the Maxine Williams Scholarship and Advancement Fund. The committee believed this change would more accurately reflect the organization's ability to support not only educational scholarships but additional initiatives that may align with the mission of the AAMA and the continued development of the medical assisting profession.

At the 2026 Summer Maxine Williams Board of Directors Meeting, the recommendation to rename the corporation to the Maxine Williams Scholarship and Advancement Fund was accepted. This strategic change creates opportunities to explore educational programs for medical assistants while remaining connected to and supported by the Association that inspired so many to begin their journey in medical assisting.

The committee is excited about the opportunities created through the establishment of the Maxine Williams Scholarship and Advancement Fund. The new structure provides a framework for expanding educational assistance, strengthening the value of future generations of medical assistants. By investing in educational advancement opportunities, the Fund can help ensure that medical assistants are supported throughout their careers while strengthening the profession that remains at the heart of the AAMA's mission.

The accomplishments of the Maxine Williams Scholarship Committee during the 2025–2026 year reflect the dedication, thoughtful collaboration, and shared commitment of its members to supporting future and current medical assistants. From administering scholarship programs and improving application processes to exploring new opportunities for education, the committee remained focused on strengthening the profession and ensuring that available resources continue to meet the evolving needs of medical assistants. The committee looks forward to continuing its work through the newly established Maxine Williams Scholarship and Advancement Fund, supporting educational achievement and investing in the future of medical assisting. The opportunity to assist individuals as they pursue the CMA (AAMA) credential and strengthen the profession remains both a privilege and a responsibility that the committee embraces enthusiasm.

The Chair extends sincere appreciation to committee members Monica Case, CMA (AAMA); Candy Miller, CMA (AAMA); Christa Smith, CMA (AAMA); and Jeanette Tyler, CMA (AAMA). Each member willingly shared their time, expertise, and passion for the profession throughout the year. Their commitment to reviewing applicants fairly, engaging in meaningful

5121 discussion, and working collaboratively to reach consensus was instrumental to the committee's
5122 success. The accomplishments outlined in this report are a direct reflection of their dedication
5123 and teamwork.

5124
5125 A special and heartfelt thank you is extended to Board Services Manager and Staff Liaison
5126 Sharon Scarborough. As a first-year chair, her guidance, knowledge, and organizational expertise
5127 were invaluable in helping the committee remain focused, organized, and successful throughout
5128 the year. Her partnership, encouragement, and commitment to the scholarship program were
5129 instrumental to the committee's achievements. The committee is stronger because of her
5130 collaboration and steadfast support.

5131
5132 The Chair would also like to recognize Executive Director Anne Storey for generously sharing
5133 her operational insight, institutional knowledge, and thoughtful recommendations for
5134 strengthening the scholarship program and its future opportunities. Her willingness to explore
5135 new ideas and provide strategic guidance contributed significantly to the committee's continued
5136 growth and long-term vision.

5137
5138
5139 Sherry Bogar, CMA (AAMA), CN-BC, Chair

5140
5141 Members:
5142 Monica Case, CMA (AAMA)
5143 Candy Miller, CMA (AAMA)
5144 Christa Smith, CMA (AAMA)
5145 Jeanette Tyler, CMA (AAMA)

5146
5147 Staff Liaisons:
5148 Sharon Scarborough

5149

***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, 2025, 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, 2025, 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
October 29, 2025

American Association of Medical Assistants, Inc.
STATEMENT OF FINANCIAL POSITION
June 30, 2025

ASSETS

CURRENT ASSETS

Cash and cash equivalents	\$ 14,165,129
Prepaid Expenses	<u>45,890</u>

Total Current Assets	<u>14,211,019</u>
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PROPERTY AND EQUIPMENT, NET	161,473
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OTHER ASSETS

Intangible Asset, Net	225,000
Right-of-use Asset	<u>468,467</u>

Total Other Assets	<u>693,467</u>
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Total Assets	<u><u>\$ 15,065,959</u></u>
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LIABILITIES AND NET ASSETS

CURRENT LIABILITIES

Accounts Payable and Accrued Expenses	\$ 554,958
Deferred Revenue	760,634
Lease Liability, Current	<u>39,386</u>

Total Current Liabilities	<u>1,354,978</u>
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LEASE LIABILITY, LONG-TERM	<u>662,934</u>
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NET ASSETS

Without Donor Restrictions	<u>13,048,047</u>
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Total Liabilities and Net Assets	<u><u>\$ 15,065,959</u></u>
----------------------------------	-----------------------------

The accompanying notes are an integral part of this statement.

American Association of Medical Assistants, Inc.
SCHEDULE OF ACTIVITIES AND CHANGES IN NET ASSETS
Year Ended June 30, 2025

	<u>Without Donor Restrictions</u>
REVENUE AND OTHER SUPPORT	
Membership Dues	\$ 1,563,327
Exam Fees	1,257,445
Recertification Application Fees	786,134
ABR - OE Courses	136,980
ABC - G Revenue	150,788
Other CE Revenue	1,730,319
CMA Today	50,095
Shipping Fees	33,680
Conferences	233,988
CASAT Donation	31,800
Miscellaneous Income	8,000
Interest Income	560,098
	<u>6,542,654</u>
Total Revenue and Other Support	
	<u>6,542,654</u>
EXPENSES	
Programs	3,221,223
General and administrative	2,488,613
Fundraising	116,913
	<u>5,826,749</u>
Total Functional Expenses	
	<u>5,826,749</u>
Increase in Net Assets	715,905
Net Assets - Beginning of the Year	<u>12,332,142</u>
Net Assets - End of Year	<u><u>\$ 13,048,047</u></u>

The accompanying notes are an integral part of this statement.

American Association of Medical Assistants
Balance Sheet Comparison
As of Jun 30, 2026

	Total	
	As of Jun 30, 2026	As of Jun 30, 2025 (PY)
Assets		
Current Assets		
Bank Accounts		
102000 Chase Checking-General	4,090,135.68	3,075,885.56
102017 ICD Securities Money Market	114,914.13	57,268.72
102018 ICD Securities CD's	11,481,974.00	11,031,974.00
Total for Bank Accounts	\$15,687,023.81	\$14,165,128.28

American Association of Medical Assistants

Fiscal Year 2027 Budget

July 2026 - June 2027

	<u>Budget</u>
Income	
427000 General CMA Today Income	500.00
427200 Advertising Income	5,000.00
435000 CMA Today Article Test Fees	24,000.00
Total 427000 General CMA Today Income	\$ 29,500.00
440000 General Fund Income	
400000 Dues Membership	1,485,000.00
410000 Non-ELC products	220,000.00
410120 Sponsorship Education Sessions	1,500.00
410200 Shipping Income- General	25,000.00
410600 ABR-OE fees	25,000.00
410700 ABR-OE courses	60,000.00
426100 Prof. Recog. Products	17,000.00
426110 Patient Navigator	40,000.00
427100 CMA Today Subscription	6,000.00
427110 Exam Prep Course	20,000.00
435100 Other ELC courses	1,000,000.00
435200 ABC Program Geriatrics	5,000.00
435300 ABC Program Pediatrics	12,000.00
435400 ABC Program Education	10,000.00
435500 Topics in Telemedicine	5,000.00
435600 ABC Practice Management	6,000.00
435700 Colorectal Cancer Screening	1,400.00
450200 Conference Registration Fees	180,000.00
450300 Conference Educ Programs	0.00
450600 Conference Advertising Inc	2,500.00
450610 Sponsorship Welcome and Awards	2,000.00
450620 Sponsorship Presidents Banquet	2,000.00
450700 Conference Exhibit Fees	24,000.00
456000 Ind.sponsor fees	100,000.00
485100 CASAT FASD	0.00
Total 440000 General Fund Income	\$ 3,249,400.00
480000 Interest Income	
480010 Interest Income General	310,000.00
Total 480000 Interest Income	\$ 310,000.00
Total Income	\$ 3,588,900.00
Expenses	
260360 Medical Law Monograph	0.00

260370 Medical Ethics Monograph	0.00
610000 General Fund Expenses	
500000 Staff Salaries- General	1,318,500.00
500030 Staff Salaries-Cont Education	528,000.00
510000 Payroll Taxes -General	95,439.05
510030 Payroll Taxes -Cont Education	0.00
520000 Group Insurance - General	187,617.89
530000 Misc Employee Benefits	9,000.00
540000 401K Retirement General	4,495.19
550000 Prof Staff Development-General	14,000.00
600310 Prof Service Texting Software	12,000.00
600320 Professional Speakers	10,000.00
600400 Auditors Fees - General	14,000.00
600500 Legal Fees	20,125.00
600700 Outsource Accounting-General	12,000.00
600800 Outsource Mailroom - General	0.00
600900 Prof Services - Communications	6,000.00
601000 Computer Maintenance Gen	150,000.00
601100 Prof Services - Cont Educ	60,000.00
601200 Prof Services - Conference	35,000.00
601300 Prof Services - BOT	10,000.00
601600 Prof Services-IT Michael Knight	75,000.00
602000 Website update/redesign expense	10,000.00
603100 Insurance General	18,488.76
610100 Professional Services-General	30,000.00
610110 Prof Services- Technology	67,340.00
610200 Professional Services HR	50,000.00
620100 Rent General	140,000.00
620700 Electricity - General	2,400.00
620810 Maintenance & Repairs General	4,000.00
620820 Merchandise Inventory & Set Up	7,500.00
621100 Telephone - General	19,000.00
650010 Postage - General	88,000.00
650200 Postage - Membership	18,000.00
650600 Printing - Membership	20,000.00
670010 Printing - General	2,500.00
670300 Printing - Communications	0.00
670600 Printing - Cont Educ	15,000.00
670700 Printing - Conference	28,000.00
670800 Printing - BOT	1,000.00
680100 Travel - General	65,000.00
680200 Travel - Cont Educ	43,360.34
680300 Travel - Conference	50,000.00
680400 Travel - BOT	60,000.00

680500 Travel Representative Bureau	7,000.00
680700 Travel - Planning Session	26,600.00
680710 Travel- HOSA	2,500.00
700100 Postage - CMA Today	93,500.00
702000 Printing -CMA Today	59,400.00
703000 Prof Services CMA Today	46,890.00
740100 Speakers Honorarium Conference	10,000.00
740400 Exhibit Expense-General	25,000.00
740500 CoNference Shipping	2,500.00
740600 Conference Advertising	10,000.00
740800 Hotel Expense - Conference	170,000.00
740900 Welcome Party-Conference	2,500.00
741700 Equipment Rental - Conference	7,500.00
741800 Office Supplies - Conference	12,000.00
741900 Conference Technology	64,500.00
910100 Depreciation - General	0.00
920110 Office Supplies-General	12,000.00
920200 Office Supplies-Communications	525.00
920610 Dues and Subscriptions-Gen	16,000.00
920700 Dues and Subscriptions-Comm	23,411.63
930010 Bank Charges - General	89,000.00
950110 Misc Expense - General	10,000.00
950300 Misc Expense - Conference	2,500.00
960800 ADA, EEOC, StateNet	32,000.00
Total 610000 General Fund Expenses	\$ 4,026,092.86
631000 ELC Expense	115,000.00
720000 Self Study Printing	0.00
721600 Printing - MARW	2,000.00
Total 720000 Self Study Printing	\$ 2,000.00
910000 Depreciation and Equipment	25,000.00
920500 Awards -Communications	1,800.00
920600 Dues and Subscriptions	2,500.00
Total 920600 Dues and Subscriptions	\$ 2,500.00
950100 Miscellaneous Expense	5,000.00
950101 Misc Expense - Cert	0.00
951100 Ill Ret Occ Tax Expense	500.00
Total 950100 Miscellaneous Expense	\$ 5,500.00
952000 CAAHEP Expenses	7,000.00
Total Expenses	\$ 4,184,892.86
Net Operating Income	-\$ 595,922.86

ADDITIONAL INFORMATON



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:

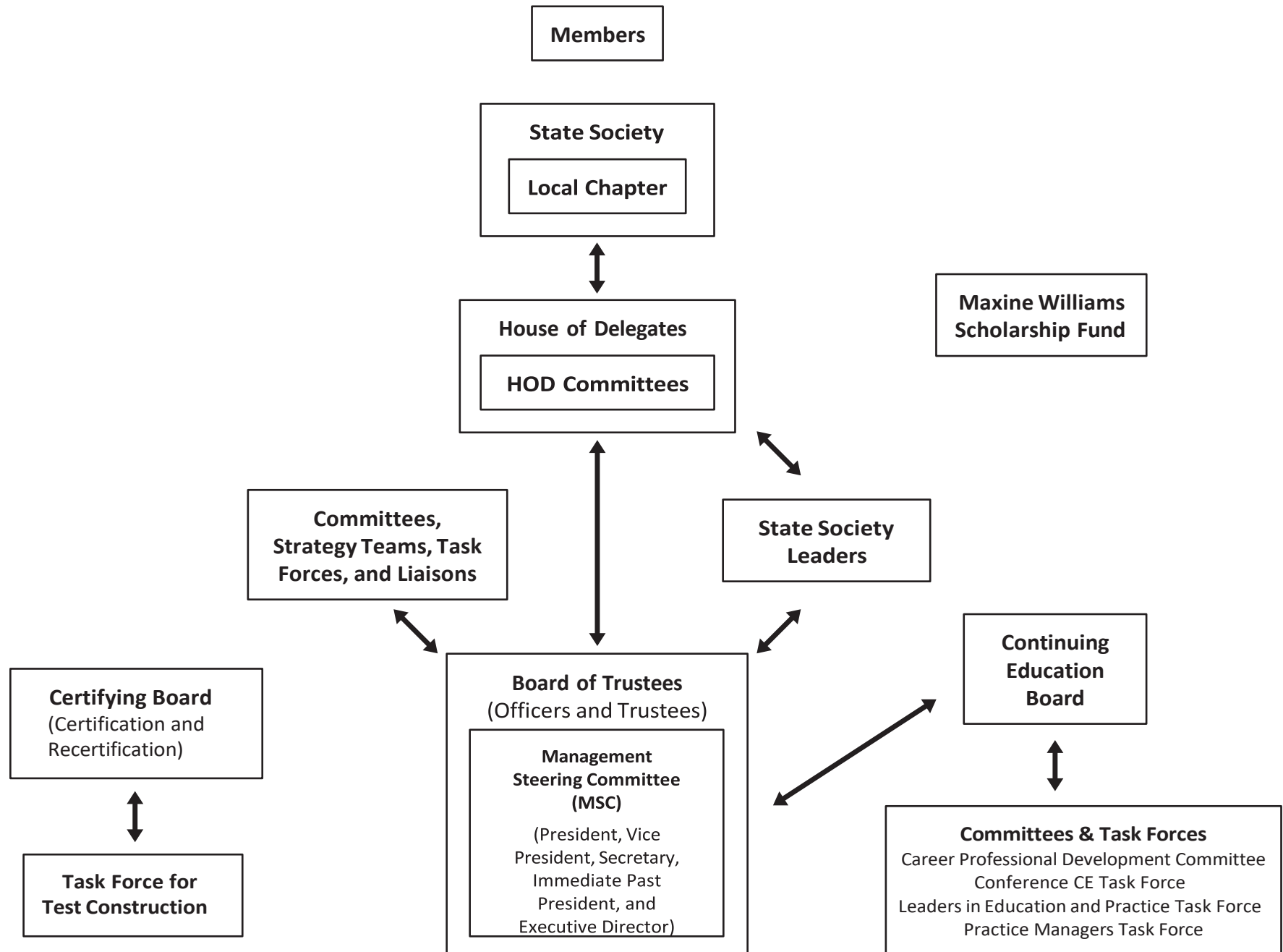
- President
- Vice President
- Secretary
- Speaker of the House
- Vice Speaker of the House
- Immediate Past President
- Seven Trustees

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](#).

AAMA 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
AAMA House of Delegates 2026

Clearly write down the motion.

I move

Motion made by: _____

Second by: _____

PASSED

FAILED

PROPOSED MOTION FORM
AAMA House of Delegates 2026

Clearly write down the motion.

I move

Motion made by: _____

Second by: _____

PASSED

FAILED



**AMERICAN ASSOCIATION
OF MEDICAL ASSISTANTS®**

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