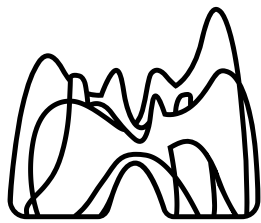


# 2024

# DELEGATES PACKET



68th Annual

**AAMA Conference**  
**Strength in Learning**



AMERICAN ASSOCIATION  
OF MEDICAL ASSISTANTS®

Sept. 20–23, 2024 • Amway Grand Plaza Hotel, Curio Collection by Hilton • Grand Rapids, MI

# AMERICAN ASSOCIATION OF MEDICAL ASSISTANTS

## 68th ANNUAL HOUSE OF DELEGATES

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American Association of Medical Assistants®

AMWAY GRAND PLAZA HOTEL, CURIO COLLECTION by HILTON

GRAND RAPIDS, MICHIGAN

Preliminary Agenda

SATURDAY, SEPTEMBER 21, 2024

**9:00 a.m. HOUSE OF DELEGATES**

Presentation of the Colors	Rockford American Legion
National Anthem	Sylvia Kazma
Pledge of Allegiance	Cameron Smith, CMA (AAMA)
<b>Call to Order</b>	<b>Sherry Bogar, CMA (AAMA)</b> <i>Speaker of the House</i>
Opening Reflections	
Introductions	
Report of the Credentials Chair	Mary Dey, CMA (AAMA)
Approval of Agenda	Sherry Bogar, CMA (AAMA)
<b>Orientation of Delegates</b>	<b>Natasha Geno, CMA (AAMA)</b>
<i>Vice Speaker of the House</i>	
Adoption of Rules of the House	
Appointment of Reference Committees and Tellers	
Supplemental Report	Monica Case, CMA (AAMA) <i>AAMA President</i>
Report of the Nominating Committee	Deborah Novak, CMA (AAMA)
Nominations from Floor	Sherry Bogar, CMA (AAMA)
Announcements	
Special Announcement	Rebecca Walker, CMA (AAMA)
Recess	

***“Meet the Candidates”—This follows the morning session of the House with an estimated start time of 10:15 a.m. and the Reference Committee Hearings to start at 1:00 p.m.***

118 **Reference Committee Schedule**  
119  
120 **1:00 p.m.** Reports, Bylaws, Resolutions  
121 The committee hearings will be in sequence, beginning at 1 p.m. and continuing until concluded  
122  
123

124 **5:00 p.m. HOUSE OF DELEGATES RECONVENES**

125  
126 Call to Order Sherry Bogar, CMA (AAMA)  
127  
128 Report of the Credentials Chair Mary Dey, CMA (AAMA)  
129  
130 Moments of Remembrance and Reflection Rebecca Walker, CMA (AAMA)  
131  
132 Report of the Reference Committees:  
133 Reports and Resolutions Natasha Geno, CMA (AAMA)  
134 Bylaws Sherry Bogar, CMA (AAMA)  
135  
136 Election of Officers and Nominating Committee Sherry Bogar, CMA (AAMA)  
137  
138 Unfinished Business Sherry Bogar, CMA (AAMA)  
139  
140 New Business Sherry Bogar, CMA (AAMA)  
141  
142 Good and Welfare Statements *(Please note only 15 minutes will be allowed)*  
143  
144 Announcements  
145  
146 Adjournment  
147  
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160

161 **PLEASE BE ADVISED THAT AUDIO-RECORDING OR VIDEO-RECORDING OF THE**  
162 **HOUSE OF DELEGATES, "MEET THE CANDIDATES," OR REFERENCE COMMITTEE**  
163 **HEARINGS IS NOT ALLOWED.**  
164

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 2024 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 must review the entire Delegates Packet before arriving at the national conference. A printed copy may be requested from the Executive Office if needed (allow enough time for the mailing process).

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 its ultimate goals.

**Commitment**

It is your duty to listen, to think objectively, and to consider all issues for the good of the entire membership and profession. Your position requires a commitment to base your decisions on the deliberations of the House, not on personal opinion or the interests of any special group, state, chapter, or individual.

**Performance**

Motions must be 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 Speaker as quickly as possible.

You were elected 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 not be in agreement with the reports, you will have ample opportunity to express your views during the next session of the House.

**On Friday only those with CHANGES to delegates or alternates from their original submissions or those that need PROXIES, MUST check in at the Credentials Desk. Proxies will be issued on Friday and not on Saturday morning.**

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

Friday, September 20, 2024 3:30–4:30 p.m.

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

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

204	Saturday, September 21	8:15–8:45 a.m.
205	Saturday, September 21	4:15–4:45 p.m.

206 Each delegate must be seated in the House **10 minutes** prior to each session.

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

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

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

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

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

220

221 *Sherry Bogar, CMA (AAMA)*

222 Speaker of the House

223

224 *Natasha Geno, CMA (AAMA)*

225 Vice Speaker of the House

226

## 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 constituent 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 30 minutes. 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 10 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:

Contact 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 remain the ultimate goal. It is the obligation of the Speaker to sense the will of the House, to preside accordingly, and to



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

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

## 272 **Introduction of Business**

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

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

## 283 **Resolutions**

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

## 289 **Procedure for Emergency or Late Resolutions**

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

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

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

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

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

## 300 **Presentation of Resolutions to the House of Delegates**

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

## 306 **Reference Committees**

307 Reference committees are groups of about five delegates selected by the Speaker to conduct open  
308 hearings on business matters of the association. Having heard discussion on the subject before it, the  
309 committee draws up a report offering MOTIONS or RECOMMENDATIONS to the House. These

310 motions and recommendations will propose the action needed based on the submitted reports, proposed  
311 Bylaws amendments, and proposed resolutions.

### 312 **Reference Committee Hearings**

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

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

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

### 326 **Reference Committee Reports**

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

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

### 335 ***Handling of Reference Committee Reports***

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

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

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

351     **Nominating Committee**

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

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

363     **New Business**

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

- 366     It is presented from the Board of Trustees; or  
367     It is of an emergency nature; or  
368     It is introduced by unanimous consent of the House of Delegates; and  
369     It is in the hands of the Speaker of the House by 8 a.m. of the day of the final session.  
370

371     **Voting**

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

378

379     ***Voice Vote***

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

382

383     ***Standing Vote or Show of Hands Vote***

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

386

**American Association of Medical Assistants®**

**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 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 and state society, and ask permission before proceeding. All remarks will be directed to the chair.

**7. Debate**

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

**8. POINT OF INFORMATION**

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

***BOARD  
OF  
TRUSTEES  
REPORTS***

**American Association of Medical Assistants® (AAMA)**

**Report of the Board of Trustees**

**For the Period Ending September 2024**

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 2023–2024 BOT consists of five officers and seven trustees. The three education board chairs and the first vice chairs may attend the BOT meetings with voice but without vote.

The 2023–2024 BOT has met numerous times (in person and virtually) since the 68th AAMA Annual Conference held in Orlando, Florida.

- AAMA Post Conference Board of Trustees Executive Session/Maxine Williams Scholarship Fund Board of Directors Meeting - Orlando, FL - September 25, 2023
- AAMA MSC Virtual Meeting - October 11, 2023
- AAMA BOT Virtual Meeting - October 12, 2023
- AAMA BOT 2023 Officer Conference Review - Chicago, IL - November 8, 2023
- AAMA BOT Planning Session/Executive Session - Chicago, IL - November 9–11, 2023
- AAMA MSC Financial - Virtual Meeting - November 28, 2023
- AAMA BOT Virtual Meeting - December 10, 2023
- AAMA BOT Virtual Meeting - January 14, 2024
- AAMA MSC CEO Balasa, Conference Meeting Planner - 2025 Conference bids - January 29, 2024
- AAMA MSC Pre-Winter Meeting - Chicago, Illinois - February 7, 2024
- AAMA MSC Budget and Finance Meeting - Chicago, Illinois - February 8, 2024
- AAMA BOT Winter Open/Executive Session - Chicago, Illinois - February 9–10, 2024
- AAMA BOT Website logo discussion - Virtual Meeting - February 13, 2024
- AAMA BOT Virtual Meeting - March 10, 2024
- AAMA BOT Executive - Virtual Meeting - March 11, 2024
- AAMA BOT Virtual Meeting - April 7, 2024
- AAMA BOT Virtual Meeting - May 5, 2024
- AAMA BOT Virtual Meeting - May 29, 2024
- AAMA BOT Virtual Meeting - June 9, 2024
- AAMA MSC Budget and Finance Meeting - June 21, 2024
- AAMA BOT Summer Open Session/Executive Session - Arlington, Virginia - June 23–24, 2024

The BOT approved the appointments of committees, strategy teams, task forces, boards, and liaisons for 2023–2024.

**Committees**

Awards  
Annual Conference

**Chairs**

Deborah Novak, CMA (AAMA)  
Deborah Novak, CMA (AAMA)

464	Bylaws and Resolutions	Candace Miller, CMA (AAMA)
465	Career Professional Development	Pamela Neu, CMA (AAMA), MBA
466	Documents	Natasha Geno, CMA (AAMA), ATS
467	Editorial Advisory	Shirley Sawyer, CMA (AAMA), CPC
468	HOD Minutes	Aimee Wicker, CMA (AAMA) until
469		resignation; Sherry Bogar, CMA
470		(AAMA), CN-BC, thereafter
471	Maxine Williams Scholarship	Virginia Thomas, CMA (AAMA)
472	Nominating	Deborah Novak, CMA (AAMA)
473	Social Media	Aimee Quinn, CMA (AAMA)
474	Strategic Issues Planning	Sandra Williams, CMA (AAMA)
475		
476	<b><u>Strategy Teams</u></b>	
477	Leadership Development	Claire Houghton, CMA (AAMA)
478	Marketing	Virginia Thomas, CMA (AAMA)
479	Membership Development	Sherry Bogar, CMA (AAMA), CN-BC
480		
481	<b><u>Task Forces</u></b>	
482	Advisory Task Force	Deborah Novak, CMA (AAMA)
483	Partnership Task Force	Deborah Novak, CMA (AAMA)
484	Educator Collaborative	Pam Neu, CMA (AAMA)
485		
486	<b><u>Education Boards and Councils</u></b>	
487	Continuing Education Board	Amber Greer, CMA (AAMA), BS, PBT
488		(ASCP)
489	Certifying Board	Carolyn Fuller, CMA (AAMA)
490	Medical Assisting Education Review Board	Karon Walton, MEd, CMA (AAMA)
491		Rebecca Dail, AAS, CMA (AAMA)
492	Judicial Council	Debby Houston, CMA (AAMA), CPC-I
493		
494	<b>The following represents a partial list of the actions and decisions of the 2023–2024 BOT:</b>	
495		
496	• Approved BOT appointments of chairs and members of committees, strategy teams, and	
497	task forces.	
498	• Approved termination of the AAMA’s relationship with Conference Direct.	
499	• Approved entering into an agreement/contract with Kathy Basel Marketing & Events as	
500	the conference planner for the 2024 AAMA Annual Conference and continue the search	
501	for 2025 AAMA Conference sites.	
502	• Approved the 2023–2024 Judicial Committee.	
503	• Approved the “Acceptable Use for Digital Services” document.	
504	• Approved the AAMA 2023–2024 Strategic Issues Plan.	
505	• Approved ordering a second exhibition kit to include an Advisory Services banner.	
506	• Approved moving forward with a podcast project starting with CEO and Legal Counsel	
507	Balasa.	
508	• Approved dissolution of Ad Hoc Committee for Educators Survey.	

- 509 • Approved creating a new task force to evaluate results of the educator survey and  
510 recommend appropriate action. The official name is the Educators Collaborative Task  
511 Force.
- 512 • Appointed Trustee Neu as Chair of the Educators Collaborative Task Force.
- 513 • Appointed the Educators Collaborative Task Force members. Additional educators would  
514 be added to this task force.
- 515 • Approved Senior Director Mokijewski to add teal color to the approved AAMA apparel  
516 line and present additional colors for apparel while keeping the integrity of the AAMA  
517 logo.
- 518 • Approved exhibiting during MGMA Leaders Conference—October 6–9, 2024, Denver,  
519 Colorado
- 520 • Approved exhibiting during AMGA (American Medical Group Association)—April 9–12,  
521 2024.
- 522 • Approved CEO Balasa to attend American Association of Nurse Practitioners Annual  
523 Meeting and observe for future exhibiting opportunities.
- 524 • Approved appointments to the Continuing Education Board, Conference CE Task Force,  
525 and Practice Managers Task Force for five total appointments.
- 526 • Approved the AAMA website rebuild project.
- 527 • Approved a donation of \$500 to the Water Wheel Foundation and a tribute in the AAMA  
528 *Medical Assisting Today* January 2024 issue to honor outside Legal Counsel Nathan  
529 Breen who passed way.
- 530 • Approved BOT Representatives Bureau (RB) assignments.
- 531 • Approved the Social Media Committee project for state conferences recognition during  
532 RB assignments.
- 533 • Approved the AAMA 2024 Conference theme, logo, and pin.
- 534 • Approved no increase in registration fees for the 2024 AAMA Conference.
- 535 • Approved the State and Chapter Secretary Guidelines.
- 536 • Approved the State and Chapter Treasurer Guidelines.
- 537 • Approved the Awards Committee’s Conference awards event and theme.
- 538 • Approved the new AAMA logo.
- 539 • Approved the 2025 AAMA Annual Conference site as being the Hyatt Regency Crystal  
540 City in Arlington, Virginia.
- 541 • Approved MARWeek 2024 theme, “Bridging the Gap Between Patients and Quality  
542 Care.”
- 543 • Approved the audit report for the fiscal year 2022 and 2023.
- 544 • Approved Career Professional Development Committee projects and modules.
- 545 • Approved a tribute for Grace Hale, “The Voice of AAMA,” to be included in the  
546 May/June issue of the *Medical Assisting Today* magazine.
- 547 • Approved an AAMA membership benefits flyer for state society and local chapter uses.
- 548 • Approved a letter from the AAMA President to be sent to new CMAs (AAMA)  
549 congratulating them on their certification and providing information about AAMA  
550 membership benefits.
- 551 • Approved a letter from the AAMA President to be sent to the non-member CMAs  
552 (AAMA) about the AAMA and membership benefits.



- Approved one AAMA 2024–2025 membership to be awarded to a participant in the Membership Committee focus groups.
- Approved the opening of the AAMA Bylaws Committee to volunteers with AAMA active membership status starting with the 2024–2025 Volunteer Leaders Application.
- Approved Social Media project for the AAMA 2024 Annual Conference.
- Approved the AAMA General Fund budget for July 1, 2024–June 30, 2025.
- Approved the AAMA MarCom budget for July 1, 2024–June 30, 2025.
- Approved the AAMA CEO annual review.
- Approved AAMA attendance at the National Colorectal Cancer Roundtable (NCCRT) Annual Meeting.
- Approved the awarding of a life membership to be announced at the 2024 Annual Conference.
- Approved proposed Bylaws amendments to be presented to the 2024 House of Delegates.
- Approved the Marketing Strategy Team project for the AAMA Annual Conference.
- Approved MARWeek 2024 poster.
- Approved each issue of *Medical Assisting Today* will contain one continuing education article carrying 2.5 CEUs, and a second continuing education article carrying 1 CEU.
- Approved the following BOT virtual meetings minutes
  - October 12, 2023
  - December 10, 2023
  - January 14, 2024
  - March 10, 2024
  - April 7, 2024
  - May 5, 2024
- Approved the following BOT in-person meetings minutes
  - Pre-HOD BOT meeting, September 22, 2023
  - BOT Planning Session, November 10, 2023
  - Pre-HOD Executive Session, September 21, 2023
  - Post-HOD Executive Session, September 25, 2023
  - BOT Planning Session Executive Session, November 11, 2023

The BOT has worked diligently for the AAMA membership this past year. The President is extremely appreciative of their dedication and time they have put forth in representing the members of the AAMA. This officer is incredibly grateful to have had the opportunity to work with the members of this BOT. The BOT is also appreciative of the challenging work of the Certifying Board, Continuing Education Board, and Medical Assisting Education Review Board. The BOT is especially thankful to CEO Balasa for his dedication and support and to the AAMA staff for their work and dedication to the AAMA.

Monica Case, CMA (AAMA)  
AAMA President 2023–2024

**American Association of Medical Assistants®**

**Report of the President**

**For the Period Ending September 2024**

The AAMA President serves as chair of the Board of Trustees, Management Steering Committee, the Budget and Finance Committee, and as the president of the AAMA Maxine Williams Scholarship Fund Board of Directors. The President also serves as ex-officio to all boards, committees, strategy teams, and task forces except for 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 in Orlando, Florida, on September 23, 2023.

Additionally, this President serves as a member of the AAMA Representatives Bureau, the Advisory Task Force, and has been appointed to the Center for the Application of Substance Abuse Technologies (CASAT) fetal alcohol spectrum disorders initiative.

**REPRESENTATIVES BUREAU ASSIGNMENTS:**

New York Society of Medical Assistants

Michigan Society of Medical Assistants

**MEETINGS ATTENDED**

This officer has represented the BOT/AAMA at the following meetings or events:

- AAMA 2023 Annual Conference-Orlando, FL-September 22–25, 2023
  - AAMA Board of Trustees Pre-HOD Executive Session-September 21, 2023
  - First Timers and Students Reception-September 22, 2023
  - AAMA Board of Trustees Open Session Meeting-September 22, 2023
  - AAMA Board of Trustees Executive Session Reconvened Meeting-September 22, 2023
  - General Session Knowledge Bowl-September 22, 2023
  - Welcome and Awards Celebration-September 22, 2023
  - AAMA 67<sup>th</sup> House of Delegates-September 23, 2023
  - Meet the Candidates-September 23, 2023
  - House of Delegates Reference Committee Hearings: Reports, Bylaws-September 23, 2023
  - House of Delegates Reconvened Meeting and Voting-September 23, 2023
  - AAMA Board of Trustees Meeting with the Society of Past Presidents (SoPPs) September 24, 2023
  - Conference Direct Meeting Planner, CEO, President–Meeting-September 24, 2023
  - AAMA State Leaders Session-September 24, 2023
  - AAMA Presidents Banquet-September 24, 2023
  - AAMA Post Conference Board of Trustees Executive Session/Orientation/Maxine Williams Scholarship Fund Board of Directors Meetings-September 25, 2023

- 637                   ○ AAMA 2023-2024 Committees, Strategy Teams, and Task Forces Meet and Greet
- 638                   September 25, 2023
- 639                   • Strategic Issues Planning-Ex Officio-Virtual Meeting-October 5, 2023
- 640                   • Career Professional Development-Ex Officio-Virtual Meeting-October 11, 2023
- 641                   • AAMA MSC - Virtual Meeting-October 11, 2023
- 642                   • AAMA BOT-Virtual Meeting-October 12, 2023
- 643                   • Strategic Issues Planning-Ex Officio-Virtual Meeting-October 18, 2023
- 644                   • Pre-Scheduled Virtual Meeting with Sun Bus-Dr. Nern, CEO Balasa, Immediate Past
- 645                   President Novak, Sun Bus-Virtual Meeting-October 19, 2023-See report of Immediate
- 646                   Past President Novak
- 647                   • Leadership Development Strategy Team-Ex Officio-Virtual Meeting-October 19, 2023
- 648                   • MGMA Conference Exhibitor Booth-Nashville, TN-October 22–24, 2023
- 649                   • Meeting with AAMA Board Services Manager, AAMA Marketing Director, and
- 650                   Immediate Past President Novak-Chicago, IL-October 26, 2023
- 651                   • AAFP Exhibitor-Chicago, IL-October 27–29, 2023
- 652                   • CEB Planning Session – Asheville, NC-November 3–4, 2023
- 653                   • AAMA BOT 2023 Officer Conference Review-Chicago, IL-November 8, 2023
- 654                   • BOT Planning Session/Executive Session/ - Chicago, IL-November 9–11, 2023
- 655                   • Social Media Committee-Ex Officio-Virtual Meeting-November 21, 2023
- 656                   • AAMA MSC, CEO Balasa, AAMA Accounting Manager and Cedarstone Accounting
- 657                   Consultant-Virtual Meeting-November 28, 2023
- 658                   • Leadership Development Strategy Team CEU Session- Virtual-December 2, 2023
- 659                   • AAMA CEO -Virtual Meeting- December 5, 2023
- 660                   • AAMA Marketing Director- Virtual Meeting- December 8, 2023
- 661                   • AAMA BOT -Virtual Meeting- December 10, 2023
- 662                   • FASD MAP Steering Committee -Virtual Meeting- December 13, 2023
- 663                   • AAMA CEO, Board Services Manager, MarCom Directors, Director of Continuing
- 664                   Education, Conference Meeting Planner and Conference Chair-Virtual Meeting-
- 665                   December 20, 2023
- 666                   • Social Media Committee-Ex Officio-Virtual Meeting-December 28, 2023
- 667                   • Marketing Strategy Team-Ex Officio Virtual Meeting-December 30, 2023
- 668                   • Conference 2024, Amway Grand, Meeting Planner and Conference Chair Novak-Virtual
- 669                   Meeting-January 3, 2024
- 670                   • Advisory Task Force Chair, AAMA CEO, AAMA Board Services Manager, Marketing
- 671                   Director-Virtual Meeting-January 4, 2024
- 672                   • CEO Balasa and IT Consultant Knight-Virtual Meeting-January 9, 2024
- 673                   • MGMA Fellow, Lisa Bell, AAMA CEO, AAMA Communications Director, AAMA
- 674                   Board Services Manager, Immediate Past President-Virtual Meeting-January 9, 2024
- 675                   • Membership Development Strategy Team-Ex Officio-Virtual Meeting-January 9, 2024
- 676                   • Awards Committee Meeting-Ex Officio-Conference Call-January 12, 2024
- 677                   • AAMA BOT-Virtual Meeting-January 14, 2024
- 678                   • Documents Committee-Ex Officio-Virtual Meeting-January 17, 2024
- 679                   • Leadership Development Strategy Team-Ex Officio-Virtual Meeting-January 18, 2024

- 680 • Conference 2024 Priorities-AAMA Board Services Manager, MarCom Directors, and
- 681 Conference Chair-Virtual Meeting-January 18, 2024
- 682 • Conference 2024 Meeting Planner Basel and Conference Chair Novak-Virtual Meeting-
- 683 January 19, 2024
- 684 • Bylaws-Ex Officio-Virtual Meeting-January 23, 2024
- 685 • Annual Conference Committee-Member-Virtual Meeting-January 24, 2024
- 686 • Social Media Committee-Ex Officio-Virtual MeetingJanuary 25, 2024
- 687 • MarCom Senior Director Mokijewski-Virtual Meeting-Projects discussion-January 26,
- 688 2024
- 689 • MSC, CEO Balasa, Conference Meeting Planner-2025 Conference bids-January 29, 2024
- 690 • Career Professional Development Committee-Ex Officio-Virtual Meeting-January 30,
- 691 2024
- 692 • Board Services Manager Flynn and MarCom Sr. Director Mokijewski-Virtual Monthly
- 693 Meeting-January 31, 2024
- 694 • Advisory Task Force, Annual Conference and Awards Committees Chair, Board Services
- 695 Manager Flynn, MarCom Sr. Director Mokijewski-Virtual Monthly Meeting-February 1,
- 696 2024
- 697 • Leadership Development Strategy Team-Ex Officio-Virtual Meeting, February 1, 2024
- 698 • Documents Committee-Ex Officio-Virtual Meeting-February 5, 2024
- 699 • MSC Pre-Winter Meeting-Chicago, Illinois-February 7, 2024
- 700 • MSC Budget and Finance Meeting-Chicago, Illinois-February 8, 2024
- 701 • BOT Committee Meeting with AAMA Staff-Chicago, Illinois-February 8, 2024
- 702 • AAMA BOT Winter Open/ Executive Meeting-Chicago, Illinois-February 9-10, 2024
- 703 • AAMA CEB Winter Meeting-Chicago, Illinois-February 11-12, 2024
- 704 • Annual Conference Chair, Conference Meeting Planner, MarCom Sr. Director-Chicago,
- 705 Illinois-February 12, 2024
- 706 • AAMA BOT Website logo discussion-Virtual Meeting-February 13, 2024
- 707 • AAMA CB Winter Meeting-Chicago, Illinois-February 24, 2024
- 708 • Documents Committee-Ex Officio-Virtual Meeting-February 26, 2024
- 709 • Annual Conference Committee-Member-Virtual Meeting-February 28, 2024
- 710 • Career Professional Development Committee-Ex Officio-Virtual Meeting-February 29,
- 711 2024
- 712 • Bylaws-Ex Officio-Virtual Meeting-March 4, 2024
- 713 • Advisory Task Force, Annual Conference and Awards Committees Chair, Board Services
- 714 Manager Flynn, MarCom Sr. Director Mokijewski-Virtual Monthly Meeting-March 7,
- 715 2024
- 716 • Board Services Manager Flynn and MarCom Sr. Director Mokijewski-Virtual Monthly
- 717 Meeting-March 8, 2024
- 718 • AAMA BOT-Virtual Meeting-March 10, 2024
- 719 • AAMA BOT Executive-Virtual Meeting-March 11, 2024
- 720 • Sun Bus, CEO Balasa, Immediate Past President Novak-Virtual Meeting-March 13, 2024
- 721 • Leadership Development Strategy Team-Ex Officio-Virtual Meeting-March 14, 2024
- 722 • Immediate Past President, CEO Balasa, Board Services Manager Flynn, MarCom Sr.
- 723 Director Mokijewski-Nominations Notification-Virtual Meeting-March 19, 2024
- 724 • Membership Development Strategy Team-Ex Officio-Virtual Meeting-March 20, 2024
- 725 • Leadership Development Committee CEU Virtual Event-March 23, 2024

- 726 • Documents Committee-Ex Officio-Virtual Meeting-March 25, 2025
- 727 • Annual Conference Committee-Member-Virtual Meeting-March 27, 2024
- 728 • Marketing Strategy Team-Ex Officio-Virtual Meeting-April 2, 2024
- 729 • Advisory Task Force, Annual Conference and Awards Committees Chair, Board Services
- 730 Manager Flynn, MarCom Sr. Director Mokijewski-Virtual Monthly Meeting-April 4,
- 731 2024
- 732 • AAMA BOT-Virtual Meeting-April 7, 2024
- 733 • Career Professional Development Committee-Ex Officio-Virtual Meeting- April 8, 2024
- 734 • AMGA Exhibitor Booth-Orlando, Florida- April 9-1, 2024
- 735 • Educators Collaborative Task Force- Ex Officio-Virtual Meeting- April 10, 2024
- 736 • Bylaws- Ex Officio-Virtual Meeting-April 15, 2024
- 737 • Membership Development Strategy Team- Ex Officio-Virtual Meeting-April 17, 2024
- 738 • Advisory Task Force, Annual Conference and Awards Committees Chair, Board Services
- 739 Manager Flynn, MarCom Sr. Director Mokijewski-Virtual Monthly Meeting-May 2,
- 740 2024
- 741 • New York State Society of Medical Assistants General Assembly-Virtual Meeting-May
- 742 4, 2024
- 743 • AAMA BOT-Virtual Meeting-May 5, 2024
- 744 • Educators Collaborative Task Force-Ex Officio-Virtual Meeting-May 8, 2024
- 745 • Board Services Manager Flynn and MarCom Sr. Director Mokijewski-Virtual Monthly
- 746 Meeting-May 9, 2024
- 747 • Leadership Development Strategy Team-Ex Officio-Virtual Meeting-May 9, 2024
- 748 • Career Professional Development Committee-Ex Officio-Virtual Meeting-May 13, 2024
- 749 • Bylaws-Ex Officio-Virtual Meeting-May 14, 2024
- 750 • Michigan Society of Medical Assistants Representatives Bureau Assignment-Owosso,
- 751 Michigan-May 17-19, 2024
- 752 • Annual Conference Committee-Member-Virtual Meeting-May 22, 2024
- 753 • BOT Virtual Meeting-May 29, 2024
- 754 • Marketing Strategy Team-Ex Officio-Virtual Meeting-June 1, 2024
- 755 • Educators Collaborative Task Force-Ex Officio-Virtual Meeting-June 5, 2024
- 756 • Advisory Task Force, Annual Conference and Awards Committees Chair, Board Services
- 757 Manager Flynn, MarCom Sr. Director Mokijewski-Virtual Monthly Meeting-June 6,
- 758 2024
- 759 • Bylaws-Ex Officio-Virtual Meeting-June 7, 2024
- 760 • AAMA BOT-Virtual Meeting-June 9, 2024
- 761 • MGMA Meeting-MGMA Director of Content & Consulting Hajde, CMPE, AAMA CEO
- 762 Balasa, Immediate Past President Novak, AAMA Board Services Manager Flynn-Virtual
- 763 Meeting-June 12, 2024
- 764 • Career Professional Development Discussion-Trustee Neu, MarCom Sr. Director
- 765 Mokijewski, CEO Balasa, Board Services Manager Flynn-Virtual Meeting-June 13, 2024
- 766 • Leadership Development Strategy Team-Ex Officio-Virtual Meeting-June 13, 2024
- 767 • CEB Summer Meeting-Arlington, Virginia-June 21-22, 2024
- 768 • AAMA MSC Budget and Finance Meeting-June 21, 2024
- 769 • AAMA BOT Summer Open Session/Executive Session-Arlington, Virginia-June 23-24,
- 770 2024
- 771 • Leadership Development Strategy Team CEU Presentation-Virtual-June 29, 2024

- Bylaws-Ex Officio-Virtual-July 1, 2024
- MGMA Podcast Collaboration Discussion – CEO Balasa, MGMA Sr. Editor Williams, MBA, MSEM-Virtual Meeting-July 8, 2024
- AAMA Conference 2024 Schedule-Conference Planner Basel, CEO Balasa, Continuing Education Director Mickowski, Conference Chair Novak-Virtual Meeting-July 8, 2024
- Advisory Task Force, Annual Conference and Awards Committees Chair, Board Services Manager Flynn, MarCom Sr. Director Mokijewski-Virtual Monthly Meeting-July 10, 2024
- AAMA BOT-Virtual Meeting-July 14, 2024
- Membership Development Strategy Team-Ex Officio-Virtual Meeting – July 17, 2024
- FASD MAP Steering Committee-Virtual Meeting-July 18, 2024
- Educators Collaborative Task Force-Ex Officio-Virtual Meeting-July 18, 2024
- AAMA CB Summer Meeting-Chicago, Illinois-July 20, 2024
- Documents Committee-Ex Officio-Virtual Meeting-July 22, 2024

## **POST CONFERENCE BOT MEETING**

- This President presided at the Post Conference Board of Trustees Executive Meeting. IT Consultant Michael Knight-
  - Completed newly elected trustees Microsoft Teams setup and email addresses.
  - Presented updates on the current infrastructure of the current AAMA website, how fragile it was and beyond just upgrading.
  - Presented updates for the restructuring and building of a new AAMA website project to meet the AAMA needs and wants. Bids had been received and vendors were being narrowed down based on project needs, deliverables, and knowledge of our software.
  - Vendor bids would be presented during the BOT Planning Session.
- CEO/Legal Counsel Balasa-
  - Discussed the importance of confidentiality among the BOT members, the Conflict-of-Interest document and Confidentiality Policy Agreement to be signed by each BOT members yearly.
- This officer-
  - Presented and the Board of Trustees approved appointments of chairs and members of committees, strategy teams, and task forces.
  - Assigned the 2023–2024 chairs to contact the 2022–2023 chairs and discuss the status of pending projects, as those projects need to be followed through and completed.
  - A brief orientation and BOT packet were given, and documents were discussed. These documents would be sent electronically, and all BOT members were to be familiar with them prior to the BOT Planning Session.
  - Announced the BOT Planning Session dates were November 10–11, 2023, in Chicago, Illinois, and more information will be sent by email.
  - Assigned BOT members to mentor and assist the newly elected trustees. Immediate Past President Novak assigned to Trustee Quinn, Secretary Thomas assigned to Trustee Thomas, and Vice President Wicker assigned to Trustee Sawyer.
  - Reminded the BOT to attend the Meet and Greet with the committees, strategy teams, and task forces at 1:30 p.m. following this meeting.
  - Any new and unfinished business was reviewed and addressed as needed.

## **2023–2024 AAMA COMMITTEE MEMBERS MEET AND GREET**

- This officer welcomed everyone in attendance. This was followed by introductions from the BOT, AAMA staff, committee chairs, and members present. Time was allotted for each committee to meet, the chair to cover the charge of the committee, and to exchange ideas and comments about the work ahead. This meeting was well attended and informative.

#### **AAMA Exhibiting Opportunities**

#### **MGMA (Medical Group Management Association) Conference Exhibitor Booth-Nashville, TN-October 22–24, 2023**

- This President, along with CEO Balasa, Immediate Past President Novak, and Social Media Manager Eldridge, staffed the AAMA’s booth during this conference. With over 3,000 attendees, the booth had a great amount of traffic. Interests and questions included where the attendees can find medical assistants, credentialed medical assistants, more training and continuing education for their employees. This allowed promotion of the AAMA as the only organization for medical assistants. Questions were raised about the scope of practice from many states and CEO Balasa had many conversations with attendees. This officer provided information including handouts for membership, continuing education available, professional development, and the CMA (AAMA) credential and certification. This officer also discussed the upcoming ABR-Medical Office Basics with attendees wanting some introductory training for potential and current employees needing some basic medical office introduction. This exhibit offered scanning of badges of attendees who visited the booth and a document of their contact information. This information will be utilized for reaching out and providing additional information about the AAMA, as many asked about membership and how their employees can become certified. This officer attended a meeting with CEO Balasa, Immediate Past President Novak, and MGMA Director of Content and Consulting Andrew Hajde, CMPE. This meeting was productive, including collaborations between AAMA and MGMA, and CEO Balasa following up for additional meetings and 2024 speaking opportunities for MGMA.
- An email was sent from this AAMA Presidents email box to 89 attendees that were scanned and wanted more information. A few highlights of the email included information about the AAMA’s presence at the 2024 upcoming MGMA Leaders Conference and reconnecting with them and other industry leaders. Mentioned and provided links for products including Medical Office Basics, professional development and continuing education opportunities, states scope of practice, and the Advisory Service. Many attendees wanted more information.

#### **AAFP (American Academy of Family Physicians) FMX, Exhibitor-Chicago, IL-October 27–29, 2023**

- This President, along with CEO Balasa, Immediate Past President Novak, Board Services Manager Flynn, and Senior Marketing Director Mokijewski staffed the booth for the 2023 FMX. This conference had over 4,000 attendees, but less interest than FMX 2022. Location of the AAMA booth and presence might have been a factor. Attendees visiting the booth asked scope of practice questions of CEO Balasa. Other questions included: where to find quality medical assistants; where to get additional training for their employees; with the shortage of medical assistants and the hiring of non-trained personnel, where can they find training for these types of hires to fit into their work schedules. Information was provided including membership, continuing education/E-Learning Center, Population Health Module, Advisory Service, the certification exam application, and some basics about the ABR-MOB

- 865 upcoming release. This officer along with Immediate Past President Novak explored other  
866 exhibitor booths and made contacts for potential partnership opportunities or relationships.  
867 • The AAMA will not be exhibiting at the 2024 conference. But a follow-up email from this  
868 AAMA President's email will be sent later this summer and will include similar highlights  
869 that were included in the MGMA email.

870  
871 **AMGA (American Medical Group Association) Exhibitor Booth-Orlando, Florida-April 9**  
872 **-11, 2024**

- 873 • This President, along with CEO Balasa and Sr. Directive Mokijewski, staffed the AAMA's  
874 booth during this conference. There were 1,159 attendees, including exhibitors. This booth  
875 had a moderate amount of traffic. Interest and questions included where the attendees can  
876 find quality medical assistants, credentialed medical assistants, more training, continuing  
877 education and professional development for their employees, and scope of practice questions.  
878 Many exhibitors had not heard of the AAMA, and we took the opportunity to discuss who we  
879 are, what we are about, whom we serve, and what we provide for medical assistants. Interest  
880 was from the registrants and exhibitors. Clinics and Practices' higher leadership, managers,  
881 clinical managers, coders, physicians, quality coordinators, and population health  
882 professionals were just some of the attendees we saw. This exhibit offered scanning of  
883 attendees' badges that visited the booth along with a document of attendee contact  
884 information and a section to add notes about specific questions and areas of interest for  
885 follow up. This officer's business card was given to individuals, and some have reached out  
886 with specific questions and a follow up was made. Some key leaders of AGMA did stop by  
887 the booth during set up and throughout the exhibiting to see if we needed anything. This was  
888 a more personal approach than with MGMA. While the AGMA and MGMA are competitors,  
889 the AMGA has closer ties with the American Medical Association. In the past, we had a  
890 greater connection with the AMA and this officer would like to see the AAMA pursue some  
891 outreach again. I think our foot traffic could have been much better if our booth looked  
892 better. We did have a new backdrop, but not any noticeable displays to attract attendees. It is  
893 key that we up our game with our exhibiting booth look and products. It is imperative that we  
894 have a new design for our exhibition overall booth look, products, available information, and  
895 promotional giveaways with an engaging way to draw attendees. With the achievement of  
896 this goal, it will improve the foot traffic of our exhibiting booths in the future.  
897 • An email was sent from this AAMA President's email box to the 21 attendees that were  
898 scanned, the business cards collected, and email questions received. The information sent  
899 was the same as the MGMA information.

900  
901 **Board of Trustees Planning Session/Executive Session/2023 Officer Conference Review-**  
902 **Chicago, IL- November 9-11, 2023**

- 903 • The 2022-2023 Officers met with input from AAMA staff and IT consultant and reviewed  
904 all aspects of the 2023 Orlando Conference including the utilization of CVENT. The  
905 information will be used for improvements and enhancements for the 2024 Grand Rapids  
906 Conference.  
907 • This President presided during the BOT planning session. Orientation sessions were  
908 conducted, and presentations included CEO Balasa on the corporate structure of the AAMA,  
909 AAMA 501c(6) status, and the BOT, CEB, and CB responsibilities; AAMA Past President  
910 Hawes on Crucial Conversations; and a Power Point presentation of BOT forms, protocols  
911 and expectations with input from this officer, CEO Balasa, Vice President Wicker,



Immediate Past President Novak, AAMA Past President Licurs and AAMA Past President Houston. CEO Balasa provided a financial update.

- A presentation requested by this officer for podcast information and cost was presented by Marketing Director Mokijewski. The BOT approved moving forward with a podcast project starting with CEO and Legal Counsel Balasa.
- Legal Counsel Balasa presented three videos on antitrust law and discussion was held.
- IT Consultant Michael Knight presented and discussed the website re-creation and bids for the project.
- The BOT updated and approved the AAMA 2023–2024 Strategic Issues Plan.
- The Budget and Finance Committee met with CEO Balasa to evaluate the current financial status of the AAMA corporation. This information was shared with the BOT during the executive session.
- The top priorities for the AAMA 2023–2024 year were established: New website (ongoing); Completion of ABR-Medical Office Basics; Conference 2024 registration released by early March 2024; Podcast development; Marketing of Advisory Service. This officer gave directions for committee chairs to send their routine projects and timelines to this officer. Discussion will take place with MarCom directors, their projects timelines and reasonable timelines will be agreed upon, adopted, and a document will be created. Committee chairs are also to provide their top priorities and timelines to this officer.
- This officer charged the BOT, particularly the Membership Development Committee, with reaching out and targeting the non-member CMAs (AAMA).
- The BOT visited the new AAMA office location in Suite 3720 in the Civic Opera Building and observed the progress of construction.
- The CEB Vice Chair, an AAMA Past President, attended this Planning Session and added valuable input.
- A meeting was called to order and unfinished or new business was reviewed and addressed as needed. The BOT did vote and approved many items, and the list can be found in the Annual Report of the Board of Trustees in the 2024 Delegates Packet.

#### **Board of Trustees Winter Open and Executive Meeting-Chicago, Illinois-February 9–10, 2024**

- The MSC met before the open session to prepare for the BOT meetings. The Budget and Finance Committee (MSC) met with CEO Balasa and all financial information was shared with the BOT during the executive session.
- The BOT chair and members present of the committees, strategy teams, and task forces, met at the new AAMA office. A schedule was provided for all attendees to meet with their staff liaisons to brainstorm and work on updates, projects, and timelines. The BOT and AAMA staff felt this was a very intense, productive use of time with a lot of brainstorming.
- IT Consultant Knight, project manager for the AAMA website, provided updates about the rebuild and all were positive. Also reported the phone system had been migrated to Teams with the association savings of about \$27,000 a year by not having a separate network. A wish list had been formulated, updated frequently, and provided frequently to Consultant Knight.
- This officer had received comments about the fonts, colors used, and costs of creation and distribution of the *Medical Assisting Today* magazine. Many past issues were passed out and a critique session was held by all in attendance including the open gallery. Adjustments would be made for a more readable magazine.

- The audit report for the fiscal year 2022 to 2023 was approved.
- The Winter BOT Highlights provide more information about the winter meeting.
- See the reports of the chairs of the committees, strategy teams, and task forces for more accomplishments of this meeting.
- Voted and approved projects or action items that can be found in the Annual Report of the Board of Trustees in the 2024 Delegates Packet.

#### **AAMA BOT Summer Open and Executive Session-Arlington, Virginia-June 22–24, 2024**

- The MSC met to discuss the open and executive session agenda, and items that needed completing during this summer meeting.
- The Budget and Finance Committee (MSC) met before the BOT summer meeting's opening session. The MSC discussed the budget and asked for clarification in some areas, knowing the Board members would have questions of their own.
- The BOT met later that evening for a pre-open session and executive work discussions.
- The summer meeting is always busy with approval of budgets, CEO annual review, evaluating any life member applications, Conference planning, and reports from committees on their progress of work and ongoing projects and approvals.
- IT Consultant Knight provided valuable updates about the website rebuild. Favorable progress continues and the project is still on target for a 2024 release.
- All committee, strategy team, and task force chairs provided updates on the progress of projects and their relation to the Strategic Issues Plan. Projects were approved and work continues until the Annual Conference.
- The MARWeek 2024 poster “Bridging the Gap Between Patients and Quality Care” was approved.
- The AAMA General Fund Budget 2024–2024 and the MarCom Budget 2024–2025 were approved by the BOT.
- The Summer BOT Highlights provide more information about the summer meeting.
- See the reports of the chairs of the committees, strategy teams and task forces for accomplishments of this meeting in the 2024 Delegates packet.
- Voted and approved projects or action items can be found in the Annual Report of the Board of Trustees in the 2024 Delegates packet.

#### **BOT Virtual Monthly Meetings**

- The BOT had monthly virtual meetings to allow for continuation of work and business throughout the year. This officer provided updates from IT Knight Website Project Manager during these meetings. Any correspondence sent on behalf of the president was reported during the meetings. These meetings allowed CEO Balasa to provide updates. Updates on committee projects, approvals and recommendations as needed. Every chair was given the opportunity to discuss their work and collaborate with the board members. Officers were given time to discuss timelines or needs that pertained to their office and responsibilities.

#### **BOT Virtual Committee Meetings**

- As President and Ex-Officio of committees, I attended nearly all the virtual meetings. This was not only for support if needed but I gained appreciativeness for the AAMA members on a personal level. These were committee members the BOT appointed. These types of meetings are very brainstorming and informative for the members as they learn more about the national level and how it functions. Many of these committee members I witnessed

potential great future national leaders. This is where encouragement and mentoring begin. The contributions, ideas and future plans will help to the success of the growth of our organization.

### **Continuing Education Board Meetings**

- Planning Session - Asheville, NC - November 3–4, 2023.
- Winter Meeting - Chicago, Illinois - February 11–12, 2024
- Summer Meeting - Arlington, Virginia - June 21–22, 2024
  - As AAMA President and Ex Officio, this officer attended all the CEB meetings. The CEB Planning Session was a very productive meeting, leading to comprehensive planning for reviewing of documents and projects for the 2023–2024 year. The CEB winter meeting covered the areas discussed during the Planning Session. The CEB summer meeting continued with the reviewing of documents and the 2023–2024 projects. This officer feels it is beneficial to engage with the members and observe this board's work. Please see the report of 2023–2024 CEB Chair Amber Greer, CMA (AAMA), BS, PBT(ASCP).

### **Certification Board Meetings**

- Winter Meeting-Philadelphia, Pennsylvania-February 24, 2024
- Summer Meeting- Chicago, Illinois- July 20, 2024
  - This AAMA President attended all the CB meetings. The CB winter board meeting was productive, and this officer continued learning more about the functions and workings of this board. Some discussion took place on how these two boards could collaborate. The CB summer meeting was a full meeting with the regular business and ongoing projects, as well as new projects. This officer was pleased to appoint a CB member to serve on the BOT Educators Collaborative Task Force. This member will give valued insight when certification and the CMA (AAMA) credential questions arise.

### **OTHER MEETINGS**

#### **MGMA Virtual Collaboration Virtual Meeting-June 12, 2024**

- MGMA Director of Content and Consulting Hajde, CMPE, AAMA CEO Balasa, Immediate Past President Novak, AAMA Board Services Manager Flynn, and this officer met. Discussions included co-branding, speaking opportunities for CEO Balasa, possibilities of a BOT liaison, and further discussions about joint podcasts.

#### **MGMA Podcast Collaboration Virtual Discussion – July 8, 2024**

- CEO Balasa, MGMA Senior Editor Williams, MBA, MSEM, and this officer met to discuss AAMA's podcast thoughts. Discussions included scope of practice, interview with CEO Balasa with getting to know him and his background, focus on medical assisting trends, and some information about the AAMA. The decision was to interview Balasa and then expand to other avenues. The podcast would last 25–30 minutes. The discussion was to post it before the MGMA Leaders Conference in October of 2024 to give us leverage before attending and exhibiting. The podcast was audio-recorded on July 16, 2024. MGMA will share the podcast link with AAMA for sharing the interview through our channels.

### **REPRESENTATIVE BUREAU ASSIGNMENTS**

- *New York Society of Medical Assistants General Assembly May 4, 2024*

While this society did not host an in-person conference, this officer was asked to attend the General Assembly. The general assembly did allow voting for the officers and AAMA Delegates. The business ran smoothly and some brainstorming occurred for options to have a state conference in 2025.

The leadership will continue to move forward to explore the best way to host a state conference with an economical plan. The officer was asked to provide information for a chapter start up. Having some interest in organizing a new chapter does excite the leadership. New York medical assisting laws have been challenged for a while and there are some strives being made. These could be favorable, and the New York Society is rallying in hopes of increasing membership. This officer looks forward to the reorganizing of future in-person conferences.

Although this was a virtual meeting, this officer cherishes the opportunity and learning experience received from this state and was grateful for the opportunity to share AAMA information, present the power point including updates. This officer would like to thank 2023–2024 NYSSMA President Kimberly Battaglini, CMA (AAMA), and 2024–2025 NYSSMA Todd Michael Lasher, CMA (AAMA), for the opportunity to represent the AAMA. This representative wants to thank the officers and attendees for allowing this officer to attend virtually and engage with the attendees.

- ***Michigan Society of Medical Assistants Representative Assignment- Owosso, Michigan May 17–19, 2024.***

This officer was the AAMA Representative for MSMA 2024 Spring Conference in Owosso, Michigan held at the Comstock Inn. There were 55 attendees and provided attendees with the opportunity of 6.5 CEUs. There were many great topics, and the speakers were knowledgeable and engaging. This officer had the pleasure of serving as a Teller during the House of Delegates. The House of Delegates was a full day with much business completed including elections of officers and delegates to the AAMA 2024 Conference.

MSMA is trying to get medical assistants licensed in the state of Michigan. The two lobbyists they have been working with were present for the HOD and both presented updates on the status. The MSMA leaders are given regular updates on the process and progress made. This officer did have the privilege to meet not only the lobbyists but the paid registered parliamentarian the MSMA has used for many years.

Since Michigan is the 2024 Conference hosting state, information was provided to the attendees by the Michigan leadership and encouraging all to attend. This is a great opportunity for the Michigan members who might not have an opportunity to attend the national conference. The exhibitor's area was great and the MSMA had many fund-raising opportunities. This office had the privilege to have breakfast and meet with the MSMA Past Presidents. All societies past presidents offer valuable knowledge and insights.

This officer was able to provide AAMA updates during various times of the conference, and all attendees were very receptive, and many questions were received. This officer was given dedicated time to present the power point with all updates from AAMA and this turned out to be a very engaging audience with many questions. This officer participated in the Knowledge

Bowl. This officer participated in the installation of the 2024–2025 MSMA officers as the new leadership prepares for the upcoming year. This officer would like to thank MSMA 2023–2024 President Christa Smith, CMA (AAMA), and the 2024-2025 newly installed President Kathy Stuut, CMA-A (AAMA) for the opportunity to represent the AAMA. This representative wants to thank Leigh Newell, CMA(AAMA), for her hospitality, all the officers and the attendees for allowing this officer to attend, renew old friendships, and form new ones. This officer will always cherish this opportunity and learning experience received and was grateful for the opportunity to share AAMA information.

#### **Fetal Alcohol Spectrum Disorders (FASD) MAP Steering Committee**

- Virtual Meeting-December 13, 2023
- Virtual Meeting-July 18, 2024
- As a steering committee member for the Medical Assistant Partnership for Healthy Pregnancies and Families (MAP), this officer attended both virtual meetings. An overview of MAP's year one and year two activities completed, in progress, or planned was presented. These activities were discussed, and some included: products for AAMA e-Learning Center, an article in the *Medical Assisting Today* Sept/Oct 2024 issue and attending and a speaking opportunity at the AAMA Annual Conference 2024. Information was provided about the new Walk & Talks, a link for the FASD Awareness Month Toolkit, and a link to their products website was provided. Representatives will be present to exhibit and present a CEU session during the AAMA Conference 2024. Discussion is taking place for speaking opportunities for the AAMA Conference 2025.

#### **Sun Bus Virtual Meeting-March 13, 2024**

- This officer along with CEO Balasa and Immediate Past President Novak attended a meeting following up from 2023 discussions with Sun Bus. The purpose of this meeting was for Sun Bus and the AAMA to discuss the feasibility of collaborating and exploring partnership possibilities. This would be a great opportunity for the AAMA and our members. See the report of the Partnership Chair.

#### **E-Votes 2023–2024**

- Approved appointments to the CEB and its committees.
- Approved the AAMA volunteers for AAMA chairs and members of committees, strategy teams, and task forces.
- Approved the new AAMA logo.
- Approved the new AAMA logo colors.
- Appointed Secretary Thomas as chair of the Maxine Williams Scholarship Committee.

#### **Maxine Williams Scholarship Fund (MWS Fund) Board of Directors Activity**

- The MWS Fund board of directors approved adding ABHES schools to the scholarship form. The check will go directly to the students, and we will request a photo to promote the winners.
- This board consists of the President, Vice President, and the Secretary. The board is required to have at least three members. The board voted to add the Immediate Past President to this board.

## COMMITTEE APPOINTMENTS

- All volunteer leadership forms were reviewed, approved appointments and appointment letters were completed and emailed. With such an overwhelming response to volunteer forms received, anyone not appointed received a notification email thanking them for volunteering and encouraging them to apply in the future.

## COMMUNICATION

- This officer wrote a President's Message, "A Note from President Case," for the *Leaders Insider* for the months of November, January, March, April, May, June, and July as of the time this report was prepared.
- This officer wrote the President's Message for the *Medical Assisting Today* publication for all issues since the November/December 2023 issue.
- This officer has been diligent in keeping open communications with the AAMA members by way of state and chapter leaders, and AAMA HOD delegates and alternates, with a copy to the BOT and the SoPPs. To mention a few examples: Notifications of dates and locations of the BOT open session meetings available to members; BOT Meetings Highlights; State and Chapter Deadlines and Dates Calendar; memos about unforeseen BOT resignations.
- The Medical Office Basics non-AAMA member purchasers at the time of this report were 35. They received a letter from this President thanking them for purchasing the AAMA product. This President provided information about membership benefits, including discounts on professional development and continuing education, which are only a small sample of the benefits we offer members.
- Follow-up emails sent to 292 new CMAs (AAMA) nonmembers from the President congratulating them and providing information about the AAMA and membership benefits.

Due to the open office of the Vice President, assignments and responsibilities were reassigned.

Representatives Bureau assignments for annual state meeting requests:

- Twenty-two requests were received from state societies. All states that submitted a request received a representative. The BOT received their assignments in a sealed envelope during the Winter BOT meeting. Social Media Chair Quinn took pictures as each BOT member opened their envelope and revealed their assigned state. This was the Social Media project kickoff to highlight state conferences and Representatives Bureau assignments.

The following states requested and received a representative:

<u>State</u>	<u>Date</u>	<u>Name</u>
South Carolina	March 14–17, 2024	Shannon Thomas, CMA (AAMA), AAS
Washington	March 16–17, 2024	Virginia Thomas, CMA (AAMA)
Connecticut	April 5–6, 2024	Sherry Bogar, CMA (AAMA), CN-BC
Indiana	April 12–14, 2024	Aimee Quinn, CMA (AAMA)
Wisconsin	April 18–20, 2024	Shirley Sawyer CMA (AAMA), CPC
Missouri	April 19, 2024	Pam Neu, CMA (AAMA), MBA
Florida	April 19–21, 2024	Aimee Quinn, CMA (AAMA)
Montana	April 19–21, 2024	Natasha Geno, CMA (AAMA), ATS
New York (Virtual HOD)	April 20–21, 2024	Monica Case, CMA (AAMA)
Ohio	April 25–27, 2024	Virginia Thomas, CMA (AAMA)

1195	North Carolina	April 25–28, 2024	Natasha Geno, CMA (AAMA), AT
1196	Iowa	April 26–27, 2024	Pam Neu, CMA (AAMA), MBA
1197	Nebraska	April 26–27, 2024	Candy Miller, CMA (AAMA)
1198	Idaho	April 26–27, 2024	Claire Houghton, CMA (AAMA)
1199	Alaska (Hybrid-Rep Virtual)	April 27, 2024	Sandra Williams, CMA (AAMA)
1200	Maine	April 27, 2024	Sherry Bogar, CMA (AAMA), CN-BC
1201	New Hampshire (Rep Virtual)	May 4, 2024	Deborah Novak, CMA (AAMA)
1202	Oregon	May 9–11, 2024	Candy Miller, CMA (AAMA)
1203	Pennsylvania	May 3–4, 2024	Claire Houghton, CMA (AAMA)
1204	Texas	May 17–19, 2024	Shirley Sawyer CMA (AAMA), CPC
1205	Michigan	May 17–19, 2024	Monica Case, CMA (AAMA)
1206	Oklahoma-SW Regional	July 21, 2024	Sherry Bogar, CMA (AAMA), CN-BC

#### **Management Steering Committee (MSC) CALLS OR MEETINGS**

- There were MSC conference calls or virtual meetings as necessary, and all information was then shared before or during the next BOT virtual or in person meeting.

#### **OTHER**

- This officer has participated in numerous conference calls and virtual meetings throughout the year. This officer met regularly and worked with CEO Balasa to respond to all questions and complete all necessary duties and challenges brought to this officer. Maintaining the integrity of the BOT and the AAMA was at the forefront.
- This officer participated in regular meetings with the new Board Services and Project Manager Flynn. Documents and protocols have been recreated. Timelines for staff day-to-day functions and BOT projects are being established. This will ensure the BOT projects move this organization forward while collaborating with AAMA staff.
- This officer participated in regular meetings with Senior Director of MarCom Mokijewski and/or Project Manager Flynn, to review and discuss updates, status of projects and information.

This officer has also remained available to the MSC, BOT, CEO Balasa, AAMA Board Services Manager, AAMA Staff Directors, IT/Website Project Manager, CB, CEB, MAERB, and all AAMA members.

All correspondence and communications were responded to promptly.

This President would like to thank CEO and Legal Counsel Donald Balasa, JD, MBA, for his availability and support, not only for this officer, but for the entire Board of Trustees. This officer wishes to thank new Board Services Manager Sharon Flynn for her support and willingness to help establish protocols for ensuring a successful team. I commend the AAMA directors, managers, and staff for their willingness to support the efforts and ideas not only of this officer. but of the entire Board of Trustees. I wish to thank Website Project Manager/IT Knight for helping to keep this project on target.

This officer thanks the Board of Trustees for their dedication and drive to enhance, grow, and promote the AAMA organization and the profession. Your dedication, willingness to standardize protocols, and support of this officer is immensely appreciated. The BOT members continue to do a great job promoting this organization and profession amongst the many challenges. It has

1243 been my honor and privilege to have worked with everyone.

1244

1245 This officer would like to thank the members of the CB, CEB and Society of Past Presidents for  
1246 the support this President received. Your dedication to this organization and profession will help  
1247 ensure we continue to move forward in the right direction.

1248

1249 Lastly, this officer thanks the AAMA members for their trust they placed in me as I served as the  
1250 AAMA President 2023–2024.

1251

1252 Monica Case, CMA (AAMA)

1253 AAMA President 2023–2024



**American Association of Medical Assistants® (AAMA)**

**Report of the Immediate Past President**

**For the period ending September 2024**

The duties of the Immediate Past President are as follows:

- Serves as an officer 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 Maxine Willaims Board of Directors
- Serves as Chair of the Nominating Committee

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

- Annual Conference Committee – Chair
- Awards Committee – Chair
- Advisory Task Force – Chair
- Partnership Task Force – Chair
- Career Professional Development Committee – Member

**MEETINGS ATTENDED:**

- AAMA Annual Conference, September 21–25, 2023 – Orlando, Florida
- Board of Trustees Executive Session – Thursday, September 21, 2023
- First Timers and Student Reception – Friday, September 22, 2023
- Board of Trustees Open Session – Friday, September 22, 2023
- Board of Trustees Executive Session Reconvene – Friday, September 22, 2023
- CMA (AAMA) Knowledge Bowl – Friday, September 22, 2023
- Excel Awards Ceremony – Friday, September 22, 2023
- 67<sup>th</sup> House of Delegates – Saturday, September 23, 2023
- Meet the Candidates – Saturday, September 23, 2023
- SoPPs and AAMA BOT Meeting – Sunday, September 24, 2023
- CEO, Conference Chair/Vice President and Conference Direct Meeting – Sunday, September 24, 2023
- State Leaders Session – Sunday, September 24, 2023
- Presidents Banquet – Sunday, September 24, 2023
- Board of Trustees Post Conference Executive Session/Orientation, Maxine Williams Scholarship Fund Meetings – Monday, September 25, 2023
- AAMA 2023-2024 Committees, Strategy Teams and Task Forces Meet and Greet Monday, September 24, 2023
- AAMA MSC Meeting – October 11, 2023
- AAMA BOT Virtual Meeting – October 12, 2023
- Virtual Meeting with Sun Bus – Dr. Nern, CEO Balasa, President Case – Oct. 19, 2023
- MGMA Exhibit, Nashville, TN – October 21–24, 2023
- AAFP Exhibit, Chicago, IL – October 27–29, 2023
- Meeting with AAMA Board Service Manager, AAMA Marketing Director and President Case, Chicago, Illinois – November 8, 2023

- 1298 • AAMA Management Steering Committee (MSC) Meeting, Chicago, IL - November 8–9,
- 1299 2023
- 1300 • BOT Planning Session, Chicago, IL – November 10–11, 2023
- 1301 • AAMA MSC Virtual Meeting – November 28, 2023
- 1302 • AAMA BOT Virtual Meeting – December 10, 2023
- 1303 • AAMA Conference Staff Director Meeting – December 20, 2023
- 1304 • Virtual meeting with Amway Grand/Meeting Planner/President Case – January 3, 2024
- 1305 • Virtual Monthly Meeting for Advisory Task Force with CEO, Board Services Manager,
- 1306 Marketing Director, and AAMA President – January 4, 2024
- 1307 • Virtual Meeting with Writer L. Bell, Don Balasa, CEO, and President Case – January 9,
- 1308 2024
- 1309 • Virtual Monthly Meeting with Board Services Manager and Marcom Director – January
- 1310 12, 2024
- 1311 • AAMA BOT Virtual Meeting – January 14, 2024
- 1312 • Virtual Meeting on Conference 2024 Priorities with MarCom Directors, Board Services
- 1313 Manager, and President Case – January 18, 2024
- 1314 • Virtual Meeting with AAMA Meeting Planner Basel and President Case – January 19,
- 1315 2024
- 1316 • MSC Meeting – virtual, January 29, 2024
- 1317 • Career Professional Development virtual meeting – January 30, 2024
- 1318 • AAMA Conference Committee Chair monthly virtual meeting with Staff – Feb. 1, 2024
- 1319 • AAMA Conference Committee virtual meeting – Feb. 3, 2024
- 1320 • MSC Meeting – February 8, 2024
- 1321 • BOT Winter Meeting – February 9–10, 2024
- 1322 • CEB Winter Meeting – Feb. 11–12, 2024
- 1323 • CB Winter Meeting – Feb. 23–24, 2024
- 1324 • AAMA Conference Committee virtual meeting – Feb. 28, 2024
- 1325 • AAMA Nominating Committee virtual meeting – Feb. 29, 2024
- 1326 • AAMA Career Professional Development virtual meeting – Feb. 29, 2024
- 1327 • AAMA Conference Committee Chair monthly virtual meeting with Staff – March 7,
- 1328 2024
- 1329 • BOT monthly meeting - virtual, March 10, 2024
- 1330 • BOT special virtual meeting – March 11, 2024
- 1331 • Partnership Chair virtual meeting with Sun Bus – March 13, 2024
- 1332 • Nominating Committee Chair virtual meeting with staff – March 19, 2024
- 1333 • AAMA Leadership virtual meeting presentation/CEU – March 23, 2024
- 1334 • AAMA Conference Committee virtual meeting – March 27, 2024
- 1335 • Conference Committee Chair virtual meeting with staff – April 4, 2024
- 1336 • Nominating Committee virtual meeting – April 4, 2024
- 1337 • MSC meeting – virtual, April 7, 2024
- 1338 • BOT monthly meeting - virtual, April 7, 2024
- 1339 • Career Professional Development virtual meeting – April 8, 2024
- 1340 • Knowledge Bowl/CB conference virtual meeting – May 2, 2024
- 1341 • Conference and Awards Committee Chair virtual meeting with staff – May 2, 2024
- 1342 • New Hampshire virtual representative assignment – May 4, 2024

- BOT monthly meeting - virtual, May 5, 2024
- Virtual meeting with writer for Career Professional Development – May 10, 2024
- Career Professional Development virtual meeting – May 13, 2024
- Bylaws Committee virtual meeting – May 14, 2024
- Conference Committee Chair virtual meeting with Meeting Planner, Speaker, and President May 16, 2024
- Awards Committee virtual meeting – May 16, 2024
- Awards Chair virtual meeting with staff – May 20, 2024
- Conference Committee virtual meeting with Meeting Planner K. Basel – May 22, 2024
- BOT special meeting on documents – May 29, 2024
- Conference and Awards Chair monthly meeting with staff, June 6, 2024
- BOT monthly meeting – virtual – June 9, 2024
- Virtual meeting with MGMA – June 12, 2024
- CEB summer Board meeting – Arlington VA, June 21–22, 2024
- AAMA summer Board meeting – Arlington VA, June 23–24, 2024
- AAMA Leadership virtual meeting – June 29, 2024
- Monthly meeting with Board Services Manager and MarCom Senior Director for Awards, Conference, and Advisory Task Force updates – Wed., July 10, 2024
- CB summer Board meeting, Chicago, IL – Friday July 19–20, 2024
- Conference call meeting with Dr. Nern, Sun Bus, Monday, July 22, 2024

#### **ADDITIONAL MEETINGS:**

##### **MGMA LEADERS CONFERENCE (Medical Group Management Association); Nashville, TN, October 22–24.**

This officer assisted CEO Balasa, President Case, and Social Media Manager Eldridge working the AAMA's booth at the 2023 MGMA Leaders Conference. This conference had over 3,000 attendees and our booth had a great deal of traffic and interest from many of those attendees. This exhibit allowed for promotional information and materials related to AAMA membership, continuing education, and our CMA (AAMA) certification. This officer was also in attendance with CEO Balasa, President Case, and Andrew Hajde, Director of Content and Consulting for MGMA. This meeting was incredibly positive with guarantees of continued collaborations between AAMA and MGMA.

##### **AAFP FMX (American Academy of Family Physicians): Chicago, Illinois, Oct. 27–29, 2023.**

This officer assisted CEO Balasa, President Case, and Board Services Manager Flynn, and MarCom Senior Director Mokijewski working the AAMA booth at the 2023 FMX. This conference had over 4,000 attendees; however, the traffic was not as good as the previous 2022 FMX. Contacts were established with attendees as well as introductions and small conversations with fellow exhibitors which could lead to additional valuable partnership opportunities or mutually beneficial relationships.

##### **AAMA REPRESENTATIVES BUREAU**

This officer was assigned to be the AAMA representative for the New Hampshire Society of Medical Assistants. This was a virtual meeting with sixty-nine attendees. NHSMA provided attendees with 4 AAMA CEUs from excellent speakers. Three of which were clinical topics and

one that was clinical or general. NHSMA state leaders have been reaching out to nonmember credentialed medical assistants to encourage them to participate in their meetings and education. The NHSMA appreciates and supports the recent AAMA Bylaws that granted all credentialed medical assistants active status membership. During their elections for delegates to the AAMA House of Delegates they were excited to have a long-standing member with the RMA credential the opportunity to serve as their state delegate for the AAMA 2024 HOD.

## **COMMITTEE/STRATEGY TEAM/TASK FORCE ASSIGNMENTS:**

### **Annual Conference Committee:**

This officer, as chair of this committee, contacted all members of the committee to welcome them to the committee after the 2023 Annual Conference. This officer scheduled monthly meetings with MarCom Senior Director, AAMA Board Services Manager, AAMA Meeting Planner, President Case, and Don Balasa, CEO and Legal Counsel. See further details in the Annual Conference Committee report.

### **Awards Committee:**

This officer as chair of this committee has met with committee members on several occasions to review proceedings and needs for the AAMA Welcome and Awards event. See further details in the Awards Committee Report.

### **Advisory Task Force:**

This officer as chair continues to send email updates to committee members. For further information see details in the Advisory Task Force Report.

### **Nominating Committee:**

This officer as chair provided communications and orientation of the newly elected committee members. See further details in the Nominating Committee Report.

### **Partnership Task Force:**

This officer was appointed to serve as the Partnership Chair upon notification of the previously appointed chair's resignation. See the Report of the Partnership Task Force.

### **Career Professional Development Committee:**

This officer as a member attended and participated in multiple virtual meetings as needed related to CPDC projects. All assignments or requests have been responded to and all deadlines have been met.

## **ADDITIONAL ASSIGNMENTS:**

- This officer was asked by President Case as a member of MSC to mentor newly elected Trustees. This officer initiated multiple communications as well as timely responding to all questions received.
- This officer was asked to review the Volunteer Leaders Position Descriptions (VLPD) and compare it to the BOT Policy and Procedures Document and the AAMA Bylaws for items related to officer positions. This assignment was completed.

1437 ➤ This officer attended the CB winter and summer meetings. These sessions were very  
 1438 productive and informative.  
 1439 ➤ This officer attended the CEB winter and summer Board meetings in conjunction with  
 1440 the AAMA winter and summer meeting. These meetings were productive.  
 1441  
 1442 This officer has been available to President Case and CEO Balasa in an advisory capacity as the  
 1443 Immediate Past President. This officer has also remained available to the MSC, AAMA Staff  
 1444 Directors and Manager, and all the AAMA Board of Trustees and AAMA members as needed.  
 1445  
 1446 All correspondence and communications have been responded to in a timely manner and this  
 1447 officer promptly participated in all e-mail ballots.  
 1448  
 1449 This officer would like to thank Don Balasa, JD, MBA, CEO/Legal Counsel and all the staff for  
 1450 their ongoing willingness to support the efforts of the BOT. This officer would also like to thank  
 1451 President Case for her continued leadership and drive to grow, prepare, and enhance this AAMA  
 1452 organization. This officer also commends the AAMA Staff for all their help and support to all  
 1453 the AAMA boards. Lastly, this officer would like to thank the AAMA members for their support  
 1454 and friendship during these past ten years on the AAMA Board of Trustees. It takes a village to  
 1455 be successful and this officer encourages those who desire to be future AAMA leaders to step up  
 1456 and contribute volunteers. This has been a valuable experience that will always be remembered  
 1457 and cherished.  
 1458  
 1459 Deborah Novak, CMA (AAMA)  
 1460 Immediate Past President 2023–2024

**American Association of Medical Assistants® (AAMA)**

**Report of the Secretary**

**For the period ending September 2024**

The duties of Secretary are as follows:

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

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

- Documents – Member
- Marketing Strategy Team – Chair
- Maxine Williams Scholarship Committee – Chair

**MEETINGS ATTENDED:**

- AAMA Annual Conference, September 22–25, 2023, Orlando, Florida
- Maxine Williams Scholarship Fund Board of Directors Meeting, September 25, 2023, Orlando, Florida
- Post HOD Executive Session, September 25, 2023, Orlando, Florida
- MSC Meeting – virtual, October 11, 2023
- BOT Monthly Meeting – virtual, October 12, 2023
- Documents Committee Meeting – virtual, October 23, 2023
- MSC Meeting, November 8-9, 2023, Chicago, Illinois
- BOT Planning Session, November 10-11, 2023, Chicago, Illinois
- MSC Meeting – virtual, November 28, 2023
- BOT Monthly Meeting – virtual, December 10, 2023
- Marketing Strategy Team Meeting – virtual, December 30, 2023
- BOT Monthly Meeting – virtual, January 14, 2024
- Documents Committee Meeting – virtual, January 17, 2024
- MSC Meeting – virtual, January 29, 2024
- Documents Committee – virtual, February 5, 2024
- MSC Meeting – February 8, 2024, Chicago, Illinois
- BOT Winter Meeting – February 9-10, 2024, Chicago, Illinois
- Documents Committee Meeting – virtual, February 26, 2024
- BOT Monthly Meeting – virtual, March 10, 2024
- Washington State Society of Medical Assistants Leadership Retreat – March 16–17, 2024, Bellingham, Washington
- AAMA Leadership CEU Session – virtual, March 23, 2024
- Documents Committee – virtual, March 25, 2024
- Marketing Strategy Team Meeting – virtual, April 2, 2024

- 1506 • MSC Meeting – virtual, April 7, 2024
- 1507 • BOT Monthly Meeting – virtual, April 7, 2024
- 1508 • Ohio State Society of Medical Assistants Annual Conference – April 25–27, 2024,
- 1509 Cincinnati, Ohio
- 1510 • BOT Monthly Meeting – virtual, May 5, 2024
- 1511 • Marketing Strategy Team Meeting – virtual, June 1, 2024
- 1512 • Maxine Williams Scholarship Committee Meeting – virtual, June 6, 2024
- 1513 • BOT Monthly Meeting – virtual, June 9, 2024
- 1514 • Maxine Williams Scholarship Committee Meeting – virtual, June 12, 2024
- 1515 • BOT Summer Meeting – June 22-24, 2024, Arlington, Virginia
- 1516 • AAMA Leadership CEU session – virtual, June 29, 2024
- 1517 • BOT Monthly Meeting – virtual, July 14, 2024

#### 1518 **AAMA REPRESENTATIVES BUREAU**

- 1521 • Washington Society of Medical Assistants – Bellingham, WA, March 15–16, 2024: The
- 1522 Washington Society of Medical Assistants Leadership Retreat was held in Bellingham,
- 1523 WA, with twenty-one leaders in attendance with 3.5 CEUs offered. Leaders in all
- 1524 positions came together to discuss the Washington Society, committee members
- 1525 discussed business, and new leaders were encouraged to learn about the committees of
- 1526 the state and leadership roles available. All concerns brought to this representative were
- 1527 reported to the appropriate staff or committee/ task force/strategy team chair for further
- 1528 review. This representative was honored to attend this in-person meeting and appreciated
- 1529 the warm and friendly hospitality.
- 1530
- 1531 • Ohio State Society of Medical Assistant – Cincinnati, OH, April 25–27, 2024: The
- 1532 Annual Conference of the Ohio State Society of Medical Assistant was held in
- 1533 Cincinnati, OH, with seventy-six registered for the event. The OSSMA awarded the Mary
- 1534 Buckley Scholarship to seven deserving students, six of whom were in attendance. Over
- 1535 the two-and-a-half-day conference, there were multiple opportunities for CEUs, with
- 1536 Saturday morning devoting time before lunch to self-care. All concerns brought to this
- 1537 representative were reported to the appropriate staff or committee/task force/strategy
- 1538 team chair for further review. This representative was honored to attend this in-person
- 1539 meeting and appreciated the warm and friendly hospitality.

#### 1540 **COMMITTEE/STRATEGY TEAM ASSIGNMENTS:**

- 1541 • Documents – Member
- 1542
- 1543 ○ Reviewed assigned documents from committee chair and provided feedback as
- 1544 requested.
- 1545 ○ Refer to the report of the Documents Committee Chair.
- 1546
- 1547 • Marketing Strategy Team – Chair
- 1548 ○ Refer to the report of the Marketing Strategy Team Chair.
- 1549
- 1550 • Maxine Williams Scholarship Committee – Chair
- 1551 ○ Refer to the report of the Maxine Williams Scholarship Committee Chair.
- 1552

As of the writing of this report, this officer has prepared and sent the following minutes, made corrections, and filed final copies with the AAMA Executive Office: AAMA Pre-Conference Executive Session (September 21–22, 2023), AAMA Pre-Conference Open Session (September 22, 2023), AAMA Post-Conference Executive Session (September 25, 2023), BOT Planning Session (November 10-11, 2023), and all monthly BOT virtual meetings (October 12, 2023, December 10, 2023, January 14, 2024, March 10, 2024, April 7, 2024, and May 5, 2024). The Board of Trustees has approved all minutes. As of the writing of this report, this officer has completed the minutes of the June 9, 2024, and July 14, 2024, BOT virtual meetings. This officer has forwarded the minutes to the MSC for review. Once the MSC has completed their review, these minutes will be sent to the BOT for final review and approval at the next scheduled virtual meeting. There are upcoming BOT monthly virtual meetings in August, and September. Once these meetings are completed, this officer will complete the minutes and send them to the MSC for review. Once approved by the MSC, the minutes will be sent to the BOT for final review and approval.

This officer received E-Ballots at the request of President Case and completed them by the deadline. All correspondence, requests for information, and all assignments have been responded to in a timely manner and all deadlines have been met.

This officer wishes to extend a thank you to President Monica Case, Chief Executive Officer and House Legal Counsel Donald Balasa, JD, MBA, and the AAMA staff for their patience and support and for their dedication to the medical assisting profession. Thank you to the members of the AAMA for your trust and support in allowing me the opportunity to serve this organization.

Virginia Thomas, CMA (AAMA)  
Secretary-Treasurer 2022–2024



**American Association of Medical Assistants® (AAMA)**

**Report of the Speaker of the House**

**For the Period Ending Sept. 2024**

The AAMA Speaker of the House presides at meetings of the House of Delegates, serves as an officer of the AAMA Board of Trustees and as a member of the AAMA Representative Bureau.

This officer had been working with Vice Speaker Geno to prepare for the 2024 AAMA House of Delegates in Grand Rapids, Michigan. This officer and Vice Speaker Geno have met virtually each month to discuss various projects and deadlines for the HOD including timeline, format and all documents. The goals of these meetings were to assure that all documents and processes were reviewed that they were properly prepared for the day of HOD

The 2024 HOD Representation Count Letter was distributed to state Presidents and follow up was done with reminders as follows:

- Initial notification was emailed to State Society's at the end of February 2024
- Reminders were sent out to states that had not submitted 30 days prior to due date
- Final Reminders were distributed approximately 7–10 days before the due date
- This officer sent personal emails to State Presidents that had not turned in Delegates forms, the Friday before due date as a reminder

This officer, Vice Speaker Geno and Parliamentary Advisor Lee reviewed the Guidelines for Delegates and Alternates. Several updates were made to the document as needed with dates and timelines along with several recommendations that were accepted by the BOT. The 2024 HOD will start one hour later for 2024 and to assist with mentoring of alternates as they learn the role of becoming delegates, they will be eligible to serve on all committees of the HOD except credentials or reference committees. Vice Speaker and this officer agreed to continue with several other processes for the previous two years HOD including:

- Deadline for Delegates and Alternates submissions will be June 23, 2024 (90 days before HOD)
- Use of the already established Excel spreadsheet for Delegates/Alternates and make available in Teams for Staff Liaison and officers to review.
- Excel spreadsheet will be used to track committee members/house volunteers. This will be used to assist with keeping records and details of the previous year's volunteers to help streamline the process and assure that delegates and alternates are being used in the appropriate roles for HOD Committees.
- Will continue with virtual training for HOD committee/house volunteers.
- Orientation of Delegates will be hosted virtually and will continue to use the PowerPoint presentation along with recording of session for those unable to attend virtually.
  - Wednesday August 28, 2024, at 6 p.m. CST and 9 p.m. CST
  - Saturday September 7, 2024, at 10:30 a.m. CST

This officer communicated monthly with Parliamentarian Advisor Lee on all documents, delegate concerns, Bylaw questions and any other issues that required her consultation.

This officer worked with Bylaws Chair (Miller) to help with date selection for Bylaws Virtual meeting and with setting up the links via Teams for these two sessions.

- 1628           • Bylaws Review #1 – August 17, 2024, at 8 a.m. (PST)  
1629           • Bylaws Review #2 – August 24, 2024, at 8 a.m. (PST)

1630  
1631 **MEETINGS ATTENDED:**

1632  
1633 This officer attended the following in person meetings:

- 1634       • AAMA 2023 Annual Conference - Orlando, Florida - September 21–25, 2023  
1635           ○ AAMA BOT Executive Session  
1636           ○ AAMA BOT Open Session  
1637           ○ AAMA Excel Awards Ceremony  
1638           ○ AAMA House of Delegates General Session  
1639           ○ AAMA House of Delegates Meet the Candidates  
1640           ○ AAMA House of Delegates Reference Committee Meetings  
1641           ○ AAMA House of Delegate Voting Session  
1642           ○ SoPPs Breakfast  
1643           ○ AAMA State Leaders Session  
1644           ○ AAMA Presidents Banquet  
1645           ○ AAMA BOT Executive Session  
1646           ○ Committee Meet and Greet  
1647       • AAMA Planning Session – Chicago, Illinois. November 8–11, 2023  
1648       • AAMA Winter BOT Meeting – Chicago, Illinois February 9–10, 2024  
1649       • AAMA Summer BOT Meeting – Arlington, Virginia June 22–24, 2024

1650  
1651 In addition to the in-person meetings, this officer attended the following virtual meetings:

- 1652       • BOT Executive Meeting – October 12, 2023  
1653       • BOT Executive Meeting – December 10, 2023  
1654       • BOT Executive Meeting – January 14, 2023  
1655       • BOT Executive Meeting – February 13, 2024  
1656       • BOT Executive Meeting – March 10, 2024  
1657       • BOT Executive Meeting – March 11, 2024  
1658       • AAMA Leadership Development Meeting – March 23, 2024 (presented)  
1659       • BOT Executive Meeting – April 7, 2024  
1660       • BOT Executive Meeting – May 5, 2024  
1661       • BOT Executive Meeting – May 29, 2024  
1662       • BOT Executive Meeting – June 9, 2024  
1663       • AAMA Leadership Development Meeting – June 29, 2024  
1664       • BOT Executive Meeting – July 14, 2024

1665  
1666 This officer plans to attend the following scheduled meetings after submission of this report:

- 1667       • BOT Executive Meeting - August 11, 2024  
1668       • By-Laws Review #1 – August 17, 2024, at 8 a.m. (PST)  
1669       • By-Laws Review #2 – August 24, 2024, at 8 a.m. (PST)  
1670       • Wednesday August 28, 2024, at 6pm CST and 9 p.m. CST  
1671       • Saturday September 7, 2024, at 10:30 a.m. CST

1672 This officer was appointed to serve as chair of the Membership Development Committee and HOD  
1673 Minutes Committee. In addition, this officer was appointed to serve as a member of the following  
1674 committees: Annual Conference Committee, Career Professional Development Committee, and Strategic  
1675 Issues Planning Committee.

The following are tasks that this officer received as part of participation of appointed AAMA Committees:

#### ANNUAL CONFERENCE COMMITTEE

- Participated in monthly virtual meetings (last Wednesday of each month)
- Responded to emails from Chair Novak for committee tasks and votes
- May 16, 2024, participated in a meeting with Chair Novak and Meeting Planner Basel to discuss layout of HOD in Grand Rapids

#### CAREER PROFESSIONAL DEVELOPMENT COMMITTEE

- Participated in virtual meetings as scheduled by Chair Neu
- Reviewed videos and print ads for Medical Office Basics Modules
- Reviewed information and presentation on new badge project
- Responded to email and votes as requested by Chair Neu
- Refer to report of the Chair

#### HOD MINUTES

- Members for committee were selected and approved by President Case:
  - Shirley Sawyer, CMA (AAMA) – Trustee
  - Sandra Williams, CMA (AAMA) – Trustee

#### STRATEGIC ISSUES PLANNING COMMITTEE

- Participated in development and update of 2023–2025 Strategic Issues Plan
- Assisted with updating of Excel Spread sheet with documentation of what items are completed towards each Strategic Issue Plan Goal
- Refer to report of the Chair

#### REPRESENTATIVE BUREAU ASSIGNMENTS

##### Connecticut State Society of Medical Assistants

- This officer attended the Connecticut Annual Conference April 5–6, 2024, in Hartford, Connecticut. There were fifty-three attendees (Members 35, Non-Members 6, Faculty 7 and Students 5) and 15 CEU sessions by excellent speakers. Connecticut State Society offers CTSMA Spirit of Giving, where they pick a charity or special project of the year to donate to. Connecticut Society promotes that attendees dress down for the first day for a monetary donation and those donations go to the selected organization. For 2024 Connecticut Society selected Foundation for Sarcoidosis Research. There was a representative present at this year's conference where they also served as a special guest speaker. The Sarcoidosis Foundation announced that CTSMA's Vice President has been selected to serve as a speaker for their organization in Connecticut. Officers and delegates were also nominated and elected during their General Assembly Meeting. The General Assembly elected two new individuals who volunteered as delegates and one new Board of Director member. This representative was honored to install the new officers of Connecticut Society. This representative was provided allotted time to present the AAMA Power Point to discuss changes and upcoming events for the AAMA. The attendees were very appreciative of the updates. This representative was honored to attend the Connecticut annual meeting and appreciated the warm and friendly hospitality by all Connecticut leaders and attendees.

##### Maine State Society of Medical Assistants

- This officer attended the Maine Annual Conference April 27, 2024, in Bangor, Maine. There were approximately fifty-five attendees and four CEU sessions by excellent speakers. The CEUs were very engaging, especially a special presentation by Rock Steady Boxing. This organization

enables people with Parkinson's Disease to fight back by empowering them to improve their quality of life through non-contact exercise curriculum. One of the speakers was a member of AAMA, however she was a credentialed CCMA that did an excellent presentation on securing DME for patients. This CCMA discussed how important the AAMA is to the profession and how it is the only organization for medical assistants therefore she could not wait to join the association. This representative presented the AAMA Power Point that highlighted changes and upcoming events for the AAMA. This representative was humbled to be asked to attend the Maine annual meeting and appreciated the warm and welcoming hospitality.

#### Southwest Regional Meeting

- This officer attended the Southwest Regional Meeting July 19–20, 2024, in Oklahoma City, Oklahoma. This is a yearly event hosted on the third weekend of every July. The southwestern states rotate hosting this leadership conference alphabetically. The Southwest Regional Group is made up of California, Colorado, Hawaii, Nevada, New Mexico, Oklahoma, Texas, and Utah. There were approximately thirty-one attendees including approximately 10 CMA non-members, with attendees coming from California, Colorado, New Mexico, Texas, and Utah. All CEUS presented were on leadership skills and tools. There was a total of 12 CEUS available to participate in. The CEUs were interactive, and the agenda was laid out so that each topic connected to the topic before it. The hosting society, Oklahoma allowed this representative an allotment of time to be able to engage with the attendees and present the AAMA Updates Power Point. During the presentation this officer provided historical facts to those in attendance, especially since many of them were non-members and provided prizes for the correct answer. This representative was honored to have been asked to attend this annual gathering of the Southwestern state leaders.

This officer participated in all e-votes and responded to correspondence as requested by President Case in a timely manner. The officer participated in all virtual board meetings and virtual committee meetings at the request of President Case and the committee chairs. This officer participated and completed all special assignments including review of the Volunteer Leadership Position Description manual, CEB Standing Rules and Guidelines and the Board of Trustee's manual.

This officer would like to thank President Case and Immediate Past President Novak for their leadership and continued contributions to the AAMA. Throughout the trials and tribulations of the last year you never lost sight of what the real objective was and continues to be. Neither of you ever forgot that we are in all in this together for the elevating our members and the bringing recognition to the profession. Thank you for the inspiration.

This officer would like to thank Don Balasa, JD, MBA, CEO, for his many years of service and guidance to the AAMA Volunteer Leaders. A huge thank you to Sharon Flynn, Board Services Manager, for joining this organization and bringing a different perspective to help improve the growth of this organization. Thank you to all the AAMA staff, for their support and willingness to serve all the AAMA members. This officer would like to commend and recognize the volunteer leaders of the Certifying Board and Continuing Education Board. Your jobs are not easy and yet you do it with grace and passion.

Finally, this officer would like to thank the members, along with the amazing men and women that choose daily to lead them. Thank you for being front line workers both professionally for your patients and for the AAMA. Know that your hard work does not go unnoticed and is not unappreciated. Thank you for all that you do.

Sherry Bogar, CMA (AAMA), CN-BC  
Speaker of the House 2023–2025

**American Association of Medical Assistants® (AAMA)**

**Report of Vice Speaker Geno**

**For the Period Ending September 2024**

The AAMA Vice Speaker of the House aids the Speaker in preparing for the HOD and serves as an officer of the AAMA BOT. Additionally, this officer is a member of the AAMA Representatives Bureau.

**AAMA VICE SPEAKER of the HOUSE REPORT:**

This officer was appointed to chair the Documents Committee and serve on the HOD Minutes Committee, Membership Committee, and Partnership Committee.

This officer and Speaker Bogar have communicated through virtual meetings to discuss the HOD and related responsibilities. Collaboration with Speaker Bogar covered the following topics:

- Received dates for future meetings and deadlines.
- Deadlines for HOD.
- Future meeting dates and deadlines.
- Tellers and Credentials Volunteers.
- Delegates and Alternate Delegates list.
- Utah Delegation – member eligibility issue.
- Correspondence with Sharon Flynn.
- Orientation meeting for Delegates.
- HOD housekeeping (name plates, room setup, etc.)
- Letters to State Presidents about not turning in delegates submissions on time.
- Conversation/emails for Eulogy for Boni Bruntz.

For full details of the work completed for the House of Delegates, please see Speaker Bogar's full report.

**MEETINGS ATTENDED:**

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

- Post-HOD/Executive Session – Orlando, Florida – September 25, 2023
- AAMA BOT Virtual Meeting – October 12, 2023
- Documents Committee Meeting – October 23, 2023
- Membership Committee Meeting – November 1, 2023
- AAMA BOT Planning Session – Chicago, IL, on November 9–12, 2023
- AAMA BOT Virtual Meeting – December 10, 2024
- Membership Committee Meeting January 9, 2024 (I was unable to meet, due to family emergency)
- AAMA BOT Virtual Meeting – January 14, 2024
- Documents Committee Meeting – January 17, 2024

- 1827 ➤ Speake/Vice Speaker Meeting – February 5, 2024
- 1828 ➤ Documents Committee Meeting – February 26, 2024
- 1829 ➤ AAMA BOT Virtual Meeting – March 10, 2024
- 1830 ➤ AAMA BOT Executive Virtual Meeting – March 11, 2024
- 1831 ➤ Membership Committee Meeting – March 20, 2024
- 1832 ➤ Documents Committee Meeting – March 25, 2024
- 1833 ➤ AAMA BOT Virtual Meeting – April 7, 2024
- 1834 ➤ Membership Committee Meeting – April 17, 2024
- 1835 ➤ Speaker/Vice Speaker Meeting – April 28, 2024
- 1836 ➤ Membership Committee Meeting – April 30, 2024
- 1837 ➤ AAMA BOT Virtual Meeting – May 5, 2024
- 1838 ➤ Documents Committee Meeting – May 21, 2024
- 1839 ➤ Membership Committee Focus Group Meeting – May 28, 2024
- 1840 ➤ Membership Committee Focus Group Meeting – May 29, 2024
- 1841 ➤ AAMA BOT Virtual Meeting – May 29, 2024
- 1842 ➤ Membership Committee Focus Group Meeting – June 3, 2024
- 1843 ➤ AAMA Leadership Meeting/ CEU – June 29, 2024
- 1844 ➤ AAMA BOT Virtual Meeting – July 14, 2024
- 1845 ➤ Membership Meeting – July 17, 2024
- 1846 ➤ Speaker/Vice Speaker Meeting – July 28, 2024
- 1847 ➤ Documents Committee Meeting – July 22, 2024
- 1848 ➤ AAMA BOT Virtual Meeting – August 11, 2024
- 1849 ➤ Speaker/Vice Speaker Meeting – August 25, 2024
- 1850 ➤ AAMA BOT Virtual Meeting - September 8, 2024

## 1851 **REPRESENTATIVES BUREAU ASSIGNMENTS:**

1852 Bozeman, Montana and Greensboro, North Carolina. Reports were sent to the MSC.

### 1853 • **Montana Assignment**

1854 This officer attended the Montana Society of Medical Assistants Conference on April 19–22,  
 1855 2024. It was a fantastic opportunity to engage with the Montana Society, fostering learning and  
 1856 fellowship. There were twenty-six registered attendees with nine CEUs offered. The sessions  
 1857 were well-received, and the speakers were informative. This officer presented one CEU on  
 1858 suicide prevention and shared the AAMA PowerPoint, highlighting benefits and resources.  
 1859 Additionally, this officer installed the newly elected officers. This officer thanks Montana SMA  
 1860 for their hospitality.

### 1861 • **North Carolina Assignment**

1862 This officer attended the North Carolina conference at the Embassy Suites in Greensboro, NC.  
 1863 The large state society's enthusiasm was inspiring. The conference had 157 registered attendees,  
 1864 including full registrations, students, and single-day participants. Thirteen speakers presented. I  
 1865 attended the ceremony for newly elected officers and served as a coach/scorekeeper for the  
 1866 knowledge bowl. Congratulations to Amber Greer for receiving the Mary S. Grubb Award. No  
 1867 issues were reported. This officer thanks the North Carolina SMA for their hospitality.

## 1872 **COMMITTEES SERVED:**

1873 **Documents Committee (Chair)**

1875 This Committee was charged with updating the Volunteer Leaders Position Descriptions  
1876 (VLPD), State and Chapter Secretary Guidelines as well as State and Chapter Treasurer  
1877 guidelines. Please see the committee report for full details.  
1878

1879 **Membership Committee**

1880 Served on the committee led by Chair Sherry Bogar. Participated in virtual committee meetings  
1881 as requested by the Chair. Please see the committee report for full details.  
1882

1883 **Partnership Committee**

1884 This committee met to review goals and aims for the upcoming year and continues to work on  
1885 these goals.  
1886

1887 **HOD Minutes Committee**

1888 No tasks assigned for review by the HOD Minutes Committee.  
1889

1890 This officer took part in all e-ballots from the President and virtual meetings called by the  
1891 President as shown above. All correspondence has been responded to promptly, and all deadlines  
1892 have been met.  
1893

1894 I would like to thank President Case for her leadership, as well as CEO Don Balasa, JD, MBA,  
1895 and all the AAMA staff for their support and guidance. Additionally, I extend my gratitude to the  
1896 members of the BOT, CEB, and CB for their contributions to our organization, and to all  
1897 members who stand for our profession and organization daily. As I journey into life post BOT, I  
1898 would like to say that my learning experience and knowledge acquired has been eye-opening and  
1899 beneficial for my knowledge of the AAMA, I could not have had this opportunity without the  
1900 support of our members and their faith in me as a leader, and rest assured I will be back when my  
1901 personal life with my mother settles. Lastly, thank you to Speaker Bogar for including this vice  
1902 speaker in all correspondence dealing with the HOD.  
1903

1904  
1905 Natasha Maria Geno, ATS, CMA (AAMA)

1906 Vice Speaker 2023–2024  
1907

1908 **American Association of Medical Assistants® (AAMA)**

1909 **Report of Trustee Houghton**

1910 **For the period ending September 2024**

1911

1912 The duties of a Trustee are as follows:

1913     Serve as a member of the Board of Trustees

1914     Serve as a member of the AAMA Representatives Bureau

1915

1916 Additionally, this Trustee was appointed to serve on the following:

1917     • Leadership Development Strategy Team – Chair

1918     • Annual Conference Committee – Member

1919     • Bylaws and Resolutions Committee – Member

1920     • Educators Collaborative Task Force – Member

1921     • Marketing Strategy Team – Member

1922

1923 **MEETINGS ATTENDED:**

1924

1925 In-Person

1926     • 2023 Annual Conference - Orlando, Florida - September 21–25, 2023

1927     • BOT Executive Session

1928     • BOT Open Session

1929     • Excel Awards Ceremony

1930     • House of Delegates General Session

1931     • House of Delegates Meet the Candidates

1932     • House of Delegates Reference Committee Meetings

1933     • House of Delegate Voting Session

1934     • SoPPs Breakfast

1935     • AAMA State Leaders Session

1936     • Presidents Banquet

1937     • BOT Executive Session

1938     • Committee Meet and Greet

1939     • Board of Trustee Planning Session November 9–12, 2023, Chicago, IL

1940     • Board of Trustees February 8–10, 2024, Chicago, IL

1941     • Board of Trustees June 23–24, 2024, Arlington, VA

1942     • Board of Trustees October 12, 2023

1943     • Board of Trustees December 10, 2023

1944     • Board of Trustees January 12, 2024

1945     • Board of Trustee March 10, 2024

1946     • Board of Trustees April 7, 2024

1947     • Board of Trustees May 5, 2024

1948

1949 Meetings planning to attend:

1950     • Virtual Annual Conference Planning, July 24, 2024, and August 28, 2024

1951     • Virtual Board of Trustees, August 11, 2024, and September 8, 2024

1952     • Bylaws Proposed Amendment review, August 17 and 24, 2024



## **REPRESENTATIVES BUREAU ASSIGNMENTS:**

- Idaho Society of Medical Assistant Annual Conference, April 26–27, 2024
  - Trustee Houghton was honored to attend the Idaho State Society of Medical Assistant Annual Conference. There were approximately twenty-one students in attendance from schools around the area. This state society is working very hard to increase membership and to bring in new leadership. The education that was provided was exceptionally good.
- Pennsylvania Society of Medical Assistant Annual Conference, May 4, 2024
  - Trustee Houghton had the honor of going to Harrisburg, PA, for the Pennsylvania Society of Medical Assistants Annual Conference. This society is working hard to invite new leaders to join the society. The education that was provided to its members and attendees was exceptional.

## **COMMITTEE/STRATEGY TEAM ASSIGNMENTS:**

- Annual Conference Committee – Member
  - Please see the report of the Chair. This member has participated in emails and virtual meetings as called by the Chair.
  - Conference Committee Meeting, February 28, 2024
  - Conference Committee Meeting, March 27, 2024
  - Conference Committee Meeting, May 22, 2024
  - Provided the layout and format for the State Leaders Session at Annual Conference.
  - All assignments have been completed
- Bylaws and Resolutions Committee – Member
  - Please see the report of the Chair. This member has been in contact with the Chair in person and via email.
  - Bylaws Committee Meeting, March 4, 2024
  - Bylaws Committee Meeting, April 15, 2024
  - Bylaws Committee Meeting, May 14, 2024
  - Bylaws Committee Meeting, June 7, 2024
  - Bylaws Committee Meeting, July 1, 2024
  - Assigned to provide the rationale for the proposed Bylaws amendments (PBAs) from the previous couple of years. Completed
  - Assigned to facilitate the May 14, 2024, virtual meeting and provided members' assignments for the PBA rationale with due date. Completed
  - Answered questions via email and text about the previous bylaws sent back from the HOD. Also provided the format of how the PBAs are to be sent out in the Delegates Packet.
  - All other assignments have been completed.
- Educators Collaborative Task Force – Member
  - Please see the report of the chair. This member has contacted the Chair in person and via email. Provided the educators on this committee with the link to the student membership application.

- 2001                   ○ Virtual Meeting, April 10, 2024
- 2002                   ○ Virtual Meeting, May 8, 2024
- 2003                   ○ Virtual Meeting, June 5, 2024
- 2004                   ○ All assignments completed
- 2005
- 2006                   • Leadership Development Strategy Team – Chair
- 2007                   ○ Please see the report of the Chair.
- 2008                   ○ Leadership Development Meeting, March 14, 2024
- 2009                   ○ State Leaders CEU, March 23, 2024
- 2010                   ○ Leadership Development Meeting, May 9, 2024
- 2011                   ○ Leadership Development Meeting, June 13, 2024
- 2012                   ○ State Leaders CEU, June 29, 2024
- 2013
- 2014                   • Marketing Strategy Team – Member
- 2015                   ○ Please see the report of the Chair. This member has participated in emails and
- 2016                   virtual meetings as called by the Chair.
- 2017                   ○ Marketing Meeting, April 2, 2024
- 2018                   ○ Marketing Meeting, June 1, 2024
- 2019                   ○ All assignments completed
- 2020

#### 2021 **OTHER ASSIGNMENTS:**

- 2022
- 2023                   • This trustee was also assigned to review the Volunteer Leadership Position Descriptions
- 2024                   brochure, Board of Trustee Policy and Procedure Manual, CEB Standing Rules and CEB
- 2025                   Policy and Procedure Manual. These assignments are completed.
- 2026

2027 All correspondence has been responded to in a timely manner and all deadlines have been met.

2028

2029 This trustee participated in all E-Ballots from President Case.

2030

2031 Trustee Houghton would like to thank President Case for all her leadership and guidance through

2032 her service. This Trustee would also like to thank Donald Balasa, JD, MBA, for all the guidance

2033 he gives to this organization. This Trustee would like to thank the staff for their hard work over

2034 the last year. There have been many changes that they have had to handle. Trustee Houghton

2035 would like to thank the members for all they do for their states. This Trustee would like to thank

2036 the Board of Trustees, Continuing Education Board, and the Certifying Board for their continued

2037 work on behalf of the members.

2038

2039 Claire M. Houghton, CMA (AAMA)

2040 2022–2024 Trustee

**American Association of Medical Assistants® (AAMA)**

**Report of Trustee Miller**

**For the Period Ending September 2024**

The duties of a Trustee are as follows:

Serve as member of the Board of Trustees

Serve as a member of the AAMA Representatives Bureau

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

Awards Committee 2023–2024 Member

Bylaws and Resolutions 2023–2024 Chair

Membership Development 2023–2024 Member

Partnership Task Force 2023–2024 Member

**BOARD OF TRUSTEES and COMMITTEE MEETINGS ATTENDED:**

AAMA 2023 Annual Conference, Lake Buena Vista, FL-September 22–25, 2023

- Board of Trustees-Pre HOD-Executive Session, Lake Buena Vista, FL-September 21, 2023
- First Timers and Students Reception, Lake Buena Vista, FL-September 22, 2023
- Board of Trustees Executive Session and Endowment Meetings, Lake Buena Vista, FL-September 22, 2023
- CMA(AAMA) Knowledge Bowl, Lake Buena Vista, FL-September 22, 2023
- Welcome and Awards Celebration, Lake Buena Vista, FL-September 22, 2023
- AAMA HOD Sessions I & II, Lake Buena Vista, FL-September 23, 2023
- Meet the Candidates, Lake Buena Vista, FL-September 23, 2023
- AAMA Reference Committees, Lake Buena Vista, FL-September 23, 2023
- AAMA HOD Reconvene and Voting, Lake Buena Vista, FL-September 23, 2023
- Meeting with the Society of Past Presidents (SoPPs), Lake Buena Vista, FL-September 24, 2023
- State Leaders Session, Lake Buena Vista, FL-September 24, 2023
- President's Banquet, Lake Buena Vista, FL-September 24, 2023
- BOT Orientation, Lake Buena Vista, FL-September 25, 2023
- BOT Post Conference Meeting, Lake Buena Vista, FL-September 25, 2023
- AAMA Committees, Strategy Teams, and Task Force Meet and Greet, Lake Buena Vista, FL-September 25, 2023
- BOT Meeting Conference Updates-Virtual, October 12, 2023
- Membership Meeting-Virtual, November 1, 2023
- AAMA Planning Session, Chicago, IL-November 10–11, 2023
- Bylaws Meeting-Virtual, November 14, 2023
- BOT Meeting-Virtual, December 10, 2023
- Membership Meeting-Virtual, January 9, 2024
- Awards Committee Meeting-Conference Call, January 12, 2024
- BOT Meeting-Virtual, January 14, 2024
- Bylaws Meeting-Virtual, January 23, 2024

- 2086 • BOT Meeting- Chicago IL February 9–10, 2024
- 2087 • Awards Committee Meeting-Chicago, IL, February 9, 2024
- 2088 • Bylaws Committee Meeting-Chicago, IL, February 9, 2024
- 2089 • BOT Meeting-Virtual, February 13, 2024
- 2090 • Bylaws Committee Meeting-Virtual, March 4, 2024
- 2091 • BOT Meeting- Virtual, March 10, 2024
- 2092 • BOT Executive Session-Virtual, March 11, 2024
- 2093 • BOT Meeting-Virtual, April 7, 2024
- 2094 • Bylaws Committee Meeting-Virtual, April 15, 2024
- 2095 • Bylaws Committee Meeting-Virtual, May 14, 2024
- 2096 • Awards Committee Meeting-Virtual May 16, 2024
- 2097 • BOT Meeting-Virtual, May 5, 2024
- 2098 • BOT Meeting-Virtual, May 29, 2024
- 2099 • Focus Group Meeting-Virtual, June 4, 2024
- 2100 • Focus Group Meeting-Virtual, June 5, 2024
- 2101 • Executive Ad-Hoc Meeting-Virtual, June 6, 2024
- 2102 • Bylaws Committee Meeting-Virtual, June 7, 2024
- 2103 • BOT Meeting-Virtual, June 9, 2024
- 2104 • Focus Group Meeting-Virtual, June 13, 2024
- 2105 • BOT Meeting-Arlington, VA, June 23-24, 2024
- 2106 • Bylaws Committee Meeting-Arlington, VA, June 24, 2024
- 2107 • Leadership Meeting-Virtual, June 29, 2024
- 2108 • Bylaws Committee Meeting-Virtual, July 1, 2024
- 2109 • BOT Meeting-Virtual, July 14, 2024
- 2110 • BOT Meeting-Virtual, August 11, 2024 (Anticipated to Attend)

## 2111 **REPRESENTATIVES BUREAU ASSIGNMENTS:**

### 2112 ***Nebraska State Society of Medical Assistants - Lincoln Nebraska April 26–27, 2024***

2113 Trustee Miller attended all business meetings including pre and post conference board

2114 meetings and the GA where she was asked to serve as parliamentarian. This trustee attended

2115 the educational sessions and found them to be interesting. This Trustee presented a CEU

2116 session on Leadership Tips and Parliamentary Procedure. During the Saturday lunch newly

2117 certified and recertified members were recognized. They held their Installation of 2024–2025

2118 Officers. President, Barb Carter, CMA (AAMA), Vice President, Angie Eytcheson, CMA

2119 (AAMA) CPC, Secretary, Steph Richards, CMA (AAMA), Treasurer, Jen Kocian, CMA

2120 (AAMA), CPC, Speaker, Terrie King, CMA (AAMA), Vice Speaker, Shannon Kibbee, CMA

2121 (AAMA), CRCs, and Immediate Past President, Angie McCarter, CMA (AAMA), LRT.

2122 They do a charity event on Friday, for a \$5.00 donation you can wear jeans, it was highly

2123 successful. They had eighty-seven attendees including fourteen nonmembers and one student.

2124 Trustee Miller met individually with several members including the student member.

2125 Questions were answered and information given. This Trustee thanks the NSMA for their

2126 hospitality.

### 2127 ***Oregon Society of Medical Assistants - Portland Oregon, May 9–11, 2024***

2128 This was a late assignment due to the original AAMA Rep assigned was not able to attend

2129 their meeting. As an OSMA Officer, Miller already had commitments but was able to

represent AAMA even during her OSMA duties. Miller attended all business meetings including pre and post conference board meetings, and the GA. She was given the opportunity at lunch on Thursday to give the AAMA updates and answer questions. Very few people knew about Beneplace, and she spoke with several members and looked at the Beneplace website. She also was approached with other questions and answered them individually. Elections were held during the GA with the following results: President Christy Oldenstadt, CMA (AAMA), President Elect Paula Purdy, CMA (AAMA), Secretary Shawn Molnar, CMA (AAMA), Treasurer Candy Miller, CMA (AAMA), Immediate Past President Alexis Holcomb, CMA (AAMA) and Delegates to National Alexis Holcomb and Shawn Molnar as well as President Oldenstadt and President Elect Purdy. Friday night was Medical BINGO for CEUs; all had a fun time. Overall, they had twenty-one CEUs available for the 3 days. They had one hundred, eighty-two attendees, with members from UT, CA, and WA in attendance. Trustee Miller thanks the members of the board for their hospitality.

## **COMMITTEE STRATEGY TEAM ASSIGNMENTS:**

### ***Awards Committee-Member***

- Submitted ideas for the Awards Ceremony Theme
  - Contributed to the Student Essay Question Decision
  - Submitted Preference for Award Statues
  - Completed Excel Awards Judging as requested by Laura Niebrugge
  - Responded to all emails from Chair Novak and completed all assignments.
- See Chair Novak's report for further information

### ***Bylaws and Resolutions Committee-Chair***

#### **HIGHLIGHTs:**

- Two Proposed Bylaws Amendments will be presented at the 2024 AAMA HOD for voting on acceptance or denial.
- This Chair proposed to the Bylaws Committee, that the AAMA Bylaws Committee be open to volunteers with an AAMA Active membership, and that opportunity be included on the Volunteer Leadership Form beginning 2024–2025. The Bylaws Committee agreed and was voted on by the BOT and approved.
- An Excel spreadsheet was created to keep track of State Bylaws and when they were reviewed for mandated changes and overall compliance with AAMA Bylaws.
- All but one state sent their bylaws with the mandated changes from 2023 HOD. (Please see Chair Miller's Bylaws Report for further information)

### ***Membership Development Strategy Team-Member***

- This member was assigned to the team "AAMA Member Benefits."
- Assignments were completed on time, including, but not limited to:
  - Suggestions and review of letters written for use by states for membership recruitment and congratulations for New CMA and Non-Member CMA
  - Vendor/Idea suggestions given for Beneplace.
  - Actively took part in the development of a new AAMA "pin"
- Attended and took part in all but one of the Focus groups. This was a wonderful experience in which much information was obtain information.

2180 This member attended and participated in all committee meetings. She thanks Chair Bogar and all  
2181 the Committee members for their hard work. It has been a busy and productive year. (Please see  
2182 Chair Bogar's report for further information)  
2183

2184 ***Partnership Committee-Member***

- 2185 • Member Miller was assigned to be our contact for Shriners Hospital. She attempted to  
2186 contact them via email and phone on several occasions and as of the writing of this report,  
2187 has not been able to connect. She will continue to reach out because this is a very worthwhile  
2188 opportunity which she is very enthusiastic about.

2189 (Please see Partnership Chair Novak's report for further information)  
2190

2191 **OTHER ASSIGNMENTS:**  
2192

2193 2023 HOD Minutes Reviewed per request of 2023 Speaker Wicker. Trustee Miller has  
2194 responded to all requests and E-votes by the deadlines. All correspondence has been responded  
2195 to on time and all deadlines have been met.  
2196

2197 Trustee Miller wishes to thank President Case for her support and leadership, CEO and Legal  
2198 Counsel Donald Balasa, JD, MBA, for his guidance and ever-willingness to answer questions,  
2199 Sharon Flynn, Board Services Chair, for her assistance with so many issues, the AAMA Staff for  
2200 their assistance, and the entire AAMA BOT for their never-ending support for this Trustee.  
2201

2202 It is an honor and pleasure to serve as an AAMA Trustee.  
2203  
2204

2205 Candy Miller, CMA (AAMA)  
2206 2023–2024 Trustee

**American Association of Medical Assistants® (AAMA)**

**Report of Trustee Neu**

**For the Period Ending September 2024**

The duties of a Trustee are as follows:

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

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

- Educators Collaborative Task Force-Chair
- Career Professional Development Committee-Chair
- Awards Committee-Member
- Bylaws and Resolutions-Member
- Strategic Issues Planning-Member

**MEETINGS ATTENDED:**

- AAMA 2023 Annual Conference-Orlando, FL-September 22–25, 2023
- Board of Trustees - Pre-HOD Executive Session- September 21, 2023
- First Timers and Students Reception-September 22, 2023
- Board of Trustees Executive Session Reconvene- September 22, 2023
- General Session Knowledge Bowl-September 22, 2023
- Welcome and Awards Celebration – September 22, 2023
- 67<sup>th</sup> AAMA House of Delegates – September 23, 2023
- Meet the Candidates – September 23, 2023
- House of Delegates Reference Committee Hearings: Reports, Bylaws –September 23, 2023
- House of Delegates Reconvene and Voting –September 23, 2023
- AAMA Board of Trustees Meeting with the Society of Past Presidents (SoPPs) – September 24, 2023
- AAMA State Leaders Session – September 24, 2023
- AAMA Presidents Banquet – September 24, 2023
- Post HOD Executive BOT Session September 25, 2023, Orlando, Florida
- AAMA 2023-2024 Committees, Strategy Teams, and Task Forces Meet and Greet – September 25, 2023
- Board of Trustees Meeting February 9–10, 2024, in Chicago, IL
- Board of Trustees Meeting June 23–24, 2024, in Arlington, VA

This trustee participated in virtual meetings called by the President

- Virtual BOT Meeting January 14, 2024
- Board of Trustees Meeting Virtual March 10, 2024
- Board of Trustees Meeting, Executive Session Virtual, March 11, 2024
- Board of Trustees Meeting-Virtual April 7, 2024

- 2252 • Board of Trustees Meeting-Virtual May 5, 2024  
2253 • Board of Trustees Meeting-Virtual May 29, 2024  
2254 • Board of Trustees Meeting-Virtual June 9, 2024  
2255 • Board of Trustees Meeting-Virtual July 14, 2024  
2256

2257 **REPRESENTATIVES BUREAU ASSIGNMENTS:**  
2258

2259 **Missouri State Conference, April 19–21, 2024—Warrensburg, Missouri**

2260 This officer attended the Missouri State Conference in Warrensburg, Missouri at the Quality Inn.  
2261 The theme was “Star Power”. The Missouri Society offered 11 in-person CEUs, and the speakers  
2262 were exceptional. Topics of Independent Living Solutions, Colorectal Health, Diabetic  
2263 Education, Mental Health, Orthotics, LTBTQ+, Keeping Your Why, and Pelvic Health were  
2264 offered. All of the speaker’s power points were emailed to the members in attendance after the  
2265 conference ended. The state is working on a website and their Facebook page is how they  
2266 communicate with all members in the state. In 2026 the Missouri State Society will be  
2267 celebrating their 75<sup>th</sup> birthday. Many members contribute to the society and the officers are  
2268 enthusiastic and working to increase membership. This officer was provided the opportunity to  
2269 present the AAMA PowerPoint and invited everyone to the National Conference in September at  
2270 Grand Rapids, MI. This officer was honored to attend the Missouri State Conference as the  
2271 AAMA representative.  
2272

2273 **Iowa State Conference, April 25–28, 2024—Tama, Iowa**

2274 This officer attended the Iowa State Conference which was held at the Meskwaki Hotel &  
2275 Casino in Tama, Iowa. The theme was “Magical Experience”. They offered 11 CEUs in-person  
2276 and virtually. The speakers were great, informative and enthusiastic about the medical assistants.  
2277 Topics such as Occupational Health, Childhood Obesity, Who Runs the World-Girls, Teaching  
2278 Leadership and Ethics Taught Me, Physical Therapy, Show Up, Nobody is going to do it for you,  
2279 Long Term COVID, Clinical Documentation, How Integrative Medicine Saved Our Lives,  
2280 OSHA, and Workers’ Comp were given. This officer was provided the time to present the  
2281 AAMA PowerPoint and answer questions about volunteering on committees and the upcoming  
2282 national conference in Grand Rapids, MI. This Trustee had the pleasure of installing the state  
2283 officers with a Harry Potter-themed service. This officer was honored to attend the Iowa State  
2284 Conference—it truly was a magical experience!  
2285

2286 **COMMITTEES AND STRATEGY TEAM ASSIGNMENTS:**  
2287

2288 The following are this trustees’ committee and strategy team assignments:  
2289

2290 **Awards Committee**

- 2291 • Awards Meeting February 9, 2024  
2292 • Awards Meeting Virtual May 16, 2024  
2293     Assigned to contribute to the Awards Ceremony Theme  
2294     Assigned to contribute to the Student Essay Question  
2295     Assigned to choosing award statues  
2296     Responded to Chair’s correspondence and assignments  
2297     (See Chair Novak’s Award Report)  
2298  
2299



2300 **Bylaws and Resolutions**

- 2301       • Bylaws Meeting-Virtual April 15, 2024  
2302       • Bylaws Meeting-Virtual May 14, 2024  
2303       • Bylaws Meeting-Virtual June 6, 2024  
2304             Assigned to contribute rationales for bylaws  
2305             Responded to Chair’s correspondence and assignments  
2306             (See Chair Miller’s Bylaws Report)

2307

2308 **Career Professional Development Committee**

- 2309       • Career Professional Development February 9, 2024  
2310       • Career Professional Development-Virtual April 8, 2024  
2311       • Career Professional Development-Virtual June 5, 2024  
2312             This committee continues working on completion of the ABR-MOB project and  
2313             introducing a new e-Learning module for this year  
2314             Refer to Chair Neu’s Report

2315

2316 **Educators Collaborative Task Force**

- 2317       • Educators Collaborative Task Force-Virtual April 10, 2024  
2318       • Educators Collaborative Task Force-Virtual May 8, 2024  
2319       • Educators Collaborative Task Force-Virtual June 5, 2024  
2320       • Educators Collaborative Task Force-Virtual July 18, 2024  
2321       • Educators Collaborative Task Force-Virtual August 15, 2024  
2322             This committee was newly formed and selected to work on projects that would  
2323             assist educators to introduce the AAMA to their students.  
2324             (Refer to Chair Neu’s Report)

2325

2326 **Strategic Issues Planning Committee**

- 2327       • Strategic Issues Planning Committee-September 23, 2024  
2328             This member was assigned to review the Strategic Issues Plan  
2329             This committee continues to work on the goals  
2330             All assignments have been completed as requested by the Chair  
2331             Refer to Chair William’s Report

2332

2333 This Trustee participated in all E-Ballots from the President, all correspondence was responded  
2334 to in a timely manner and all deadlines were met.

2335

2336

2337 Pamela L. Neu, CMA (AAMA), MBA  
2338 2022–2024 Trustee

**American Association of Medical Assistants® (AAMA)**

**Report of Trustee Quinn**

**For the Period Ending Sept. 2024**

The duties of a Trustee are as follows:

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

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

- Social Media Committee - Chair
- Bylaws Committee - Member
- Documents Committee - Member
- Membership Committee - Member

**MEETINGS ATTENDED:**

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

- 2023 AAMA Annual Conference | Orlando, FL
  - Post-HOD BOT/ Endowment Executive Session | Orlando, FL – Sept. 25, 2023
- AAMA BOT Planning Session | Chicago, IL – November 9–12, 2023
- AAMA Winter Board Meeting | Chicago, IL – February 9–10, 2024
- AAMA Summer Board Meeting | Arlington, VA – June 23–24, 2024

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

- AAMA BOT October Meeting | Virtual – October 12, 2023
- AAMA Documents Committee Meeting | Virtual – October 23, 2023
- AAMA Membership Committee Meeting | Virtual – November 1, 2023
- AAMA Bylaws Committee Meeting | Virtual – November 14, 2023
- AAMA Social Media Committee Meeting | Virtual – November 21, 2023
- AAMA BOT December Meeting | Virtual – December 10, 2023
- AAMA Social Media Committee Meeting | Virtual – December 28, 2023
- AAMA Membership Committee Meeting | Virtual – January 9, 2024
- AAMA BOT January Meeting | Virtual – January 14, 2024
- AAMA Documents Committee Meeting | Virtual – January 17, 2024
- AAMA Bylaws Committee Meeting | Virtual – January 23, 2024
- AAMA Social Media Committee Meeting | Virtual – January 25, 2024
- AAMA BOT Review | Virtual – February 14, 2024
- AAMA Social Media Committee Meeting | Virtual – February 22, 2024
- AAMA Documents Committee Meeting | Virtual – February 26, 2024
- AAMA Bylaws Committee Meeting | Virtual – March 4, 2024
- AAMA BOT March Meeting | Virtual – March 10, 2024
- AAMA BOT Executive Meeting | Virtual – March 11, 2024
- AAMA Membership Committee Meeting | Virtual – March 20, 2024
- AAMA Documents Committee Meeting | Virtual – March 25, 2024
- AAMA BOT April Meeting | Virtual – April 7, 2024

- 2384 • AAMA Bylaws Committee Meeting | Virtual – April 14, 2024
- 2385 • AAMA Membership Committee Meeting | Virtual – April 17, 2024
- 2386 • AAMA Membership Committee Meeting | Virtual – April 30, 2024
- 2387 • AAMA BOT May Meeting | Virtual – May 5, 2024
- 2388 • AAMA Bylaws Committee Meeting | Virtual – May 14, 2024
- 2389 • AAMA Documents Committee Meeting | Virtual – May 21, 2024
- 2390 • AAMA Social Media Committee Meeting | Virtual – May 23, 2024
- 2391 • AAMA Membership Committee Focus Group Meeting | Virtual – May 28, 2024
- 2392 • AAMA Membership Committee Focus Group Meeting | Virtual – May 29, 2024
- 2393 • AAMA BOT Meeting | Virtual – May 29, 2024
- 2394 • AAMA Membership Committee Focus Group Meeting | Virtual – June 3, 2024
- 2395 • AAMA Membership Committee Focus Group Meeting | Virtual – June 4, 2024
- 2396 • AAMA Membership Committee Focus Group Meeting | Virtual – June 5, 2024
- 2397 • AAMA Bylaws Committee Meeting | Virtual – June 7, 2024
- 2398 • AAMA BOT June Meeting | Virtual – June 9, 2024
- 2399 • AAMA Documents Committee Meeting | Virtual – June 11, 2024
- 2400 • AAMA Membership Committee Focus Group meeting | Virtual – June 13, 2024
- 2401 • AAMA Membership Committee Focus Group Recap | Virtual – June 19, 2024
- 2402 • AAMA Social Media Committee Meeting | Virtual – June 27, 2024
- 2403 • AAMA Bylaws Committee Meeting | Virtual – July 1, 2024
- 2404 • AAMA BOT July Meeting | Virtual – July 14, 2024
- 2405 • AAMA Membership Committee Meeting | Virtual – July 17, 2024

2406

2407 Planned Meetings to attend after the submission of this report:

- 2408 • AAMA Documents Committee Meeting | Virtual – July 22, 2024
- 2409 • AAMA Social Media Committee Meeting | Virtual – July 25, 2024
- 2410 • AAMA BOT August Meeting | Virtual – August 11, 2024
- 2411 • AAMA Bylaws Review | Virtual – August 17, 2024
- 2412 • AAMA Membership Committee Meeting | Virtual – August 21, 2024
- 2413 • AAMA Social Media Committee Meeting | Virtual – August 22, 2024
- 2414 • AAMA Bylaws Review | Virtual – August 24, 2024
- 2415 • AAMA HOD Orientation for Delegates and Alternates | Virtual – August 28, 2024
- 2416 • AAMA HOD Orientation for Delegates and Alternates | Virtual – September 7, 2024
- 2417 • AAMA BOT September Meeting | Virtual – September 8, 2024

2418

## 2419 **REPRESENTATIVES BUREAU ASSIGNMENTS:**

2420 ***Indiana Society of Medical Assistants Annual Conference / Edinburg, IN – April 12-14, 2024***

2421 This Trustee attended the 68<sup>th</sup> annual Indiana Society of Medical Assistants Conference, April  
 2422 12–14. There was a slight increase in registrations this year: 47 up from 41 last year. Of the 47  
 2423 registered 30 were members, 12 were first timers, 4 educators, 8 recent recerts, 1 non-member  
 2424 and 2 members from another state. There were 9 CEUs offered. The CEU sessions were well-  
 2425 liked by all the attendees. The speakers were informative and knowledgeable. Indiana Society is  
 2426 divided into 6 districts, all of which are actively trying to recruit new members. This trustee  
 2427 presented the AAMA PowerPoint, which included slides on benefits and AAMA resources.  
 2428 Congratulations to the newly installed officers for the IN SMA. The IN SMA awarded Pam Neu

with Medical Assistant of the Year and Rita Michel with Life Membership. This trustee thanks the IN Society of Medical Assistants for their overwhelming hospitality while attending the conference!

### ***Florida Society of Medical Assistants Annual Conference / Orlando, FL – April 18–21, 2024***

This Trustee attended the 71<sup>st</sup> annual Florida Society of Medical Assistants State Conference, April 18–21. Registration was up this year to 49, several more than last year. In attendance this year were 37 members, 17 were first timers, 1 educator, and 11 non-members. Of the 11 non-members, 4 were CMAs (AAMA), 4 NHA members, 1 LPN (Educator), and 2 students. There were 6 CEUs offered. The CEU sessions were informative and knowledgeable and well-liked by all the attendees. Florida Society is divided into 7 Chapters. This trustee presented the AAMA PowerPoint, which included slides on benefits and AAMA resources. Congratulations to the newly installed officers for the FL SMA. At the conclusion of the conference, 2 of the NHA members signed up to be members of the AAMA and volunteered their time on several state committees. At the conclusion of the conference 3 students were awarded scholarships; this scholarship pays the registration fee for the 2025 FSMA Conference. This trustee thanks the FL SMA for their overwhelming hospitality while attending the conference!

### **COMMITTEE/STRATEGY TEAM ASSIGNMENTS:**

#### ***Bylaws Committee***

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

#### ***Documents Committee***

This Trustee was available for meetings and discussions with the committee and the chair through multiple emails and virtual meetings. This trustee reviewed the following documents: Volunteer Leadership Position Descriptions (VLPD) and State/Chapter Treasurer Guidelines. Please see the documents committee report.

#### ***Membership Committee***

This Trustee was available for meetings and discussions with the committee and the chair through multiple emails and virtual meetings. This trustee was assigned to and tasked with developing a focus group for CMA (AAMA) nonmembers/NCCA credentialed non-members. Please see the Membership Committee report.

#### ***Social Media Chair***

Please see the Social Media Chair report.

#### **Other Assignments:**

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

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

This Trustee would like to thank President Case for her support and leadership this past year as my first term as Trustee. CEO and Legal Counsel Donald Balasa for his dedication, guidance,

2475 and willingness to answer questions. The AAMA staff for their support and the AAMA BOT for  
2476 their assistance, guidance, and support throughout my first year as a Trustee.

2477

2478 Aimee Quinn, CMA (AAMA)

2479 2023–2025 Trustee

2480

**American Association of Medical Assistants® (AAMA)**

**Report of Trustee Sawyer**

**For the Period Ending September 2024**

The duties of a Trustee are as follows:

Serve as member of the Board of Trustees

Serve as a member of the AAMA Representatives Bureau

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

Editorial Advisory - Chair

Maxine Williams Scholarship Committee - Member

Career Professional Development Committee - Member

Documents Committee - Member

Partnership Task Force - Member

Educators Collaborative Task Force - Member

House of Delegates Minutes Committee - Member

**MEETINGS ATTENDED:**

BOT Post Conference Board Meeting, September 2023

BOT Meeting – Virtual, October 12, 2023

BOT Planning Session – Chicago, IL, November 10–11, 2023

BOT Meeting –Virtual, December 10, 2023

BOT Meeting – Virtual, January 14, 2024

BOT Winter Meeting, Chicago, IL, February 9–10 2024

BOT Meeting – Virtual, March 10, 2024

BOT Meeting – Virtual, April 5, 2024

BOT Meeting – Virtual, May 5, 2024

BOT Meeting – Virtual, June 6, 2024

BOT Summer Meeting – Arlington, VA, June 22–23, 2024

BOT Meeting – Virtual, July 14, 2024

Will attend the following BOT meeting virtually – August 11, 2024

AAMA Annual Conference, September 19–23, 2024

**REPRESENTATIVES BUREAU ASSIGNMENTS:**

Wisconsin Society – April 18–20, 2024, Neenah, WI. The 67th Wisconsin Annual Conference was held in Neenah, WI. Hosted by the Valley Chapter. It was “The Future Vision of Healthcare”. It was a great meeting with approximately 70 in attendance and one student. The CEU sessions: Reclaim Balance through Energy, Music for Wellness, Forensic Toxicology for the Medical Assistant, Respiratory Diseases after the Pandemic were just a few. There were 11 CEUs. All the speakers were great and knowledgeable on their topics. This was their first year of holding a general assembly. There were 28 members present for the assembly. There were no concerns that needed to be addressed. This representative was given time to show the slide presentation with AAMA updates. This representative was honored to attend this meeting and appreciated the warm and friendly hospitality of all members.

Texas Society – May 17–19, 2024 – Austin, TX. The Texas Society annual meeting was held in Austin, the state capital. It was Back 2 Basics. It was a great meeting with approximately 36 attendees in person and 22 virtual. Their CEU sessions: Skills Needed to Excel as a Leader, Self-Care is not Selfish, Texas Scope of Practice, Patient Advocacy, and Managing Student Anxiety were just a few of the topics presented. The speakers were all knowledgeable and interesting. There were approximately 15 members in the assembly with 10 eligible to vote. There was an evening session that included one CEU and pizza. They also did a beautiful memorial tribute to Ann Naegele. This representative was given time to show the slide presentation with AAMA updates. Trustee Sawyer was honored to install the new TSMA officers. There were no concerns to be addressed. It was this representative's honor to attend this meeting and she appreciates the warm and hospitable Texas welcome.

#### **COMMITTEE/STRATEGY TEAM ASSIGNMENTS:**

- Maxine Williams Scholarship: Trustee Sawyer attended in person, November 2023; no assignments were given at that time. Attended a virtual meeting on June 6, 2024 – was given 12 applications to review and score. Attended virtual meetings on June 12, 2024; discussed all applications and the top 5 applicants received scholarships.
- Career Professional Development: Attended January 30, 2024, virtual meeting reviewed documents that were presented for the Medical Office Basics (MOB). February 8, 2024, Chicago, IL, discussed two topics for the MOA. April 8, 2024 - Discussed recordings of speakers and number of CEUs. May 13, 2024, discussed final pricing of MOB and CEUs after all documentation had been returned and branded. Will attend the virtual meeting in July 2024.
- Documents Committee: Trustee Sawyer has attended virtual meetings in October 2023 and January 2024; reviewed VLPD to make changes and bring it up to date, VLPD is waiting on CEB input before update can be finalized. February 26, 2024: Trustee Sawyer was given a section of the National and State Treasurer document to review and make suggestions. March 25, 2024: Trustee Sawyer reviewed 10 pages of the Policy and Procedures Manual. Trustee Sawyer will attend the July 2024 virtual meeting.
- Partnership Task Force: Meeting, February 8, 2024: Trustee Sawyer was given two companies to call and set up meetings about partnering.
- Educators Collaborative Task Force: April 10, 2024: Trustee Sawyer participated in discussion on how AAMA can help educators and students get involved. May 8, 2024: Trustee Sawyer participated in discussion for letter to welcome students. June 5, 2024: Trustee Sawyer participated in discussion about video on student membership and why it is important. July 18, 2024: gave question for Don to answer during podcast on Gainful Employment; added to the wish list for AAMA website. Trustee Sawyer will participate in the August 12, 2024, virtual meeting.
- Editorial Advisory Chair: See separate report.

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

Shirley Sawyer, CMA (AAMA)  
2023–2025 Trustee

**American Association of Medical Assistants® (AAMA)**

**Report of Trustee Thomas**

**For the Period Ending September 2024**

The duties of a Trustee are as follows:

Serve as a member of the Board of Trustees

Serve as a member of the AAMA Representatives Bureau

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

- Awards
- Leadership
- Maxine Williams Scholarship
- Educators Collaborative Task Force

**MEETINGS ATTENDED:**

- Virtual BOT, January 14, 2024
- Virtual Leadership Committee Meeting, January 18, 2024
- Virtual Leadership Committee Meeting, February 1, 2024
- Winter BOT Meeting, Chicago, February 9 and 10
- Virtual Leadership Committee Meeting, March 7, 2024
- Virtual BOT Meeting, March 10, 2024
- AAMA Representatives Bureau Assignment, South Carolina, March 14 through 17, 2024
- Virtual BOT Meeting, April 7, 2024
- Virtual Educators Collaborative Task Force Meeting, April 10, 2024
- Virtual BOT Meeting, May 5, 2024
- Virtual Educators Collaborative Task Force Meeting, May 8, 2024
- Virtual Awards Committee Meeting, May 16, 2024
- Virtual Educators Collaborative Task Force Meeting, June 5, 2024
- Virtual Maxine Williams Scholarship Committee Meeting, June 6, 2024
- Virtual BOT Meeting, June 9, 2024
- Virtual Maxine Williams Scholarship Committee Meeting, June 12, 2024
- Virtual Leadership Committee Meeting, June 13, 2024
- Summer BOT Meeting; Arlington, Virginia; June 23 through 24, 2024
- Virtual BOT Meeting, July 14, 2024

**Meetings After Submission of Report Planning to Attend**

- Virtual Educators Collaborative Task Force Meeting, July 18, 2024
- Virtual Orientation for Delegates and Alternates, August 8, 2024
- Virtual Orientation for Delegates and Alternates, September 7, 2024

**REPRESENTATIVES BUREAU ASSIGNMENTS:**

This Trustee attended the South Carolina Society of Medical Assistants Annual Conference in Anderson, South Carolina, March 14–17, 2024. The conference hosted ninety-four



attendees with twenty-two students. Their speakers were informative with a wide range of topics from American Sign Language, Balance and Fall Prevention, Working as a Team, Bowl of Knowledge, SC Dogs: Soft Paws, Warm Hearts, and many others. They also hosted various vendors and provided many opportunities for photos throughout the conference. The House of Delegates met on Friday and the business of the state was conducted in a timely and organized fashion. This Trustee had the opportunity to meet and speak with the students and talk about the AAMA and the benefits of joining and learn more about their “why” of becoming a medical assistant. This Trustee was also given time to meet with the members of the state to present information on the new Population Health, BENEPLACE benefits, the rebuilding of the Website, the E-Learning Center, and the true benefits of being a member of the AAMA. This Trustee was honored to install the newly elected. 2024–2025 officers at the Saturday night Presidents Banquet, with the theme of Dream Catchers: Medical Assistants are the Dreamers of Health Care.

## **COMMITTEE/STRATEGY TEAM ASSIGNMENTS:**

### **Awards Committee:**

Discussed and reviewed the application forms for the Excel and Awards of Distinctions and made suggestions for some improvements to the forms. Participated in choosing the theme for the 2024 Annual Conference Awards Ceremony as well as all the activities for the evening. Reviewed the recommendations for this year’s awards and voted to use a new vendor in Michigan. We review and score the applications once they are all received for determination of winners for this year’s Excel Awards. (Refer to the report of Chair Deborah Novak)

### **Educators Collaborative Task Force:**

Collaborating with educators to create new documents for educators to share with students about membership and benefits of the AAMA. Plans are being discussed and formulated regarding a Facebook page for medical assisting educators like our AAMA leadership page, along with other resources for educators and students. (Refer to the report of Chair Pam Neu)

### **Leadership Committee:**

Assigned to be the lead on producing questions for the Leadership Session at AAMA Annual Conference. Reached out to the group to compile the questions that will be used for the panel discussion portion of the Leadership Session at the Annual Conference. The panelist for the leadership round table at the Annual Conference has been selected. This committee is continuing to offer leadership CEU sessions throughout the year for state leadership. (Refer to the report of the Chair Claire Houghton)

### **Maxine Williams Scholarship Committee:**

Received and reviewed all applications that were submitted and have made recommendations for this year’s winners who will be presented at the Awards Ceremony in Grand Rapids. (Refer to the report of Chair Virginia Thomas)

### **Additional Assignments:**

This Trustee participated in e-ballots conducted by President Monica Case.

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

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

Shannon Thomas CMA (AAMA)  
2023–2025 Trustee

2686 **American Association of Medical Assistants® (AAMA)**

2687 **Report of Trustee Williams**

2688 **For the Period Ending September 2024**

2689

2690 The duties of a Trustee are as follows:

2691     Serve as member of the Board of Trustees

2692     Serve as a member of the AAMA Representatives Bureau

2693

2694 Additionally, this Trustee was appointed to serve on the following:

2695     Strategic Issues (Chair), Marketing, Career Professional Development, CASAT Steering

2696     Committee, and Leadership Development Strategy Team.

2697

2698 **MEETINGS ATTENDED:**

2699

2700     This Trustee has attended the following meetings: ~~☐☐☐~~

2701     AAMA 2023 Annual Conference –September 21–25, 2023, Orlando, Florida

2702     First Timers and Students Reception – September 22, 2023, Orlando, Florida

2703     BOT Pre HOD meeting/Executive Session – September 22, 2023, Orlando, Florida

2704     CMA (AAMA) Knowledge Bowl – September 22, 2023, Orlando, Florida

2705     Welcome and Awards Celebration – September 22, 2023, Orlando, Florida

2706     House of Delegates – September 23, 2023, Orlando, Florida

2707     Meet the Candidates – September 22, 2023, Orlando, Florida

2708     Reference Committee Hearings: Reports, Bylaws, Resolutions, September 23, 2023, Orlando,

2709     Florida

2710     Meeting with the SoPPs –September 24, 2023, Orlando, Florida

2711     State Leaders Session – September 24, 2023, Orlando, Florida

2712     Presidents Banquet – September 24, 2023, Orlando, Florida

2713     Post HOD Executive BOT Session, September 25, 2023, Orlando, Florida

2714     AAMA Committees, Strategy Teams, and Task Forces Meeting – September 25, 2023, Orlando,

2715     Florida

2716     BOT Planning Session – November 9–12, 2023, Chicago, IL

2717     Virtual BOT Meeting, December 10, 2023

2718     Virtual BOT Meeting, January 14, 2024

2719     Committee meeting for Leadership Development, February 8, 2024, AAMA Executive

2720     Office, Chicago, IL

2721     Committee meeting for Career Professional Development, February 8, 2024, AAMA

2722     Executive Office, Chicago IL

2723     BOT Meeting February 9–10, 2024, Chicago, IL

2724     Virtual Career Professional Development Committee Meeting, February 29, 2024

2725     Virtual BOT Meeting, March 10, 2024

2726     Virtual BOT Executive Virtual meeting, March 11, 2024

2727     Virtual BOT meeting, April 7, 2024

2728     Virtual Career Professional Development Committee Meeting, April 8, 2024

2729     Virtual Leadership Development Committee Meeting, May 9, 2024

2730     Virtual Career Professional Development Committee Meeting, May 13, 2024

2731     Virtual BOT Meeting, May 29, 2024

2732     BOT Meeting June 22, 2024, Arlington, VA (left early due to a family emergency)

2733     Virtual BOT, July 14, 2024

2734     Virtual BOT, August 11, 2024

2735 Virtual BOT, September 8, 2024

2736

2737 **REPRESENTATIVES BUREAU ASSIGNMENT:**

2738

2739 This Trustee was honored to attend the virtual Conference of the Alaska Society of Medical  
2740 Assistants on April 27, 2024. There were 23 members in attendance and 5.5 hours of CEUs were  
2741 offered. The society held their general assembly business meeting during which new officers and  
2742 delegates to AAMA House of Delegates were elected.

2743

2744 **COMMITTEE/STRATEGY TEAM ASSIGNMENTS:**

2745

2746 Strategic Issues Plan: See separate report.

2747 Marketing: See report of Chair Thomas

2748 Leadership: See report of Chair Houghton

2749 CASAT Steering Committee: This member was unable to attend the virtual meeting held on  
2750 December 13, 2023. Attended virtual meeting on July 18, 2024.

2751

2752 This trustee participated in all E-Ballots from President Case.

2753

2754 All correspondence has been responded to in a timely manner and all deadlines have been met.

2755

2756

2757 Sandra Williams CMA (AAMA)

2758 2023–2025 Trustee

**American Association of Medical Assistants® (AAMA)**  
**Report of the Chief Executive Officer and Legal Counsel**  
**For the Period Ending (approximately) September 2024**

The following is a summary of Chief Executive Officer (CEO) Balasa’s priorities and accomplishments, and an update on pertinent developments, since (approximately) the American Association of Medical Assistants (AAMA) 2023 Annual Conference, September 22 through 25, 2023, in Lake Buena Vista, Florida.

The CEO’s focus has been on facilitating the AAMA’s accomplishment of its *Mission* and *Strategic Issues Plan* by: (1) assisting President Case 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.

**Medical Assistants Recognition (MAR) Day Public Policy Update**

On October 18, 2023—Medical Assistants Recognition (MAR) Day—CEO Balasa issued a public policy e-blast to all AAMA members informing them that the United States Department of Education (USDE) would be issuing final amendments to its regulations governing scholarship funding for students in programs leading to licensure or certification. He pointed out that the AAMA has been monitoring these regulations throughout the proposal stages to protect the interests of the medical assisting profession.

**Advisory Service**

CEO Balasa, with the assistance of Director Mokijewski, recorded the inaugural podcast of the Advisory Service. With the assistance of Manager Flynn, he sent a memorandum to state medical societies and state affiliates of the American Academy of Family Physicians informing them of the Advisory Service and urging them and their members to avail themselves of the expertise of the Advisory Service panel of experts.

**“The Final Gainful Employment Regulations: What CAAHEP Educators Need to Know”**

The United States Department of Education regulations regarding gainful employment (GE) measures that academic programs that “prepare students for gainful employment in a recognized occupation” must meet went into effect July 1, 2024. (These regulations have been challenged in court.) Legal Counsel Balasa suspects that these regulations may have a greater impact than anticipated on medical assisting and other allied health programs. He wrote an article for the Commission on Accreditation of Allied Health Education Programs (CAAHEP) *Communiqué* and for his “Public Affairs” feature in *Medical Assisting Today*. Here are some of the key points of this article:

*What two tests must GE programs pass to continue to be eligible for Title IV participation, and for its students to be eligible for participation in financial assistance programs under Title IV?*

A program must pass two tests to continue to be eligible for Title IV participation. Note the following from the “Fact Sheet: Biden-Harris Administration Announces Landmark Regulations on Accountability, Transparency, & Financial Value for Postsecondary Students”:

- A debt-to-earnings (D/E) rate that compares the median annual payments on loan debt

borrowed for the program to the median earnings of its Federally aided graduates. For a program to pass, its graduates' debt payments must be no more than 8% of annual earnings or 20% of discretionary earnings, which is defined as annual earnings minus 150% of the Federal poverty guideline for a single individual (about \$21,870 in 2023).  
• A new earnings premium (EP) test that measures whether the typical graduate from a program that received Federal aid is earning at least as much as a typical high school graduate in the labor force (i.e., either working or unemployed) in their State between the ages of 25 and 34. This is equal to roughly \$25,000 nationally but varies across States.

*Specifically, what will trigger the loss of Title IV eligibility for GE programs?*

The following is an excerpt from the "Dear Colleague Letter (GEN-24-04): Regulatory Requirements for Financial Value Transparency and Gainful Employment":

The regulations:

- Provide that a GE program loses Title IV eligibility if it either fails the D/E rates measure in two out of any three consecutive award years for which rates are calculated or the EP measure in two out of any three consecutive award years for which rates are calculated.
- Establish a three-year period of ineligibility for failing GE programs that have been voluntarily discontinued or withdrawn from Title IV eligibility by an institution, or that lose eligibility as a result of failing the D/E rates or EP metric, during which the Department will not approve a substantially similar program in the same 4-digit CIP code range as the failing program.
- Require institutions to provide warnings to current and prospective students for GE programs that are at risk of a loss of Title IV eligibility due to having failed one of the metrics in one of the two most recent award years for which the program received metrics, content and delivery of which to be specified by the Department, and provide that students must acknowledge having seen these warnings before the institution may enter into an enrollment agreement with the student or disburse any Title IV funds.

Mr. Balasa will be prepared to assist program directors of accredited medical assisting programs with any questions they have or challenges they receive from the U.S. Department of Education.

### **Website Rebuild**

As of the date of this report, the website rebuild project remains on schedule. Mr. Balasa has been overseeing this important project and allocating resources so that it is completed on schedule, and that the end result meets or exceeds expectations.

### **Colorado Health Care Workforce Coalition**

AAMA Past President Chris Hollander, CMA (AAMA), and Mr. Balasa continue to participate in the virtual meetings of the Colorado Health Workforce Coalition ("Coalition"), a collaborative public policy group organized by the Colorado Hospital Association. The Coalition is advocating for a stackable credential system under state law that would allow professionals to earn credentials that will enable them to advance incrementally in their profession(s) of choice.

### **Conclusion of Service on the CAAHEP Board of Directors and as CAAHEP President**

CEO Balasa has served on the CAAHEP Board of Directors since July 1, 2018. He has served as

CAAHEP President since July 1, 2021. His terms on the Board and as President ended June 30, 2024. He will continue to serve on the CAAHEP Bylaws Committee, Planning and Development Committee, and Outcomes Task Force.

### **I.C.E.**

CEO Balasa continues to serve on the Institute for Credentialing Excellence (I.C.E.) Accreditation Services Council and Government Affairs Committee.

Mr. Balasa co-presented “The Value of Accreditation: How to Leverage Value Statements to Support your Program” at the I.C.E. Annual Exchange in October of 2023.

### **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.

### **“New York Governor Urges New York Legislature to Allow Medical Assistants to Administer Immunizations”**

Mr. Balasa submitted the above-titled article for the May-June *Medical Assisting Today*. The following is an excerpt from this article:

For over thirty years New York law has not permitted licensed providers to delegate to medical assistants the administration of medication. On January 17, 2024, New York Governor Kathy Hochul submitted legislation to the New York Senate and General Assembly that would permit physicians, nurse practitioners, and physician assistants to delegate to appropriately trained medical assistants the drawing up and administering of immunizations in outpatient settings under the licensed provider’s authority and supervision.

This legislation is similar to the 2022 Connecticut legislation that allows educated and credentialed medical assistants to be delegated by licensed providers the administration of vaccines.

### **Speaking at MGMA Operations Conference and Leadership Conference**

Legal Counsel Balasa presented/will be presenting “Legal Guidelines for Utilizing Medical Assistants in Telehealth” for the Medical Group Management Association (MGMA) Operations Conference (May 30 through June 1, 2024) and for the MGMA Leaders Conference (October 6 through 9, 2024). The following are the learning objectives for this presentation:

#### **Expanded learning objectives:**

This session will provide you with the knowledge to:

1. Review and apply the legal analysis for determining tasks (including telehealth tasks) that are delegable and not delegable to medical assistants.
2. Understand and operationalize the *fundamental legal principle* regarding medical assisting scope of practice: Medical assistants are not permitted to exercise independent clinical judgment or make clinical assessments, evaluations, or interpretations.

3. Identify additional legal facts involving medical assistants, such as scope of practice depending on whether the provider is a physician, nurse practitioner, or physician assistant.
4. Review and apply the legal analysis for determining reimbursement for medical assisting services under federal programs such as Chronic Care Management (CCM) and Remote Patient/Physiologic Monitoring (RPM).
5. Recognize medical assistants as ideal telehealth professionals because they are licensed in only one state (Washington) with minimal issues of scope of practice across state lines, and optimally deploy them.

### **Scope of Practice Presentations**

Mr. Balasa has presented scope of practice continuing education sessions for the Texas Society of Medical Assistants, the Massachusetts Society of Medical Assistants, the Florida Society of Medical Assistants, the Association of South Carolina Oncology Managers, the Nash-Edgecombe Chapter of the North Carolina Society of Medical Assistants, the Union County Chapter of the North Carolina SMA, and the Forsyth-Stokes-Davie Chapter of the NCSMSA.

### **American Association of Nurse Practitioners Annual Conference**

Mr. Balasa attended the annual conference of the American Association of Nurse Practitioners (AANP), June 26 through 29, 2024. His objective was to seek support from nurse practitioners in persuading state boards of nursing to amend their regulations (or to draft legislation) so that nurse practitioners are permitted to delegate the administration of certain types of injections (including vaccines) to appropriately educated and currently credentialed medical assistants.

### **Presentation for Council for Higher Education Accreditation (CHEA)**

Mr. Balasa presented “Beyond Gainful Employment: Other Title IV Rule Revisions that Impact Quality and Eligibility” at the January 29 through February 1, 2024, Annual Conference of the Council for Higher Education Accreditation (CHEA). CHEA is the private sector equivalent to the United States Department of Education. CHEA recognizes CAAHEP.

### **Attendance at Virtual Meetings**

Mr. Balasa attended virtual meetings of the American Academy of Ambulatory Care Nursing and the Association of Specialized and Professional Accreditors.

### **Kinn’s Medical Assisting Fundamentals**

CEO Balasa had an email discussion with Brigitte Niedzwiecki, revising author of Kinn’s *Medical Assisting Fundamentals* and *The Medical Assistant*. He mentioned his opinion that medical assistants should be taught advanced tasks (e.g., IV initiation and infusion; insertion and removal of urinary catheters; and limited scope radiography) in states in which these tasks are delegable legally to medical assistants. The following is an excerpt from this discussion:

Just before we drafted the ideas for Kinn’s *Medical Assisting Fundamentals* 2e, I attended the national conference. While talking with other educators, I heard that they were teaching catheterization, IVs, and X-rays. Many indicated they were lacking adequate teaching resources for these advanced skills. Some were using very dated textbooks. I addressed this with my editor, and we felt that adding chapters to address these topics might be helpful for the schools teaching the advanced skills. (We added chapters to both Kinn *MA Fundamentals* 2e and Kinn’s *The Medical Assistant*.) We knew not all states allowed MAs to perform these advanced skills and indicated that in the textbook. We



figured instructors could skip chapters that didn't relate to the MA scope of practice in their state.

The IV content contained more theory than skills and the skills were very basic (e.g., inserting and discontinuing IVs, priming tubing, and hanging IV solutions). The catheterization focused on inserting, discontinuing, and collecting urine specimens. The radiology chapters were focused on the limited scope of practice skills. We also added several specimen collection skills and two were related to the COVID-19 testing procedures.

### **Michigan Legislation**

The Michigan Society of Medical Assistants has been able to have legislation introduced into the Michigan legislature that would require medical assistants to have medical assisting education and a medical assisting credential to perform certain advanced tasks. At the request of the Michigan SMA legislative leaders, Legal Counsel Balasa has done research and provided information to the Michigan SMA.

### **South Carolina Legislation**

A bill in the South Carolina legislature clarifies some of the ambiguous language in the previous medical assisting law. The bill reaffirms that there are two categories of medical assistants—“certified medical assistants” and “unlicensed assistive personnel (UAP).” Certified medical assistants must have completed a medical assisting education program and have a current medical assisting certification that is accredited by the National Commission for Certifying Agencies. There is also a grandfathering provision and a grace period provision. Certified medical assistants are permitted to perform more advanced tasks than UAP.

This bill was enacted into law.

### **Audit Report for the Fiscal Year Ending June 30, 2023**

According to the audit report for the fiscal year ending June 30, 2023, the revenue for the AAMA corporation (tax-exempt under Section 501(c)(6) of the Internal Revenue Code) was \$6,530,743. The expense was \$5,415,568. This reflects an excess of revenue over expense of \$1,115,175. The net assets/net worth as of June 30, 2023, was \$11,530,200.

### **Move to Suite 3720 of the Civic Opera Building**

As approved by the AAMA Board of Trustees, the AAMA Executive Office moved from Suite 1575 to Suite 3720 of the Civic Opera Building. Suite 3720 is smaller than Suite 1575. As a result, rental costs will be decreased. Also, the owners of the Civic Opera Building filed for bankruptcy in 2022. Consequently, they were eager to maintain current revenue streams and were willing to let Suite 3720 for a reasonable monthly amount.

### **New York University Research Project on Medical Assistants**

Mr. Balasa received the following invitation from a professor at New York University:

Dear Mr. Balasa,

I am an Assistant Professor at NYU who studies the job quality and work environments of health care workers. Over the past few years, I have published some papers on the importance and role of MAs in primary care (see [Lai et al. 2022](#), and [Lai et al 2022](#)).

Currently, my colleagues and I are gathering information on research that is

needed around medical assistants in primary care. This project is supported by the NYU Discovery Fund for Human Health. Given your role as CEO of AAMA, we are hoping for a chance to talk to you.

Mr. Balasa agreed to talk with Professor Lai. He found Mr. Balasa's insights to be helpful. Professor Lai intends to incorporate Mr. Balasa's comments in a future scholarly article.

### **Credential Integrity Action Alliance**

Mr. Balasa has been invited to participate in preliminary meetings of the Credential Integrity Action Alliance (CIAA). The following are excerpts from the CIAA website:

The CIAA promotes initiatives and lobbies for legislative and policy changes that prevent commercial cheating and cheating-for-hire services from undermining academic and credential integrity in the United States. Members include universities, licensure and certification authorities, service partners, and individuals dedicated to promoting integrity.

Founded in 2023 to address the alarming growth of commercial cheating and cheating-for-hire services, the CIAA is a nonprofit corporation with a 501(c)(4) exemption from federal tax for lobbying purposes. Its six-member board of directors is elected by its members. Membership is open to all individuals, academic institutions, organizations that publish and administer assessments, and related associations that support the Alliance's mission. Prospective members (including their leadership) and individual members should not have a material financial interest in, or otherwise receive compensation or benefits from, companies that offer cheating services.

### **Letter to Connecticut Department of Public Health**

CEO Balasa was informed that educated and credentialed medical assistants were not being delegated vaccine administration as permitted by the 2022 legislation. He wrote the following April 9, 2024, letter to the Commissioner of the Connecticut Department of Public Health:

As you are aware, in 2022 the Connecticut legislature enacted a bill that permits medical assistants who have met education and testing requirements to administer vaccines under the authority and supervision of licensed independent providers.

The attached document is found on the website of the Connecticut Department of Public Health (DPH). Note the following excerpt:

\*\*\* CGS 19a-6s authorizes certain specially trained medical assistants to administer vaccines under the supervision, control, and responsibility of a physician, physician assistant, or advanced practice registered nurse. Chapter 368a

One of the primary reasons for the enactment of the 2022 legislation was the need to expand the availability of preventive services such as vaccines to Connecticut patients. This need is still significant in 2024. Deploying educated and credentialed medical assistants to administer vaccines not only increases the accessibility of vaccines, but also frees up physicians, nurse practitioners, and physician assistants to provide services that only they are allowed legally to provide.

Given this ongoing need, the AAMA and its Connecticut Society urge the Connecticut DPH to display more prominently and in several places on its website the existence of

this vaccine option for medical assistants. Informing providers and medical assistants of this program would increase the number of medical assistant vaccinators and would redound to the benefit of Connecticut patients.

#### **Washington State Society and Bogus Trademark Inquiry**

The Washington State Society of Medical Assistants received the following trademark request:

This is [name withheld], Paralegal Officer from an Intellectual Property Office of Paramounts Consulting Group. I would like to bring to your knowledge that we have received the trademark application for the same business name as yours Washington State Society of Medical Assistants from the State of South Carolina while searching for this brand name, your information appeared. According to IP Protocols, your brand name is not registered with the Patent & Trademark Office that allow others to proceed with the registration.

However, as the Patent and Trademark office & IP Protocols suggest giving priority to the business owner over the new applicant. Therefore, we are reaching out to you for confirming whether would you be interested in reserving the federal trademark rights under your ownership for your name/mark.

If you wish to proceed, kindly reply to the same email so further steps can be shared.

Please note that if you choose not to register the trademark, the other applicant will proceed as the Patent & Trademark office processes applications on a first-come, first-served basis.

We would appreciate your prompt response, as the other applicant is still on hold until we receive your response. In case of no contact from you within the next 4 business days, the other applicant will be given the opportunity to begin their registration following the standard examination and filing procedure with the United States Patent & Trademark Office.

As per the Act of 1946 §§ 1051 et seq, it is mandatory to register your mark to hold the ownership rights federally.

Mr. Balasa's opinion was that this was a "phishing" attempt and should be ignored. General Counsel Christina Pannos agreed. The Washington State SMA leaders were informed.

#### **Updating and Republishing of "Best Practices for Practices"**

At a meeting of the Educators Collaborative Task Force, some of the educators mentioned that they would appreciate an article from the AAMA that would point out to employers why they should be hiring CMAs (AAMA). Mr. Balasa reminded the educators about his 2015 article "Best Practices for Practices: Protect Your Office by Employing CMAs (AAMA)." They thought this was a good article and should be updated for republication in *Medical Assisting Today*. Mr. Balasa said that he would be happy to update the article.

#### **Articles for Council on Licensure, Enforcement, and Regulation (CLEAR) Regulatory Network**

Mr. Balasa made the following posts on the CLEAR *Regulatory Network*:

- 3094 • Federal Trial Court Rules that Military Spouse Is Entitled to Work in Licensed Profession  
3095 Despite State Objection  
3096 • Louisiana Sued for Mandating Minority Appointments to Medical Board  
3097 • Graduates of Non-ABA-Accredited Law Schools Will Be Eligible for Indiana Bar  
3098 Examination  
3099 • Maryland Supreme Court Clarifies ADA Disability Standard

3100  
3101 **Official Observer to AMA House of Delegates**

3102 The AAMA is an Official Observer to the American Medical Association (AMA) House of  
3103 Delegates (HOD). Mr. Balasa represented the AAMA at the AMA Annual Meeting in June of  
3104 2024 in Chicago. There were some resolutions pertinent to medical assisting that he followed at  
3105 the reference committee hearings and on the floor of the HOD. As a representative of an Official  
3106 Observer, he is permitted to speak at reference committee hearings and has done so when  
3107 necessary.

3108  
3109 The following were some of the resolutions and reports that were of relevance for the medical  
3110 assisting profession and the AAMA.

- 3111 • Reassessment of Continuing Board Certification Process  
3112 • The Role of Maintenance of Certification  
3113 • Proper Use of Overseas Virtual Assistants in Medical Practice  
3114 • Incorporating Surveillance Colonoscopy into the Colorectal Cancer Screening Continuum  
3115 • Physician Assistant and Nurse Practitioner Movement Between Specialties  
3116

3117 **National Colorectal Cancer Roundtable (NCCRT)**

3118 Mr. Balasa attended the National Colorectal Cancer Roundtable (NCCRT) 2023 Annual Meeting  
3119 in Houston, Texas. The NCCRT volunteer leaders and staff continue to recognize the AAMA as  
3120 a valuable partner in the crusade to reduce (and eventually eliminate) the incidence of colorectal  
3121 cancer in the United States.  
3122

3123 **Center for the Application of Substance Abuse Technologies (CASAT) of the University of**  
3124 **Nevada, Reno (UNR)**

3125 The AAMA has been designated as a subgrantee under a new grant awarded by the Centers for  
3126 Disease Control and Prevention to the Center for the Application of Substance Abuse  
3127 Technologies (CASAT) of the University of Nevada, Reno (UNR). This grant is for national  
3128 partnerships to address prenatal alcohol and other substance use and Fetal Alcohol Spectrum  
3129 Disorders (FASDs).  
3130

3131 **Parliamentary Opinion**

3132 Counsel Balasa was asked by Board of Trustees members on Representatives Bureau  
3133 assignments whether it is permissible under *Robert's Rules of Order* for an officer of a state  
3134 society to hold more than one officer position. He responded as follows:

3135 An individual is permitted to hold more than one office in a state society unless the state  
3136 society bylaws or other governance document specifically forbid this. *Robert's Rules*  
3137 does not forbid an individual from holding more than one office.  
3138

3139 There is a second part to this analysis, however. See 45:2 of the 12th edition of *Robert's*  
3140 *Rules*. A person holding two or more offices only has one vote.  
3141

**CEB Medical Ethics and Medical Law Monographs**

Counselor Balasa is serving as the subject matter expert for these two monographs of the Continuing Education Board—*Foundations of Medical Ethics for the Medical Assistant* and *Foundations of Medical Law for the Medical Assistant*. He wrote case studies for the ethics monograph. He also wrote the questions for these monographs.

**Virtual Presentation for National Network of Health Career Programs in Two-Year Colleges (NN2) 2023 Conference**

Mr. Balasa gave a virtual presentation entitled “Proposed USDE Regulations Would Impact Professional Preparatory Programs that Are ‘Too Short’ or ‘Too Long’” September 28, 2023.

**Federal Agencies Open Online Portal for Reporting Anticompetitive Practices in the Health Care Sector**

In an April 18, 2024, press release, the United States Department of Justice (DOJ), the Federal Trade Commission (FTC), and the Department of Health and Human Services (DHHS) launched a joint online portal “for the public to report health care practices that may harm competition.”

The following statement by Assistant Attorney General Jonathan Kanter of the DOJ’s Antitrust Division in the press release articulates the purpose of this portal:

“Competition in health care is crucial to ensuring fair and competitive wages across the healthcare sector and affordable and quality healthcare for all Americans. Today’s launch of [HealthyCompetition.gov](https://www.healthycompetition.gov) – a one-stop shop to report potential violations of our competition laws to the Justice Department and FTC – will allow the agencies to collaborate early and often, helping to promote economic opportunity and fairness for all.”

One of the examples of “conduct that can harm competition in healthcare” in the press release is “unnecessary healthcare provider recertification or accreditation requirements.” It is described as follows:

**Description:** Certifying bodies or accreditation organizations can impose unnecessary requirements on healthcare providers. Unnecessary requirements can raise the costs of practicing medicine. They can also reduce the number of healthcare practitioners participating in the marketplace. These requirements can harm competition and increase the cost of healthcare services.

**Example:** Certifying bodies or accreditation organizations ask physicians to meet unnecessary requirements to stay certified.

Legal Counsel Balasa will monitor any actions by the federal agencies that may have an impact on medical assisting.

**MGMA Podcast**

Mr. Balasa recorded a podcast for the Medical Group Management Association entitled “Exploring the Legal Landscape of Medical Assistants.” This podcast will be available no later than August of 2024.

Donald Balasa

CEO and General Counsel

**American Association of Medical Assistants® (AAMA)**

**Report of the Marketing Director**

**Period Ending September 2024**

Director Gina Mokijewski provides administrative direction and project management for the marketing and communications departments for the American Association of Medical Assistants (AAMA) and supports the AAMA Board of Trustees and its committees, the Certifying Board (CB) and staff, and the Continuing Education Board and staff. This report will provide an overview of how the department has supported the various committees and boards throughout their 2023–2024 term.

**Board of Trustees**

Director Mokijewski supports the Board of Trustees and its various committees by aiding all board and committee related materials and projects that require marketing, design, branding, or promotional assistance. In her position as staff liaison, Director Mokijewski provides guidance and suggestions to each committee for their different initiatives and goals.

The following BOT specific projects are of note for the 2023–2024 term:

- Work with external contracting parties pertaining to the new AAMA website which included:
  - Coordinating design approvals with the Board of Trustees for updated AAMA logo provided by Graphek
  - Assist in internal content review with OrgSource and staff directors and managers
  - Answering questions and providing feedback to OrgSource team in relation to the association and specific association needs for the new website
- Design and order AAMA exhibiting kit
- Management of exhibiting kit and its delivery to and from every exhibiting opportunity
- Support 2023–2024 AAMA President Monica Case and CEO Donald Balasa at the AAMA at the following exhibiting appearances:
  - AAFP FMX (Chicago); *along with 2023–2024 Immediate Past President Deborah Novak and Board Services Manager Sharon Flynn.*
  - AMGA (Orlando)
- Attended and submitted reports for the following BOT meetings:
  - 2024 Winter Board Meeting (Chicago)
  - 2024 Summer Board of Trustees Meeting (Arlington, VA)
- Record and produce the new AAMA Podcast's first podcast with AAMA CEO and Legal Counsel Donald A. Balasa, JD, MBA
- Update title and cover design of *Medical Assisting Today (MAToday)*

**Advisory Task Force**

Director Mokijewski has been working with the Advisory Task Force and staff liaisons CEO and Legal Counsel Donald Balasa and Board Services Manager Sharon Flynn on supporting the Advisory Service members and promoting their many strengths.

- 2024 MGMA double booth design and approach with Chair Novak and President Case
- AAMA Podcast episodes promoting the Advisory Service Program and its members
- Update Advisory Task Force materials with new members and new information

### **Annual Conference Committee**

Together with Committee Chair Novak, MarCom Department staff organizes project timelines, executing old and entirely new conference materials, and handles the logistics of running a successful conference.

The MarCom Department has collaborated with the committee with the following projects:

- Designed 2024 AAMA Annual Conference logo for approval
- Update and manage the 2024 Conference Cvent website and registration portals
- Collaborate with Conference Planner Kathy Basel on conference logistics
- Designing signage and executing branding of the 2024 Annual Conference hotel space
- Management and outreach of 2024 exhibitors and sponsors

### **Awards Committee**

Director Mokijewski and Director Sanks-Korenchan worked together with Chair Novak to update and revise the various aspects of the Excel Awards submission and judging processes.

- Updated all forms and documents
- Order Awards of Distinction Pins
- Assisted Chair Novak in researching different vendors and award styles for the Awards of Distinction trophies for 2024

### **Career Professional Development Committee**

The Marketing Department has assisted with the branding of the Medical Office Basics courses and developed marketing plans for the committee's approval. The committee has also begun work on a second series of courses for the Career Professional Development Series titled "Insurance Insights and Quality Measures," for which we have designed a new digital badge.

- Medical Office Basics (MOB)
  - Redesign each Medical Office Basics course with AAMA branding and design elements
  - Create 3 short videos for promoting of MOB on social media
  - Create eblast for external marketing of MOB
- Insurance Insights and Quality Measures
  - Designed digital badge for new program

### **Marketing Strategy Team**

At the guidance of Chair Thomas and her committee, the design team has been hard at work designing the new "Bridging the Gap Between Patients and Quality Care" theme for 2024 MARWeek products, as well as offering new stickers, padfolios, and keychains for purchase to sport your AAMA pride.

- Implemented and designed the committee's "Building Bridges Between Patients and Quality Care" theme and design ideas
- Researched different padfolio options for sale at the AAMA Conference
- Redesigned "Who I Am Makes a Difference" buttons into new stickers with updated design

### **Membership Committee**

Director Mokijewski supported Chair Bogar by offering her support and guidance for the committee's focus group endeavors. The design team has also been assisting the Membership Committee with new AAMA Membership Pins.

- 3281 • New AAMA membership pin design and vendor search
- 3282 • Support Chair Bogar and liaison Nick Mickowski with focus group questions and
- 3283 approach

3284

### 3285 **Partnership Task Force**

3286 Director Mokijewski and the Marketing Team continue to promote and support the efforts of our  
3287 current partners.

- 3288 • The AAMA has been designated as a subgrantee under a new grant awarded by the
- 3289 Centers for Disease Control and Prevention to the Center for the Application of
- 3290 Substance Abuse Technologies (CASAT) of the University of Nevada, Reno (UNR) and
- 3291 its Medical Assistant Partnership for Healthy Pregnancies and Families (MAP). This
- 3292 grant is for national partnerships to address prenatal alcohol and other substance use and
- 3293 Fetal Alcohol Spectrum Disorders (FASDs).
- 3294 ○ Represented the AAMA at the 2024 FASD Partners Meeting at the CDC
- 3295 ○ Supported University of Nevada, Reno CASAT team with their “Training of
- 3296 Trainers” campaign

3297

### 3298 **Social Media**

3299 Social Media Committee Chair Aimee Quinn helped curate campaigns and produce her own  
3300 social media videos which the department has been posting on the committee’s behalf.

- 3301 • Posted the committee’s following campaigns:
- 3302 ○ “Board of Trustee’s Positivity Jar”
- 3303 ○ Board of Trustee representative assignment recaps
- 3304 ○ Board Meeting Recaps

3305

### 3306 **Continuing Education Board**

3307 The MarCom Department assists the Continuing Education Board (CEB) by updating their  
3308 current continuing education materials, bringing their new educational materials to life through  
3309 design and publishing, and assisting them with any marketing campaigns or product sales they  
3310 wish to promote.

3311 Projects of note for the 2023–2024 term:

- 3312 • ABR-OE updates to the following courses:
- 3313 ○ Anatomy
- 3314 ○ Clinical Lab
- 3315 ○ Medical Records
- 3316 ○ Foundations of Order Entry
- 3317 • Monographs currently underway:
- 3318 ○ Nutrition
- 3319 ○ Foundations of Medical Law for Medical Assistants
- 3320 ○ Foundations of Medical Ethics for Medical Assistants

### 3321 **Certifying Board**

3322 The MarCom Department helps to update all certification materials and collaborates with  
3323 Director Gottwaldt on new marketing and promotional initiatives for the CMA (AAMA)  
3324 credential.

3325 Projects of note for the 2023–2024 term:

- 3326 • Removing IAS logo and language from all AAMA materials
- 3327 • Removing 30-day completion requirement from all AAMA materials
- 3328 • “More Ways to Become a CMA (AAMA)” campaign



3329  
3330 Director Mokijewski would like to thank and applaud the entire MarCom Department for their  
3331 commitment, creativity, and tireless efforts this past year. From crafting compelling copy to  
3332 executing truly creative designs, each of you have played such a vital role in the success of so  
3333 many of our projects this year (Miranda Sanks-Korechan, Laura Niebrugge, Kelli Smith, Felicia  
3334 Eldrige, and Connor Satterlee).  
3335 Looking forward to another exciting year ahead!

3336  
3337 Respectfully submitted,  
3338 Gina Mokijewski  
3339 Marketing Director

3340

3341

American Association of Medical Assistants®

Report of the Director of Communications/  
Medical Assisting Today Managing Editor

For the Period Ending September 2024

**Ongoing Responsibilities and Projects**

The following are summaries of the ongoing products and services provided by the MarCom Department, with a focus on projects started, in development, or completed between February 2024 and September 2024.

**Advertising**

Communications Director Miranda Sanks-Korenchan\* manages the inbox alias that people interested in advertising with the AAMA often email. She forwards list rental inquiries to [ListRental@aama-ntl.org](mailto:ListRental@aama-ntl.org). And she forwards conference advertising and exhibiting interests to Marketing Director Gina Mokijewski.

*\*During Mrs. Sanks-Korenchan's maternity leave, Communications Manager Laura Niebrugge skillfully completed these tasks and many more.*

**Blog(s)**

- *Legal Eye: On Medical Assisting*
- *CMA (AAMA) In Sight: For Medical Assistants with an Eye for Excellence*

*Special thanks to CEO Donald Balasa for his content writing, to Ms. Niebrugge for her fantastic work with both blogs, to Associate Editor Kelli Smith for her blog post writings on certification, and to everyone's contributions to the certification blog.*

**Conference**

The MarCom Department provides all editorial, design, production, and marketing services for all print and electronic conference materials.

**Departmental Support**

The MarCom Department supports the print and electronic communications and marketing needs of all AAMA departments. The following are highlights of those projects:

**Certification**

The MarCom Department supports the Certification Department in many ways that are annual responsibilities and impromptu tasks performed as needed.

**Ongoing Tasks**

- Monthly: Text recertification reminders to CMAs (AAMA) and recently expired CMAs (AAMA) about recertification

- 3386                   • Monthly: Email recertification reminders e-blasts to CMAs (AAMA) and recently  
3387                   expired CMAs (AAMA) about recertification  
3388                   • Monthly: Email New CMAs (AAMA) and First-Time Recertifying CMAs  
3389                   (AAMA) e-Blast Series  
3390

3391                   *Many thanks to Certification Department staff, especially Certification Director Katie*  
3392                   *Gottwaldt, for their support in the creation process of the required messaging.*  
3393

3394                   Continuing Education

3395                   MarCom staff supports the Continuing Education Board (CEB) and CE Department by  
3396                   providing ongoing editorial, design, production, and marketing services for continuing  
3397                   education products.  
3398

3399                   *New, In-Development Projects*

- 3400                   • CE self-study books reviews and updates (include editorial and design services)  
3401                       ○ *Phlebotomy*  
3402                       ○ *Introduction to Microbiology*  
3403                       ○ *Nutrition*  
3404                       ○ Others as directed by the CEB via CE and Membership Director Nick  
3405                   Mickowski  
3406

3407                   *Many thanks to Mr. Mickowski for his support and hard work in all our shared projects.*  
3408

3409                   Membership

3410                   The MarCom Department supports the Membership Department in editing, designing,  
3411                   and producing all print and electronic membership materials (e.g., enrollment brochures,  
3412                   membership renewal materials, social media banners, social media marketing campaigns,  
3413                   new-member e-blasts, and membership webpages).  
3414

3415                   E-Blasts

3416                   The MarCom Department, with support from several other departments, sends many annual e-  
3417                   blast with varying recurrence.  
3418

3419                   *New, Published/Scheduled e-Blasts*

- 3420                   • New Submission Tool for Uploading non-AAMA CEUs (May 21, 2024)  
3421

3422                   *New, In-Development e-Blasts*

- 3423                   • Communications about this policy: Initial certificants may apply a maximum of 20  
3424                   recertification points (AAMA-approved points or non-AAMA-approved points)  
3425                   earned in the three months prior to initial certification toward recertification.  
3426                   *(Pending CB approval)*  
3427                       ○ For AAMA Leaders/Program Planners  
3428                       ○ For Program Directors and Educators  
3429                       ○ For new CMAs (AAMA) [Years 2 through 4]

3430                   ○ For new CMAs (AAMA) [Year 5]  
 3431                   • Apprenticeship info to program directors (*Pending CB approval*)  
 3432  
 3433   MarCom Miscellaneous  
 3434  
 3435   *In-Development Projects on Hold*  
 3436                   • *Partnership Marketing, Advertising, Exhibiting Opportunities* document  
 3437                   • Resource document that will advise medical assistants on best practices for listing  
 3438                   multiple credentials  
 3439  
 3440   Medical Assisting Today  
 3441   The MarCom Department works on three magazines simultaneously in various stages of  
 3442   development: planning (e.g., assigning topics and working with writers), production (e.g., editing  
 3443   and design), post-production wrap (e.g., archiving and thanking writers/interviewees).  
 3444  
 3445   Medical Assistants Recognition Week (MARWeek)  
 3446   The MarCom editorial staff provides editorial services for all print and electronic MARWeek  
 3447   materials. We also support customer service staff with order approval management.  
 3448  
 3449   Press Releases  
 3450   Editorial staff work on and submit press releases via Newswire when applicable.  
 3451  
 3452   Surveys  
 3453   MarCom editorial staff will send the following between June and December 2024:  
 3454                   • 2024 *Medical Assisting Today* Reader Survey  
 3455                   • 2024 Compensation and Benefits Survey  
 3456                   • Evaluation of the AAMA Conference Continuing Education Sessions  
 3457                   • AAMA Annual Conference Evaluation  
 3458                   • 2024-2025 *Medical Assisting Today* Interviewee Consent Questionnaire  
 3459  
 3460   *New, In-Development Surveys on Hold*  
 3461                   • State Society & Local Chapter Official Terminology Survey  
 3462  
 3463   Volunteer Leadership Support  
 3464   Communications Director Miranda Sanks-Korenchan is a staff liaison for, and editorial staff  
 3465   provides support to the following volunteer groups:  
 3466                   • Awards Committee  
 3467                   • CASAT-FASD Committee  
 3468                   • Documents Committee  
 3469                   • Editorial Advisory Committee  
 3470                   • Leadership Development Strategy Team  
 3471  
 3472   Editorial staff substantially and regularly supports the following volunteer groups:  
 3473                   • Career Professional Development Committee

- 3474       • Membership Development Strategy Team  
3475       • Nominating Committee

3476

3477 For information on each group's latest projects, please refer to the respective group's report.

3478 Website

3479 The MarCom Department is responsible for designated sections of website content and updates  
3480 to such webpages in coordination with other departments.

3481

3482 *New, In-Development Tasks*

3483 MarCom staff is prepared to help with the website redesign. This project will be extremely time-  
3484 consuming for all involved. As this initiative progresses, MarCom staff will have to rearrange  
3485 our project schedules to prioritize the website redesign.

3486

3487

3488 Miranda Sanks-Korechan  
3489 Director of Communications

3490

3491	<b>American Association of Medical Assistants® (AAMA)</b>
3492	<b>Report of the Director of Continuing Education and Membership</b>
3493	<b>For Period Ending September 2024</b>
3494	
3495	<b><u>OVERVIEW OF RESPONSIBILITIES</u></b>
3496	<b>Continuing Education and Membership Department</b>
3497	- Work with Customer Service Manager Erika Mercado to facilitate the day-to-day
3498	operations of the department
3499	- Attend and advise on monthly staff meetings, coordinated by Manager Mercado, to
3500	review current policies and address any recent changes to policies/workflows
3501	- Attend biweekly meetings with Manager Mercado to discuss departmental operations and
3502	to cross-train on departmental processes and advanced database functions
3503	- Assist staff with operational questions and questions/concerns from members as needed
3504	- Review all requests for AAMA CEU approval from chapters/state societies as well as
3505	from non-AAMA Education Providers
3506	- Work with volunteer leaders on chapter, state, and national levels to address their
3507	questions and requests regarding:
3508	• Officers
3509	• Rosters/lists
3510	• AAMA CEU approval requests
3511	• Chapter formation/disbandment,
3512	• Zip code realignment
3513	• Reporting data
3514	- Coordinate annual membership processes including:
3515	• State and Chapter Officer election Notification Form processing
3516	• Dues Verification
3517	• New membership year preparation
3518	• Membership dues rebate
3519	• Membership dues billing
3520	<b>Continuing Education Board (CEB) Liaison</b>
3521	- Attend CEB winter and summer meetings, fall planning session, and ad hoc virtual
3522	meetings as they arise
3523	- Assist CEB Chair Greer and Vice Chair Hawes with CEB meeting preparation through
3524	agenda book assistance and procurement of related documents.
3525	- Facilitate CEB projects, such as the development of new CE products
3526	- Liaison to the following CEB task forces
3527	• Leaders in Education and Practice Task Force
3528	• Practice Managers Task Force
3529	• Conference CE Task Force
3530	• Assessment-Based Certificate Task Force

3531 **Additional Liaison Responsibilities**

- 3532 - Membership Development Committee  
3533 - Annual Conference Committee  
3534 - Career Professional Development Committee

3535

3536 **MEMBERSHIP AND CONTINUING EDUCATION DATA**

3537 **Membership Numbers**

3538 There were 21,861 AAMA Members as of June 30, 2024, compared to 23,044 AAMA members  
3539 as of June 30, 2023. This equates to a 5.1% decline year over year.

3540 **AAMA E-Learning Center Purchases by Year**

3541 E-Learning center revenue remains strong, though the rate of increase in annual sales has slowed  
3542 so far in 2024. The year-over-year numbers through the first half of 2024 are remarkably similar.  
3543 The \$1,030,875.00 revenue (approximate) from Jan-June 2023 can be compared to the  
3544 \$1,038,786.00 revenue (approximate) from Jan-June 2024, reflecting a 0.77% increase year-  
3545 over-year.

3546

3547 **Continuing Education Program Approvals**

3548 State society programs from January–June 2024 (294 programs) are down 19.2% from January–  
3549 June 2023 (364).

3550

3551 However, chapter programs from January–June 2024 (315 programs) are up 8.6% from January–  
3552 June 2023 (290).

3553

3554 **Non-AAMA Education Providers**

3555 Revenue from Non-AAMA Education Providers is up 100.5% when comparing January–June  
3556 2023 (\$33,053) to January–June 2024 (\$66,290).

3557

3558 The increase in revenue largely stems from the price changes that went into effect for programs  
3559 submitted on or after September 1, 2022. Administrative fees have also been assessed for  
3560 providers that submit more than 250 monthly course completions for processing.

3561

3562 **PROJECTS**

3563 **Non-AAMA CEUs Submission Testing and Launch**

3564

3565 Director Mickowski was part of a testing team, along with Director Gottwaldt, Assistant Director  
3566 Rumpel, Manager Mercado, and IT Consultant Knight, that reviewed the functionality for non-  
3567 AAMA CEU uploads and the refining of pages associated with the new tool. This new tool  
3568 allows users to upload non-AAMA CEUs through the website for review. Courses that are  
3569 approved get added to the individual's transcript as non-AAMA CEUs. There is a comment  
3570 feature that allows staff to also provide additional detail on declined courses. Users may then  
3571 resubmit the appropriate documentation as requested for re-review.

3572

3573 The launch date of this tool was April 19, 2024, and it has already been widely used. 1,953  
3574 individuals have submitted at least one program through this new tool as of July 22, 2024.  
3575 Collectively, staff have reviewed 12,155 programs, approving 6,945 programs and declining  
3576 5,210 programs. The proportion of declined programs is expected to go down as CMAs (AAMA)  
3577 become more comfortable with the necessary requirements of non-AAMA CEU submissions.  
3578 Staff continue to refine messaging and review processes to better streamline the review for the  
3579 large volume of submissions.

3580  
3581 Response to the new tool has been largely favorable. It addresses the common concern expressed  
3582 by CMAs (AAMA) over the years that they would like to know in advance what non-AAMA  
3583 CEUs can be used toward recertification. This will ultimately reduce stress and save many  
3584 CMAs (AAMA) time and money on recertification as they will be able to log their non-AAMA  
3585 CEUs over the course of their five-year recertification period.

3586  
3587 **AAMA Website Update Project**

3588 Director Mickowski is assisting with aspects of the website update project as requested. Along  
3589 with Manager Mercado, he is conducting content reviews, answering questions, and providing  
3590 feedback on processes from the site and database to aid in the development of the new site.

3591  
3592 **Medical Assistant Partnership for Healthy Pregnancies and Families – AAMA E-Learning**  
3593 **Center Courses**

3594 Director Mickowski assisted with the addition of the following free courses to the AAMA e-  
3595 Learning Center, provided through the Medical Assistant Partnership for Healthy Pregnancies  
3596 and Families:

3597 *Understanding the Opioid Overdose Crisis: How Medical Assistants Can Help Patients*  
3598 by Scott Walters, PhD (Added on March 11, 2024)  
3599 5,777 completions

3600 *Engaging Conversation: A Motivational Interviewing Approach*  
3601 by Amy Shanahan, MS CADC (Added on March 21, 2024)  
3602 4,884 completions

3603 *Women & Alcohol: Prevalence, trends, and preventing alcohol-related harm*  
3604 by Sandra J. Gonzalez, PhD, MSSW, LCSW (Added on May 15, 2024)  
3605 3,371 completions

3606 \*Completion data as of July 22, 2024

3607

3608 **2024 AAMA Annual Conference**

3609 Director Mickowski worked with MarCom colleagues on the preparation and testing of the  
3610 conference registration site, which launched on March 4, 2024.

3611 Director Mickowski is assisting with conference-related questions from registrants as they arise  
3612 and assisting staff and volunteer leaders with other aspects of the planning process.



## **New Monographs**

Director Mickowski assisted the CEB with their development of three new monographs:

*Nutrition*

*Foundations of Medical Law for Medical Assistants*

*Foundations of Medical Ethics for Medical Assistants*

Development for all three monographs began with CEB creation of outlines to identify relevant material and general structure. The monographs were then developed by Learn Ethos, with consistent and thorough input from a subset of the CEB through a series of review rounds and weekly calls. Director Mickowski joined the calls, along with CEO Balasa, and facilitated the process by reviewing the content, consolidating CEB input, and conducting check-change reviews to ensure feedback had been effectively addressed.

## **Career Professional Development Committee Projects**

Director Mickowski assisted the committee with the launch of the Assessment-Based Recognition in Medical Office Basics program to the AAMA e-Learning Center. The initial launch included the first five courses and went live on February 15, 2024, with the remaining three courses to be added and launched around the end of July 2024.

## **Membership Development Committee Projects**

The committee developed letters to welcome new AAMA members and a flier with member benefits to assist states in promoting membership. Director Mickowski assisted with review of these documents and provided a staff perspective. These letters and the flier were posted to the website in an officer-only content block on the “Guidelines and Forms” page under the “Volunteers” tab.

Director Mickowski also assisted in messaging focus group survey responders who were nonmember CMAs (AAMA) with a free E-learning course and a letter regarding benefits of membership that was developed by the committee.

The committee has worked with Beneplace to increase usage of this AAMA member benefit. An eblast and social media posts were created with the help of MarCom colleagues to promote Healthcare Month (May) on the Beneplace platform. Additional collaboration with Beneplace is ongoing and expected for the annual conference and for MARWeek.

## **STAFF**

Director of Continuing Education and Membership Mickowski would like to thank the Continuing Education and Membership team members for their ongoing excellent work: Janet Arreola, Natasher Dixon, Manager Erika Mercado, and Essence Patterson.

Nick Mickowski

Director of Continuing Education and Membership

# ***COMMITTEE REPORTS***

**American Association of Medical Assistants® (AAMA)**

**Report of the Annual Conference Committee**

**For the Period Ending September 2024**

The charge of this committee is to review and oversee the functions and proceedings of the AAMA Annual Conference and identify opportunities to enhance events and schedules for the members and attendees. This committee also collects the bids for future annual conferences and works with the AAMA meeting planner to research options in those submitted areas. Once the top three options are presented by the meeting planner the committee will present these to the Board of Trustees to vote on the best option for the event activities and the membership attendees. The Board of Trustees also voted to make the Chair of the Annual Conference Committee to be the role, duties, and responsibilities of the AAMA Immediate Past President. The rationale for this decision was that the Chair needs to have witnessed all aspects of the Conference Events, contracts, negotiations, set ups and conference budget. After no less than 3 years on the MSC the IPP has fully been exposed to all the important parts that occur during the AAMA Annual Conference.

The 68<sup>th</sup> Annual Conference will be held in Grand Rapids, Michigan at the Amway Grand Plaza on September 20–23, 2024. The conference committee continues to hold monthly meetings to review all areas of the conference. During our May meeting we included Kathy Basel our AAMA meeting planner in which to review our event space room layouts. This was extremely helpful to all event chairs and officers in preparation for sessions. This information was also shared with the educational boards, as they also need updates as they prepare for their sessions/presentations.

This chair continues to get a monthly update from our meeting planner on room pick-ups and attendee registration. Currently we are over 66% of our room guarantee. Registration as of the time of this report was over 350 registrations with 9 weeks to go. Historically this is what we see each year at this time.

Marcom Senior Director Mokijewski is overseeing the Exhibitors and sponsors. To date we have nine paid exhibitors. Another opportunity to increase revenue is through sponsors of events, activities, and ads, which can be placed on the Cvent application and several event communications. To date, we have three states who have committed to sponsoring either a breakfast or happy hour session. Eblast information was sent out to include these sponsorship opportunities to our state leaders as well as to our past exhibitors.

The Michigan Host Society Chair Smith & CCETF Chair Ley has confirmed all the speakers and topics for the upcoming 2024 annual conference. CCETF Chair Ley has also shared conference education topics for 2025 conference education host society from Virginia. At the June CEB and BOT Summer meeting we had the opportunity to meet with some of the Virginia Committee members to discuss responsibilities and to answer any questions from the hosting society.

This officer has also had monthly meetings, as well as many conference calls, with our meeting planner and staff regarding needs and requests for conference events. Food and beverage options are still at an all-time high which makes it challenging to determine the best options for the

3701 events which include meals or snacks. During these meetings we also review the session needs  
3702 such as room set up, AV equipment, and signage.

3703 Our meeting Planner Kathy Basel has received the 2026 Bids and is in the process of reviewing  
3704 the areas and hotels that could meet the needs for the AAMA. It is the goal of this committee to  
3705 be back on track with announcing the AAMA Annual Conference locations two years in  
3706 advance.

3707 It has been this officer's pleasure to serve as the Annual Conference Committee Chair. This chair  
3708 would like to thank her committee members, who are dedicated to assuring a smooth and well-  
3709 run professional conference. This officer would also like to thank all the AAMA Staff for their  
3710 continued assistance and support. This officer appreciates Don Balasa, JD, MBA CEO & Legal  
3711 Counsel and Kathy Basel, AAMA meeting planner for their participation and guidance to help  
3712 ensure that the AAMA membership has many options and opportunities to gain experience and  
3713 network opportunities during the Annual Conferences.

3714

3715 Deborah Novak, CMA (AAMA), Chair

3716 Members:

3717 Christa Smith, CMA (AAMA)

3718 Sherry Bogar, CMA (AAMA)

3719 Claire Houghton, CMA (AAMA)

3720 Clare Ley, CMA (AAMA)

3721

3722 Staff Liaisons:

3723 Sharon Flynn, Board Services Manager

3724 Gina Mokijewski, Senior Marketing and Communications Director

3725 Nick Mickowski, Membership and Continuing Education Director

3726

**American Association of Medical Assistants® (AAMA)**

**Report of the Awards Committee**

**For the period ending September 2024**

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

This chair has met monthly with MarCom Senior Director Mokijewski and Board Services Manager Flynn to review the needed staff liaison's aid in the purchasing of the awards and event activities for the Welcome and Awards night. The committee held in-person meetings during regularly scheduled BOT meetings as well as several virtual meetings and email communications and assignments. Assignments included a review of all the award submission forms and scoring sheets. The staff and committee members researched some suggestions to look at the possibility of ordering trophies in bulk to see if this might be a cost savings. However, it was found that that would require storage at the AAMA Executive Office as well as yearly shipping cost to and from the engraving company that would not result in any savings. It was decided that this was not our best option at this time. It was decided to go with a new vendor which is Baudville, and they are in Grand Rapids, Michigan. Other topics discussed in these monthly meetings include e-blasts and notices sent out reminding state leaders and members of the timelines and deadlines for submitting nominations for the 2024 awards.

In February it was decided that the theme for the 2024 Welcome and Awards will be "A night amongst the Stars." There will be a costume contest for those who wish to take part and come as their favorite celebrity star. This may include celebrities from genres such as movie stars, athletes, musicians, or famous/historical individuals. There will be entertainment by a few special folks.

The committee developed the AAMA Student Essay prompt questions with a consensus by the AAMA Board of Trustees. The prompt question for 2024 is "What are your goals and aspirations as a medical assistant to stand out to your employer, patients, and in your career?" This year we received eight essay submissions.

The committee began reviewing all the award submissions on July 17, 2024, with a goal to be completed by July 25, 2024. Winners will be announced Friday evening at the Welcome and Awards. The committee received submissions for the following awards:

- Excellence in Publishing
- Excellence in Marketing, Promotion, and Recruitment
- Excellence in Website Development
- Excellence in Community Service
- Medical Assistant of the Year Award
- Leadership and Mentoring Award
- Golden Apple Award
- Rising Star Award
- CMA (AAMA) Employer of the Year Award

3773       • Student Essay Award  
3774

3775       This chair and committee worked with the AAMA meeting planner Kathy Basel in finding light  
3776 refreshments for the Welcome and Awards event. We do not have a final determination at the  
3777 time of this report; however, it is a fact that food and beverage costs along with required  
3778 gratuities and taxes are at an all-time explosive rate. A key point to note is that this is not a meal,  
3779 so attendees should have dinner prior to the event.  
3780

3781       This chair would like to thank the committee members for their engagement and contributions of  
3782 ideas for this year's event. This chair would also like to express the committee members  
3783 gratitude to the staff, MarCom Senior Director Mokijewski, Director of Communications  
3784 Miranda Sanks-Korechan, Board Services Manager Flynn, and Communications Manager  
3785 Laura Niebrugge who aided this committee through the projects, brainstorming, and  
3786 presentations. This chair would also like to thank President Case for giving me this opportunity  
3787 to serve as this committees Chair.  
3788

3789       Deborah Novak, CMA (AAMA)  
3790 Chair  
3791

3792       Committee Members:

3793       Candy Miller, CMA (AAMA)  
3794       Pam Neu, CMA (AAMA)  
3795       Shannon Thomas, CMA (AAMA)  
3796

3797       Staff Liaisons:

3798       Gina Mokijewski, Senior Marketing and Communications Director  
3799       Miranda Sanks-Korechan, Communications Director and Managing Editor  
3800       Sharon Flynn, Board Services Manager  
3801

**American Association of Medical Assistants® (AAMA)**

**Report of Bylaws and Resolutions**

**For the Period Ending September 2024**

The Bylaws and Resolutions committee is responsible for officially notifying each constituent society of all changes to the AAMA Bylaws and explaining how the changes may impact constituent society bylaws. If there are AAMA Bylaws changes that the constituent societies are mandated to include in their bylaws, this committee must notify the constituent societies and provide a deadline by which each society must send their revised bylaws for this committee to review.

**Mandated Bylaws Changes**

This committee initially met virtually in November 2023 and discussed the mandatory changes from the 2023 HOD and the process for notifying State Societies. After this meeting, Chair Miller collaborated with Manager Flynn, along with CEO Balasa in formulating a letter to be sent to the state Presidents and President Elect/or Vice Presidents, with the mandated changes. Below is the mandated change to the Bylaws:

**1. SECTION 2. Qualifications.**

**A. ACTIVE—An Active member shall be one of the following:**

1. A credentialed medical assistant holding current status through a National Commission for Certifying Agencies (NCCA)-accredited certification program and whose credential has not been revoked as provided by the respective credentialing body...

2. Anyone who was an active member on 12/31/87, who has never been a CMA (AAMA), and who has maintained continuous active membership. Continuous active membership shall be defined as having dues postmarked or submitted electronically to the AAMA Executive Office by December 31 (the controlling time is that of sending, not that of receiving)

This letter was emailed to all state society Presidents and President Elects/or Vice Presidents on January 3, 2024. As per the AAMA Bylaws, revised bylaws are due back to AAMA within 30 days of notification. These changes were due by February 2, 2024. Initially, updated Bylaws were received from fifteen states. These bylaws were distributed amongst the Bylaws Committee for review. After the first influx, this chair reviewed the state bylaws as they came in, a few at a time January 24, 2024, a reminder email was sent to the states who had not sent mandatory changes, with the due date of February 2, 2024. Some states responded by sending their bylaws. February 16, 2024, an email was sent to the remaining sixteen states who had not sent their bylaws asking when they would be able to comply. During the next few weeks mandated bylaws changes were received sporadically from eleven more states, making them compliant. May 23, 2024, an email was sent to the last five states, not in compliance stating:

“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”.

After this email, three more states responded with their updated bylaws. This chair telephoned the two remaining state presidents on June 7, 2024, asking if help was needed for their mandatory bylaws' submission. Neither state asked for added help or information. One state sent their bylaws that day. On July 9, 2024, a certified letter was sent to the remaining state who is not in compliance, saying the following:

According to AAMA Bylaw ARTICLE IV, Section 7, Constituent Societies not in conformity with the mandated sections of the AAMA Bylaws 30 days prior to the opening of the AAMA HOD shall not be allowed Delegate representation at the AAMA HOD”.

As of July 21, 2024, one state is not compliant. This state has 30 days before the 2024 House of Delegates start, to be seated at the HOD. Prior to sending, all letters were reviewed by CEO Balasa. Except for the one state, all states were emailed that their Bylaws were in compliance with AAMA's mandatory changes from the 2023 HOD.

### **Bylaws Review**

The committee met virtually on January 24, 2024. They reviewed the PBAs not approved from the last two year's HOD for potential resubmission at the 2024 HOD. This chair asked the committee to continue to think about which PBAs they would like to revisit and discuss at the next meeting. This committee met in person on February 9, 2024, in Chicago. Proposed bylaws changes were discussed, and decisions were made on which ones would be their focus. Chair Miller asked the members to email her with suggested wording and rationale to be discussed at their next meeting. She also asked the members to review the entire bylaws to look for any other potential PBAs. During the next two virtual meetings, there was continued discussion on wording and rationale for the PBAs. During their May virtual meeting, it was decided they would send two PBAs to the BOT for their approval. In June, there was continued discussion on the wording and rationale and in July, proposed wording and rationale was agreed on. This was emailed out to the BOT for their review and approval.

### **Bylaws Tracking**

This chair worked closely with Sharon Flynn and a spreadsheet has been developed with all the states listed to keep track of when Bylaws were last received and reviewed by the Bylaws Committee. This also has a tab for the mandatory changes. This will make it easier for the Bylaws Committee to keep track of when the states Bylaws were reviewed for compliance, both mandatory and complete state bylaws. This tool will be a valuable resource in upcoming years for the Bylaws committee and the AAMA staff to check compliance of each state's bylaws. Prior to this, no documentation for tracking the bylaws was found.

The Bylaws Committee will continue to review entire state bylaws for compliancy with AAMA Bylaws.

### **New Opportunity**

Additionally, this Chair proposed to the Bylaws Committee, that the AAMA Bylaws Committee be open to volunteers with an AAMA Active membership, and that is opportunity be included on the Volunteer Leadership Form beginning 2024–2025. The Bylaws Committee agreed, and this was voted on by the BOT and approved. She feels this will be well received by AAMA members and have a positive impact on the Bylaws Committee.



3894 **Virtual Bylaws Review Meetings**

3895 Two virtual Bylaws review meetings have been scheduled:

3896

3897 Saturday, August 17, 2024, and Saturday, August 24, 2024.

3898 8:00 a.m. Pacific/10:00 a.m. Central/ 11:00 a.m. Eastern

3899

3900 This Chair encourages members to attend one of these sessions. They are open to all members  
3901 who wish to attend,

3902

3903 Chair Miller thanks AAMA Board Services Manager, Sharon Flynn, for her help this past year.  
3904 Flynn's guidance and knowledge was invaluable to this Chair and the Bylaws Committee. We  
3905 could not have done it without you! She also thanks Don Balasa, JD, MBA, CEO and Legal  
3906 Counsel for his support, suggestions, knowledge, and legal guidance and for answering all her  
3907 questions! She thanks the committee members for their active participation and hard work this  
3908 year on the Bylaws Committee and President Monica Case for her attendance and participation  
3909 in our meetings. Miller thanks President Case for the opportunity to serve as Bylaws and  
3910 Resolutions Chair.

3911

3912 Candy L. Miller, CMA(AAMA)

3913 2023–2024 Bylaws and Resolutions Chair

3914

3915 Committee Members:

3916 Natasha Geno, CMA(AAMA)

3917 Pam Neu, CMA(AAMA)

3918 Aimee Quinn, CMA(AAMA)

3919

3920 Staff Liaisons:

3921 Don Balasa, JD, MBA Ex-Officio

3922 Sharon Flynn AAMA Board Services Director

3923

American Association of Medical Assistants® (AAMA)

**Report of the Career Professional Development Committee  
For the Period Ending September 2024**

This committee is charged with addressing opportunities to provide information and education to medical assistants to help educate them about potential career advancements and create education for pathways to advance within their careers.

This year's committee worked with the 2022–2023 committee to finalize the ABR-Medical Office Basis (MOB) modules. The PowerPoints were completed and branded. The recordings were done on PowerPoint and Part 1 was completed and released by mid-February. Part I had five modules:

- How to Deal When Things in Fact Are not OK
- Communication at its Best
- Registration and Insurance
- Law and Ethics
- Healthcare Compliance for the Front Office

Currently, the feedback on these modules has been favorable and they have been doing well as an e-learning product. The following grid presents quantity and revenue from sales and what has been purchased as of July 2024.

**ABR: MOB I**

Revenue: \$23,420

Row Labels	Count of Purchase Amount
Member	393
Nonmember	46
<b>Grand Total</b>	<b>439</b>

The second part of the project was completed and is ready to launch. Part two contains the following modules:

- Foundations of Medical Terminology
- Introduction to the World of Medical Coding
- Introduction to Anatomy and Physiology

The committee wants to thank all the authors and recorders for their contributions to these informative PowerPoints. Everyone worked very hard to produce the best product possible for our members and those who invest in their continuing education.

It was decided to combine both parts and market the modules as a complete set that will have ten (10) CEUs. Pricing for the ten (10) CEUs is \$100 for members, \$160 for nonmembers, and employers purchasing ten (10) or more full courses will receive \$15 off. For those who bought the module(s) prior to the release of the entire ten (10) CEU course, special pricing is available for the complete package.

MarCom has advertising going out to other organizations such as MGMA, AAFP, and PAHCOM. LinkedIn and social media are being used to place banners and videos for advertising. Members will receive e-blasts indicating what is available. MarCom has worked with this committee to complete a wonderful package as promotion of this course.

The committee is working hard to complete our next project that will be part of the Population Health Badge. The project should be completed and announced soon. Modules in the Population Health series have netted over \$345,000. Here are the current numbers on Population Health as of July 2024.

#### **Population Health**

Revenue: \$345,170

<b>Row Labels</b>	<b>Count of Product Name</b>
<b>Creating Care Management Programs</b>	<b>119</b>
Member	95
Nonmember	24
<b>Motivational Interviewing: Understanding the How, What, When, and Why</b>	<b>504</b>
Member	407
Nonmember	97
<b>Patient Navigators: An Ideal Role for Credentialed Medical Assistants</b>	<b>256</b>
Member	193
Nonmember	63
<b>Population Health Module</b>	<b>3019</b>
Member	2635
Nonmember	384
<b>Population Health Overview</b>	<b>156</b>
Member	111
Nonmember	45
<b>The Expanding Field of Health Coaching: An Ideal Role for Credentialed Medical Assistants</b>	<b>145</b>
Member	111
Nonmember	34
<b>The Impact of Behavioral Health on Population Health</b>	<b>1021</b>
Member	802
Nonmember	219
<b>Grand Total</b>	<b>5220</b>

This Career Professional Development team has been generous with their time, patience, and commitment to the two projects we were charged with this year. The Chair would like to thank the team members for their ideas, suggestions, contributions, and hard work to ensure the success of the team's goals. The Chair would like to thank Director Mokijewski and her staff for the collaboration and wonderful work that they developed for the team. Thank you, Donald Balasa and Nick Mickowski, for all the contributions you made, and the support given to the committee.

3987 This chair would like to thank President Case for the opportunity to chair the Professional Career  
3988 Development Committee.  
3989 Pamela L. Neu, CMA (AAMA), MBA  
3990 Chair  
3991  
3992 Members:  
3993 Sherry Bogar, CMA (AAMA)  
3994 Deborah Novak, CMA (AAMA)  
3995 Shirley Sawyer, CMA (AAMA)  
3996 Linda Vitzthum, CMA (AAMA)  
3997 Sandra Williams, CMA (AAMA)  
3998  
3999 Staff Liaison:  
4000 Don Balasa, CEO and Legal Counsel  
4001 Nick Mickowski, Continuing Education and Membership Director

**American Association of Medical Assistants® (AAMA)**

**For the Period Ending September 2024**

**Report of the Documents Committee**

**Documents Committee Report**

The Documents Committee is charged and responsible for reviewing AAMA documents to ensure they are current and consistent with other documents.

This committee has met multiple times to make corrections to the documents with the information we have, discussing the updating process and making necessary corrections. This chair also spoke with President Case multiple times, who asked me to hold off on the CEB documents until she gathered their corrected input.

**Key updates include:**

- ❖ This committee worked on the BOT Policy and Procedures Manual, the Volunteer Leaders Position Descriptions (VLPD), State and Chapter Treasurer, and State and Chapter Secretary, documents this current year.
- ❖ The State and Chapter Treasurer's guidelines with corrections was sent to the BOT for review March 09, 2024.
- ❖ State and Chapter Treasurer's guidelines approved by the BOT March 10, 2024.
- ❖ Guidelines sent to Sharon and Gina on March 11, 2024, with some spacing errors that they will fix.
- ❖ Volunteer Leadership Position Descriptions: President Case requested each BOT member to review their current BOT position and the committee(s) they will chair. The Documents Committee will also review sections of the Certifying Board and the Continuing Education Board governance documents to identify and recommend any needed updates.
- ❖ This chair corresponded with the Documents Committee via email on multiple occasions. Due to Representatives Bureau assignments, we postponed meetings until June 10th.
- ❖ This chair has asked the committee to review the updates in the VLPD document listed in TEAMS. President Case has provided corrections from the CEB that still need to be reviewed, approved, and voted on by the BOT.
- ❖ This committee will meet and review each section page-by-page for more accurate corrections.
- ❖ The Documents Committee met on July 22, 2024, to go over one-by-one the corrections to the VLPD. Corrections will be presented to the BOT on August 11, 2024.

4047 ❖ This committee will continue working on the documents until the HOD in Grand Rapids,  
4048 MI.  
4049

4050 This chair would like to thank the committee members for their work and flexibility. I also  
4051 extend my gratitude to the Chairs of the Continuing Education Board and Certifying Board, their  
4052 committee members, and their staff liaisons for reviewing the relevant sections of these  
4053 documents before my handoff. Special thanks to President Monica Case for her leadership and  
4054 the opportunity to chair this committee. There is continued work to be done by this committee.  
4055

4056 Natasha Geno, CMA (AAMA)  
4057 Chair  
4058

4059 Members:  
4060 Shirley Sawyer, CMA (AAMA)  
4061 Virginia Thomas, CMA (AAMA)  
4062 Aimee Quinn, CMA (AAMA)  
4063

4064 Staff Liaison:  
4065 Miranda Sanks-Korechan, Communications Director and Managing Editor  
4066

**American Association of Medical Assistants® (AAMA)**

**Report of Editorial Advisory Committee**

**For the Period Ending September 2024**

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

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

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

- Kidney Transplant 101
- Overtime Blues
- Insect Repellent Safety
- Pediatric Eye Care
- Child Abuse
- Overcoming Math Anxiety
- Credentialing
- How to keep the clinic calm when everything is going haywire
- Coaching Employees
- Proper ways to study for CMA (AAMA) exam

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

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

Shirley Sawyer, CMA (AAMA), Chair

**Members:**

Jennifer Atkins, CMA (AAMA)  
Rebecca Eldridge, CMA (AAMA)  
Donna Gibbins, CMA (AAMA)  
Angela Kort, CMA (AAMA)  
Todd Lasher, CMA (AAMA)  
Tonya Milam, CMA (AAMA)  
Deanna Schnebbe, CMA (AAMA)  
Paula Schubert, CMA (AAMA)

**Staff Liaison:**

Miranda Sanks-Korechan, Communications Director & Managing Editor

4113                    **American Association of Medical Assistants® (AAMA)**  
4114                    **Report of the House of Delegates Minutes Committee**  
4115                    **For Period Ending September 2024**

4116

4117    The HOD Minutes Committee is charged with reviewing the minutes for the AAMA House of  
4118    Delegates (HOD) for accuracy.

4119

4120    The minutes were reviewed and posted to the AAMA website. Any member wishing to view the  
4121    AAMA HOD minutes may access them from the “News” tab on the menu bar of the website  
4122    home page. You must be an AAMA member and log in to access the minutes.

4123

4124    A memorandum and a copy of the minutes were emailed by the Speaker of the 2023 AAMA  
4125    HOD to the Delegates and Alternate Delegates of the 2023 AAMA HOD.

4126

4127    The information was also emailed to the 2022–2023 and 2023–2024 AAMA Board of Trustees;  
4128    AAMA Society of Past Presidents, 2023–2024 AAMA State Society Presidents and Presidents-  
4129    Elect/Vice Presidents and AAMA Staff Directors and Managers.

4130

4131    The Chair wishes to thank the members of this committee for their time and service.

4132

4133    Aimee Wicker, CMA (AAMA), Chair until resignation then succeeded by  
4134    Sherry Bogar, CMA (AAMA), CN-BC (submitted report)

4135

4136    Members:

4137    Sherry Bogar, CMA (AAMA) – Vice Speaker

4138    Natasha Geno, CMA (AAMA)

4139    Candy Miller, CMA (AAMA)

4140



**American Association of Medical Assistants® (AAMA)**

**Report of the Nominating Committee**

**For the period Ending September 2024**

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

This chair contacted the members of this committee via email to welcome them to the Nominating Committee. The members were asked to start thinking of members who would be eligible candidates for the open Officer and Trustee positions. This chair provided each member with the following resources:

- Guidelines for the AAMA Nominating Committee
- AAMA Officer Qualifications
- *Medical Assisting Today* Platform & Vital Stats Form
- Officer & Trustee Nomination Form
- Copy of email to State Leaders regarding the process for nominations
- Deadline Date for nominations as May 1, 2024

An e-mail and eblast were sent to all state society leaders on January 16, 2024, to inform them of the May 1, 2024, deadline for submission for the following five elective open positions for 2024–2025:

- Vice President
- Secretary – 2-year term
- Trustee positions (two-year positions) – 3 open positions

A copy of this information was also sent to the current members of the AAMA Board of trustees as a reminder if they wish to be a candidate for any of the open positions they must also apply for on or before May 1, 2024. Additional eblast reminders were sent out by the MarCom Department.

Due to multiple unforeseen resignations because of personal/family obligations or current BOT members deciding to campaign for a newly open board position the following positions have become available for election after the first membership notification of open positions for the 2024 HOD.

- President
- Vice Speaker – 1 year term
- Speaker of the House – 1 year term

After a review and discussion by the MSC, which includes Don Balasa, JD, MBA CEO & Legal Counsel, and taking the opinions of the 2023 & 2024 HOD Parliamentary Advisor, it was determined a 10-day nomination submission period for the final open position of the speaker of the house was in order within the AAMA Bylaws and Roberts Rules. This position became open after the deadline date for members to submit applications to serve for this position. An additional announcement went out to all State Society Presidents/President Elects/Vice

Presidents on June 8, 2024, instructing them to notify their members of this latter open position. E-blast notices were also sent to all AAMA membership on June 10, 2024. The deadline for submission of the open position of Speaker of the House ended on June 18, 2024.

The following candidates were added to the AAMA 2024 nominating slate:

- President – Virginia Thomas, CMA (AAMA), from the Virginia State Society
- Vice President – Sherry Bogar, CMA (AAMA), from the Texas State Society
- Secretary – Loxie Kistler, CMA (AAMA), from the Ohio State Society (2-year term)
- Vice Speaker – Claire Houghton, CMA (AAMA), from the Texas State Society (1-year term)
- Speaker of the House – Jane Seelig, CMA-A (AAMA), from the Indiana State Society (1-year term)

*There will be three open Trustee positions for election:*

- Trustee – Cameron Smith, CMA (AAMA), from the North Carolina Society (2-year term)
- Trustee – Pam Neu, CMA (AAMA), from Indiana State Society (2-year term)
- Trustee – Candy Miller, CMA (AAMA), from the Oregon State Society (2-year term)

After receiving the verification for each candidate by the staff office and all committee members, this chair forwarded each candidates documentation required to run for AAMA Trustee/Officer. This included the process and dates and times of the two upcoming virtual Meet the Candidates and the on-site during the recess of the morning session of the HOD. The notice included the following information:

The first Virtual “Meet the Candidates” will be held on August 3, at 12:30 p.m. EST. This will be a virtual team meeting open to the AAMA membership and consist of each candidate introducing themselves and their qualifications and experience. The second Virtual “Meet the Candidates” will be held September 7, 2024, at 12:45 p.m. EST. This will be a Q & A session. Each candidate will be given 2-3 questions to be prepared to answer. The last session of “Meet the Candidates” will be in-person following the first session of the 2024 HOD in Grand Rapids. Candidates will have 3-4 minutes to present their speech and will be stationed in specified areas of the HOD room to answer questions from the delegates and membership attendees of the HOD. Instructions, dates, and timelines have been sent to each eligible candidate, as well as future requirements and dates of 2024-2025 mandatory in person meetings required if elected.

All correspondence was responded to promptly. This chair will continue to maintain contact with the committee members should any nominees come forward to be nominated from the floor.

This officer would like to extend a sincere “thank ou” to the members of this committee for their hard work and understanding during this unusual chain of events. Their attention to details and quick turnaround on assignments was commendable. This officer would also like to thank President Case, CEO & Legal Counsel Don Balasa, and staff liaison Sharon Flynn for their guidance and support.

Deborah Novak, CMA (AAMA) – Chair  
Immediate Past President 2023–2024

Members:

Cassie Cornelison, CMA (AAMA)

4231 Todd Lasher, CMA (AAMA)  
4232 Crissy Taylor, CMA (AAMA)  
4233 Michelle Van Handel, CMA (AAMA)  
4234  
4235 Staff Liasons:  
4236 Don Balasa, CEO and Legal Counsel  
4237 Sharon Flynn, Board Services Manager  
4238

**American Association of Medical Assistants® (AAMA)**

**Report of the Social Media Committee  
For the Period Ending September 2024**

The Social Media Committee is charged with developing new and creative ways to increase visibility and active participation with LinkedIn, Twitter, Facebook, and Instagram, as well as develop, implement, and maintain all strategic social media communications, public relations, outreach, and event activities and materials that align with the 2023–2024 Strategic Planning Goals #3 and #4.

Goal #3: Increase membership of medical assistants in the AAMA organization

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

Goal #4: Enhance engagement and communications

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

This committee continued to move forward with our discussions and ongoing projects. This chair has and will continue to conduct discussions, requests, and timelines via email and virtual meetings, in order to meet the above goals for this committee per the Strategic Issue Plan.

This chair has communicated with all committee members via email, including follow-up after team meetings with written minutes of discussion items and assigned tasks. Virtual meetings were held on:

- ❖ November 21, 2023
- ❖ December 28, 2023
- ❖ January 25, 2024
- ❖ February 22, 2024
- ❖ May 23, 2024
- ❖ June 27, 2024

Upcoming meetings (after report submission)

- ❖ July 25, 2024
- ❖ August 22, 2024

Discussion details based on the committees' desire to continue working on pending projects from the previous year or to investigate new opportunities for this committee. Following the November and December virtual meetings, we decided on our top three priority projects.

**Project #1: Weekly Questions with “Reel” Answer**

This first project will be an ongoing project. The Committee will compile a list of questions to ask our volunteers, whether they are BOT members or State or Chapter leaders and have them answer the questions via a reel. This will then be posted on all the social media outlets. The

committee would like to eventually see the members participate as well.

Currently, the committee members are compiling “reels” with leaders. It was suggested to the committee to have several completed (ten) before posting the first one. The goal is to post one every 2 weeks to start. The committee decided with the name: **“Reel” Talk with Medical Assistants**. The committee looks forward to showcasing these soon,

### **Project #2: Continue with Representatives Bureau Assignments and Highlighting the States**

The second project the committee would like to see completed by late summer after all the Representatives Bureau (RB) assignments have been completed. The committee will come up with information to put in the RB packets. For example:

- Where is the RB assignment
- Requesting pictures (will give a QR code for the representative to pass out to make getting pictures back easier. The card will state they are giving consent for their photos to be posted via social media if they send one in.)
  - Highlights of their visits
  - Group pictures
  - Favorite experiences
  - New-person-they-met highlight blurb i.e.,
    - Who they are, what type of work they do, and something fun about them.

Posts have been made with pictures from the RB assignments. Unfortunately, the QR code, which was a great idea, did not work out as planned. There was a data limit as to how many submissions would be accepted. The committee had photos through the busiest weekend in April but after that no other submissions would be accepted. An announcement at the May BOT meeting asked the BOT Reps to send pictures to the social media chair. The completed posts have been submitted and posted to all social media outlets.

### **Project #3: Mini Mics**

This committee would like to continue with this project that did not get finished at last year’s conference. The chair, on behalf of the committee members, submitted an agenda request for the June BOT meeting. The committee would like to purchase five (5) mini mics and a blank clapper board to use during the conference, this request was approved with the addition of purchasing five (5) clapper boards rather than just one. These would be used before/after the first timers’ session, Welcome Banquet, Presidents’ Banquet, Awards, and other random times throughout the conference. These fun props will be used to make “reels” from members for the social media pages.

### **Other Small Projects:**

BOT members were asked at the planning session to write down positivity quotes for members. These quotes were made into posts for the social media accounts. These were posted every Tuesday until all the BOT members had submitted quotes.

This committee chair also took pictures of all the in-person meetings and made posts for social media. There were also posts made from the BOT highlighting the different holidays.

This chair would like to thank my committee for their hard work. This chair would also like to thank AAMA staff members Gina Mokijewski and Felicia Eldridge for their guidance and

4332 assistance in posting to the social media pages.  
4333  
4334 Aimee Quinn, BHA, CMA (AAMA), Chair  
4335  
4336 Members :  
4337 Michelle Adams, CMA (AAMA)  
4338 Jennifer Atkins, CMA (AAMA)  
4339 Amanda Harris, CMA (AAMA)  
4340 Alexandria Holcomb, CMA (AAMA)  
4341 Christina Sears, CMA (AAMA)  
4342 Jeanette Tyler, CMA (AAMA)  
4343 Lucinda Wilson, CMA (AAMA)  
4344  
4345 Staff Liaison:  
4346 Gina Mokijewski, Senior Marketing and Communications Director  
4347

**American Association of Medical Assistants® (AAMA)**  
**Report of the Strategic Issues Planning Committee**  
**For the period ending September 2024**

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

Prior to the Board of Trustees (BOT) Planning Session in November 2023, this Chair conducted two virtual meetings with members of this strategy team on October 5<sup>th</sup>, 2023, and October 19<sup>th</sup>, 2023, to review the previous year's Strategic Issues Plan (SIP) and make suggested changes. The revised plan was discussed at the BOT Planning Session.

During the BOT Planning Session in November 2023, this Chair conducted a session regarding the previous year's SIP to show which goals were accomplished and to discuss if we need to change, delete, or add any new goals for the upcoming year. After a great brainstorming session, a newly revised SIP was created and approved by the BOT.

It was also discussed that each Committee/Strategy Team Chair should give a progress report to the SIP Chair prior to the BOT meetings to demonstrate that their committee/strategy team is progressing along with their respective goal(s). The tracking tool was updated and uploaded to the SIP Teams Channel on January 20, 2024. Each committee chair was encouraged to review the tool and update as appropriate. Several committee chairs have given updates as to the progress of meeting the SIP goals for their committee.

After approval by the BOT, this Strategy Team Chair posted the completed SIP to the 2023–2024 file folder of the Strategic Issues Planning Committee's Teams channel and notified Staff Liaison Sharon Flynn. The plan is posted in the Members Only section of the AAMA website; a document with only the goals listed is placed for review by anyone accessing the AAMA website.

The current Strategic Issues Plan Goals are as follows:

- Goal 1: Rebuild AAMA Website.
- Goal 2: Strengthen the market share of the AAMA membership and CMA (AAMA) credential.
- Goal 3: Increase membership of medical assistants in the AAMA organization.
- Goal 4: Enhance engagement and communication.
- Goal 5: Educate the decision makers on the value and utilization of credentialed medical assistants.
- Goal 6: Expand educational opportunities.
- Goal 7: Be the leading resource for medical assisting scope-of-practice information.

Sandra Williams, CMA (AAMA), Chair

Members:

Sherry Bogar, CMA (AAMA), CN-BC

Debby Houston, CMA (AAMA), CPC

4395 Patty Licurs, CMA (AAMA), CPC  
4396 Pamela Neu, CMA (AAMA)  
4397  
4398 Staff Liaisons:  
4399 Donald Balasa, JD, MBA, CEO and Legal Counsel  
4400 Sharon Flynn, Board Services Manager  
4401



***STRATEGY***  
***TEAMS***  
***REPORTS***

**American Association of Medical Assistants® (AAMA)**  
**Report of the Leadership Development Strategy Team**  
**For Period Ending September 2024**

This committee is charged with developing the State Leaders session for the 2024 AAMA Annual Conference and deciding the direction, projects, and activities for the committee while keeping in mind the Strategic Issues Plan.

The Leadership Development Strategy Team met for an initial welcome and Meet-and-Greet for the committee members in Orlando, FL, on Monday, September 25, 2023. At this meeting, open discussion was held to prompt the team members to consider our charge and focus points for 2023–2024. The discussion items considered by Strategy Team members for evaluation are the current Leader e-blasts sent by MarCom, methods of contact to ensure leaders are receiving information, identification of tools and how to access them, requirements to obtain leadership positions, monitoring the Facebook Leadership Page, sponsorship of virtual leadership CEU sessions, and the State Leader Session at the Annual Conference.

This committee hosted a CEU meeting on December 2, 2023, The Art of Giving Effective Feedback by Preethi Fernando. This committee is planning at least two more virtual CEU offerings this spring. CEO and AAMA Legal Counsel Donald Balasa offered to present on the scope of practice for each state. This committee hosted a virtual meeting for State Leaders on March 23, 2024, on Forms and Documents. This session carried one AAMA CEU. This Committee also hosted a virtual CEU meeting for State Leaders on June 29, 2024. The topic presented was on patient advocacy by Kristilyn Moses, CMA (AAMA), BSM, MSP, MHR.

This committee is working hard to move forward with the mentorship panel at the State Leaders Session at conference. The committee has invited these members to sit as panel members:

- ❖ Paula Purdy, CMA (AAMA)
- ❖ Debby Houston, CMA (AAMA)
- ❖ Patty Licurs, CMA (AAMA)
- ❖ Deb Benson, CMA (AAMA)
- ❖ Betty Springer, CMA (AAMA)
- ❖ Alternate Mary Lou Allison, CMA-C (AAMA)

The committee has come up with eleven questions for this panel and will be sending them out so that they can prepare for the session. We will have time for audience questions also. Rebecca Walker, CMA (AAMA) will be presenting on the Fundamentals of Mentoring.

This Chair would like to thank all the committee members for all their hard work this year organizing quarterly State Leader Meetings and obtaining CEUs for these meetings. Chair Houghton would also like to thank them for the hard work that they did for the Annual State Leaders Session.

Chair Houghton would like to thank the staff liaisons—Donald A. Balasa, Miranda Sanks-Korenchan, and Sharon Flynn—for all their help with getting the information out to members for the CEU session that we offered. A special thanks to Sharon Flynn for all the work that she has

4448 done to get the meeting ready for this committee. Chair Houghton thanks President Case for  
4449 allowing her to service as the Chair of this committee.

4450

4451

4452 Claire Houghton, CMA (AAMA)

4453 Leadership Development Strategy Team Chair

4454

4455

4456 MEMBERS:

4457 Katherine Edwards, CMA (AAMA)

4458 Stephanie Hodgins, CMA (AAMA)

4459 Alexandria Holcomb, CMA (AAMA)

4460 Debby Houston, CMA (AAMA)

4461 Karla Hunter, CMA (AAMA)

4462 Angela Kort, CMA (AAMA)

4463 Katharine Largent, CMA (AAMA)

4464 Francie Mooney, CMA (AAMA)

4465 Paula Purdy, CMA (AAMA)

4466 Sherri Steele, CMA (AAMA)

4467 Shannon Thomas, CMA (AAMA)

4468 Jeanette Tyler, CMA (AAMA)

4469 Sandra Williams, CMA (AAMA)

4470

4471 STAFF LIAISONS:

4472 Donald A. Balasa, JD, MBA, CEO and Legal Counsel

4473 Miranda Sanks-Korenchan, Communications Director and Managing Editor

4474 Sharon Flynn, Board Services Manager

4475

**American Association of Medical Assistants® (AAMA)**

**Report of the Marketing Strategy Team**

**For the period ending September 2024**

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. Also, it is charged with developing ways to promote the AAMA to the public, including employers, health agencies, and medical assisting programs.

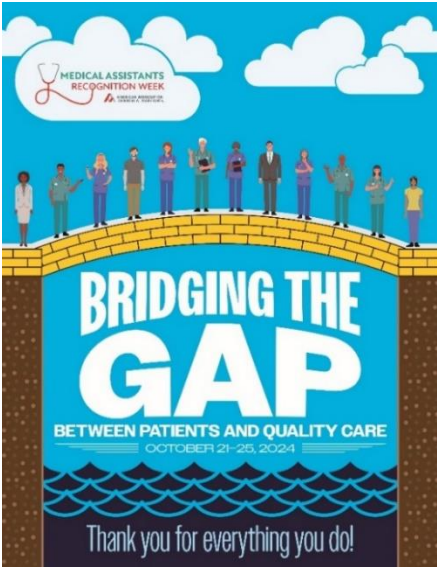
As the Marketing Strategy Team began to strategize for the year 2023–2024, this team kept in mind the current AAMA Strategic Issues Plan. The charge of the Marketing Strategy Team is to increase the market share of the AAMA membership and the CMA (AAMA) credential and educate decision makers on the value and utilization of credentialed medical assistants.

AAMA President Monica Case, CMA (AAMA), held a Meet and Greet for all committee, strategy team, and task force members in attendance at the AAMA Annual Conference in Orlando, Florida, on Monday, September 25, 2023. After brief introductions from committee chairs and members, the Marketing Strategy Team members in attendance met to discuss the charge of the team and to brainstorm for the coming year. Discussion included: Medical Assistants Recognition Week (MARWeek) 2024, continuing projects from the previous year's marketing strategy team, marketing to membership and employers, tips for resume writing, AAMA merchandise, and AAMA button redesign.

Following the AAMA Planning Session, this chair contacted team members to welcome them to the team and updated all team members with the information discussed at the AAMA Annual Conference Meet and Greet. The team was asked to email ideas for the 2024 MARWeek theme to this chair in preparation for a future virtual meeting. A second email was sent asking members to send ideas for the redesign of the AAMA button available to all state and chapter societies to promote the AAMA and medical assisting. A virtual meeting was set for December 30, 2023, at 11 a.m. EST. During this meeting, the team discussed the ideas for the 2024 MARWeek theme and chose: "Medical Assistants: Bridging the Gap..." The idea of this theme reflects the diverse ways that medical assistants bridge the gap in health care for patients regarding insurance, medications, providers, etc. Also, during the meeting, the team discussed some ideas for a redesign of the AAMA button. A suggestion was made to make the button into a sticker that can be placed on laptops, water bottles, and more. Another suggestion was to make a downloadable image that states could use for marketing and promotional items with their state logo. This information was shared with Marketing and Communications Senior Director Mokijewski and was discussed at the Winter Board of Trustees meeting in Chicago, Illinois, February 9–10, 2024.

The Marketing Strategy Team continued working after the Winter BOT meeting to develop the theme and poster concept/idea for Medical Assistants Recognition Week. This chair worked closely with Senior Director Mokijewski to bring the ideas of the committee to life via the Annual Conference poster. The theme was presented to the Board of Trustees at the winter board meeting and approved: Bridging the Gap between patients and quality care. Senior Director Mokijewski and her staff completed final edits to the poster which was presented at the Summer

4522 Board of Trustees meeting June 22–24, 2024, in Arlington, Virginia. Upon review, the Board of  
4523 Trustees approved the 2024 MARWeek poster.  
4524



4525  
4526  
4527  
4528 The Marketing Strategy Team worked to create an updated design of the medical assistant  
4529 button. The team discussed ideas and concepts, which were sent to Senior Director Mokijewski.  
4530 Three designs were shared with the committee at the April 2, 2024, virtual meeting and one was  
4531 selected. The new AAMA design was presented to the Board of Trustees at the April virtual  
4532 meeting for approval. The design will be available as a sticker that members will be able to place  
4533 on items such as water bottles and laptops, among other items. The Board of Trustees approved  
4534 the design. This chair will also discuss with Senior Director Mokijewski the creation of a digital  
4535 version of the design for states to use for state and chapter marketing materials. This design will  
4536 be used as well to purchase key chains that will be sold at the AAMA Annual Conference in  
4537 Grand Rapids, Michigan.  
4538



- Solid teal border
- Red title
- Teal stethoscope
- 2C logo
- Red inner ring gradient

4539  
4540 The Marketing Strategy Team is exploring the cost of an AAMA padfolio for sale at an AAMA  
4541 Annual Conference. The plan is to possibly have the item available for the 2024 Conference, but  
4542 no later than the 2025 Conference. The team has reviewed some samples of larger size and  
4543 smaller size padfolios. Pricing, including set up cost, shipping, and tax, is being obtained for two  
4544 large and two small padfolios. The committee plans to review the pricing once available and

4545 decide on which size will be purchased. Once the team makes a decision on style, size, and  
 4546 quantity, a proposal will be sent, along with pricing information, to the Board of Trustees for  
 4547 approval.  
 4548

4549 This chair received resume writing tips from committee member Paula Purdy and has forwarded  
 4550 these to Senior Director Mokijewski. The AAMA Marketing and Communications Department is  
 4551 working to update the AAMA website (Membership – Career Center – Polish Up Your Resume)  
 4552 with the updated tips for students and members to use when writing or updating their resumes to  
 4553 market themselves effectively. Once available, the link to the AAMA website will be sent to all  
 4554 members and shared on the AAMA social media pages.  
 4555

4556 The 2023–2024 Marketing Strategy Team has a small team assigned to begin to create a short  
 4557 PowerPoint or video that could be used by states at state Medical Group Management  
 4558 Association meetings or other opportunities to promote medical assisting. Due to another project,  
 4559 this assignment was deferred from the 2022–2023 Marketing Strategy Team to the 2023–2024  
 4560 Marketing Strategy Team. The team is working on the project and once reviewed and approved  
 4561 by the Board of Trustees, it will be sent to Senior Director Mokijewski for branding. Once the  
 4562 project is complete, an announcement will be sent to State and Chapter leaders with a link to the  
 4563 presentation.  
 4564

4565 This chair would like to thank the team members for their ideas, suggestions, contributions, and  
 4566 commitment to the success of the goals of the team. This chair would also like to thank Senior  
 4567 Director Mokijewski and her staff for their collaboration. This chair would finally like to thank  
 4568 President Case for the opportunity to serve as the Marketing Strategy Team chair for 2023–2024.  
 4569

4570 Virginia Thomas, CMA (AAMA), Chair  
 4571

4572 Members:  
 4573 Julie Fogt, CMA (AAMA)  
 4574 Donna Gibbins, CMA (AAMA)  
 4575 Claire Houghton, CMA (AAMA)  
 4576 Lisa Humbertson, CMA (AAMA)  
 4577 Denise Jozefiak, CMA (AAMA)  
 4578 Christy Oldenstadt, CMA (AAMA)  
 4579 Paula Purdy, CMA (AAMA)  
 4580 Christina Sears, CMA (AAMA)  
 4581 Jane Seelig, CMA-A (AAMA)  
 4582 Judy Seymour, CMA (AAMA)  
 4583 Brian Stimpson, CMA (AAMA)  
 4584 Michelle Van Handel, CMA (AAMA)  
 4585 Sandra Williams, CMA (AAMA)  
 4586

4587 Staff Liaison:  
 4588 Gina Mokijewski, Senior Marketing and Communications Director

**American Association of Medical Assistants® (AAMA)**  
**Report of the Membership Development Strategy Team**  
**For the Period Ending Sept. 2024**

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

The membership team consisted of nine state leaders and three Board of Trustee members including last year's chair. President Case kicked the year off with a meeting of the members with this chair at the 2023 AAMA Conference with a meet and greet. At this session, members present discussed ways they would like to see AAMA Membership Benefits change and ideas on how to best market the benefits of AAMA Membership.

This chair sent an email communication to members welcoming them to the Membership Strategy Team and included a questionnaire to find out what each committee member saw as a benefit of being an AAMA Member, if they were members of other organizations and their preferred method of meeting. This chair received information from last year's Chair Miller for review and was provided with the non-members survey immediately prior to the 2023 conference.

At the committee's first virtual meeting, several items were discussed including the mission of the team, goals for the team and projects from the previous year's team. President Case informed the team members that a special charge for this year's team was to reach out and engage with non-member CMAs (AAMA). The team's goal should include finding out why the non-members were not members and how they can get them to invest in being an AAMA Member. The team was reminded of the AAMAs Strategic Issues Plan, and it was decided to be sure that this year's goals for the team would fall in line with these. The team decided on 3 goals: A) to continue with the flyer from the previous year's team, B) focus group meetings, and C) evaluation of AAMA Member Benefits. The team felt that these goals would contribute towards meeting AAMA Strategic Issue Goal #3 - Increase membership of medical assistants with the AAMA Organization and Issue Goal #4 - Enhance engagement and communication.

After reviewing the goals set forth by the committee, this chair decided the most effective way to achieve the goals set forth would be to divide the team into three smaller teams. This would allow each team to work on each goal separately. Each team was assigned tasks and members were placed on the teams according to their answers on the questioner at the beginning of the year. One team would concentrate on review of the AAMA Benefits, and the other two teams will develop and conduct the focus groups to gain a better understanding of what the AAMA can do to engage non-member CMAs (AAMA) and non-CMA (AAMA) members.

Team One held a virtual meeting shortly after to discuss the Membership Benefits and ways to enhance them. This team discussed reviewing the Beneplace website and making suggestions for adding additional vendors to it. This team also would like Beneplace logo to be used more frequently in the e-blasts that are sent out by the AAMA. During the discussion about Beneplace

the team indicated that they felt there was too much information being placed in the general membership e-blasts that go out. They felt that the e-blast is targeting all the members and not all members are CMA (AAMA), there should be more information about the benefits of being an AAMA member being discussed in these e-blasts. The team felt that this e-blast was a great opportunity to discuss membership benefits, including Beneplace, highlight States and some of their activities, possibly include a member of the month or quarter or possibly even an employer of the quarter. They felt that maybe these highlights would appeal more to the members and possibly even encourage considering volunteer leadership. Team one discussed investigating Membership Loyalty pins. The suggestion was to start the pins at year 5 continue in 5-year increments to 30 years, and then go 10-year increments up to 50 years.

This chair worked with AAMA Staff and Trustee Quinn on the development of Membership Loyalty Lapel Pins. Several designs were submitted by Connor Satterlee, AAMA Graphic Designer. Two designs were sent to the team to vote on. The team voted for the design, however discussed that they wanted some additional changes made including the pin being done in silver. The pin was sent back to Connor for edits and a new design was returned. The team voted unanimously on the design. This chair requested that at least two quotes be provided to the team for review so a recommendation could be made to the BOT. After reviewing the two quotes provided, it was decided that the chair would research additional companies to compare cost of other vendors. Upon completion of the research the information will go back to MarCom for review of the selected vendor. To properly prepare this recommendation for the BOT, this chair asked the AAMA office for cost of shipping and envelopes for shipping the pins to members and number of members per year increment. Upon receipt of this information, this recommendation will go to the BOT for a vote to purchase, provide and sell Membership Loyalty Pins. The team hopes that the pins can be used for States to honor their members with the pins at award ceremonies or during MARWeek.

The entire team met to discuss the 2024 Early Bird discount and the 2023 CMA (AAMA) Non-Member survey results. The team discussed that the Early Bird discount was great but did not increase membership. The team felt that the discounts needed to be different for new members and loyal members. Suggestions for discounts included bulk year discounts (2-, 3-, 4-, 5-year bundles with and w/out CEUs), \$10.00 discount for new members and \$20.00 discount for renewing members and coupons based on the number of years you had been a member. It was also pointed out that the Early Bird discount was AAMA's way to help members during the pandemic. The team was informed that due to technology barriers these discounts that were mentioned would need to be held off on until the new AAMA website. The team's consensus was to withdraw the Early Bird Discount and have the suggestions of the new discounts looked at with the new website. During this meeting the team discussed the 2023 CMA (AAMA) Non-Member Survey results (sent out for all committee members to review). Several on the team expressed concerns that the survey indicated that the top three reasons for why these CMAs (AAMA) were not members included A) they forgot to pay because they didn't get a reminder, B) the AAMA Dues due date was at the end of the year and C) the cost of membership was too much at one time. Options that the team mentioned should be researched included 1) considering a new due date that does not fall within the last three months of the year, 2) quarterly payment plans, and 3) possible use of direct deposit through employer. The committee will be continuing



to review the survey results and will use the results to help formulate the focus group discussions.

The entire team reviewed and made suggested edits to the previous committee's flyer. Upon their review this flyer was sent to the BOT for approval. Upon approval from the BOT the flyer was sent to MarCom for branding and formatting, after this was completed, the flyer was uploaded to the AAMA website. This chair worked with Chair Houghton, Chair of Leadership to have the flyer information sent out to state leaders through the AAMA Leaders Insider.

This chair received communication from a previous representative bureau assignment state leader that they were trying to build up their membership and were looking for templates of letters to send out to newly certified CMAs (AAMA) and would like to know if the AAMA had any on file. After discussion with President Case, it was decided that the Membership Team would take this project on. This task was assigned to Group One. While discussing the letter, it was decided by the team to develop a letter for non-member CMAs (AAMA) educating them on the benefits. The group took on the development of both letters with enthusiasm. Letters for both these groups were developed for both state leaders to use as a template and for the AAMA/President to send out. Before the letters could be used, they were sent to editorial department for editorial review, upon completion of editorial review the letter was submitted to BOT for approval. After the BOT approved, this chair met with Liaison Nick Mickowski, Board Services Sharon Flynn, CEO and Liaison Don Balasa, and President Case to discuss how AAMA would use the letters. It was decided that the new CMA (AAMA) letters would be mailed out the month after they obtained their CMA (AAMA) credential and that letters would go back to the start of April 2024, and the non-member CMA (AAMA) letters would go out at the end of August and again late November electronically. The letters from the AAMA will be signed by the current AAMA President and the state letters will allow for states to insert all their information into the appropriate places. The letters can also be cut and pasted into an email format for electronic distribution. The main objective for these letters is to assure that all our volunteer leaders that are recruiting members are providing our target audience with accurate and AAMA verified information. These individuals will now be receiving the same information from both the national and state/chapter level. All the tools that have been created by the Membership Development Team were sent out to our State and Chapter leaders via the AAMA Leaders Insider and have been placed on a members-only area for volunteer leaders, with the assistance of staff liaison Nick Mickowski.

With the assistance of Nick Mickowski, a meeting with the AAMA Beneplace Manager Isabelle Bode was scheduled with the team. The team met with Ms. Bode, President Case, Don Balasa, and Nick Mickowski to discuss how Beneplace can improve their offerings for the AAMA membership and to discuss how Beneplace AAMA Member Perks Program works for the members (demonstration was provided). Per Ms. Bode, in January 2024 a new Beneplace loyalty program was started that can be used with the AAMA Member Perks Program, within Beneplace where members can accumulate points for up to three years toward future Beneplace purchases. Members of the team reviewed the website for suggestions of vendors to provide to Beneplace to seek out discounts for AAMA Members. Beneplace will work on building a custom marketplace for AAMA to assure that the right vendors are accessible to AAMA Members. A list of 22

vendors was submitted by the team to Beneplace to work on securing discounts for AAMA Marketplace as well as specials for Medical Assistants Recognition Week in October. The list included vendors that will sell scrubs, stethoscopes or other healthcare related items. Additional items that the committee discussed was ways to highlight this benefit including a relaunch of Beneplace as a member benefit via e-blast, a special banner will be to be placed on AAMA Marketplace highlighting special events (i.e. Conference, MARWeek), possible sponsorship or display at Conference, an ad in magazine and assuring that they are listed on future e-blasts to AAMA members. Isabelle indicated that Beneplace could assist with other services including tuition discounts and possible malpractice insurance.

A report was provided by Beneplace to the Membership Team that indicated that there was an increase in 40.6% in the first 6 months of 2024 over the entire year of 2023. The numbers show an average savings of \$116.00 per member.

	Active Users	New Users	Average Savings
1/1-12/31/23	1205	454	\$102
1/1-7/9/24	1694	666	\$116
% Change	40.6%	46.7%	\$13.7%

AAMA placed information about Beneplace in the AAMA Representative Bureau Power Points and placed ads in the AAMA e-blasts. It was suggested that the Membership Team continue to look and evaluate the site quarterly for any necessary updates that may be applicable to the AAMA members and submit them to Beneplace.

In July Ms. Bode happily reported that Beneplace is still working on several of the vendors, including the possibility of offering malpractice insurance. Beneplace is unable to join the AAMA this year at conference however will send information to distribute to members and some special giveaways. Ms. Bode was also excited to announce that they secured Uniform Advantage (UA) as a special vendor for the AAMA Marketplace. They will offer the following discounts to AAMA Members that use their AAMA Beneplace log in:

- 15% off all retail-priced items on their website
- Logo cost discounted to \$5.99 from \$8.99
- Each line of text embroidery will be discounted to \$5.99 from \$7.99 and will run various online shipping options.

Beneplace will coordinate a special discount code for any purchase made on Beneplace for MARWeek 2024 and Uniform Advantage has indicated they will do something special for MARWeek in addition to the Beneplace discount.

The biggest project for the Membership Development Group Two and Three collaborated on was the Focus Groups. It was decided that the groups would reach out to non-member CMAs (AAMA) and members that had only been with the AAMA for 5 years or less. Group Two and

Three provided this chair with available dates and a schedule was sent out to members of the groups for their assigned Focus Group Day. A basic form was developed for the Focus Group to sign up for participation. Email lists were formulated by Nick Mickowski who then sent the emails out to both groups advertising the opportunity to participate in the Focus Groups and posts were placed on AAMA social media platforms. A QR code was created by this chair for use in the AAMA Representative Bureau Power Point. Sign up for the Focus Groups opened on April 1<sup>st</sup> and within the first hour of the release for sign up there were over 85 individuals that had signed up. The sign up for Focus Groups was open from April 1–30<sup>th</sup> and approximately 300 individuals signed up for participation. This chair took the sign up listed and divided the individuals into two groups, then placed them into an online application that randomly pulled 25–30 individuals ([https://www.abcya.com/games/random\\_name\\_picker](https://www.abcya.com/games/random_name_picker)) for each focus group session. It was decided that the team would host six focus groups, three for each medical assistant group. The focus groups were done via Teams. Several of the other team members requested to join the focus groups as did Don Balasa, President Case, and some of the members of the BOT. Each session lasted approximately one hour, and a series of questions were asked each focus group. Each membership team member present took notes and at the end of each session notes were compared. After all the sessions concluded the information was put together in a document and was sent to the BOT and Committee Chairs to assist in planning their future projects. Below is a list of questions with a summary of the answers received:

**CMA (AAMA) Non-Member Focus Group Engagement Questions:**

- ***What drew each of you to becoming a medical assistant?***
  - Answers varied from several wanted to go into nursing, others didn't like the admin side of house, and a few indicated it was a second career
- ***Do your employers offer any professional development or continuing education support?***
  - Only one indicated employer assisted with CEU/professional development (\$300/year); most employers do not, and one employer refers employees to AAMA website for CEUs resources and options
- ***What discourages you from joining a professional association?***
  - Several indicated not knowing anyone, the cost was a factor for almost all, several indicated it was only good right before recertification time; several indicated they did not know there was a difference between certification and membership, and one indicated no local active chapter
- ***What have you heard about AAMA membership? Who did you hear it from?***
  - Many stated that they heard from their instructors or other medical assistants that were preparing for recertification and stated indicated that members get a discount on test and CEUs. A couple indicated that the dues are too expensive and there is no incentive to join. Several mentioned that it appears that the AAMA is always asking for money to purchase this or that.
- ***If we offered/changed anything about membership would that make a big enough difference to encourage you to join?***
  - Free or discounted CEUs more often (one mentioned AAPC magazine CEUs are free), virtual CEUs for all members not just AAMA Leaders, more AAMA products, national should hold State Societies accountable for their activities and finally most

indicated that payment plans would help or lower cost dues, reminder text messages for due.

**CMA (AAMA) 5-year Member Focus Group Engagement Questions:**

- ***What drew each of you to becoming a medical assistant?***
  - Several were working in nursing homes, or they wanted to take care of others.
- ***Do your employers offer any professional development or continuing education support?***
  - Several indicated that they are offered education through employer (i.e. HIPAA, Diversity, and such courses).
- ***Why did you join the AAMA?***
  - Several stated that it was required by educators; a couple of others mentioned professional recognition and all of the individuals mentioned the CEUs as being the only benefit.
- ***Why do you continue to be a member of the AAMA?***
  - Access CEUs online and in magazine for discounts. Several mentioned the magazine was enjoyed as are emails that are distributed. Many did not understand the scope of practice information or protection and a few others mentioned access to discounted CEUs.
- ***What areas of AAMA Membership can AAMA improve on?***
  - Almost all of the participants mentioned having lower cost CEUs, discounts on bulk year memberships and payment plans, different due date – not so close to holidays; cost savings on retail good/services; better explanation of the membership model- certification versus membership
- ***What have you heard about AAMA membership? Who did you hear it from?***
  - Several mentioned that they had heard from their local chapters and educators about the AAMA. Local Chapters discussed the importance of obtaining CEUs and how membership will provide them discounts. Educators talk about the importance of the professional networking
- ***If we change anything about the AAMA Membership, what would it be?***
  - Discounted CEUs or free CEUs from magazine, use of social media or virtual platform for AAMA CEUs. Eblasts should be more topic focused (membership, CEU, certification/recertification, conference and practitioner and educator). Practice Management Classes or classes to help medical assistance on the career lattice.

The committee was pleased with the response to the Focus Groups and wanted to make sure we kept these individuals engaged. The committee recommended to the BOT that a free CEU was provided to those CMA (AAMA) non-members that signed up to participate. The BOT agreed to allow access to those individuals to one of the CASAT sponsored CEUs. The CMA (AAMA) Non-Members were sent the CMA (AAMA) non-member letter educating them about the benefits of membership along with access to the free CEU. These individuals were allowed to take advantage of this CEU opportunity from June 1–30, 2024. Approximately 20% of those individuals that received the email took advantage of this opportunity, in addition 9% of those individuals also joined the AAMA. The committee also recommended awarding membership to an individual that participated in one of the focus group sessions. The individuals were placed in the same online application used to select them for the Focus Groups. The winner was notified via email by this chair along with Director and Liaison Nick Mickowski. Several participants of

the Focus Groups have kept in touch with this chair, and information about their state society and the names of their state leaders has been provided.

After reviewing this data from the Focus Groups, the Membership Development Team and our staff liaisons discussed what could be trialed to help build up membership while still providing our current members with what they needed. The Membership Development Team recommended to the BOT and CEB that we should increase the number of CEUs available in the magazine and allow members to purchase 3 CEUs for the price of 2. In addition, it was recommended that since by law AAMA may increase the non-members cost by 50%, we increase their costs of CEUs available to \$40.00 per CEU. This recommendation was presented by Don Balasa to the CEB and to the BOT at the Summer 2024 meeting. The recommendation was approved by the BOT. The pilot of this incentive will start with the Sept/Oct 2024 issue and run through July/Aug 2024 edition. The MarCom and Communications Directors will work on the advertising of this new incentive.

This chair met with Tyler Michel from ID.me in January 2024 to discuss possibly hosting an AAMA portal on their website. This portal would allow our members to put in their membership numbers and be recognized by ID.me for discounts on merchandise and services through them. During the discussion Mr. Michel, from ID.me mentioned that ID.me could verify the CMA (AAMA) credential. ID.me is not only a discount savings program but they also do credential verification for the US Military, IRS, Social Security, and Department of Employment Services to just name a few. They are used by many hospital organizations with verification of physician's digital identities that includes their credentials, licenses and other important information. Another option to consider is ID.me to verify's an individual's membership and status they will be able to download a digital card for their electronic wallet to obtain discounts at many local stores and services. After multiple discussions with Mr. Michel, he indicated at the time ID.me only has limited ability to link and verify the status of one's association membership. However, hoped by third quarter of 2024 they should have the ability to offer an AAMA portal. The portal will offer discounts and verification of credentials if AAMA desires to pursue this. This chair followed up with Mr. Michel in July 2024. Due to the size of the project, content of the project and need for technology to work together this project will have to be carried over to the next committee.

This chair would like to thank the spectacular work of the Membership Development Team, Summer O'Neal, Dawn Jordan Leblanc, Marsha Benedict, Leann Buneta, Paula Schubert, and Melinda Rhynes, along with my AAMA BOT Team members Natasha Geno, Aimee Quinn and Candy Miller, without this team none of this would have been accomplished. This chair is absolutely humbled by the hard work and dedication of these individuals to the AAMA. Your willingness to take time out of your day for the members of this association was inspirational. Thank you for always being engaged throughout this last year.

This Chair would also like to express a huge amount of gratitude to our staff partners Nick Mickowski and Don Balasa for their knowledge, support and always willingness to help or answer questions (and we have so many)! Your openness and willingness to try new things with this committee helped us get all the projects completed that we did.

4900  
4901 A special thank you to President Monica Case for your faith in me as the Chair of the  
4902 Membership Committee. Your continuous participation in our meetings and your constant  
4903 feedback has been very valuable.  
4904  
4905  
4906 Sherry Bogar, CMA (AAMA), CN-BC, Chair  
4907  
4908 MEMBERS:  
4909 Cindy Baird, CMA (AAMA)  
4910 Marsha Benedict, CMA-A (AAMA)  
4911 Leann Buneta, CMA (AAMA)  
4912 Patricia Clark, CMA (AAMA)  
4913 Natasha Geno, CMA (AAMA)  
4914 Marilyn Huddleston-Reeder, CMA (AAMA)  
4915 Dawn Jordan Leblanc, CMA (AAMA)  
4916 Candace Miller, CMA (AAMA)  
4917 Summer O'Neal, CMA (AAMA)  
4918 Aimee Quinn, CMA (AAMA)  
4919 Melinda Rhynes, CMA (AAMA)  
4920 Paula Schubert, CMA (AAMA)  
4921  
4922 STAFF LIAISON:  
4923 Nick Mickowski, Continuing Education & Membership Director  
4924 Don Balasa, CEO and Legal Counsel  
4925

***TASK  
FORCE  
REPORTS***

**American Association of Medical Assistants® (AAMA)**

**Report of the Advisory Task Force**

**For the Period Ending September 2024**

The Advisory Task Force was established and charged in 2019–2020 with the task of researching ways in which to compile beneficial resources and knowledge to those that hire Medical Assistants including the ability to provide advisory support to employers on the utilization of Medical Assistants in the outpatient settings.

This Chair has had monthly meetings with Senior Marcom Director, Gina (Lang) Mokijewski and Board Services Manager, Sharon Flynn to continually review our priorities and progress. During many of these meetings President Case and CEO/Legal Counsel Balasa also joined these meetings. In February, these meetings started to determine the priority of marketing action items and timelines for the Advisory Service which includes Don Balasa, JD, MBA's scope of practice presentations. The priorities include the following:

1. Marketing and Advertising of the Advisory Service offering to possible include LinkedIn/Google and other social media advertising.
2. Replacement of damaged Advisory Service signage for exhibits and additional marketing materials/signage.
3. Begin the recording and presentations of podcast.
4. Create Tip sheets for Advisory Service members to utilize when recording podcasts and the types of podcast platforms they can use.

The first AAMA podcast has been completed and reviewed by the ATF members. This podcast will be shared on LinkedIn soon. This post will have the ability to be reposted by members to their LinkedIn pages as well to promote extended outreach. This is targeted to the employers and hiring/managers so it will not be used on Facebook. This is only an audio podcast. Here is the link which will allow you to listen to this Podcast by Don Balasa, JD, MBA AAMA CEO & Legal Counsel.

[https://aama-my.sharepoint.com/personal/glang\\_aama-ntl\\_org/\\_layouts/15/stream.aspx?id=%2Fpersonal%2Fglang%5Faama%2Dntl%5Forg%2FDocuments%2Fmisc%2FAttachments%2FEp%2E%201%20%2D%20Don%20%2D%20MF2%2Ewav%2Ewav&ga=1&referrer=StreamWebApp%2EWeb&referrerScenario=AddressBarCopied%2Eview%2E051cf0ab%2D9544%2D4a4b%2D8730%2Dbb6f4d11ae1a](https://aama-my.sharepoint.com/personal/glang_aama-ntl_org/_layouts/15/stream.aspx?id=%2Fpersonal%2Fglang%5Faama%2Dntl%5Forg%2FDocuments%2Fmisc%2FAttachments%2FEp%2E%201%20%2D%20Don%20%2D%20MF2%2Ewav%2Ewav&ga=1&referrer=StreamWebApp%2EWeb&referrerScenario=AddressBarCopied%2Eview%2E051cf0ab%2D9544%2D4a4b%2D8730%2Dbb6f4d11ae1a)

In addition, CEO Balasa has also completed a joint podcast with MGMA which will also be available for the AAMA members to listen to and to share. Two additional podcasts are currently in development. Don Balasa as legal counsel/CEO is working on a Gainful Employment podcast and Paula Purdy, CMA (AAMA), is currently working on one podcast for employers on how to recruit, retain, and reward credentialed medical assistants. Paula's second podcast will be targeted to the active medical assistant audience and/or students preparing for employment on interviewing tips and creating resumes that get noticed. The goal is to have a library of podcasts. The plan is to start with one or two airings per month.



4972 Currently the staff are updating our Advisory Service Bios and plan to highlight these on  
4973 social media platforms to include some of the available services provided by the  
4974 Advisory Service members. Some of these services include Speakers and/or consultations  
4975 in-person or virtual Q & A on the utilization of Credentialed and non-credentialed  
4976 medical assistants in the workplace.

4977  
4978 The AAMA Board of Trustees did agree to add Virginia Thomas, CMA (AAMA), to this  
4979 task force this year. The advisory task force members must be AAMA current or past  
4980 officers who also hold leadership positions in their current employment. The members of  
4981 the ATF are terms of 5 years of service per appointment. Currently members can have re-  
4982 appointed consecutive terms.

4983  
4984 Additional opportunities to market the Advisory Service which would be revenue bearing  
4985 for the organization are by presenting materials and information at some of our known  
4986 exhibiting engagements. This year we will have at least one Advisory Service Member  
4987 available to speak and answer questions related to this service at the upcoming MGMA  
4988 Leaders Annual meeting. We will be working on additional plans for outreach and  
4989 marketing of our Advisory Service. We will also have additional signage and a  
4990 consultation area at the upcoming MGMA Exhibit to also promote these services.

4991  
4992 I would like to thank the members of this committee for their continued support and  
4993 patience as we move forward with these initiatives. I would also like to thank our AAMA  
4994 staff and this committee's Staff liaisons Gina Mokijewski & Sharon Flynn along with  
4995 Don Balasa, JD, MBA, CEO & Legal Counsel for their contributions and support of this  
4996 Task Force and Advisory Service.

4997  
4998 Deborah Novak, CMA (AAMA) Chair  
4999 Immediate Past President

5000  
5001 Members:  
5002 Monica Case, CMA (AAMA)  
5003 Julie Flaatten, CMA (AAMA)  
5004 Sue Hawes, CMA (AAMA)  
5005 Debby Houston, CMA (AAMA)  
5006 Lisa Lee, CMA (AAMA)  
5007 Patty Licurs, CMA (AAMA)  
5008 Paula Purdy, CMA (AAMA)  
5009 Rebecca Walker, CMA (AAMA)  
5010 Loxie Kistler, CMA (AAMA)  
5011 Virginia Thomas, CMA (AAMA)  
5012 Betty Springer, CMA (AAMA)

5013  
5014 Staff Liaisons:  
5015 Don Balasa, JD, MBA, AAMA CEO & Legal Counsel  
5016 Gina Mokijewski, Senior Marketing and Communications Director  
5017 Sharon Flynn, Board Services Manager

5018

5019 **American Association of Medical Assistants® (AAMA)**  
5020 **Report of the Educators Collaborative Task Force**  
5021 **For the Period Ending September 2024**

5022  
5023 The objective of this task force is to educate/encourage educators regarding the benefits  
5024 of association with the AAMA, determine the resource needs of educators and where to  
5025 locate information related to the profession, provide educators and their respective  
5026 societies with tools to establish a State Society Educator Group if there is none, and  
5027 determine how to reach out to current and recent graduates to join AAMA and know the  
5028 benefits of becoming a member.

5029  
5030 The committee sent out the application forms to the instructors that were members of the  
5031 AAMA and expressed an interest in the task force. Applications were completed and  
5032 returned with resumes to President Case. President Case then reviewed the applications  
5033 and resumes. Five educators were appointed in January 2024. In February the members  
5034 were notified and challenged to choose a name for this committee. The members of the  
5035 task force were busy in February and March discussing the purpose of the task force and  
5036 the challenges of being an educator. It was discussed how the task force could help  
5037 educators lighten some of their challenges with students in collaboration with each other.

5038  
5039 Acceptance letters were sent out to the following members:

5040 Christine Dzoga, CMA (AAMA), from Illinois  
5041 Jolene Guenther, CMA (AAMA), from Wisconsin  
5042 Laura McClain, CMA (AAMA), from South Carolina  
5043 Lisa Nash, CMA (AAMA), from Alaska  
5044 Annette Wilhelm, CMA (AAMA), from Indiana

5045  
5046 Additional members on this committee were:

5047 Claire Houghton, CMA (AAMA)  
5048 Patty Licurs, CMA (AAMA)  
5049 Shirley Sawyer, CMA (AAMA)  
5050 Shannon Thomas, CMA (AAMA)  
5051 Diane VanderPloeg, CMA (AAMA)

5052  
5053 A virtual meeting was held April 10, 2024. Items discussed at the meeting included:

- 5054 1. Objectives for the Task Force  
5055 a. Educate/encourage educators regarding the benefits of association with AAMA.  
5056 b. Determine the needs of educators and where to find resources related to the  
5057 profession.  
5058 c. Provide educators and their respective societies with tools to establish a State  
5059 Society Educator Group if there is none.  
5060 d. Determine how to encourage current and recent graduates to join the AAMA.  
5061 2. Needs of the educators and their programs.  
5062 a. Letters to welcome the students to the AAMA and identify available  
5063 membership benefits  
5064 b. A repository directory of all the program directors  
5065 c. An Educators Corner on the website

- d. Swag specifically for students

The June 5, 2024, meeting was held virtually and discussed:

1. A congratulations letter for presentation to the BOT for approval.
  - a. A letter was presented to the task force that cannot be modified.
    - i. State and local chapter links may be included
    - ii. Second letter option may include an introductory letter from the program and then the AAMA letter to follow
2. An Educators' Tab has been submitted to the Website manager with links such as:
  - a. CAAHEP, ABHES, and MAERB websites
  - b. Opportunity for CEUs specifically for educators
  - c. Fact/Q & A Sheet specific to students/educators
  - d. List of Program Directors

This will be submitted to the BOT for approval.

3. Educators' Forum for presentation to the BOT for approval then forwarded to MarCom to create and manage
  - a. Create a Facebook group just for Educators that would be private invite only
4. Discuss with the Certifying Board the need to allow CEUs that can be used for recertification for a longer length of time prior to initial certification.
  - a. Information was given that the students may use twenty (20) recertification points earned during the three (3) months prior to obtaining their CMA (AAMA) for initial recertification.
5. Educating medical facilities on why having the CMA (AAMA) credential is important.
  - b. Don will have an article in the Nov/Dec *Medical Assisting Today*
    - i. Updating past article
  - c. AMA-Steps Forward
    - i. [www.edhub.ama-assn.org/steps-forward](http://www.edhub.ama-assn.org/steps-forward)
      1. This was introduced by one of the educators as a possible help for ideas and tools.
  - d. Morning Huddles
    - i. Meeting every morning for short meetings of needs and thoughts for the day.
6. Create AAMA Introduction Video directed towards students on YouTube—Presented to the BOT then forwarded to MarCom to create
  - a. 2–5 minutes long
  - b. Visually stimulating
  - c. Not dated
  - d. Diversity Included
  - e. Action Filled

The July 18, 2024, virtual meeting was held. Items that the members discussed:

1. We welcomed Diane VanderPloeg, CMA (AAMA), Liaison from the Certifying Board to our group. We look forward to working with her.
2. Articles that Don Balasa, JD, MBA, CEO, Legal Counsel, sent out:
  - a. United States Department of Education final Gainful Employment rule
    - i. Members discussed the possibilities of getting this information to all educators. It was decided that a podcast with Don Balasa, JD, CEO,

- 5114 Legal Counsel, presenting the material for all educators would be  
5115 done. This will be worked on by MarCom to be released.
- 5116 ii. Members brainstormed questions for the podcast and gave 5–6 questions to  
5117 be addressed in the podcast.
- 5118 b. Don Balasa, JD, MBA, CEO, Legal Counsel, reviewed the new article for the  
5119 *Medical Assisting Today*, November/December issue on the revision of his  
5120 previous article “Best Practices”. Everyone liked the new article and is looking  
5121 forward to reading it in its entirety.
- 5122 c. The members of the committee were asked to give a detailed list of the items  
5123 they would like to see on the Educators’ Tab of the website for our August  
5124 meeting. What are they specifically looking for and what documents would  
5125 they want to see within the corner for Educators. There will be a discussion on  
5126 the guidelines for the Educators’ Tab for the website. These will be discussed in  
5127 August to be submitted to the BOT for approval.
- 5128 d. Our YouTube video was discussed but it was determined that this project may  
5129 have to be postponed until next year.

5130  
5131 This Chair would like to thank the committee members for their hard work and valuable  
5132 contributions focused on providing relevant information for all educators in medical  
5133 assisting programs. Much appreciation to Don Balasa, JD, MBA, CEO, Legal Counsel,  
5134 for mentoring our committee and his insightful contributions to the projects considered. I  
5135 would like to thank President Case for the opportunity to chair this Educators  
5136 Collaborative Task Force.

5137  
5138 Pamela L. Neu, CMA (AAMA), MBA, Chair

5139  
5140 Members:

5141 Christine Dzoga, CMA (AAMA)  
5142 Jolene Guenthner, CMA (AAMA)  
5143 Claire Houghton, CMA (AAMA)  
5144 Patty Licurs, CMA (AAMA)  
5145 Laura McClain, CMA (AAMA)  
5146 Lisa Nash, CMA (AAMA)  
5147 Shirley Sawyer, CMA (AAMA)  
5148 Shannon Thomas, CMA (AAMA)  
5149 Diane VanderPloeg, CMA (AAMA)  
5150 Annette Wilhelm, CMA (AAMA)

5151  
5152 Staff Liaison:  
5153 Donald Balasa, CEO and Legal Counsel  
5154

**American Association of Medical Assistants® (AAMA)**

**Report of the Partnership Task Force**

**For the Period Ending September 2024**

The Partnership Task Force is charged to develop and research partnership opportunities with outside allied health organizations, governmental agencies, corporations, and/or associations where a partnership would provide mutual benefits and market our organization. The purpose of a partnership is marketing our organization while keeping in mind the AAMA mission statement and the current Strategic Issue Plan.

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

**THE SUN BUS:**

At the time of this report, we are waiting to receive a Memorandum of Understanding (MOU) from the Sun Bus administration. Once both organizational leaders agree and sign this MOU, The Sun Bus will be added to our Partnerships. We are looking forward to working with the Sun Bus with the initiative to provide early detection of skin disorders. This partnership will allow volunteer opportunities for our members to be educated in testing procedures and the opportunity to provide patient education on preventive care and sun safety to prevent and or detect skin cancer. This is a grant funded organization which will provide this service regardless of location, socioeconomic status, or insurance coverage. Once we receive the MOU and schedule of Sun Bus events and locations we will reach out to State and/or local chapters to inform them of this initiative and opportunities within their state. Members who volunteer will earn Continuing Education & Training on Melanoma and Skin Cancer Detection & Prevention. This officer has spoken to the Sun Bus Medical Director, Dr. Karen Nern, three times by phone in the last month. Dr. Nern informed me that they have had some staffing changes and delays; however she assured me this week that she will be our direct contact for the Sun Bus. She stated the MOU was in process, and she shared with this officer the completed and the detailed power point clinical and administrative educational training components. Not only will the AAMA members benefit from the education and learning of this community wide issue, but they will also actively be able to help educate and screen the public preventively. Dr. Nern has also agreed to provide a speaker to present a clinical CEU session related to the Detection, Prevention, and treatment of skin cancers. Here is a link to the Sun Bus for more info: <https://www.thesunbus.org/>

**AAMA Current Partnerships Updates:**

National Colorectal Cancer Roundtable Partnership

- The National Colorectal Cancer Roundtable will hold their Annual Meeting Nov.

20–22, 2024, in Fort Worth, Texas. AAMA usually sends one staff member and one board member to participate in this meeting. CEO Don Balasa has asked Sharon Flynn, Board Services Manager and Partnership Liaison to attend this year’s NCCRT meeting along with President Case who will represent the Board of Trustees.

#### **Additional Relationships and connections:**

The AAMA continues to have relationships with Medical Group Management Association (MGMA). There was a virtual meeting on June 12, 2024. At this meeting we discussed future opportunities and co-branding with MGMA. It was suggested by MGMA for Don to participate in a co-branded MGMA podcast. Connections and conversations followed with President Case and CEP Balasa and within a week the podcast was recorded and at the time of this report was in editing review. This podcast will be shared with AAMA members and can be shared on other social media platforms. We also continue communications with the American Academy of Family Physicians (AAFP), the American Cancer Society (ACS), and the Ohio Partners for Cancer Control (OPPC).

The Partnership Task Force members were assigned to specific potential organizations to see if a collaboration/partnership may be considered. Outreach is in progress and hopefully we will have more to report by the Pre-Conference Board Meeting. Here is a list of some of the potential organizations:

- The Shriners Hospital for Children
- Good Rx
- Exact Science
- American Medical Group Association

This officer would like to thank the members of this committee as well as President Case, Don Balasa, and our committee staff liaisons for their engagement, participation, and support.

Deborah Novak, CMA (AAMA)  
PTF Chair

#### **MEMBERS:**

Candy Miller, CMA (AAMA)  
Monica Case, CMA (AAMA)  
Natasha Geno, CMA (AAMA)  
Shirley Sawyer, CMA (AAMA)

#### **STAFF LIAISONS**

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

***BOARDS  
AND  
COUNCILS  
REPORTS***

**American Association of Medical Assistants® (AAMA)**

**Report of the Certifying Board**

**For the Period Ending September 2024**

The Certifying Board's (CB's) mission is to certify medical assistants to validate the knowledge, critical thinking, and problem-solving skills required by employers and patients. The purpose of the CB is to protect public safety by upholding the currency, reliability, and validity of the CMA (AAMA) credential, and the CB focuses on ensuring that the quality of the CMA (AAMA) Certification/Recertification process leads to the best patient care possible.

Board of Trustees Winter Meeting

The CB Chair attended the AAMA BOT meeting on February 9–10, 2024, in Chicago, IL.

Forms Review Meeting

The CB met with PSI psychometrician and editorial staff for Forms Review at the Warwick Hotel Rittenhouse Square, Philadelphia, Pennsylvania, on February 21–22, 2024. This process includes review of items for relevancy to current practices and technical accuracy plus overall content and balance of form. The board reviewed the six exam forms during the meeting. Several follow up virtual meetings were held with PSI to finalize the forms. All six exam forms were approved for delivery in July 2024.

Certifying Board Winter Meeting

On February 23–24, 2024, following the Forms Review meeting in Philadelphia, the Certifying Board met for their winter meeting. AAMA President Monica Case, CMA (AAMA), and Immediate Past President Deborah Novak, CMA (AAMA), were in attendance.

Board of Trustees Summer Meeting

The CB Chair and Immediate Past Chair Sokolnik attended the AAMA Board of Trustees meeting at the Hyatt Regency Crystal City in Arlington, Virginia, on June 22–23, 2024.

Certifying Board Summer Meeting

The summer meeting of the Certifying Board will be held on July 19 and 20, 2024, at the American Association of Medical Assistant Executive Office in Chicago, IL. The annual recertification audit is scheduled for July 18, 2024, at the AAMA office with public member Beth Jaeger, SHRM-SCP, SPHR, Vicki Sokolnik, CMA (AAMA), CB Immediate Past Chair, and Melinda Garcia CMA (AAMA) to perform the audit. Records are checked for continuing education compliance, including the required number of certification points assigned to the correct categories and ensuring proper payment was received.

Task Force for Test Construction Meeting

The Task Force for Test Construction (TFTC) meeting is scheduled for October 10–11th, 2024, at PSI corporate offices in Olathe, KS. The CB Pool Review meeting and Item Writing Workshop will be held on October 9th, before the TFTC meeting.

The American Association of Medical Assistants (AAMA) CMA Online Practice Exam



continues to be used frequently on the AAMA website. As of July 2024, 22,858 practice exams had been purchased.

The CB asked North and South Carolina state societies, who agreed, to host the “CMA (AAMA) Knowledge Bowl” at the 2024 AAMA Annual Conference. The event continues to be well-received and a member-favored event.

Per Ms. Gottwaldt, the CMA (AAMA) examinee statistics for 2023 are as follows:

<b>2023 CMA (AAMA) Examinees</b>	<b>Total</b>	<b>Pass Rate Percent (%)</b>
Initial	4,742	65%
Recertification	2,046	97%
ALL	6,788	75%

**Total Exam Applications in 2023 = 7,913**

Thank you to the Certifying Board for its ongoing dedication and determination to protect the credential.

Thank you to AAMA President Case, AAMA Immediate Past President Novak, and the Board of Trustees for their hard work.

Thank you to Certification Director Katie Gottwaldt, Assistant Director of Operations and Certification Operations Manager Lee Rumpel, Certification Department staff, and Chief Executive Officer and Legal Counsel Donald Balasa for their continued support and dedication.

Respectfully submitted,

Carolyn Fuller CMA (AAMA)  
Certifying Board Chair, 2024–2025

Members of the CB:

Carolyn Fuller, CMA (AAMA), Chair  
Vicki Sokolnik, CMA (AAMA), Immediate Past Chair  
Nikal Redwine, CMA (AAMA), RN, BSN, TFTC Co-Chair  
Alisha Graham, CMA (AAMA), TFTC Co-Chair  
Diane Vander Ploeg, CMA (AAMA), MS, Second Vice Chair  
Melinda Garcia, CMA (AAMA), TFTC Vice Chair  
Aribell McRae-Spencer, FNP

Public Members:

Beth Jaeger, SPHR, SHRM-SCP

Staff Liaison:

Katie Gottwaldt, Certification Director

**American Association of Medical Assistants® (AAMA)**

**Report of the Director of Certification**

**For the Period Ending September 2024**

Director Gottwaldt provides administrative direction for the American Association of Medical Assistants (AAMA) Certification Department and serves as the primary liaison and support to the Certifying Board (CB) of the AAMA. Director Gottwaldt's duties include, but are not limited to, the following responsibilities or functions:

- Serves as the primary liaison to the CB of the AAMA
- Provides assistance and professional support to the CB, including coordinating meetings and developing agendas
- Assists with the coordination for the CB, Task Force for Test Construction (TFTC) and other meetings as required for the ongoing effectiveness of the Certification Program
- Assists the CB in recruiting volunteers for service on the CB and committees of the CB
- Assists the CB with strategic and budgetary planning, ensuring financial stability
- Monitors department resources and expenditures to ensure fiscal stability
- Serves as the primary liaison to PSI and other certification vendors and contractors
- Negotiates contracts for test consulting and administration in consultation with the CEO and the CB
- Monitors and ensures the CMA (AAMA) Certification Program complies with the reliability, validity, security, and impartiality standards required by the National Commission for Certifying Agency (NCCA)
- Oversees the Certification Department staff
- Establishes and implements departmental policies and procedures
- Collaborates with AAMA staff and directors of other volunteer boards within the organization to facilitate seamless communication and achieve unified organizational objectives
- Coordinates with staff and stakeholders to promote the value of the credential
- Facilitates the revision and production of all internal and external certification documents
- Oversees the production and distribution of certification documents

Director Gottwaldt has provided guidance and direction for the following certification initiatives in 2024:

- Live Remote Proctoring (LRP) through PSI
- Non-AAMA CEU submission tool
- Initial Research: Occupational Analysis for the CMA (AAMA) Certification Program
- Website upgrade – Certification-specific sections

Currently, Director Gottwaldt serves as a Board Member for the Certification Network Group (CNG), a non-profit organization that creates education and networking events for credentialing professionals. The annual CNG Board meeting is held each year in December, and the CNG Board meets virtually on a monthly basis. Her term on the CNG Board will be ending at the end of 2024. Director Gottwaldt also serves on the Program Committee of the Institute for Credentialing Excellence (I.C.E.). The Program Committee meets virtually on a monthly basis to review and approve the sessions for the I.C.E. annual conference, the I.C.E. Exchange. The I.C.E. Exchange will be held November 17–20, 2024 in Miami Beach, Florida.

Respectfully submitted,  
Katie Gottwaldt  
AAMA Director of Certification

**American Association of Medical Assistants® (AAMA)**

**Report of the Continuing Education Board**

**For the period ending September 2024**

The Continuing Education Board’s mission is to promote and encourage participation in all continuing education opportunities of the American Association of Medical Assistants and to develop, review, and approve continuing education opportunities for AAMA CEUs. The CEB oversees the Conference Continuing Education Task Force (CCETF), Leaders in Education and Practice (LEAP) Task Force, and Practice Manager’s Task Force (PMTF).

The Board held the following meetings:

- Planning Session: November 3–4, 2023, Asheville, NC
- Virtual Meeting: November 16, 2023
- Virtual Meeting: December 20, 2023
- Winter Meeting: February 11–12, 2024, Chicago, IL
- Summer Meeting: June 21–22, 2024, Arlington, VA

Monica Case, CMA (AAMA), President, and Aimee Wicker, CMA (AAMA), Vice President (resigned) attended the Planning Session. Monica Case, CMA (AAMA), President, and Deborah Novak, CMA (AAMA), Immediate Past President, attended the winter and summer meetings.

Continuing Education Board Orientation

During the Planning Session, an orientation was conducted for all members in attendance. Orientation featured a presentation by CEB Vice Chair Sue Hawes titled “How to Have Crucial Conversations.” It also covered CEB Roles, the structure and finances of the AAMA, “Antitrust Basics” presented by Don Balasa, and the review and setup of Teams led by Michael Knight.

Monograph and e-Learning Center Updates

All monographs will be placed on a two-year review cycle to ensure they remain up to date. They will be divided into two groups, allowing three monographs to be reviewed annually. To address scheduling constraints and workloads, the CEB will consider proposals from private medical writers for updates to the monographs scheduled for the 2024–2025 fiscal year.

Due to many outdated articles in the e-Learning Center, the CEB will consider proposals from private medical writers for assistance with updates to these courses.

Medical Law and Medical Ethics Monographs

The CEB has partnered with Learn Ethos to develop two new monographs: “Foundations of Medical Law for Medical Assistants” and “Foundations of Medical Ethics for Medical Assistants.” The Medical Law monograph will grant the learner 25 CEUs, while the Medical Ethics monograph will grant the learner 15 CEUs. CEO Don Balasa, JD, MBA,

served as the subject matter expert for both monographs. Both monographs are in the final stages of development and are expected to be available for purchase by the end of 2024.

#### Documents Updates

The CEB has completed a comprehensive review of the Standing Rules, Policies and Procedures, and Volunteer Leadership Position Descriptions. Proposed changes to these documents have been completed and sent to the Board of Trustees for review and approval.

#### Assessment Based Certificates (ABCs)

The Continuing Education Board offers the following ABC courses:

- Assessment-Based Certificate Program in Geriatrics
- Assessment-Based Certificate Program in Allied Health Education
- Assessment-Based Certificate Program in Pediatrics
- Assessment-Based Certificate Program in Practice Management

ABC-Practice Management was reviewed during the 2023–2024 fiscal year and will continue to be reviewed every two years. ABC-Geriatrics, launched at the beginning of 2022, is scheduled for review during the 2024–2025 fiscal year and every two years thereafter. To reduce costs, the CEB will consider a proposal from a private medical writer for updates to ABC-Geriatrics, instead of utilizing Learn Ethos.

Initially, ABC-Pediatrics held I.C.E. accreditation, but during the summer 2024 CEB meeting, it was decided to discontinue this accreditation. ABC-Pediatrics was last reviewed in June 2023 and will now follow a two-year review cycle. The ABC-Allied Health Education is the only Assessment-Based Certificate course that holds I.C.E. accreditation at this time. ABC-Allied Health Education underwent its first review during the 2023–2024 fiscal year and is scheduled for annual reviews moving forward to ensure compliance with I.C.E. accreditation requirements.

#### Volunteer Appointments

At each meeting, the Continuing Education Board reviews and votes on every volunteer leadership application submitted by individuals who wish to serve on the Continuing Education Board or one of its task forces. After the CEB votes to accept or approve an appointment, the CEB Chair forwards the appointment to the Board of Trustees for their review and final approval or denial.

#### Budget

A comprehensive budget proposal was developed by the Continuing Education Board and presented to the Board of Trustees during their summer meeting. These areas encompass updates to the e-Learning Center (ELC) articles, revisions to ABC programs, enhancements to monographs, and funding for new projects. Additionally, the budget covers marketing initiatives and the LEAP preconference workshop and introduces a new line item for a software purchase to support the ongoing and future needs of ABC programs.

#### Conference Continuing Education Task Force (CCETF)

The Conference Continuing Education Task Force is charged with developing continuing education session topics, with descriptions and objectives, for the Annual Conference. This includes research of previous conference topics, solicitation of current topics of interest, and development of future topics.

The CCETF Chair provided the 2024 Conference Education Chair with initial guidelines, and a list of approved Annual Conference topics and outlines and has been available to provide general oversight and assistance as the hosting state coordinates speakers. Additionally, the CCETF Chair has already initiated contact with the 2025 Conference Education Chair of the hosting state and provided initial guidelines, a list of approved annual conference topics, and outlines.

Additionally, the CCETF Chair, Clare Ley, has attended the Board of Trustee Conference Committee meetings and collaborated with Chair Novak to update the education template for the 2025 AAMA Annual Conference.

The Conference Continuing Education Task Force is actively researching and developing topics, including objectives, descriptions, and potential speakers, for the 2026 AAMA Annual Conference. This year, over 40 conference topics have been submitted and reviewed by the Continuing Education Board members.

#### Leaders in Education and Practice (LEAP)

On Thursday, September 21, 2023, LEAP held its first annual LEAP Pre-Conference Educator Workshop. There were 63 paid registrations and attendees received 4 CEUs for their attendance and participation. Topics presented included:

- A Review of Learning Theories and How to Apply them in the Classroom, presented by Dr. Angela Belnap
- Fostering Collaborative Excellence: Implementing Interprofessional Education in Medical Assistant Programs, presented by Dr. Rachel Houston
- Curriculum Development

In addition to the CEU presentations mentioned above, educators in attendance participated in a strategy session facilitated by LEAP members. This session featured active discussions on learning theories, curriculum development, and the implementation of interprofessional education exercises. Attendees expressed high satisfaction with the workshop and provided positive feedback to the Task Force. Many participants later reported using their attendance at the workshop to enhance their professional portfolios as they sought academic rank or promotion in their educator roles.

LEAP also held its annual LEAP Forum at the 2023 AAMA Annual Conference. This event was well attended and received positive feedback from those in attendance. The Forum focused on implementation strategies for curricular updates and continued strategy planning from the LEAP Pre-Conference Educator Workshop.

LEAP plans to host its second annual LEAP Pre-Conference Educator Workshop on September 19, 2024, in Grand Rapids, Michigan. The planning for this workshop has been a major focus throughout the 2024 calendar year. The educational sessions will

cover a range of topics, including Education Terminology, Artificial Intelligence in the Classroom, and an active learning session on Preventing Burnout in Medical Assistant Education and Practice.

In addition to planning the LEAP Pre-Conference Educator Workshop, LEAP members have been working on the submission of educator conference sessions for the 2026 AAMA Annual Conference to the Conference Continuing Education Task Force (CCETF) to be reviewed by the Continuing Education Board.

Practice Managers Task Force (PMTF)

The Practice Managers Task Force is charged with encouraging credentialed medical assistants to pursue practice management and supervisory roles and to develop and offer advanced practice management educational sessions at the AAMA Annual Conference. This year, the PMTF Chair has been coordinating with the 2024 PMTF Keynote Speaker. Additionally, PMTF members have been working on the submission of advanced practice management conference sessions for the 2026 AAMA Annual Conference to the Conference Continuing Education Task Force (CCETF) to be reviewed by the Continuing Education Board.

As we wrap up a successful year, I want to extend my thanks to the members of the Continuing Education Board for their exceptional hard work and dedication. I also want to express our immense gratitude to our staff liaison, Nick Mickowski. We could not have accomplished what we did without his unwavering support and expertise. His contributions have been vital to our success.

Respectfully,

Amber Greer, BS, CMA (AAMA), PBT(ASCP), CEB Chair

Members:

Clare Ley, CMA (AAMA) – CCETF Chair

Susan Hawes, CMA (AAMA), MBA, FACMPE – CEB Vice Chair

Rachel Houston, DHSc, CMA (AAMA) – LEAP Chair

Frances Mooney, ATA, CMA (AAMA) – LEAP Vice Chair

Brian Stimpson, Sr., CMA (AAMA)

Linda Vitzthum, CMA (AAMA) – PMTF Chair

Staff Liaison:

Nick Mickowski, Continuing Education and Membership Director

5577                                    **American Association of Medical Assistants® (AAMA)**  
5578                                    **Report of the Judicial Council**  
5579                                    **For the Period Ending September 2024**  
5580  
5581    The Judicial Council exercises jurisdiction in all questions involving membership  
5582    interpretation and any controversies arising from interpreting the AAMA Bylaws and/or  
5583    the Code of Ethics of the Association.  
5584  
5585    No issues or concerns were presented to the Judicial Council for consideration during the  
5586    2023–2024 association year.  
5587  
5588    Debby B. Houston, CMA (AAMA), CPC-I  
5589    Chair  
5590  
5591    Members:  
5592    Patty Licurs, CMA (AAMA), Vice Chair  
5593    Sue Hawes, CMA (AAMA)  
5594    Lisa Lee, CMA (AAMA)  
5595    Julie Flaatten, CMA (AAMA)  
5596  
5597    Staff Liaison: Donald Balasa, JD, MBA  
5598



***PROPOSED  
BYLAWS  
AMENDMENTS***

5600 **Proposed Bylaws Amendment #1**

5601  
5602  
5603 **Article XII-Board of Trustees**

5604  
5605 Section 6. Management Steering Committee

5606  
5607 ***Current Wording***

5608  
5609 **SECTION 6.** The Management Steering Committee shall consist of the President, Vice  
5610 President, Immediate Past President, Secretary, and Chief Executive Officer.

5611  
5612 ***Proposed Wording***

5613  
5614 **SECTION 6.** The Management Steering Committee shall consist of the President, Vice  
5615 President, Immediate Past President, Secretary, and Chief Executive Officer as an Ex-  
5616 Officio member, without a vote.

5617  
5618 ***Rationale***

5619 Making the Chief Executive Officer (CEO) as an ex officio member of the Management  
5620 Steering Committee without a vote offers several advantages. It allows the committee to  
5621 benefit from the CEO's expertise in organizational operations and strategy without  
5622 influencing voting outcomes. By abstaining from voting, the CEO maintains neutrality  
5623 and focuses solely on providing informed advice to committee members. It is worth  
5624 noting that the CEO currently (and throughout his tenure as AAMA CEO) has not  
5625 exercised his right to vote.

American Association of Medical Assistants® (AAMA)

**Proposed Bylaws Amendment #2**

**Article XII-Board of Trustees**

**Section 6. Management Steering Committee**

As per the current AAMA Bylaws: “The Management Steering Committee shall not assume the planning, budgeting, or policymaking responsibilities of the Board of Trustees, and shall in all cases be bound by decisions and policies of the Board of Trustees.”

Fiscal impact: None

***Current Wording***

**SECTION 6.** Management Steering Committee. The Management Steering Committee shall consist of the President, Vice President, Immediate Past President, Secretary, and Chief Executive Officer.

***Proposed Wording***

**SECTION 6.** Management Steering Committee. The Management Steering Committee shall consist of the President, Vice President, Immediate Past President, Secretary, Speaker of the House, and Chief Executive Officer.

***Rationale***

***Skill Development:*** Participation in the MSC can provide valuable experience and skill development for the Speaker of the House. Exposure to executive decision-making and communication at this level enhances preparedness for advanced leadership roles, such as Vice President.

***Mentoring Opportunities:*** The MSC can serve as a platform for mentorship and professional development. Mentoring within the committee can help groom current leaders, such as the Speaker of the House, for future leadership positions.

***DISCLAIMER:*** As per the current AAMA Bylaws: the Management Steering Committee shall not assume the planning, budgeting, or policymaking responsibilities of the Board of Trustees, and shall in all cases be bound by decisions and policies of the Board of Trustees.

# ***APPENDIX***

5668	<b>American Association of Medical Assistants® (AAMA)</b>		
5669	<b>2024 Delegates and Alternates</b>		
5670	<b>(Current as of August 2, 2024 - Subject to Later Revision)</b>		
5671			
5672			
5673			
5674	<b><u>STATE</u></b>	<b><u>DELEGATES</u></b>	<b><u>ALTERNATES</u></b>
5675			
5676	<b>Alabama</b>	Crystal Gersh, CMA (AAMA)	Ashley Faulkner, CMA (AAMA)
5677		Brandy Owen, CMA (AAMA)	Tracie Fuqua, CMA (AAMA)
5678		Melanie Strain, CMA (AAMA)	
5679			
5680	<b>Alaska</b>	Jessican Jensky, CMA (AAMA)	
5681		Tamarack Brottem, CMA (AAMA)	
5682		Lisa Nash, CMA (AAMA)	
5683			
5684	<b>Arkansas</b>	Melinda Rhynes, CMA (AAMA)	
5685		Misty Ross, CMA (AAMA)	
5686			
5687	<b>California</b>	Virginia Marquette, CMA (AAMA)	Katelyn Marie Dixon, CMA (AAMA)
5688		Nancy Lizon, CMA (AAMA)	
5689		Julie Thomas, CMA (AAMA)	
5690			
5691	<b>Colorado</b>	Christine Hollander, CMA (AAMA)	
5692			
5693	<b>Connecticut</b>	Rebecca Parry, CMA (AAMA)	Roxanne Sealing, CMA (AAMA)
5694		Tabitha Opie, CMA (AAMA)	Nina Watson, CMA (AAMA)
5695		Susan Klos, CMA (AAMA)	Katty Rice, CMA (AAMA)
5696			
5697	<b>Florida</b>	Jeanette Tyler CMA (AAMA)	
5698		Christine Sears, CMA (AAMA)	
5699		Deniece Jozefiak, CMA (AAMA)	
5700		Mary Lou Allison, CMA (AAMA)	
5701			
5702	<b>Georgia</b>	Christina McRee, CMA (AAMA)	
5703		Vickie Cottrill, CMA (AAMA)	
5704		Sabrina Edge, CMA (AAMA)	
5705			
5706	<b>Hawaii</b>	Mae Dorado, CMA (AAMA)	
5707			
5708	<b>Idaho</b>	Shaeli Christiansen, CMA (AAMA)	Jessica Hunter, CMA (AAMA)
5709		Christina Tipton, CMA (AAMA)	Angela Liffel, CMA (AAMA)
5710		Rebecca Van Orden, CMA (AAMA)	
5711			
5712	<b>Illinois</b>	Katherine Schoonhoven, CMA (AAMA)	
5713		Sharon Strutzenberg, CMA (AAMA)	
5714		Rebecca Cruse, CMA (AAMA)	
5715		Lydnise House, CMA (AAMA)	
5716		Donna Radzun, CMA (AAMA)	
5717			
5718	<b>Indiana</b>	Paula Schubert, CMA (AAMA)	
5719		Heidi Sisson, CMA (AAMA)	

5720		Brandi Gaumer, CMA (AAMA)	
5721		Katja Stine, CMA (AAMA)	
5722		Dianne Wimsett, CMA (AAMA)	
5723		Joyce Edds, CMA (AAMA)	
5724			
5725	<b>Iowa</b>	Michele Sears, CMA (AAMA)	Jacquelyn Hellyer, CMA (AAMA)
5726		Katie Wahl, CMA (AAMA)	
5727		Rachel Ozburn, CMA (AAMA)	
5728		Lucinda Wilson, CMA (AAMA)	
5729		Deanna Schnebbe, CMA (AAMA)	
5730			
5731	<b>Kentucky</b>	Carol Gross, CMA (AAMA)	Joni Magness, CMA (AAMA)
5732		Rina Hammer, CMA (AAMA)	Stacey Smith, CMA (AAMA)
5733		Terri Slinker, CMA (AAMA)	Tracy Phillips, CMA (AAMA)
5734		Danielle Ritchey, CMA (AAMA)	
5735		Mary LaFond, CMA (AAMA)	
5736			
5737	<b>Maine</b>	Barbara Marchelletta, CMA (AAMA)	
5738		Dominic Sanchez, CMA (AAMA)	
5739		Sue Hawes, CMA (AAMA)	
5740			
5741	<b>Massachusetts</b>	Dawn Jordan Leblanc, CMA (AAMA)	Ramona Sterczala, CMA (AAMA)
5742		Sarah Godin, CMA (AAMA)	
5743		Jean Lynam, CMA (AAMA)	
5744			
5745	<b>Michigan</b>	Kathy Stuut, CMA-A (AAMA)	
5746		Nicole Burris, CMA (AAMA)	
5747		Dori Barr, CMA (AAMA)	
5748		Atesha Osborn, CMA (AAMA)	
5749		Casey Haney, CMA (AAMA)	
5750		Mistie Atkins, CMA (AAMA)	
5751			
5752	<b>Minnesota</b>	Denise Schmitz, CMA (AAMA)	Charlene Metzger, CMA (AAMA)
5753		Rhonda Samborski CMA (AAMA)	Kendra Pogose, CMA (AAMA)
5754		Lisa Kuechle, CMA (AAMA)	
5755		Courtney Mattson, CMA (AAMA)	
5756		Danielle Perron, CMA (AAMA)	
5757			
5758	<b>Missouri</b>	Rachel Clifford, CMA (AAMA)	Linda Langford, CMA (AAMA)
5759		Juanita Paul, CMA (AAMA)	Jacquelyn Harris, CMA (AAMA)
5760		Samantha Enciu, CMA (AAMA)	Molly Bolz, CMA (AAMA)
5761			
5762	<b>Montana</b>	Lori Schalk, CMA (AAMA)	Angela Wood, CMA (AAMA)
5763		Joleen South, CMA (AAMA)	
5764			
5765	<b>Nebraska</b>	Barbara Carter, CMA (AAMA)	Angy McCarter, CMA (AAMA)
5766		Angie Eytcheson, CMA (AAMA)	Terrie King, CMA (AAMA)
5767		Steph Richards, CMA (AAMA)	Jen Kocian, CMA (AAMA)
5768			
5769	<b>Nevada</b>	Carol Cohen, CMA (AAMA)	
5770			
5771	<b>New Hampshire</b>	Richard Benton, jr., CMA (AAMA)	Brian Stimpson, Sr., CMA (AAMA)
5772		Courtney Insley, CMA (AAMA)	Jennifer Depiano CMA (AAMA)

5773		Sandra Monty, RMA (AMT)	Linda Prince, CMA (AAMA)
5774			
5775	<b>New Jersey</b>	Susan Henderson, CMA (AAMA)	
5776		Marianne Van Deursen, CMA (AAMA)	
5777		Nitza Sheehan, CMA (AAMA)	
5778	<b>New Mexico</b>	Jennifer Benton, CMA (AAMA)	Lori Rager, CMA (AAMA)
5779		Toni Coffman, CMA (AAMA)	Jeremy Soto, CMA (AAMA)
5780			
5781	<b>New York</b>	Todd Lasher, CMA (AAMA)	
5782		Kim Battaglini, CMA (AAMA)	
5783		Cindy Ryder, CMA (AAMA)	
5784			
5785	<b>North Carolina</b>	Paula Cooke, CMA (AAMA)	Patricia Clark, CMA (AAMA)
5786		Maria Van DeBovenkamp, CMA (AAMA)	
5787		Rebecca Eldridge, CMA (AAMA)	
5788		Heather Wines, CMA (AAMA)	
5789		Cameron Smith, CMA (AAMA)	
5790		Summer O'Neal, CMA (AAMA)	
5791		Casie Cornelison, CMA (AAMA)	
5792		Linda Metcalf, CMA (AAMA)	
5793		Stephanie Hodgin, CMA (AAMA)	
5794			
5795	<b>Ohio</b>	Julie Fogt, CMA (AAMA)	Laura Mizicko, CMA (AAMA)
5796		Rhonda Lazette, CMA (AAMA)	Julie Ledbetter, CMA (AAMA)
5797		Loxie Kistler, CMA (AAMA)	
5798		Mary Elizabeth Regis, CMA (AAMA)	
5799		Jennifer Young, CMA (AAMA)	
5800		Amy McMaster, CMA (AAMA)	
5801			
5802	<b>Oklahoma</b>	Julie Benson, CMA-AC (AAMA)	
5803		Leann Buneta, CMA (AAMA)	
5804			
5805	<b>Oregon</b>	Christy Oldenstadt, CMA (AAMA)	
5806		Paula Purdy, CMA (AAMA)	
5807		Shawn Molnar, CMA (AAMA)	
5808		Alexandria Holcomb, CMA (AAMA)	
5809			
5810	<b>Pennsylvania</b>	Jennifer Gonzalez, CMA (AAMA)	
5811		Kellie Ann Humma, CMA (AAMA)	
5812		Janet Mills, CMA (AAMA)	
5813		Mary Louise Ninehauser, CMA (AAMA)	
5814			
5815	<b>South Carolina</b>	Crissy Taylor, CMA (AAMA)	
5816		Patty Licurs, CMA (AAMA)	
5817		Lisa Kianos, CMA (AAMA)	
5818		Jacquelin Harris, CMA (AAMA)	
5819			
5820	<b>South Dakota</b>	Susan Hookie, CMA (AAMA)	Erica Arends, CMA (AAMA)
5821		Amanda Schroeder, CMA (AAMA)	
5822		Alexius Thorpe, CMA (AAMA)	
5823			
5824	<b>Tennessee</b>	Dawn Alter, CMA (AAMA)	
5825		Marilyn Huddleston-Reeder, CMA (AAMA)	

5826	<b>Texas</b>	Dina Harrett, CMA (AAMA)	
5827		Donna Gibbins, CMA (AAMA)	
5828		Charlene Couch, CMA (AAMA)	
5829			
5830	<b>Utah</b>	Suzy Johnson, CMA (AAMA)	
5831		Heather Mendy CMA (AAMA)	
5832		Angela Belnap, CMA (AAMA)	
5833			
5834	<b>Virginia</b>	Deborah Benson, CMA (AAMA)	
5835		Amanda Harris, CMA (AAMA)	
5836		Debby Houston, CMA (AAMA)	
5837			
5838	<b>Washington</b>	Francie Mooney, CMA (AAMA)	
5839		Sandra Erlewine, CMA (AAMA)	
5840		Doreen Hoch, CMA (AAMA)	
5841		Lorrie Jones, CMA (AAMA)	
5842		Gayle Kinney, CMA (AAMA)	
5843		Amanda Lee, CMA (AAMA)	
5844			
5845	<b>Wisconsin</b>	Kelly Emmons, CMA (AAMA)	Kim Gropp, CMA (AAMA)
5846		Danieel Bodoh, CMA (AAMA)	Kimberly Cooper, CMA (AAMA)
5847		Julie Beecher, CMA (AAMA)	
5848		Julie Flaatten, CMA (AAMA)	
5849		Donna Center, CMA (AAMA)	
5850		Veronica Hebert, CMA (AAMA)	
5851		Marcia Rene Puetz, CMA (AAMA)	



***INFORMATIONAL***  
***ONLY***

**American Association of Medical Assistants® (AAMA)**

**Report of the Maxine Williams Scholarship Committee**

**For the period ending September 2024**

The charge of the Maxine Williams Scholarship (MWS) Committee is to review applications and qualifications submitted to the AAMA. It is a not-for-profit, tax-exempt corporation.

The following were the activities of this committee.

The Board of Trustees elected this officer to serve as chair on May 7, 2024. The previous chair and the current committee members worked on changes to the application and made changes that were approved by the Maxine Williams Board of Directors. The approved changes include:

- Allow ABHES students to apply
  - Change application to allow students themselves to apply
  - Change application to allow for electronic submission and to include a personal, non-school email address and cell phone number.
  - Change due date to May 15, 2024
  - Award money will be sent directly to the student
- Any changes or suggestions made to the application were reviewed and made by Manager of Board Services Sharon Flynn and checked for legality by CEO and House Legal Counsel Donald Balasa, JD, MBA.

The application was uploaded to the AAMA website and a copy of the application was sent to CAAHEP and ABHES program directors. The deadline for submissions was May 15, 2024.

This chair received a total of forty-seven applications, and all were uploaded to the AAMA BOT Teams, Maxine Williams Scholarship Committee Folder. Seven applications were ineligible (due to an incomplete application, missing documentation, student status, etc.)

This chair set up a virtual meeting on June 6, 2024, for committee members to discuss their assigned applications to review. A copy of the blank 2024 application for reference, and a copy of the scoring rubric form with instructions were loaded into the Teams folder for all committee members to access. Each committee member scored their assigned applications and sent the scoring sheets to this chair. On June 12, 2024, the committee members met to review the top scoring applications and chose the following scholarship recipients:

1. Shalimar Guillermo – Central Penn College, Pennsylvania - \$3,500
2. Monsurat Jimoh – Wake Technical Community College, North Carolina - \$3,500
3. Jackie Pullum – Harford Community College, Maryland - \$2,500
4. Kenadee Wiegel – Western Technical College, Wisconsin - \$2,500
5. Elaine Booker – Hunter Business College, New York - \$1,500

5897 Winners of the Maxine Williams Scholarships were announced at the Summer Board of  
5898 Trustees meeting in Arlington, Virginia, June 22–23, 2024. Following the board meeting,  
5899 this Chair and Director of Board Services Flynn notified all recipients that were chosen that  
5900 they would receive their scholarship award via mail along with scholarship tax information,  
5901 a free one-year AAMA student membership, and their photo and brief biography would be  
5902 in a future issue of *Medical Assisting Today* magazine and future marketing materials.  
5903 Scholarship applicants that were not selected to receive a scholarship received an email  
5904 thanking them for their interest in the scholarship program and encouraging the student to  
5905 continue to pursue a medical assisting career.

5906  
5907 This Chair and committee members also discussed suggested changes to the Maxine  
5908 Williams Scholarship questions and changes to the scoring rubric. These changes will be  
5909 shared with the Maxine Williams Board of Directors to discuss at their next scheduled  
5910 meeting.

5911  
5912 This Chair would like to thank the committee members for their collaboration and  
5913 completion of assignments. This Chair would also like to thank Sharon Flynn and Erika  
5914 Mercado, MWS Committee staff liaisons, for their help and assistance through this process.

5915  
5916 Virginia Thomas, CMA (AAMA), Chair

5917  
5918 Members

5919 Shirley Sawyer, CMA (AAMA)

5920 Shannon Thomas, CMA (AAMA)

5921  
5922 Staff Liaisons:

5923 Sharon Flynn, Board Services Manager

5924 Erika L Mercado, Customer Service Manager

5925

***AAMA***  
***FINANCIAL***  
***REPORTS***

American Association of Medical Assistants® (AAMA)  
**GENERAL FUND BUDGET AND NARRATIVE**  
**For the fiscal year July 1, 2024, through June 30, 2025**

**Revenues**

Membership Dues: The audited amount of Membership Dues for fiscal year (FY) 2023 was 1,747,284. The amount for FY 2024 is estimated to be 1,394,642. The amount for FY 2025 is projected to be 1,250,000.

ELC Sales: The projected amount for FY 2025 is 1,800,000.

Monograph Sales: The projected amount for FY 2025 is 460,000.

Fees from non-AAMA continuing education providers: Continuing education providers (also known as independent sponsors) who are not AAMA state societies or component chapters have to pay to have their CE courses reviewed and approved for AAMA CEUs. The projected amount for FY 2025 is 100,000. The CEB has increased these fees in recent years.

Fees received for mailed-in tests for CEU articles in *Medical Assisting Today*: The projected amount for FY 2025 is 30,000. The tests may also be submitted on the e-LC, and payment for these tests is recognized in the “ELC Sales” line item (see above).

*Medical Assisting Today* revenue from subscriptions and advertisements: The projected amount for FY 2025 is 50,000.

Annual Conference: Revenue for the 2022 Annual Conference in Myrtle Beach, South Carolina, was 203,209. Revenue for the 2023 Annual Conference in Lake Buena Vista, Florida, was 259,599. The projected revenue for the 2024 Annual Conference in Grand Rapids, Michigan, is 220,000.

**TOTAL REVENUES BUDGETED FOR FY 2025**  
**\$3,910,000**

**Expenses**

Staff salaries: Staff salaries are estimated to be 1,527,854 for FY 2024. The projection for FY 2025 is being raised to 1,580,000. This is a small increase to reflect raises for employees.

Temporary assistance: There are no temporary assistance expenses projected for FY 2025.

5969 Payroll taxes: There is a small projected increase to allow for any federal and state tax  
5970 increases.  
5971

5972 Group insurance: This line item subsumes group insurance coverage for employees, such  
5973 as health insurance and dental insurance. A small increase is projected to allow for  
5974 increases in insurance premiums.  
5975

5976 Miscellaneous employee benefits: This line item includes charges for the water and coffee  
5977 machine, the holiday party, snack food orders for employee meetings, and occasional  
5978 purchase of donuts for staff.  
5979

5980 401k retirement: This line item includes the fees paid to maintain our pension plan. In FY  
5981 2023 this also included a contribution to the plan by the AAMA for each employee. This  
5982 has not been done in the previous fifteen years. The intent was to reward the staff for their  
5983 hard and excellent work in FY 2024, which included the move to Suite 3720. There is no  
5984 contribution planned in FY 2025.  
5985

5986 Professional staff development: This line item includes continuing education for staff. For  
5987 example, I attend sessions on changes in the employment law, the Americans with  
5988 Disabilities Act (including the new pregnancy accommodations law), and tax changes for  
5989 not-for-profits.  
5990

5991 Suite 3720 moving expenses: Because of rent rebates and other financial concessions we  
5992 were able to negotiate with the building, the direct cost of moving from Suite 1575 to Suite  
5993 3720 was reasonable. The direct costs that will be reflected in FY 2024 are currently  
5994 53,398. No sizable additional costs are anticipated.  
5995

5996 Auditor's fees: This reflects the fee that we pay to the CPA firm that conducts an annual  
5997 audit and makes sure that the AAMA is following generally accepted accounting  
5998 principles.  
5999

6000 Howe & Hutton fees: The fees we pay for the services of Howe & Hutton attorneys are  
6001 captured in this line item. No major increase is forecast for FY 2025. Mr. Balasa tries to  
6002 answer as many legal questions as his schedule permits.  
6003

6004 Outsource accounting: This line item includes QuickBooks monthly charges, the payroll  
6005 service we use (Paylocity), and the fees we pay CPA Tina Williams for her services.  
6006

6007 Outsource mailroom: Outsourcing the mailroom services over the last twenty years has  
6008 proven to be economical. An increase is projected for FY 2025 because of a possible  
6009 increase in fees.  
6010

6011 Computer Maintenance Gen: The following are subsumed in this line item:  
6012 Microsoft Azure—approximately \$9,000 a month  
6013 Microsoft computer maintenance charges

6014 Microsoft Teams  
6015 Other Hardware and Software charges  
6016 Adobe monthly fees  
6017 Computer maintenance programs  
6018 Keycard entrance maintenance fees  
6019  
6020 Prof services-BOT: This includes the President's Pin that is ordered every year.  
6021  
6022 Prof services-IT Michael Knight: This is remuneration for IT Consultant Michael Knight.  
6023  
6024 Insurance General: This line item includes insurance premiums for our directors and  
6025 officers liability policy, our errors and omissions policy, the policy that ensures the  
6026 contents of our office, our general liability policy, and our workers' compensation policy.  
6027 Rates are anticipated to go up slightly.  
6028  
6029 Professional services-General: Membership for staff directors in the American Society of  
6030 Association Executives; membership in the Association Forum of Chicagoland; and the  
6031 plaque for Nathan Breen's family.  
6032  
6033 Rent has decreased substantially because of our move to a smaller space.  
6034  
6035 Maintenance & Repairs-General: This line item was high in FY 2024 because we had to  
6036 rent dumpsters and the use of the freight elevators because of the move. In a normal year,  
6037 this line item includes monthly office cleaning and minor services from the building.  
6038  
6039 Travel-General: This includes my trips to speaking engagements and out-of-town  
6040 meetings, such as the American Association of Nurse Practitioners, the Council for Higher  
6041 Education Accreditation, and the Council on Licensure, Enforcement, and Regulation  
6042 (CLEAR).  
6043  
6044 Travel Conference-Staff and BOT  
6045  
6046 Travel-BOT: This includes BOT travel expenses except Representatives Bureau travel,  
6047 Planning Session travel, and Annual Conference travel.  
6048  
6049 Travel-Representatives Bureau: Travel costs for RB assignments.  
6050  
6051 Travel-Strategic Planning/Planning Session: Expenses for the November 2023 Planning  
6052 Session for the BOT are reflected in this account.  
6053  
6054 MGMA Exhibit Expenses: This includes MGMA Corporate Membership (\$6,500), exhibit  
6055 booth at the MGMA Leaders Conference (\$3,500), and other travel expenses related to  
6056 exhibiting at MGMA. The FY 2025 amount includes the 12,000 reflected in Director  
6057 Mokijewski's budget request.  
6058

6059 Exhibit Expense-General: This includes all other travel expenses for exhibiting besides  
6060 MGMA (e.g., AMGA, AAFP, AAMC). The FY 2025 amount includes the 5,650 reflected  
6061 in Director Mokijewski's budget request.

6062  
6063 Office supplies-General: Day-to-day office supplies such as paper; sanitizers; office  
6064 cleaning supplies; small orders of coffee and tea.

6065  
6066 Dues and Subscriptions-General: This includes my subscription to Law 360—a weekly  
6067 reporting service on developments in health law and antitrust law; fees charged by AmEx  
6068 for employee credit cards (\$45 per employee and \$45 per BOT member); and my  
6069 subscription to Bloomberg Law Updates (\$9,330). This also includes the amount indicated  
6070 in Director Mokijewski's budget request.

6071  
6072 Bank charges-General: This reflects the amount we pay the bank for credit card processing.  
6073 Staff searches the market on a yearly basis to see whether this service can be obtained at a  
6074 lower cost at another bank. Rates generally increase each year.

6075  
6076 Misc Expense-General: This includes amounts we pay for shredding services and offsite  
6077 storage. It also includes the amounts we pay for inspection of fire extinguishers, and minor  
6078 transactions that does not fit any other categories.

6079  
6080 Shipping monographs: This is the amount estimated by Director Mickowski.

6081  
6082 MarCom-Annual Conference; The 9,961 for FY 2025 is explained in Director  
6083 Mokijewski's budget request.

6084  
6085 Annual Conference: The expenses for the 2022 (Myrtle Beach) and 2023 (Orlando) Annual  
6086 Conferences were high. The 2023 hotel expenses were very high. This was due, in part, to  
6087 price increases instituted by the hotel after the COVID-19 pandemic. Every effort will be  
6088 made to hold the line on expenses for the 2024 Annual Conference in Grand Rapids,  
6089 Michigan. The cost projection for the Grand Rapids Annual Conference is 200,000.

6090  
6091 MarCom-press releases: This line item is explained in Director Mokijewski's budget  
6092 request.

6093  
6094 ADA, EEOC, StateNet: This includes my StateNet subscription that enables me to monitor  
6095 weekly state and federal proposed legislation and regulations and reporting services for the  
6096 Americans with Disabilities Act and the Equal Employment Opportunity Commission.

6097  
6098 ABC Education  
6099 Medical Law monograph:  
6100 Medical Ethics monograph:  
6101 Nutrition monograph:  
6102 Prof. services-Cont. education:  
6103 Travel-Cont. education:



6104 I.C.E. expense for accreditation of ABC-P and ABC-AHE:  
6105 ELC expense:

6106

6107 **TOTAL EXPENSES BUDGETED FOR FY 2025**

6108 **3,699,103**

6109

6110

6111 **EXCESS REVENUES OVER EXPENSES FOR FY 2025**

6112 **\$3,910,000 - 3,699,103 = 210,897**

6113



# 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, 2023, 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, 2023, 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 CPA's

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

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#### **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

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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  
December 2, 2023

**American Association of Medical Assistants, Inc.**STATEMENT OF FINANCIAL POSITION June 30,  
2023

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<u>ASSETS</u>	
CURRENT ASSETS	
Cash and cash equivalents	12,672,722
Prepaid Expenses	<u>59,089</u>
Total Current Assets	<u>12,731,811</u>
PROPERTY AND EQUIPMENT, NET	133,140
RIGHT-OF-USE ASSET	<u>1,054,464</u>
Total Assets	<u>\$13,919,415</u>
<u>LIABILITIES AND NET ASSETS</u>	
CURRENT LIABILITIES	
Accounts Payable and Accrued Expenses	396,776
Deferred Revenue	900,302
Due to Other Organizations	37,673
Lease Liability, Current	<u>74,776</u>
Total Current Liabilities	<u>1,409,527</u>
LEASE LIABILITY, LONG-TERM	979,688
NET ASSETS	
Without Donor Restrictions	<u>11,530,200</u>
Total Liabilities and Net Assets	<u>\$13,919,415</u>

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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, 2023

	<u>Without Donor Restrictions</u>
<b>REVENUE AND OTHER SUPPORT</b>	
Membership Dues	1,747,284
Exam Fees	1,464,668
Recertification Application Fees	508,032
ABR - OE Courses	211,565
ABC - G Revenue	390,155
Other CE Revenue	1,733,000
CMA Today	68,885
Shipping Fees	65,060
Conferences	203,209
CASAT Donation	21,950
Miscellaneous Income	25,108
Interest Income	91,827
Total Revenue and Other Support	<u>6,530,743</u>
<b>EXPENSES</b>	
Programs	2,759,769
General and administrative	2,512,025
Fundraising	143,774
Total Functional Expenses	<u>5,415,568</u>
Increase in Net Assets	1,115,175
Net Assets - Beginning of the Year	10,415,025
Net Assets - End of Year	<u>\$ 11,530,200</u>

The accompanying notes are an integral part of this statement.

***ADDITIONAL  
INFORMATON***

## **AAMA Organizational Structure**

Established in 1955, the American Association of Medical Assistants® (AAMA) continues to be the premier organization dedicated to serving the interests of medical assistants. In fact, it is the only association in the world devoted exclusively to the medical assisting profession.

AAMA members include practicing medical assistants (administrative, clinical, and practice managers), medical assisting educators, students, and others interested in the profession. In addition, scores of physicians serve the AAMA at the chapter, state, and national levels.

The AAMA is a trilevel organization comprising national, state, and local levels. The national association maintains the Executive Office in Chicago. State societies are chartered by and affiliated with the national association. Local chapters are chartered by and directly affiliated with their state society. Members are required to belong to all three levels unless there is no local chapter or state society available.

The governing body of the AAMA is the House of Delegates (HOD). The HOD convenes each year at the AAMA Annual Conference and comprises members of the Board of Trustees (BOT), AAMA past presidents, and delegates from each of the constituent state societies. It is the responsibility of the HOD to determine the policies of the AAMA, amend its Bylaws, conduct the election of officers and trustees, and act upon any proposals brought forth.

Resolutions to be submitted to the HOD are reviewed by the BOT. The BOT is composed of the following:

- President
- Vice President
- Secretary
- Speaker of the House
- Vice Speaker of the House
- Immediate Past President
- Seven Trustees

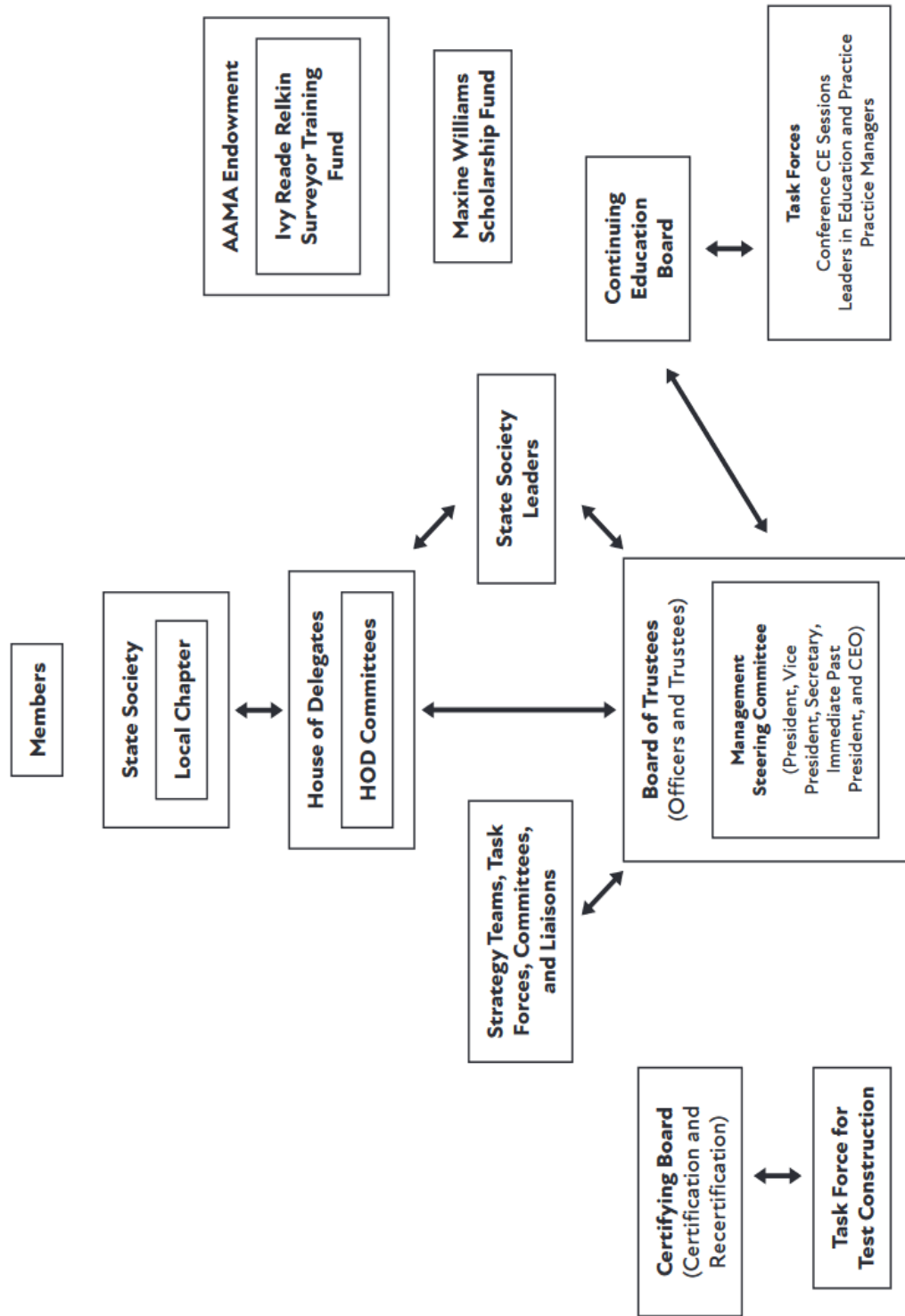
The BOT is responsible for overseeing the financial affairs of the association, conducting the business of the AAMA between annual meetings of the HOD and appointing members to boards, strategy teams, task forces, and committees. Their work is guided by the AAMA Strategic Issues Plan, the blueprint of the future of the association.

There are two educational boards: the Certifying Board (CB) and the Continuing Education Board (CEB). It is the responsibility of the CB to prepare, administer, and evaluate exams for certification and recertification and certify or recertify successful candidates. The CEB administers the continuing education program, which includes continuing education articles, conference educational sessions, and self-study products.

The AAMA Occupational Analysis is the cornerstone of the work performed by the education boards. The Occupational Analysis is the basis for the medical assisting curriculum, content of the CMA (AAMA) Certification Exam, and topics approved for continuing education. For a copy of the Occupational Analysis or the AAMA Strategic Issues Plan, visit the [AAMA website](#).



# Organizational Chart



## Initialisms and Acronyms

<b>Initials</b>	<b>Description</b>
AAFP	American Academy of Family Physicians
AAMA	American Association of Medical Assistants
AAMAE	American Association of Medical Assistants Endowment
AAPC	American Academy of Professional Coders
ABHES	Accrediting Bureau of Health Education Schools
ACS	American Cancer Society
ACCSC	Accrediting Commission of Career Schools and Colleges
ACICS	Accrediting Council for Independent Colleges and Schools
ADA	American Dental Association
ADAA	American Dental Assistants Association
AFC	Association Forum of Chicagoland
AHDI	Association for Healthcare Documentation Integrity
AHIMA	American Health Information Management Association
AMA	American Medical Association
AMT	American Medical Technologists
ASAE	American Society of Association Executives
ASMT	American Society of Medical Technicians
BOT	Board of Trustees
CAAHEP	Commission on Accreditation of Allied Health Education Programs
CASAT	Center for the Application of Substance Abuse Technologies
CB	Certifying Board (AAMA)
CCETF	Conference Continuing Education Task Force (CEB)
CEB	Continuing Education Board (AAMA)
CEU	Continuing Education Unit
CMA (AAMA)	Certified Medical Assistant (AAMA)
CMA-A (AAMA)	Certified Medical Assistant (AAMA) – Administrative
CMA-C (AAMA)	Certified Medical Assistant (AAMA) – Clinical
CMA-P (AAMA)	Certified Medical Assistant (AAMA) – Pediatric
CPC	AAPC-Certified Professional Coder
DOE	United States Department of Education
FSMB	Federation of State Medical Boards
HOSA	Health Occupations Students of America
HPN	Health Professions Network
I.C.E.	Institute for Credentialing Excellence
LEAP	Leaders in Education and Practice
MAERB	Medical Assistant Education Review Board
MARWeek	Medical Assistants Recognition Week
MSC	Management Steering Committee
MWSC	Maxine Williams Scholarship Committee
NACCLS	National Accrediting Agency for Clinical Laboratory Sciences
NCSBN	National Council of State Boards of Nursing
NCCA	National Commission for Certifying Agencies

## **Medical Assisting Creed**

**The Medical Assisting Creed of the AAMA sets forth medical assisting statements of belief:**

- **I believe in the principles and purposes of the profession of medical assisting.**
- **I endeavor to be more effective.**
- **I aspire to render greater service.**
- **I protect the confidence entrusted to me.**
- **I am dedicated to the care and well-being of all people.**
- **I am loyal to my employer.**
- **I am true to the ethics of my profession.**
- **I am strengthened by compassion, courage, and faith.**

## Proposed Motion Form

*Clearly write down the motion.*

I move \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Motion made by: \_\_\_\_\_

Second: \_\_\_\_\_

PASSED

FAILED

*After the motion has been moved and seconded, the form must be sent to the Speaker of the House via a Page.*

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## Proposed Motion Form

*Clearly write down the motion.*

I move \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Motion made by: \_\_\_\_\_

Second: \_\_\_\_\_

PASSED

FAILED

*After the motion has been moved and seconded, the form must be sent to the Speaker of the House via a Page.*



**AMERICAN ASSOCIATION  
OF MEDICAL ASSISTANTS®**

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