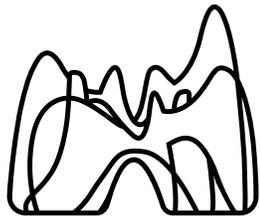


2024 DELEGATES PACKET



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

42	Educators Collaborative Task Force	129
43	Partnership	132
44		
45	BOARDS AND COUNCILS	
46	Certifying Board	135
47	Certification Director	137
48	Continuing Education Board	139
49	Judicial Council	143
50		
51	PROPOSED BYLAWS AMENDMENTS AND RESOLUTIONS	
52	Proposed Bylaws Amendment 24-01	145
53	Proposed Bylaws Amendment 24-02.....	146
54		
55	APPENDIX	
56		
57	Delegates/Alternates	
58	2024 Delegates and Alternates	148
59		
60	Information Only	
61	Maxine Williams Scholarship Committee	153
62		
63	AAMA Financial Reports	
64	Financial Report of the Fiscal Year Ending June 30, 2023.....	156
65	2023 Audit Report	161
66		
67	Additional Information	
68	AAMA Organizational Structure	167
69	Initialisms and Acronyms	169
70	Medical Assisting Creed.....	170
71	Proposed Motion Form.....	171

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)
Call to Order	Sherry Bogar, CMA (AAMA) <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)
Orientation of Delegates	Natasha Geno, CMA (AAMA)
<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**

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1:00 p.m. Reports, Bylaws, Resolutions
The committee hearings will be in sequence, beginning at 1 p.m. and continuing until concluded

5:00 p.m. HOUSE OF DELEGATES RECONVENES

Call to Order	Sherry Bogar, CMA (AAMA)
Report of the Credentials Chair	Mary Dey, CMA (AAMA)
Moments of Remembrance and Reflection	Rebecca Walker, CMA (AAMA)
Report of the Reference Committees:	
Reports and Resolutions	Natasha Geno, CMA (AAMA)
Bylaws	Sherry Bogar, CMA (AAMA)
Election of Officers and Nominating Committee	Sherry Bogar, CMA (AAMA)
Unfinished Business	Sherry Bogar, CMA (AAMA)
New Business	Sherry Bogar, CMA (AAMA)
Good and Welfare Statements	<i>(Please note only 15 minutes will be allowed)</i>
Announcements	
Adjournment	

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

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

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A Guide for Delegates

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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

General Rules

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388

389

390 **1. Admission to the House of Delegates**

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

393 **2. Seating**

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

398 **3. Voting Body**

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

402 **4. Orders**

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

405 **5. Motions**

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

409 **6. Discussion**

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

413 **7. Debate**

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

419 **8. POINT OF INFORMATION**

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

***BOARD
OF
TRUSTEES
REPORTS***

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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	<u>Strategy Teams</u>	
477	Leadership Development	Claire Houghton, CMA (AAMA)
478	Marketing	Virginia Thomas, CMA (AAMA)
479	Membership Development	Sherry Bogar, CMA (AAMA), CN-BC
480		
481	<u>Task Forces</u>	
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	<u>Education Boards and Councils</u>	
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 **The following represents a partial list of the actions and decisions of the 2023–2024 BOT:**

- 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.

- 553 • Approved one AAMA 2024–2025 membership to be awarded to a participant in the
- 554 Membership Committee focus groups.
- 555 • Approved the opening of the AAMA Bylaws Committee to volunteers with AAMA
- 556 active membership status starting with the 2024–2025 Volunteer Leaders Application.
- 557 • Approved Social Media project for the AAMA 2024 Annual Conference.
- 558 • Approved the AAMA General Fund budget for July 1, 2024–June 30, 2025.
- 559 • Approved the AAMA MarCom budget for July 1, 2024–June 30, 2025.
- 560 • Approved the AAMA CEO annual review.
- 561 • Approved AAMA attendance at the National Colorectal Cancer Roundtable (NCCRT)
- 562 Annual Meeting.
- 563 • Approved the awarding of a life membership to be announced at the 2024 Annual
- 564 Conference.
- 565 • Approved proposed Bylaws amendments to be presented to the 2024 House of Delegates.
- 566 • Approved the Marketing Strategy Team project for the AAMA Annual Conference.
- 567 • Approved MARWeek 2024 poster.
- 568 • Approved each issue of *Medical Assisting Today* will contain one continuing education
- 569 article carrying 2.5 CEUs, and a second continuing education article carrying 1 CEU.
- 570 • Approved the following BOT virtual meetings minutes
 - 571 ○ October 12, 2023
 - 572 ○ December 10, 2023
 - 573 ○ January 14, 2024
 - 574 ○ March 10, 2024
 - 575 ○ April 7, 2024
 - 576 ○ May 5, 2024
- 577 • Approved the following BOT in-person meetings minutes
 - 578 ○ Pre-HOD BOT meeting, September 22, 2023
 - 579 ○ BOT Planning Session, November 10, 2023
 - 580 ○ Pre-HOD Executive Session, September 21, 2023
 - 581 ○ Post-HOD Executive Session, September 25, 2023
 - 582 ○ BOT Planning Session Executive Session, November 11, 2023

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

591
 592 Monica Case, CMA (AAMA)
 593 AAMA President 2023–2024

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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 67th 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 Mokijewsk, 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

- 772 • Bylaws-Ex Officio-Virtual-July 1, 2024
- 773 • MGMA Podcast Collaboration Discussion – CEO Balasa, MGMA Sr. Editor Williams,
- 774 MBA, MSEM-Virtual Meeting-July 8, 2024
- 775 • AAMA Conference 2024 Schedule-Conference Planner Basel, CEO Balasa, Continuing
- 776 Education Director Mickowski, Conference Chair Novak-Virtual Meeting-July 8, 2024
- 777 • Advisory Task Force, Annual Conference and Awards Committees Chair, Board Services
- 778 Manager Flynn, MarCom Sr. Director Mokijewski-Virtual Monthly Meeting-July 10,
- 779 2024
- 780 • AAMA BOT-Virtual Meeting-July 14, 2024
- 781 • Membership Development Strategy Team-Ex Officio-Virtual Meeting – July 17, 2024
- 782 • FASD MAP Steering Committee-Virtual Meeting-July 18, 2024
- 783 • Educators Collaborative Task Force-Ex Officio-Virtual Meeting-July 18, 2024
- 784 • AAMA CB Summer Meeting-Chicago, Illinois-July 20, 2024
- 785 • Documents Committee-Ex Officio-Virtual Meeting-July 22, 2024
- 786

787 **POST CONFERENCE BOT MEETING**

- 788 • This President presided at the Post Conference Board of Trustees Executive Meeting.
- 789 IT Consultant Michael Knight-
- 790 ○ Completed newly elected trustees Microsoft Teams setup and email addresses.
- 791 ○ Presented updates on the current infrastructure of the current AAMA website, how
- 792 fragile it was and beyond just upgrading.
- 793 ○ Presented updates for the restructuring and building of a new AAMA website project
- 794 to meet the AAMA needs and wants. Bids had been received and vendors were being
- 795 narrowed down based on project needs, deliverables, and knowledge of our software.
- 796 ○ Vendor bids would be presented during the BOT Planning Session.
- 797 • CEO/Legal Counsel Balasa-
- 798 ○ Discussed the importance of confidentiality among the BOT members, the Conflict-
- 799 of-Interest document and Confidentiality Policy Agreement to be signed by each
- 800 BOT members yearly.
- 801 • This officer-
- 802 ○ Presented and the Board of Trustees approved appointments of chairs and members of
- 803 committees, strategy teams, and task forces.
- 804 ○ Assigned the 2023–2024 chairs to contact the 2022–2023 chairs and discuss the status
- 805 of pending projects, as those projects need to be followed through and completed.
- 806 ○ A brief orientation and BOT packet were given, and documents were discussed.
- 807 These documents would be sent electronically, and all BOT members were to be
- 808 familiar with them prior to the BOT Planning Session.
- 809 ○ Announced the BOT Planning Session dates were November 10–11, 2023, in
- 810 Chicago, Illinois, and more information will be sent by email.
- 811 ○ Assigned BOT members to mentor and assist the newly elected trustees. Immediate
- 812 Past President Novak assigned to Trustee Quinn, Secretary Thomas assigned to
- 813 Trustee Thomas, and Vice President Wicker assigned to Trustee Sawyer.
- 814 ○ Reminded the BOT to attend the Meet and Greet with the committees, strategy teams,
- 815 and task forces at 1:30 p.m. following this meeting.
- 816 ○ Any new and unfinished business was reviewed and addressed as needed.
- 817

818 **2023–2024 AAMA COMMITTEE MEMBERS MEET AND GREET**

- 819 • This officer welcomed everyone in attendance. This was followed by introductions from the
820 BOT, AAMA staff, committee chairs, and members present. Time was allotted for each
821 committee to meet, the chair to cover the charge of the committee, and to exchange ideas and
822 comments about the work ahead. This meeting was well attended and informative.
823

824 **AAMA Exhibiting Opportunities**

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

- 827 • This President, along with CEO Balasa, Immediate Past President Novak, and Social Media
828 Manager Eldridge, staffed the AAMA’s booth during this conference. With over 3,000
829 attendees, the booth had a great amount of traffic. Interests and questions included where the
830 attendees can find medical assistants, credentialed medical assistants, more training and
831 continuing education for their employees. This allowed promotion of the AAMA as the only
832 organization for medical assistants. Questions were raised about the scope of practice from
833 many states and CEO Balasa had many conversations with attendees. This officer provided
834 information including handouts for membership, continuing education available, professional
835 development, and the CMA (AAMA) credential and certification. This officer also discussed
836 the upcoming ABR-Medical Office Basics with attendees wanting some introductory training
837 for potential and current employees needing some basic medical office introduction. This
838 exhibit offered scanning of badges of attendees who visited the booth and a document of
839 their contact information. This information will be utilized for reaching out and providing
840 additional information about the AAMA, as many asked about membership and how their
841 employees can become certified. This officer attended a meeting with CEO Balasa,
842 Immediate Past President Novak, and MGMA Director of Content and Consulting Andrew
843 Hajde, CMPE. This meeting was productive, including collaborations between AAMA and
844 MGMA, and CEO Balasa following up for additional meetings and 2024 speaking
845 opportunities for MGMA.
- 846 • An email was sent from this AAMA Presidents email box to 89 attendees that were scanned
847 and wanted more information. A few highlights of the email included information about the
848 AAMA’s presence at the 2024 upcoming MGMA Leaders Conference and reconnecting with
849 them and other industry leaders. Mentioned and provided links for products including
850 Medical Office Basics, professional development and continuing education opportunities,
851 states scope of practice, and the Advisory Service. Many attendees wanted more information.
852

853 **AAFP (American Academy of Family Physicians) FMX, Exhibitor-Chicago, IL-October**
854 **27–29, 2023**

- 855 • This President, along with CEO Balasa, Immediate Past President Novak, Board Services
856 Manager Flynn, and Senior Marketing Director Mokijewski staffed the booth for the 2023
857 FMX. This conference had over 4,000 attendees, but less interest than FMX 2022. Location
858 of the AAMA booth and presence might have been a factor. Attendees visiting the booth
859 asked scope of practice questions of CEO Balasa. Other questions included: where to find
860 quality medical assistants; where to get additional training for their employees; with the
861 shortage of medical assistants and the hiring of non-trained personnel, where can they find
862 training for these types of hires to fit into their work schedules. Information was provided
863 including membership, continuing education/E-Learning Center, Population Health Module,
864 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,

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

940 **Board of Trustees Winter Open and Executive Meeting-Chicago, Illinois-February 9–10,**
 941 **2024**

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

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

964

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

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

989

990 **BOT Virtual Monthly Meetings**

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

998

999 **BOT Virtual Committee Meetings**

- 1000 • As President and Ex-Officio of committees, I attended nearly all the virtual meetings. This
- 1001 was not only for support if needed but I gained appreciativeness for the AAMA members on
- 1002 a personal level. These were committee members the BOT appointed. These types of
- 1003 meetings are very brainstorming and informative for the members as they learn more about
- 1004 the national level and how it functions. Many of these committee members I witnessed

1005 potential great future national leaders. This is where encouragement and mentoring begin.
1006 The contributions, ideas and future plans will help to the success of the growth of our
1007 organization.

1008

1009 **Continuing Education Board Meetings**

- 1010 • Planning Session - Asheville, NC - November 3–4, 2023.
- 1011 • Winter Meeting - Chicago, Illinois - February 11–12, 2024
- 1012 • Summer Meeting - Arlington, Virginia - June 21–22, 2024
 - 1013 ○ As AAMA President and Ex Officio, this officer attended all the CEB meetings. The
 - 1014 CEB Planning Session was a very productive meeting, leading to comprehensive
 - 1015 planning for reviewing of documents and projects for the 2023–2024 year. The CEB
 - 1016 winter meeting covered the areas discussed during the Planning Session. The CEB
 - 1017 summer meeting continued with the reviewing of documents and the 2023–2024
 - 1018 projects. This officer feels it is beneficial to engage with the members and observe
 - 1019 this board's work. Please see the report of 2023–2024 CEB Chair Amber Greer, CMA
 - 1020 (AAMA), BS, PBT(ASCP).
 - 1021

1021

1022 **Certification Board Meetings**

- 1023 • Winter Meeting-Philadelphia, Pennsylvania-February 24, 2024
- 1024 • Summer Meeting- Chicago, Illinois- July 20, 2024
 - 1025 ○ This AAMA President attended all the CB meetings. The CB winter board meeting
 - 1026 was productive, and this officer continued learning more about the functions and
 - 1027 workings of this board. Some discussion took place on how these two boards could
 - 1028 collaborate. The CB summer meeting was a full meeting with the regular business
 - 1029 and ongoing projects, as well as new projects. This officer was pleased to appoint a
 - 1030 CB member to serve on the BOT Educators Collaborative Task Force. This member
 - 1031 will give valued insight when certification and the CMA (AAMA) credential
 - 1032 questions arise.
 - 1033

1033

1034 **OTHER MEETINGS**

1035 **MGMA Virtual Collaboration Virtual Meeting-June 12, 2024**

- 1036 • MGMA Director of Content and Consulting Hajde, CMPE, AAMA CEO Balasa, Immediate
1037 Past President Novak, AAMA Board Services Manager Flynn, and this officer met.
1038 Discussions included co-branding, speaking opportunities for CEO Balasa, possibilities of a
1039 BOT liaison, and further discussions about joint podcasts.

1040

1041 **MGMA Podcast Collaboration Virtual Discussion – July 8, 2024**

- 1042 • CEO Balasa, MGMA Senior Editor Williams, MBA, MSEM, and this officer met to discuss
1043 AAMA’s podcast thoughts. Discussions included scope of practice, interview with CEO
1044 Balasa with getting to know him and his background, focus on medical assisting trends, and
1045 some information about the AAMA. The decision was to interview Balasa and then expand
1046 to other avenues. The podcast would last 25–30 minutes. The discussion was to post it before
1047 the MGMA Leaders Conference in October of 2024 to give us leverage before attending and
1048 exhibiting. The podcast was audio-recorded on July 16, 2024. MGMA will share the podcast
1049 link with AAMA for sharing the interview through our channels.

1050

1051 **REPRESENTATIVE BUREAU ASSIGNMENTS**

- 1052 • *New York Society of Medical Assistants General Assembly May 4, 2024*

1053 While this society did not host an in-person conference, this officer was asked to attend the
1054 General Assembly. The general assembly did allow voting for the officers and AAMA
1055 Delegates. The business ran smoothly and some brainstorming occurred for options to have a
1056 state conference in 2025.

1057
1058 The leadership will continue to move forward to explore the best way to host a state
1059 conference with an economical plan. The officer was asked to provide information for a
1060 chapter start up. Having some interest in organizing a new chapter does excite the leadership.
1061 New York medical assisting laws have been challenged for a while and there are some strives
1062 being made. These could be favorable, and the New York Society is rallying in hopes of
1063 increasing membership. This officer looks forward to the reorganizing of future in-person
1064 conferences.

1065
1066 Although this was a virtual meeting, this officer cherishes the opportunity and learning
1067 experience received from this state and was grateful for the opportunity to share AAMA
1068 information, present the power point including updates. This officer would like to thank
1069 2023–2024 NYSSMA President Kimberly Battaglini, CMA (AAMA), and 2024–2025
1070 NYSSMA Todd Michael Lasher, CMA (AAMA), for the opportunity to represent the
1071 AAMA. This representative wants to thank the officers and attendees for allowing this officer
1072 to attend virtually and engage with the attendees.

1073
1074 • ***Michigan Society of Medical Assistants Representative Assignment- Owosso, Michigan***
1075 ***May 17–19, 2024.***

1076 This officer was the AAMA Representative for MSMA 2024 Spring Conference in Owosso,
1077 Michigan held at the Comstock Inn. There were 55 attendees and provided attendees with the
1078 opportunity of 6.5 CEUs. There were many great topics, and the speakers were
1079 knowledgeable and engaging. This officer had the pleasure of serving as a Teller during the
1080 House of Delegates. The House of Delegates was a full day with much business completed
1081 including elections of officers and delegates to the AAMA 2024 Conference.

1082
1083 MSMA is trying to get medical assistants licensed in the state of Michigan. The two lobbyists
1084 they have been working with were present for the HOD and both presented updates on the
1085 status. The MSMA leaders are given regular updates on the process and progress made. This
1086 officer did have the privilege to meet not only the lobbyists but the paid registered
1087 parliamentarian the MSMA has used for many years.

1088
1089 Since Michigan is the 2024 Conference hosting state, information was provided to the
1090 attendees by the Michigan leadership and encouraging all to attend. This is a great
1091 opportunity for the Michigan members who might not have an opportunity to attend the
1092 national conference. The exhibitor’s area was great and the MSMA had many fund-raising
1093 opportunities. This office had the privilege to have breakfast and meet with the MSMA Past
1094 Presidents. All societies past presidents offer valuable knowledge and insights.

1095
1096 This officer was able to provide AAMA updates during various times of the conference, and
1097 all attendees were very receptive, and many questions were received. This officer was given
1098 dedicated time to present the power point with all updates from AAMA and this turned out to
1099 be a very engaging audience with many questions. This officer participated in the Knowledge

1100 Bowl. This officer participated in the installation of the 2024–2025 MSMA officers as the
1101 new leadership prepares for the upcoming year. This officer would like to thank MSMA
1102 2023–2024 President Christa Smith, CMA (AAMA), and the 2024-2025 newly installed
1103 President Kathy Stuut, CMA-A (AAMA) for the opportunity to represent the AAMA. This
1104 representative wants to thank Leigh Newell, CMA(AAMA), for her hospitality, all the
1105 officers and the attendees for allowing this officer to attend, renew old friendships, and form
1106 new ones. This officer will always cherish this opportunity and learning experience received
1107 and was grateful for the opportunity to share AAMA information.
1108

1109 **Fetal Alcohol Spectrum Disorders (FASD) MAP Steering Committee**

- 1110 • Virtual Meeting-December 13, 2023
- 1111 • Virtual Meeting-July 18, 2024
- 1112 • As a steering committee member for the Medical Assistant Partnership for Healthy
1113 Pregnancies and Families (MAP), this officer attended both virtual meetings. An overview of
1114 MAP’s year one and year two activities completed, in progress, or planned was presented.
1115 These activities were discussed, and some included: products for AAMA e-Learning Center,
1116 an article in the *Medical Assisting Today* Sept/Oct 2024 issue and attending and a speaking
1117 opportunity at the AAMA Annual Conference 2024. Information was provided about the new
1118 Walk & Talks, a link for the FASD Awareness Month Toolkit, and a link to their products
1119 website was provided. Representatives will be present to exhibit and present a CEU session
1120 during the AAMA Conference 2024. Discussion is taking place for speaking opportunities
1121 for the AAMA Conference 2025.
1122

1123 **Sun Bus Virtual Meeting-March 13, 2024**

- 1124 • This officer along with CEO Balasa and Immediate Past President Novak attended a meeting
1125 following up from 2023 discussions with Sun Bus. The purpose of this meeting was for Sun
1126 Bus and the AAMA to discuss the feasibility of collaborating and exploring partnership
1127 possibilities. This would be a great opportunity for the AAMA and our members. See the
1128 report of the Partnership Chair.
1129

1130 **E-Votes 2023–2024**

- 1131 Approved appointments to the CEB and its committees.
- 1132 Approved the AAMA volunteers for AAMA chairs and members of committees, strategy
1133 teams, and task forces.
- 1134 Approved the new AAMA logo.
- 1135 Approved the new AAMA logo colors.
- 1136 Appointed Secretary Thomas as chair of the Maxine Williams Scholarship Committee.
1137
1138

1139 **Maxine Williams Scholarship Fund (MWS Fund) Board of Directors Activity**

- 1140 • The MWS Fund board of directors approved adding ABHES schools to the scholarship form.
1141 The check will go directly to the students, and we will request a photo to promote the
1142 winners.
- 1143 • This board consists of the President, Vice President, and the Secretary. The board is required
1144 to have at least three members. The board voted to add the Immediate Past President to this
1145 board.
1146
1147

1148 **COMMITTEE APPOINTMENTS**

- 1149 • All volunteer leadership forms were reviewed, approved appointments and appointment
1150 letters were completed and emailed. With such an overwhelming response to volunteer forms
1151 received, anyone not appointed received a notification email thanking them for volunteering
1152 and encouraging them to apply in the future.

1153
1154 **COMMUNICATION**

- 1155 • This officer wrote a President’s Message, “A Note from President Case,” for the *Leaders*
1156 *Insider* for the months of November, January, March, April, May, June, and July as of the
1157 time this report was prepared.
- 1158 • This officer wrote the President’s Message for the *Medical Assisting Today* publication for
1159 all issues since the November/December 2023 issue.
- 1160 • This officer has been diligent in keeping open communications with the AAMA members by
1161 way of state and chapter leaders, and AAMA HOD delegates and alternates, with a copy to
1162 the BOT and the SoPPs. To mention a few examples: Notifications of dates and locations of
1163 the BOT open session meetings available to members; BOT Meetings Highlights; State and
1164 Chapter Deadlines and Dates Calendar; memos about unforeseen BOT resignations.
- 1165 • The Medical Office Basics non-AAMA member purchasers at the time of this report were
1166 35. They received a letter from this President thanking them for purchasing the AAMA
1167 product. This President provided information about membership benefits, including discounts
1168 on professional development and continuing education, which are only a small sample of the
1169 benefits we offer members.
- 1170 • Follow-up emails sent to 292 new CMAs (AAMA) nonmembers from the President
1171 congratulating them and providing information about the AAMA and membership benefits.

1172
1173 Due to the open office of the Vice President, assignments and responsibilities were reassigned.

1174
1175 Representatives Bureau assignments for annual state meeting requests:

- 1176 • Twenty-two requests were received from state societies. All states that submitted a request
1177 received a representative. The BOT received their assignments in a sealed envelope during
1178 the Winter BOT meeting. Social Media Chair Quinn took pictures as each BOT member
1179 opened their envelope and revealed their assigned state. This was the Social Media project
1180 kickoff to highlight state conferences and Representatives Bureau assignments.

1181
1182 The following states requested and received a representative:

1184 <u>State</u>	<u>Date</u>	<u>Name</u>
1185 South Carolina	March 14–17, 2024	Shannon Thomas, CMA (AAMA), AAS
1186 Washington	March 16–17, 2024	Virginia Thomas, CMA (AAMA)
1187 Connecticut	April 5–6, 2024	Sherry Bogar, CMA (AAMA), CN-BC
1188 Indiana	April 12–14, 2024	Aimee Quinn, CMA (AAMA)
1189 Wisconsin	April 18–20, 2024	Shirley Sawyer CMA (AAMA), CPC
1190 Missouri	April 19, 2024	Pam Neu, CMA (AAMA), MBA
1191 Florida	April 19–21, 2024	Aimee Quinn, CMA (AAMA)
1192 Montana	April 19–21, 2024	Natasha Geno, CMA (AAMA), ATS
1193 New York (Virtual HOD)	April 20–21, 2024	Monica Case, CMA (AAMA)
1194 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

1207

1208 **Management Steering Committee (MSC) CALLS OR MEETINGS**

- 1209 • There were MSC conference calls or virtual meetings as necessary, and all information was
 1210 then shared before or during the next BOT virtual or in person meeting.

1211

1212 **OTHER**

- 1213 • This officer has participated in numerous conference calls and virtual meetings throughout
 1214 the year. This officer met regularly and worked with CEO Balasa to respond to all questions
 1215 and complete all necessary duties and challenges brought to this officer. Maintaining the
 1216 integrity of the BOT and the AAMA was at the forefront.

- 1217 • This officer participated in regular meetings with the new Board Services and Project
 1218 Manager Flynn. Documents and protocols have been recreated. Timelines for staff day-to-
 1219 day functions and BOT projects are being established. This will ensure the BOT projects
 1220 move this organization forward while collaborating with AAMA staff.

- 1221 • This officer participated in regular meetings with Senior Director of MarCom Mokijewski
 1222 and/or Project Manager Flynn, to review and discuss updates, status of projects and
 1223 information.

1224

1225 This officer has also remained available to the MSC, BOT, CEO Balasa, AAMA Board Services
 1226 Manager, AAMA Staff Directors, IT/Website Project Manager, CB, CEB, MAERB, and all
 1227 AAMA members.

1228

1229 All correspondence and communications were responded to promptly.

1230

1231 This President would like to thank CEO and Legal Counsel Donald Balasa, JD, MBA, for his
 1232 availability and support, not only for this officer, but for the entire Board of Trustees. This
 1233 officer wishes to thank new Board Services Manager Sharon Flynn for her support and
 1234 willingness to help establish protocols for ensuring a successful team. I commend the AAMA
 1235 directors, managers, and staff for their willingness to support the efforts and ideas not only of
 1236 this officer. but of the entire Board of Trustees. I wish to thank Website Project Manager/IT
 1237 Knight for helping to keep this project on target.

1238

1239 This officer thanks the Board of Trustees for their dedication and drive to enhance, grow, and
 1240 promote the AAMA organization and the profession. Your dedication, willingness to standardize
 1241 protocols, and support of this officer is immensely appreciated. The BOT members continue to
 1242 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

1254 **American Association of Medical Assistants® (AAMA)**

1255 **Report of the Immediate Past President**

1256 **For the period ending September 2024**

1257

1258 The duties of the Immediate Past President are as follows:

1259 Serves as an officer of the Board of Trustees

1260 Serves as a member of the Management Steering Committee

1261 Serves as a member of the Budget and Finance Committee

1262 Serves as a member of the Maxine Willaims Board of Directors

1263 Serves as Chair of the Nominating Committee

1264

1265 Additionally, this officer was appointed to serve on the following:

1266 Annual Conference Committee – Chair

1267 Awards Committee – Chair

1268 Advisory Task Force – Chair

1269 Partnership Task Force – Chair

1270 Career Professional Development Committee – Member

1271

1272 **MEETINGS ATTENDED:**

1273 • AAMA Annual Conference, September 21–25, 2023 – Orlando, Florida

1274 • Board of Trustees Executive Session – Thursday, September 21, 2023

1275 • First Timers and Student Reception – Friday, September 22, 2023

1276 • Board of Trustees Open Session – Friday, September 22, 2023

1277 • Board of Trustees Executive Session Reconvene – Friday, September 22, 2023

1278 • CMA (AAMA) Knowledge Bowl – Friday, September 22, 2023

1279 • Excel Awards Ceremony – Friday, September 22, 2023

1280 • 67th House of Delegates – Saturday, September 23, 2023

1281 • Meet the Candidates – Saturday, September 23, 2023

1282 • SoPPs and AAMA BOT Meeting – Sunday, September 24, 2023

1283 • CEO, Conference Chair/Vice President and Conference Direct Meeting – Sunday,
1284 September 24, 2023

1285 • State Leaders Session – Sunday, September 24, 2023

1286 • Presidents Banquet – Sunday, September 24, 2023

1287 • Board of Trustees Post Conference Executive Session/Orientation, Maxine Williams
1288 Scholarship Fund Meetings – Monday, September 25, 2023

1289 • AAMA 2023-2024 Committees, Strategy Teams and Task Forces Meet and Greet
1290 Monday, September 24, 2023

1291 • AAMA MSC Meeting – October 11, 2023

1292 • AAMA BOT Virtual Meeting – October 12, 2023

1293 • Virtual Meeting with Sun Bus – Dr. Nern, CEO Balasa, President Case – Oct. 19, 2023

1294 • MGMA Exhibit, Nashville, TN – October 21–24, 2023

1295 • AAFP Exhibit, Chicago, IL – October 27–29, 2023

1296 • Meeting with AAMA Board Service Manager, AAMA Marketing Director and President
1297 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

- 1343 • BOT monthly meeting - virtual, May 5, 2024
- 1344 • Virtual meeting with writer for Career Professional Development – May 10, 2024
- 1345 • Career Professional Development virtual meeting – May 13, 2024
- 1346 • Bylaws Committee virtual meeting – May 14, 2024
- 1347 • Conference Committee Chair virtual meeting with Meeting Planner, Speaker, and
- 1348 President May 16, 2024
- 1349 • Awards Committee virtual meeting – May 16, 2024
- 1350 • Awards Chair virtual meeting with staff – May 20, 2024
- 1351 • Conference Committee virtual meeting with Meeting Planner K. Basel – May 22, 2024
- 1352 • BOT special meeting on documents – May 29, 2024
- 1353 • Conference and Awards Chair monthly meeting with staff, June 6, 2024
- 1354 • BOT monthly meeting – virtual – June 9, 2024
- 1355 • Virtual meeting with MGMA – June 12, 2024
- 1356 • CEB summer Board meeting – Arlington VA, June 21–22, 2024
- 1357 • AAMA summer Board meeting – Arlington VA, June 23–24, 2024
- 1358 • AAMA Leadership virtual meeting – June 29, 2024
- 1359 • Monthly meeting with Board Services Manager and MarCom Senior Director for
- 1360 Awards, Conference, and Advisory Task Force updates – Wed., July 10, 2024
- 1361 • CB summer Board meeting, Chicago, IL – Friday July 19–20, 2024
- 1362 • Conference call meeting with Dr. Nern, Sun Bus, Monday, July 22, 2024

1363
1364 **ADDITIONAL MEETINGS:**

1365
1366 **MGMA LEADERS CONFERENCE (Medical Group Management Association); Nashville,**

1367 **TN, October 22–24.**
1368 This officer assisted CEO Balasa, President Case, and Social Media Manager Eldridge working
1369 the AAMA’s booth at the 2023 MGMA Leaders Conference. This conference had over 3,000
1370 attendees and our booth had a great deal of traffic and interest from many of those attendees.
1371 This exhibit allowed for promotional information and materials related to AAMA membership,
1372 continuing education, and our CMA (AAMA) certification. This officer was also in attendance
1373 with CEO Balasa, President Case, and Andrew Hajde, Director of Content and Consulting for
1374 MGMA. This meeting was incredibly positive with guarantees of continued collaborations
1375 between AAMA and MGMA.

1376
1377 **AAFP FMX (American Academy of Family Physicians): Chicago, Illinois, Oct. 27–29, 2023.**

1378 This officer assisted CEO Balasa, President Case, and Board Services Manager Flynn, and
1379 MarCom Senior Director Mokijewski working the AAMA booth at the 2023 FMX. This
1380 conference had over 4,000 attendees; however, the traffic was not as good as the previous 2022
1381 FMX. Contacts were established with attendees as well as introductions and small conversations
1382 with fellow exhibitors which could lead to additional valuable partnership opportunities or
1383 mutually beneficial relationships.

1384
1385 **AAMA REPRESENTATIVES BUREAU**

1386
1387 This officer was assigned to be the AAMA representative for the New Hampshire Society of
1388 Medical Assistants. This was a virtual meeting with sixty-nine attendees. NHSMA provided
1389 attendees with 4 AAMA CEUs from excellent speakers. Three of which were clinical topics and

1390 one that was clinical or general. NHSMA state leaders have been reaching out to nonmember
1391 credentialed medical assistants to encourage them to participate in their meetings and education.
1392 The NHSMA appreciates and supports the recent AAMA Bylaws that granted all credentialed
1393 medical assistants active status membership. During their elections for delegates to the AAMA
1394 House of Delegates they were excited to have a long-standing member with the RMA credential
1395 the opportunity to serve as their state delegate for the AAMA 2024 HOD.

1396

1397

1398 **COMMITTEE/STRATEGY TEAM/TASK FORCE ASSIGNMENTS:**

1399

1400 **Annual Conference Committee:**

1401 This officer, as chair of this committee, contacted all members of the committee to welcome
1402 them to the committee after the 2023 Annual Conference. This officer scheduled monthly
1403 meetings with MarCom Senior Director, AAMA Board Services Manager, AAMA Meeting
1404 Planner, President Case, and Don Balasa, CEO and Legal Counsel. See further details in the
1405 Annual Conference Committee report.

1406

1407 **Awards Committee:**

1408 This officer as chair of this committee has met with committee members on several occasions to
1409 review proceedings and needs for the AAMA Welcome and Awards event. See further details in
1410 the Awards Committee Report.

1411

1412 **Advisory Task Force:**

1413 This officer as chair continues to send email updates to committee members. For further
1414 information see details in the Advisory Task Force Report.

1415

1416 **Nominating Committee:**

1417 This officer as chair provided communications and orientation of the newly elected committee
1418 members. See further details in the Nominating Committee Report.

1419

1420 **Partnership Task Force:**

1421 This officer was appointed to serve as the Partnership Chair upon notification of the previously
1422 appointed chair's resignation. See the Report of the Partnership Task Force.

1423

1424 **Career Professional Development Committee:**

1425 This officer as a member attended and participated in multiple virtual meetings as needed related
1426 to CPDC projects. All assignments or requests have been responded to and all deadlines have
1427 been met.

1428

1429 **ADDITIONAL ASSIGNMENTS:**

1430

1431 ➤ This officer was asked by President Case as a member of MSC to mentor newly elected
1432 Trustees. This officer initiated multiple communications as well as timely responding to
1433 all questions received.

1434 ➤ This officer was asked to review the Volunteer Leaders Position Descriptions (VLPD)
1435 and compare it to the BOT Policy and Procedures Document and the AAMA Bylaws for
1436 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

1461 **American Association of Medical Assistants® (AAMA)**

1462 **Report of the Secretary**

1463 **For the period ending September 2024**

1464

1465 The duties of Secretary are as follows:

1466

1467 • Serves as a member of the Board of Trustees and the Maxine Williams Board of
1468 Directors

1469 • Serves as a member of the Management Steering Committee

1470 • Serves as a member of the Budget and Finance Committee

1471 • Serves as a member of the AAMA Representatives Bureau

1472

1473 Additionally, this Secretary was appointed to serve on the following:

1474

1475 • Documents – Member

1476 • Marketing Strategy Team – Chair

1477 • Maxine Williams Scholarship Committee – Chair

1478

1479 **MEETINGS ATTENDED:**

1480

1481 • AAMA Annual Conference, September 22–25, 2023, Orlando, Florida

1482 • Maxine Williams Scholarship Fund Board of Directors Meeting, September 25, 2023,
1483 Orlando, Florida

1484 • Post HOD Executive Session, September 25, 2023, Orlando, Florida

1485 • MSC Meeting – virtual, October 11, 2023

1486 • BOT Monthly Meeting – virtual, October 12, 2023

1487 • Documents Committee Meeting – virtual, October 23, 2023

1488 • MSC Meeting, November 8-9, 2023, Chicago, Illinois

1489 • BOT Planning Session, November 10-11, 2023, Chicago, Illinois

1490 • MSC Meeting – virtual, November 28, 2023

1491 • BOT Monthly Meeting – virtual, December 10, 2023

1492 • Marketing Strategy Team Meeting – virtual, December 30, 2023

1493 • BOT Monthly Meeting – virtual, January 14, 2024

1494 • Documents Committee Meeting – virtual, January 17, 2024

1495 • MSC Meeting – virtual, January 29, 2024

1496 • Documents Committee – virtual, February 5, 2024

1497 • MSC Meeting – February 8, 2024, Chicago, Illinois

1498 • BOT Winter Meeting – February 9-10, 2024, Chicago, Illinois

1499 • Documents Committee Meeting – virtual, February 26, 2024

1500 • BOT Monthly Meeting - virtual, March 10, 2024

1501 • Washington State Society of Medical Assistants Leadership Retreat – March 16–17,
1502 2024, Bellingham, Washington

1503 • AAMA Leadership CEU Session – virtual, March 23, 2024

1504 • Documents Committee – virtual, March 25, 2024

1505 • 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
1519 **AAMA REPRESENTATIVES BUREAU**

- 1520
- 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
1541 **COMMITTEE/STRATEGY TEAM ASSIGNMENTS:**

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

1553 As of the writing of this report, this officer has prepared and sent the following minutes, made
1554 corrections, and filed final copies with the AAMA Executive Office: AAMA Pre-Conference
1555 Executive Session (September 21–22, 2023), AAMA Pre-Conference Open Session (September
1556 22, 2023), AAMA Post-Conference Executive Session (September 25, 2023), BOT Planning
1557 Session (November 10-11, 2023), and all monthly BOT virtual meetings (October 12, 2023,
1558 December 10, 2023, January 14, 2024, March 10, 2024, April 7, 2024, and May 5, 2024). The
1559 Board of Trustees has approved all minutes. As of the writing of this report, this officer has
1560 completed the minutes of the June 9, 2024, and July 14, 2024, BOT virtual meetings. This officer
1561 has forwarded the minutes to the MSC for review. Once the MSC has completed their review,
1562 these minutes will be sent to the BOT for final review and approval at the next scheduled virtual
1563 meeting. There are upcoming BOT monthly virtual meetings in August, and September. Once
1564 these meetings are completed, this officer will complete the minutes and send them to the MSC
1565 for review. Once approved by the MSC, the minutes will be sent to the BOT for final review and
1566 approval.

1567
1568 This officer received E-Ballots at the request of President Case and completed them by the
1569 deadline. All correspondence, requests for information, and all assignments have been responded
1570 to in a timely manner and all deadlines have been met.

1571
1572 This officer wishes to extend a thank you to President Monica Case, Chief Executive Officer and
1573 House Legal Counsel Donald Balasa, JD, MBA, and the AAMA staff for their patience and
1574 support and for their dedication to the medical assisting profession. Thank you to the members of
1575 the AAMA for your trust and support in allowing me the opportunity to serve this organization.

1576
1577 Virginia Thomas, CMA (AAMA)
1578 Secretary-Treasurer 2022–2024

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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.

1676 The following are tasks that this officer received as part of participation of appointed AAMA
1677 Committees:

1678
1679 **ANNUAL CONFERENCE COMMITTEE**

- 1680 • Participated in monthly virtual meetings (last Wednesday of each month)
- 1681 • Responded to emails from Chair Novak for committee tasks and votes
- 1682 • May 16, 2024, participated in a meeting with Chair Novak and Meeting Planner Basel to discuss
1683 layout of HOD in Grand Rapids

1684
1685 **CAREER PROFESSIONAL DEVELOPMENT COMMITTEE**

- 1686 • Participated in virtual meetings as scheduled by Chair Neu
- 1687 • Reviewed videos and print ads for Medical Office Basics Modules
- 1688 • Reviewed information and presentation on new badge project
- 1689 • Responded to email and votes as requested by Chair Neu
- 1690 • Refer to report of the Chair

1691
1692 **HOD MINUTES**

- 1693 • Members for committee were selected and approved by President Case:
 - 1694 ○ Shirley Sawyer, CMA (AAMA) – Trustee
 - 1695 ○ Sandra Williams, CMA (AAMA) – Trustee

1696
1697 **STRATEGIC ISSUES PLANNING COMMITTEE**

- 1698 • Participated in development and update of 2023–2025 Strategic Issues Plan
- 1699 • Assisted with updating of Excel Spread sheet with documentation of what items are completed
1700 towards each Strategic Issue Plan Goal
- 1701 • Refer to report of the Chair

1702
1703 **REPRESENTATIVE BUREAU ASSIGNMENTS**

1704
1705 **Connecticut State Society of Medical Assistants**

- 1706 • This officer attended the Connecticut Annual Conference April 5–6, 2024, in Hartford,
1707 Connecticut. There were fifty-three attendees (Members 35, Non-Members 6, Faculty 7 and
1708 Students 5) and 15 CEU sessions by excellent speakers. Connecticut State Society offers CTSMA
1709 Spirit of Giving, where they pick a charity or special project of the year to donate to. Connecticut
1710 Society promotes that attendees dress down for the first day for a monetary donation and those
1711 donations go to the selected organization. For 2024 Connecticut Society selected Foundation for
1712 Sarcoidosis Research. There was a representative present at this year’s conference where they
1713 also served as a special guest speaker. The Sarcoidosis Foundation announced that CTSMA’s
1714 Vice President has been selected to serve as a speaker for their organization in Connecticut.
1715 Officers and delegates were also nominated and elected during their General Assembly Meeting.
1716 The General Assembly elected two new individuals who volunteered as delegates and one new
1717 Board of Director member. This representative was honored to install the new officers of
1718 Connecticut Society. This representative was provided allotted time to present the AAMA Power
1719 Point to discuss changes and upcoming events for the AAMA. The attendees were very
1720 appreciative of the updates. This representative was honored to attend the Connecticut annual
1721 meeting and appreciated the warm and friendly hospitality by all Connecticut leaders and
1722 attendees.

1723
1724 **Maine State Society of Medical Assistants**

- 1725 • This officer attended the Maine Annual Conference April 27, 2024, in Bangor, Maine. There
1726 were approximately fifty-five attendees and four CEU sessions by excellent speakers. The CEUs
1727 were very engaging, especially a special presentation by Rock Steady Boxing. This organization

1728 enables people with Parkinson’s Disease to fight back by empowering them to improve their
1729 quality of life through non-contact exercise curriculum. One of the speakers was a member of
1730 AAMA, however she was a credentialed CCMA that did an excellent presentation on securing
1731 DME for patients. This CCMA discussed how important the AAMA is to the profession and how
1732 it is the only organization for medical assistants therefore she could not wait to join the
1733 association. This representative presented the AAMA Power Point that highlighted changes and
1734 upcoming events for the AAMA. This representative was humbled to be asked to attend the
1735 Maine annual meeting and appreciated the warm and welcoming hospitality.
1736

1737 Southwest Regional Meeting

- 1738 • This officer attended the Southwest Regional Meeting July 19–20, 2024, in Oklahoma City,
1739 Oklahoma. This is a yearly event hosted on the third weekend of every July. The southwestern
1740 states rotate hosting this leadership conference alphabetically. The Southwest Regional Group is
1741 made up of California, Colorado, Hawaii, Nevada, New Mexico, Oklahoma, Texas, and Utah.
1742 There were approximately thirty-one attendees including approximately 10 CMA non-members,
1743 with attendees coming from California, Colorado, New Mexico, Texas, and Utah. All CEUS
1744 presented were on leadership skills and tools. There was a total of 12 CEUS available to
1745 participate in. The CEUs were interactive, and the agenda was laid out so that each topic
1746 connected to the topic before it. The hosting society, Oklahoma allowed this representative an
1747 allotment of time to be able to engage with the attendees and present the AAMA Updates Power
1748 Point. During the presentation this officer provided historical facts to those in attendance,
1749 especially since many of them were non-members and provided prizes for the correct answer.
1750 This representative was honored to have been asked to attend this annual gathering of the
1751 Southwestern state leaders.
1752

1753 This officer participated in all e-votes and responded to correspondence as requested by President Case in
1754 a timely manner. The officer participated in all virtual board meetings and virtual committee meetings at
1755 the request of President Case and the committee chairs. This officer participated and completed all special
1756 assignments including review of the Volunteer Leadership Position Description manual, CEB Standing
1757 Rules and Guidelines and the Board of Trustee’s manual.
1758

1759 This officer would like to thank President Case and Immediate Past President Novak for their leadership
1760 and continued contributions to the AAMA. Throughout the trials and tribulations of the last year you
1761 never lost sight of what the real objective was and continues to be. Neither of you ever forgot that we are
1762 in all in this together for the elevating our members and the bringing recognition to the profession. Thank
1763 you for the inspiration.
1764

1765 This officer would like to thank Don Balasa, JD, MBA, CEO, for his many years of service and guidance
1766 to the AAMA Volunteer Leaders. A huge thank you to Sharon Flynn, Board Services Manager, for
1767 joining this organization and bringing a different perspective to help improve the growth of this
1768 organization. Thank you to all the AAMA staff, for their support and willingness to serve all the AAMA
1769 members. This officer would like to commend and recognize the volunteer leaders of the Certifying
1770 Board and Continuing Education Board. Your jobs are not easy and yet you do it with grace and passion.
1771

1772 Finally, this officer would like to thank the members, along with the amazing men and women that
1773 choose daily to lead them. Thank you for being front line workers both professionally for your patients
1774 and for the AAMA. Know that your hard work does not go unnoticed and is not unappreciated. Thank
1775 you for all that you do.
1776

1777
1778 Sherry Bogar, CMA (AAMA), CN-BC
1779 Speaker of the House 2023–2025
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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, 2024. It was a fantastic opportunity to engage with the Montana Society, fostering learning and fellowship. There were twenty-six registered attendees with nine CEUs offered. The sessions were well-received, and the speakers were informative. This officer presented one CEU on suicide prevention and shared the AAMA PowerPoint, highlighting benefits and resources. Additionally, this officer installed the newly elected officers. This officer thanks Montana SMA for their hospitality.

1855

- **North Carolina Assignment**

1856

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

1857

COMMITTEES SERVED:

1858

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

1953 **REPRESENTATIVES BUREAU ASSIGNMENTS:**

1954

1955

- Idaho Society of Medical Assistant Annual Conference, April 26–27, 2024

1956

- 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.

1957

1958

1959

1960

1961

1962

- Pennsylvania Society of Medical Assistant Annual Conference, May 4, 2024

1963

- 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.

1964

1965

1966

1967

1968

COMMITTEE/STRATEGY TEAM ASSIGNMENTS:

1969

1970

- Annual Conference Committee – Member

1971

- Please see the report of the Chair. This member has participated in emails and virtual meetings as called by the Chair.

1972

1973

- Conference Committee Meeting, February 28, 2024

1974

- Conference Committee Meeting, March 27, 2024

1975

- Conference Committee Meeting, May 22, 2024

1976

- Provided the layout and format for the State Leaders Session at Annual Conference.

1977

1978

- All assignments have been completed

1979

1980

- Bylaws and Resolutions Committee – Member

1981

- Please see the report of the Chair. This member has been in contact with the Chair in person and via email.

1982

1983

- Bylaws Committee Meeting, March 4, 2024

1984

- Bylaws Committee Meeting, April 15, 2024

1985

- Bylaws Committee Meeting, May 14, 2024

1986

- Bylaws Committee Meeting, June 7, 2024

1987

- Bylaws Committee Meeting, July 1, 2024

1988

- Assigned to provide the rationale for the proposed Bylaws amendments (PBAs) from the previous couple of years. Completed

1989

- Assigned to facilitate the May 14, 2024, virtual meeting and provided members' assignments for the PBA rationale with due date. Completed

1990

1991

- 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.

1992

1993

1994

1995

- All other assignments have been completed.

1996

1997

- Educators Collaborative Task Force – Member

1998

- 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.

1999

2000

- 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

OTHER ASSIGNMENTS:

- 2021
- 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

2041 **American Association of Medical Assistants® (AAMA)**

2042 **Report of Trustee Miller**

2043 **For the Period Ending September 2024**

2044

2045 The duties of a Trustee are as follows:

2046 Serve as member of the Board of Trustees

2047 Serve as a member of the AAMA Representatives Bureau

2048

2049 Additionally, this Trustee was appointed to serve on the following:

2050 Awards Committee 2023–2024 Member

2051 Bylaws and Resolutions 2023–2024 Chair

2052 Membership Development 2023–2024 Member

2053 Partnership Task Force 2023–2024 Member

2054

2055 **BOARD OF TRUSTEES and COMMITTEE MEETINGS ATTENDED:**

2056

2057 AAMA 2023 Annual Conference, Lake Buena Vista, FL-September 22–25, 2023

2058 • Board of Trustees-Pre HOD-Executive Session, Lake Buena Vista, FL-September 21,
2059 2023

2060 • First Timers and Students Reception, Lake Buena Vista, FL-September 22, 2023

2061 • Board of Trustees Executive Session and Endowment Meetings, Lake Buena Vista, FL-
2062 September 22, 2023

2063 • CMA(AAMA) Knowledge Bowl, Lake Buena Vista, FL-September 22, 2023

2064 • Welcome and Awards Celebration, Lake Buena Vista, FL-September 22, 2023

2065 • AAMA HOD Sessions I & II, Lake Buena Vista, FL-September 23, 2023

2066 • Meet the Candidates, Lake Buena Vista, FL-September 23, 2023

2067 • AAMA Reference Committees, Lake Buena Vista, FL-September 23, 2023

2068 • AAMA HOD Reconvene and Voting, Lake Buena Vista, FL-September 23, 2023

2069 • Meeting with the Society of Past Presidents (SoPPs), Lake Buena Vista, FL-
2070 September 24, 2023

2071 • State Leaders Session, Lake Buena Vista, FL-September 24, 2023

2072 • President’s Banquet, Lake Buena Vista, FL-September 24, 2023

2073 • BOT Orientation, Lake Buena Vista, FL-September 25, 2023

2074 • BOT Post Conference Meeting, Lake Buena Vista, FL-September 25, 2023

2075 • AAMA Committees, Strategy Teams, and Task Force Meet and Greet,
2076 Lake Buena Vista, FL-September 25, 2023

2077 • BOT Meeting Conference Updates-Virtual, October 12, 2023

2078 • Membership Meeting-Virtual, November 1, 2023

2079 • AAMA Planning Session, Chicago, IL-November 10–11, 2023

2080 • Bylaws Meeting-Virtual, November 14, 2023

2081 • BOT Meeting-Virtual, December 10, 2023

2082 • Membership Meeting-Virtual, January 9, 2024

2083 • Awards Committee Meeting-Conference Call, January 12, 2024

2084 • BOT Meeting-Virtual, January 14, 2024

2085 • 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 meetings and the GA where she was asked to serve as parliamentarian. This trustee attended the educational sessions and found them to be interesting. This Trustee presented a CEU session on Leadership Tips and Parliamentary Procedure. During the Saturday lunch newly certified and recertified members were recognized. They held their Installation of 2024–2025 Officers. President, Barb Carter, CMA (AAMA), Vice President, Angie Eytcheson, CMA (AAMA) CPC, Secretary, Steph Richards, CMA (AAMA), Treasurer, Jen Kocian, CMA (AAMA), CPC, Speaker, Terrie King, CMA (AAMA), Vice Speaker, Shannon Kibbee, CMA (AAMA), CRCS, and Immediate Past President, Angie McCarter, CMA (AAMA), LRT. They do a charity event on Friday, for a \$5.00 donation you can wear jeans, it was highly successful. They had eighty-seven attendees including fourteen nonmembers and one student. Trustee Miller met individually with several members including the student member. Questions were answered and information given. This Trustee thanks the NSMA for their hospitality.

2114

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

2115

This was a late assignment due to the original AAMA Rep assigned was not able to attend their meeting. As an OSMA Officer, Miller already had commitments but was able to

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2122

2133 represent AAMA even during her OSMA duties. Miller attended all business meetings
2134 including pre and post conference board meetings, and the GA. She was given the opportunity
2135 at lunch on Thursday to give the AAMA updates and answer questions. Very few people
2136 knew about Beneplace, and she spoke with several members and looked at the Beneplace
2137 website. She also was approached with other questions and answered them individually.
2138 Elections were held during the GA with the following results: President Christy Oldenstadt,
2139 CMA (AAMA), President Elect Paula Purdy, CMA (AAMA), Secretary Shawn Molnar,
2140 CMA (AAMA), Treasurer Candy Miller, CMA (AAMA), Immediate Past President Alexis
2141 Holcomb, CMA (AAMA) and Delegates to National Alexis Holcomb and Shawn Molnar as
2142 well as President Oldenstadt and President Elect Purdy. Friday night was Medical BINGO for
2143 CEUs; all had a fun time. Overall, they had twenty-one CEUs available for the 3 days. They
2144 had one hundred, eighty-two attendees, with members from UT, CA, and WA in attendance.
2145 Trustee Miller thanks the members of the board for their hospitality.
2146

2147 **COMMITTEE STRATEGY TEAM ASSIGNMENTS:**

2148 *Awards Committee-Member*

- 2149 • Submitted ideas for the Awards Ceremony Theme
- 2150 • Contributed to the Student Essay Question Decision
- 2151 • Submitted Preference for Award Statues
- 2152 • Completed Excel Awards Judging as requested by Laura Niebrugge
- 2153 • Responded to all emails from Chair Novak and completed all assignments.
- 2154 • See Chair Novak’s report for further information
- 2155
- 2156

2157 *Bylaws and Resolutions Committee-Chair*

2158 HIGHLIGHTS:

- 2159 • Two Proposed Bylaws Amendments will be presented at the 2024 AAMA HOD for
2160 voting on acceptance or denial.
- 2161 • This Chair proposed to the Bylaws Committee, that the AAMA Bylaws Committee be
2162 open to volunteers with an AAMA Active membership, and that opportunity be included
2163 on the Volunteer Leadership Form beginning 2024–2025. The Bylaws Committee agreed
2164 and was voted on by the BOT and approved.
- 2165 • An Excel spreadsheet was created to keep track of State Bylaws and when they were
2166 reviewed for mandated changes and overall compliance with AAMA Bylaws.
- 2167 • All but one state sent their bylaws with the mandated changes from 2023 HOD. (Please
2168 see Chair Miller’s Bylaws Report for further information)
- 2169

2170 *Membership Development Strategy Team-Member*

- 2171 • This member was assigned to the team “AAMA Member Benefits.”
- 2172 • Assignments were completed on time, including, but not limited to:
 - 2173 • Suggestions and review of letters written for use by states for membership
 - 2174 recruitment and congratulations for New CMA and Non-Member CMA
 - 2175 • Vendor/Idea suggestions given for Beneplace.
 - 2176 • Actively took part in the development of a new AAMA “pin”
- 2177 • Attended and took part in all but one of the Focus groups. This was a wonderful
2178 experience in which much information was obtain information.
2179

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

2207 **American Association of Medical Assistants® (AAMA)**

2208 **Report of Trustee Neu**

2209 **For the Period Ending September 2024**

2210

2211 The duties of a Trustee are as follows:

2212

- 2213 • Serve as member of the Board of Trustees
- 2214 • Serve as a member of the AAMA Representatives Bureau

2215

2216 Additionally, this Trustee was appointed to serve on the following:

2217

- 2218 • Educators Collaborative Task Force-Chair
- 2219 • Career Professional Development Committee-Chair
- 2220 • Awards Committee-Member
- 2221 • Bylaws and Resolutions-Member
- 2222 • Strategic Issues Planning-Member

2223

2224 **MEETINGS ATTENDED:**

2225

- 2226 • AAMA 2023 Annual Conference-Orlando, FL-September 22–25, 2023
- 2227 • Board of Trustees - Pre-HOD Executive Session- September 21, 2023
- 2228 • First Timers and Students Reception-September 22, 2023
- 2229 • Board of Trustees Executive Session Reconvene- September 22, 2
- 2230 • General Session Knowledge Bowl-September 22, 202
- 2231 • Welcome and Awards Celebration – September 22, 2023
- 2232 • 67th AAMA House of Delegates – September 23, 2023
- 2233 • Meet the Candidates – September 23, 2023
- 2234 • House of Delegates Reference Committee Hearings: Reports, Bylaws –September 23,
- 2235 2023
- 2236 • House of Delegates Reconvene and Voting –September 23, 2023
- 2237 • AAMA Board of Trustees Meeting with the Society of Past Presidents (SoPPs) –
- 2238 September 24, 2023
- 2239 • AAMA State Leaders Session – September 24, 2023
- 2240 • AAMA Presidents Banquet – September 24, 2023
- 2241 • Post HOD Executive BOT Session September 25, 2023, Orlando, Florida
- 2242 • AAMA 2023-2024 Committees, Strategy Teams, and Task Forces Meet and Greet –
- 2243 September 25, 2023
- 2244 • Board of Trustees Meeting February 9–10, 2024, in Chicago, IL
- 2245 • Board of Trustees Meeting June 23–24, 2024, in Arlington, VA

2246

2247 This trustee participated in virtual meetings called by the President

2248

- 2248 • Virtual BOT Meeting January 14, 2024
- 2249 • Board of Trustees Meeting Virtual March 10, 2024
- 2250 • Board of Trustees Meeting, Executive Session Virtual, March 11, 2024
- 2251 • 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 75th 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)

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

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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 68th 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

2429 with Medical Assistant of the Year and Rita Michel with Life Membership. This trustee thanks
2430 the IN Society of Medical Assistants for their overwhelming hospitality while attending the
2431 conference!

2432
2433 ***Florida Society of Medical Assistants Annual Conference / Orlando, FL – April 18–21, 2024***

2434 This Trustee attended the 71st annual Florida Society of Medical Assistants State Conference,
2435 April 18–21. Registration was up this year to 49, several more than last year. In attendance this
2436 year were 37 members, 17 were first timers, 1 educator, and 11 non-members. Of the 11 non-
2437 members, 4 were CMAs (AAMA), 4 NHA members, 1 LPN (Educator), and 2 students. There
2438 were 6 CEUs offered. The CEU sessions were informative and knowledgeable and well-liked by
2439 all the attendees. Florida Society is divided into 7 Chapters. This trustee presented the AAMA
2440 PowerPoint, which included slides on benefits and AAMA resources. Congratulations to the
2441 newly installed officers for the FL SMA. At the conclusion of the conference, 2 of the NHA
2442 members signed up to be members of the AAMA and volunteered their time on several state
2443 committees. At the conclusion of the conference 3 students were awarded scholarships; this
2444 scholarship pays the registration fee for the 2025 FSMA Conference. This trustee thanks the FL
2445 SMA for their overwhelming hospitality while attending the conference!

2446
2447 **COMMITTEE/STRATEGY TEAM ASSIGNMENTS:**

2448 ***Bylaws Committee***

2449 This Trustee was available for meetings and discussions with the committee and the chair
2450 through multiple emails and virtual meetings. Please see the Bylaws committee report.

2451

2452 ***Documents Committee***

2453 This Trustee was available for meetings and discussions with the committee and the chair
2454 through multiple emails and virtual meetings. This trustee reviewed the following documents:
2455 Volunteer Leadership Position Descriptions (VLPD) and State/Chapter Treasurer Guidelines.
2456 Please see the documents committee report.

2457

2458 ***Membership Committee***

2459 This Trustee was available for meetings and discussions with the committee and the chair
2460 through multiple emails and virtual meetings. This trustee was assigned to and tasked with
2461 developing a focus group for CMA (AAMA) nonmembers/NCCA credentialed non-members.
2462 Please see the Membership Committee report.

2463

2464 ***Social Media Chair***

2465 Please see the Social Media Chair report.

2466

2467 **Other Assignments:**

2468 This trustee participated in all E-Ballots from President Case, and they were completed and
2469 submitted by the deadlines.

2470

2471 All correspondence has been responded to in a timely manner and all deadlines have been met.

2472

2473 This Trustee would like to thank President Case for her support and leadership this past year as
2474 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

2481 **American Association of Medical Assistants® (AAMA)**

2482 **Report of Trustee Sawyer**

2483 **For the Period Ending September 2024**

2484

2485 The duties of a Trustee are as follows:

2486 Serve as member of the Board of Trustees

2487 Serve as a member of the AAMA Representatives Bureau

2488

2489 Additionally, this Trustee was appointed to serve on the following:

2490 Editorial Advisory - Chair

2491 Maxine Williams Scholarship Committee - Member

2492 Career Professional Development Committee - Member

2493 Documents Committee - Member

2494 Partnership Task Force - Member

2495 Educators Collaborative Task Force - Member

2496 House of Delegates Minutes Committee - Member

2497

2498 **MEETINGS ATTENDED:**

2499

2500 BOT Post Conference Board Meeting, September 2023

2501 BOT Meeting – Virtual, October 12, 2023

2502 BOT Planning Session – Chicago, IL, November 10–11, 2023

2503 BOT Meeting –Virtual, December 10, 2023

2504 BOT Meeting – Virtual, January 14, 2024

2505 BOT Winter Meeting, Chicago, IL, February 9–10 2024

2506 BOT Meeting – Virtual, March 10, 2024

2507 BOT Meeting – Virtual, April 5, 2024

2508 BOT Meeting – Virtual, May 5, 2024

2509 BOT Meeting – Virtual, June 6, 2024

2510 BOT Summer Meeting – Arlington, VA, June 22–23, 2024

2511 BOT Meeting – Virtual, July 14, 2024

2512 Will attend the following BOT meeting virtually – August 11, 2024

2513 AAMA Annual Conference, September 19–23, 2024

2514

2515 **REPRESENTATIVES BUREAU ASSIGNMENTS:**

2516

2517 Wisconsin Society – April 18–20, 2024, Neenah, WI. The 67th Wisconsin Annual Conference

2518 was held in Neenah, WI. Hosted by the Valley Chapter. It was “The Future Vision of

2519 Healthcare”. It was a great meeting with approximately 70 in attendance and one student. The

2520 CEU sessions: Reclaim Balance through Energy, Music for Wellness, Forensic Toxicology for

2521 the Medical Assistant, Respiratory Diseases after the Pandemic were just a few. There were 11

2522 CEUs. All the speakers were great and knowledgeable on their topics. This was their first year of

2523 holding a general assembly. There were 28 members present for the assembly. There were no

2524 concerns that needed to be addressed. This representative was given time to show the slide

2525 presentation with AAMA updates. This representative was honored to attend this meeting and

2526 appreciated the warm and friendly hospitality of all members.

2527 Texas Society – May 17–19, 2024 – Austin, TX. The Texas Society annual meeting was held in
2528 Austin, the state capital. It was Back 2 Basics. It was a great meeting with approximately 36
2529 attendees in person and 22 virtual. Their CEU sessions: Skills Needed to Excel as a Leader, Self-
2530 Care is not Selfish, Texas Scope of Practice, Patient Advocacy, and Managing Student Anxiety
2531 were just a few of the topics presented. The speakers were all knowledgeable and interesting.
2532 There were approximately 15 members in the assembly with 10 eligible to vote. There was an
2533 evening session that included one CEU and pizza. They also did a beautiful memorial tribute to
2534 Ann Naegele. This representative was given time to show the slide presentation with AAMA
2535 updates. Trustee Sawyer was honored to install the new TSMA officers. There were no concerns
2536 to be addressed. It was this representative’s honor to attend this meeting and she appreciates the
2537 warm and hospitable Texas welcome.

2538

2539 **COMMITTEE/STRATEGY TEAM ASSIGNMENTS:**

2540

- 2541 • Maxine Williams Scholarship: Trustee Sawyer attended in person, November 2023;
2542 no assignments were given at that time. Attended a virtual meeting on June 6, 2024 –
2543 was given 12 applications to review and score. Attended virtual meetings on June 12,
2544 2024; discussed all applications and the top 5 applicants received scholarships.
- 2545 • Career Professional Development: Attended January 30, 2024, virtual meeting
2546 reviewed documents that were presented for the Medical Office Basics (MOB).
2547 February 8, 2024, Chicago, IL, discussed two topics for the MOA. April 8, 2024 -
2548 Discussed recordings of speakers and number of CEUs. May 13, 2024, discussed
2549 final pricing of MOB and CEUs after all documentation had been returned and
2550 branded. Will attend the virtual meeting in July 2024.
- 2551 • Documents Committee: Trustee Sawyer has attended virtual meetings in October
2552 2023 and January 2024; reviewed VLPD to make changes and bring it up to date,
2553 VLPD is waiting on CEB input before update can be finalized. February 26, 2024:
2554 Trustee Sawyer was given a section of the National and State Treasurer document to
2555 review and make suggestions. March 25, 2024: Trustee Sawyer reviewed 10 pages of
2556 the Policy and Procedures Manual. Trustee Sawyer will attend the July 2024 virtual
2557 meeting.
- 2558 • Partnership Task Force: Meeting, February 8, 2024: Trustee Sawyer was given two
2559 companies to call and set up meetings about partnering.
- 2560 • Educators Collaborative Task Force: April 10, 2024: Trustee Sawyer participated in
2561 discussion on how AAMA can help educators and students get involved. May 8,
2562 2024: Trustee Sawyer participated in discussion for letter to welcome students. June
2563 5, 2024: Trustee Sawyer participated in discussion about video on student
2564 membership and why it is important. July 18, 2024: gave question for Don to answer
2565 during podcast on Gainful Employment; added to the wish list for AAMA website.
2566 Trustee Sawyer will participate in the August 12, 2024, virtual meeting.
- 2567 • Editorial Advisory Chair: See separate report.

2568

2569 All correspondence has been responded to in a timely manner and all deadlines have been met.

2570

2571 Shirley Sawyer, CMA (AAMA)

2572 2023–2025 Trustee

2573

2574 **American Association of Medical Assistants® (AAMA)**

2575 **Report of Trustee Thomas**

2576 **For the Period Ending September 2024**

2577

2578 The duties of a Trustee are as follows:

2579 Serve as a member of the Board of Trustees

2580 Serve as a member of the AAMA Representatives Bureau

2581

2582 Additionally, this Trustee was appointed to serve on the following:

- 2583 • Awards
- 2584 • Leadership
- 2585 • Maxine Williams Scholarship
- 2586 • Educators Collaborative Task Force

2587

2588 **MEETINGS ATTENDED:**

2589

- 2590 • Virtual BOT, January 14, 2024
- 2591 • Virtual Leadership Committee Meeting, January 18, 2024
- 2592 • Virtual Leadership Committee Meeting, February 1, 2024
- 2593 • Winter BOT Meeting, Chicago, February 9 and 10
- 2594 • Virtual Leadership Committee Meeting, March 7, 2024
- 2595 • Virtual BOT Meeting, March 10, 2024
- 2596 • AAMA Representatives Bureau Assignment, South Carolina, March 14 through 17, 2024
- 2597
- 2598 • Virtual BOT Meeting, April 7, 2024
- 2599 • Virtual Educators Collaborative Task Force Meeting, April 10, 2024
- 2600 • Virtual BOT Meeting, May 5, 2024
- 2601 • Virtual Educators Collaborative Task Force Meeting, May 8, 2024
- 2602 • Virtual Awards Committee Meeting, May 16, 2024
- 2603 • Virtual Educators Collaborative Task Force Meeting, June 5, 2024
- 2604 • Virtual Maxine Williams Scholarship Committee Meeting, June 6, 2024
- 2605 • Virtual BOT Meeting, June 9, 2024
- 2606 • Virtual Maxine Williams Scholarship Committee Meeting, June 12, 2024
- 2607 • Virtual Leadership Committee Meeting, June 13, 2024
- 2608 • Summer BOT Meeting; Arlington, Virginia; June 23 through 24, 2024
- 2609 • Virtual BOT Meeting, July 14, 2024

2610

2611 **Meetings After Submission of Report Planning to Attend**

- 2612 • Virtual Educators Collaborative Task Force Meeting, July 18, 2024
- 2613 • Virtual Orientation for Delegates and Alternates, August 8, 2024
- 2614 • Virtual Orientation for Delegates and Alternates, September 7, 2024

2615

2616 **REPRESENTATIVES BUREAU ASSIGNMENTS:**

2617 This Trustee attended the South Carolina Society of Medical Assistants Annual Conference
2618 in Anderson, South Carolina, March 14–17, 2024. The conference hosted ninety-four

2619 attendees with twenty-two students. Their speakers were informative with a wide range of
2620 topics from American Sign Language, Balance and Fall Prevention, Working as a Team,
2621 Bowl of Knowledge, SC Dogs: Soft Paws, Warm Hearts, and many others. They also hosted
2622 various vendors and provided many opportunities for photos throughout the conference.
2623 The House of Delegates met on Friday and the business of the state was conducted in a
2624 timely and organized fashion. This Trustee had the opportunity to meet and speak with the
2625 students and talk about the AAMA and the benefits of joining and learn more about their
2626 “why” of becoming a medical assistant. This Trustee was also given time to meet with the
2627 members of the state to present information on the new Population Health, BENEPLACE
2628 benefits, the rebuilding of the Website, the E-Learning Center, and the true benefits of being
2629 a member of the AAMA. This Trustee was honored to install the newly elected.
2630 2024–2025 officers at the Saturday night Presidents Banquet, with the theme of Dream
2631 Catchers: Medical Assistants are the Dreamers of Health Care.
2632

2633 **COMMITTEE/STRATEGY TEAM ASSIGNMENTS:**

2634 **Awards Committee:**

2635 Discussed and reviewed the application forms for the Excel and Awards of Distinctions and
2636 made suggestions for some improvements to the forms. Participated in choosing the theme
2637 for the 2024 Annual Conference Awards Ceremony as well as all the activities for the
2638 evening. Reviewed the recommendations for this year’s awards and voted to use a new
2639 vendor in Michigan. We review and score the applications once they are all received for
2640 determination of winners for this year’s Excel Awards. (Refer to the report of Chair Deborah
2641 Novak)
2642
2643

2644 **Educators Collaborative Task Force:**

2645 Collaborating with educators to create new documents for educators to share with students
2646 about membership and benefits of the AAMA. Plans are being discussed and formulated
2647 regarding a Facebook page for medical assisting educators like our AAMA leadership page,
2648 along with other resources for educators and students. (Refer to the report of Chair Pam
2649 Neu)
2650

2651 **Leadership Committee:**

2652 Assigned to be the lead on producing questions for the Leadership Session at AAMA
2653 Annual Conference. Reached out to the group to compile the questions that will be used for
2654 the panel discussion portion of the Leadership Session at the Annual Conference.
2655 The panelist for the leadership round table at the Annual Conference has been selected. This
2656 committee is continuing to offer leadership CEU sessions throughout the year for state
2657 leadership. (Refer to the report of the Chair Claire Houghton)
2658

2659 **Maxine Williams Scholarship Committee:**

2660 Received and reviewed all applications that were submitted and have made
2661 recommendations for this year’s winners who will be presented at the Awards Ceremony in
2662 Grand Rapids. (Refer to the report of Chair Virginia Thomas)
2663

2664 **Additional Assignments:**

2665 This Trustee participated in e-ballots conducted by President Monica Case.
2666

2667 All correspondence has been responded to in a timely manner, and all deadlines have been
2668 met.

2669
2670 Trustee Thomas also wants to thank President Case for all her support, leadership, and
2671 guidance through her service on the Board of Trustees. This Trustee would also like to thank
2672 Donald Balasa, JD, MBA, for the guidance and willingness to serve the organization. This
2673 Trustee would also like to thank the AAMA staff for the dedication and hard work that they
2674 have put in this past year. They have endured many changes and losses but have pushed
2675 forward with strength and determination. This Trustee would also like to thank the members
2676 and all they do. If not for you, we would not have an AAMA. You do not go unnoticed or
2677 unappreciated. This Trustee would also like to thank the Certifying Board and the
2678 Continuing Education Board for your hard work on behalf of the members of the AAMA.
2679 Your dedication and the results of your hard work are remarkable. This Trustee would also
2680 like to thank the Board of Trustees for the hard work and dedication to the membership and
2681 betterment of the AAMA, and for the guidance and support of my first year on the board.

2682
2683
2684 Shannon Thomas CMA (AAMA)
2685 2023–2025 Trustee

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

2687 **Report of Trustee Williams**

2688 **For the Period Ending September 2024**

2689

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

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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

2806 borrowed for the program to the median earnings of its Federally aided graduates. For a
2807 program to pass, its graduates' debt payments must be no more than 8% of annual
2808 earnings or 20% of discretionary earnings, which is defined as annual earnings minus
2809 150% of the Federal poverty guideline for a single individual (about \$21,870 in 2023).
2810 • A new earnings premium (EP) test that measures whether the typical graduate from a
2811 program that received Federal aid is earning at least as much as a typical high school
2812 graduate in the labor force (i.e., either working or unemployed) in their State between
2813 the ages of 25 and 34. This is equal to roughly \$25,000 nationally but varies across
2814 States.

2815
2816 *Specifically, what will trigger the loss of Title IV eligibility for GE programs?*
2817 The following is an excerpt from the “Dear Colleague Letter (GEN-24-04): Regulatory
2818 Requirements for Financial Value Transparency and Gainful Employment”:

- 2819 The regulations:
- 2820 • Provide that a GE program loses Title IV eligibility if it either fails the D/E rates
2821 measure in two out of any three consecutive award years for which rates are
2822 calculated or the EP measure in two out of any three consecutive award years for
2823 which rates are calculated.
 - 2824 • Establish a three-year period of ineligibility for failing GE programs that have
2825 been voluntarily discontinued or withdrawn from Title IV eligibility by an
2826 institution, or that lose eligibility as a result of failing the D/E rates or EP metric,
2827 during which the Department will not approve a substantially similar program in
2828 the same 4-digit CIP code range as the failing program.
 - 2829 • Require institutions to provide warnings to current and prospective students for
2830 GE programs that are at risk of a loss of Title IV eligibility due to having failed
2831 one of the metrics in one of the two most recent award years for which the
2832 program received metrics, content and delivery of which to be specified by the
2833 Department, and provide that students must acknowledge having seen these
2834 warnings before the institution may enter into an enrollment agreement with the
2835 student or disburse any Title IV funds.

2836
2837 Mr. Balasa will be prepared to assist program directors of accredited medical assisting programs
2838 with any questions they have or challenges they receive from the U.S. Department of Education.

2839
2840 **Website Rebuild**

2841 As of the date of this report, the website rebuild project remains on schedule. Mr. Balasa has
2842 been overseeing this important project and allocating resources so that it is completed on
2843 schedule, and that the end result meets or exceeds expectations.

2844
2845 **Colorado Health Care Workforce Coalition**

2846 AAMA Past President Chris Hollander, CMA (AAMA), and Mr. Balasa continue to participate
2847 in the virtual meetings of the Colorado Health Workforce Coalition (“Coalition”), a collaborative
2848 public policy group organized by the Colorado Hospital Association. The Coalition is advocating
2849 for a stackable credential system under state law that would allow professionals to earn
2850 credentials that will enable them to advance incrementally in their profession(s) of choice.

2851
2852 **Conclusion of Service on the CAAHEP Board of Directors and as CAAHEP President**

2853 CEO Balasa has served on the CAAHEP Board of Directors since July 1, 2018. He has served as

2854 CAAHEP President since July 1, 2021. His terms on the Board and as President ended June 30,
2855 2024. He will continue to serve on the CAAHEP Bylaws Committee, Planning and Development
2856 Committee, and Outcomes Task Force.

2857

2858 **I.C.E.**

2859 CEO Balasa continues to serve on the Institute for Credentialing Excellence (I.C.E.)
2860 Accreditation Services Council and Government Affairs Committee.

2861

2862 Mr. Balasa co-presented “The Value of Accreditation: How to Leverage Value Statements to
2863 Support your Program” at the I.C.E. Annual Exchange in October of 2023.

2864

2865 **House Legal Counsel Responsibilities**

2866 Counselor Balasa has continued to help constituent state societies and component chapters with
2867 issues involving bylaws, parliamentary procedure, suspected or actual misappropriation of funds,
2868 records retention, obtaining an Employer Identification Number/Taxpayer Identification Number
2869 (EIN/TIN), incorporation, advising states and chapters in regard to notices from the Internal
2870 Revenue Service, and the ineligibility of states and chapters for state sales tax exemption. He has
2871 sent cease and desist letters to medical assistants who are using the CMA (AAMA) credential
2872 and are not CMAs (AAMA), and to former CMAs (AAMA) who are using the credential even
2873 though their CMA (AAMA) is not current.

2874

2875 **“New York Governor Urges New York Legislature to Allow Medical Assistants to
2876 Administer Immunizations”**

2877 Mr. Balasa submitted the above-titled article for the May-June *Medical Assisting Today*. The
2878 following is an excerpt from this article:

2879

For over thirty years New York law has not permitted licensed providers to delegate to
2880 medical assistants the administration of medication. On January 17, 2024, New York
2881 Governor Kathy Hochul submitted legislation to the New York Senate and General
2882 Assembly that would permit physicians, nurse practitioners, and physician assistants to
2883 delegate to appropriately trained medical assistants the drawing up and administering of
2884 immunizations in outpatient settings under the licensed provider’s authority and
2885 supervision.

2886

This legislation is similar to the 2022 Connecticut legislation that allows educated and
2887 credentialed medical assistants to be delegated by licensed providers the administration
2888 of vaccines.

2889

2890 **Speaking at MGMA Operations Conference and Leadership Conference**

2891 Legal Counsel Balasa presented/will be presenting “Legal Guidelines for Utilizing Medical
2892 Assistants in Telehealth” for the Medical Group Management Association (MGMA) Operations
2893 Conference (May 30 through June 1, 2024) and for the MGMA Leaders Conference (October 6
2894 through 9, 2024). The following are the learning objectives for this presentation:

2895

Expanded learning objectives:

2896

This session will provide you with the knowledge to:

2897

1. Review and apply the legal analysis for determining tasks (including telehealth tasks)
2898 that are delegable and not delegable to medical assistants.

2899

2. Understand and operationalize the *fundamental legal principle* regarding medical
2900 assisting scope of practice: Medical assistants are not permitted to exercise independent
2901 clinical judgment or make clinical assessments, evaluations, or interpretations.

- 2902 3. Identify additional legal facts involving medical assistants, such as scope of practice
2903 depending on whether the provider is a physician, nurse practitioner, or physician
2904 assistant.
2905 4. Review and apply the legal analysis for determining reimbursement for medical
2906 assisting services under federal programs such as Chronic Care Management (CCM) and
2907 Remote Patient/Physiologic Monitoring (RPM).
2908 5. Recognize medical assistants as ideal telehealth professionals because they are licensed
2909 in only one state (Washington) with minimal issues of scope of practice across state lines,
2910 and optimally deploy them.

2911

Scope of Practice Presentations

2913 Mr. Balasa has presented scope of practice continuing education sessions for the Texas Society
2914 of Medical Assistants, the Massachusetts Society of Medical Assistants, the Florida Society of
2915 Medical Assistants, the Association of South Carolina Oncology Managers, the Nash-
2916 Edgecombe Chapter of the North Carolina Society of Medical Assistants, the Union County
2917 Chapter of the North Carolina SMA, and the Forsyth-Stokes-Davie Chapter of the NCSMSA.

2918

American Association of Nurse Practitioners Annual Conference

2920 Mr. Balasa attended the annual conference of the American Association of Nurse Practitioners
2921 (AANP), June 26 through 29, 2024. His objective was to seek support from nurse practitioners in
2922 persuading state boards of nursing to amend their regulations (or to draft legislation) so that
2923 nurse practitioners are permitted to delegate the administration of certain types of injections
2924 (including vaccines) to appropriately educated and currently credentialed medical assistants.

2925

Presentation for Council for Higher Education Accreditation (CHEA)

2927 Mr. Balasa presented “Beyond Gainful Employment: Other Title IV Rule Revisions that Impact
2928 Quality and Eligibility” at the January 29 through February 1, 2024, Annual Conference of the
2929 Council for Higher Education Accreditation (CHEA). CHEA is the private sector equivalent to
2930 the United States Department of Education. CHEA recognizes CAAHEP.

2931

Attendance at Virtual Meetings

2933 Mr. Balasa attended virtual meetings of the American Academy of Ambulatory Care Nursing
2934 and the Association of Specialized and Professional Accreditors.

2935

Kinn’s Medical Assisting Fundamentals

2937 CEO Balasa had an email discussion with Brigitte Niedzwiecki, revising author of Kinn’s
2938 *Medical Assisting Fundamentals* and *The Medical Assistant*. He mentioned his opinion that
2939 medical assistants should be taught advanced tasks (e.g., IV initiation and infusion; insertion and
2940 removal of urinary catheters; and limited scope radiography) in states in which these tasks are
2941 delegable legally to medical assistants. The following is an excerpt from this discussion:

2942 Just before we drafted the ideas for Kinn's *Medical Assisting Fundamentals* 2e, I attended
2943 the national conference. While talking with other educators, I heard that they were
2944 teaching catheterization, IVs, and X-rays. Many indicated they were lacking adequate
2945 teaching resources for these advanced skills. Some were using very dated textbooks.
2946 I addressed this with my editor, and we felt that adding chapters to address these topics
2947 might be helpful for the schools teaching the advanced skills. (We added chapters to both
2948 Kinn *MA Fundamentals* 2e and Kinn's *The Medical Assistant*.) We knew not all states
2949 allowed MAs to perform these advanced skills and indicated that in the textbook. We

2950 figured instructors could skip chapters that didn't relate to the MA scope of practice in
2951 their state.

2952 The IV content contained more theory than skills and the skills were very basic (e.g.,
2953 inserting and discontinuing IVs, priming tubing, and hanging IV solutions). The
2954 catheterization focused on inserting, discontinuing, and collecting urine specimens. The
2955 radiology chapters were focused on the limited scope of practice skills. We also added
2956 several specimen collection skills and two were related to the COVID-19 testing
2957 procedures.

2958

2959 **Michigan Legislation**

2960 The Michigan Society of Medical Assistants has been able to have legislation introduced into the
2961 Michigan legislature that would require medical assistants to have medical assisting education
2962 and a medical assisting credential to perform certain advanced tasks. At the request of the
2963 Michigan SMA legislative leaders, Legal Counsel Balasa has done research and provided
2964 information to the Michigan SMA.

2965

2966 **South Carolina Legislation**

2967 A bill in the South Carolina legislature clarifies some of the ambiguous language in the previous
2968 medical assisting law. The bill reaffirms that there are two categories of medical assistants—
2969 “certified medical assistants” and “unlicensed assistive personnel (UAP).” Certified medical
2970 assistants must have completed a medical assisting education program and have a current
2971 medical assisting certification that is accredited by the National Commission for Certifying
2972 Agencies. There is also a grandfathering provision and a grace period provision. Certified
2973 medical assistants are permitted to perform more advanced tasks than UAP.

2974

2975 This bill was enacted into law.

2976

2977 **Audit Report for the Fiscal Year Ending June 30, 2023**

2978 According to the audit report for the fiscal year ending June 30, 2023, the revenue for the
2979 AAMA corporation (tax-exempt under Section 501(c)(6) of the Internal Revenue Code) was
2980 \$6,530,743. The expense was \$5,415,568. This reflects an excess of revenue over expense of
2981 \$1,115,175. The net assets/net worth as of June 30, 2023, was \$11,530,200.

2982

2983 **Move to Suite 3720 of the Civic Opera Building**

2984 As approved by the AAMA Board of Trustees, the AAMA Executive Office moved from Suite
2985 1575 to Suite 3720 of the Civic Opera Building. Suite 3720 is smaller than Suite 1575. As a
2986 result, rental costs will be decreased. Also, the owners of the Civic Opera Building filed for
2987 bankruptcy in 2022. Consequently, they were eager to maintain current revenue streams and
2988 were willing to let Suite 3720 for a reasonable monthly amount.

2989

2990 **New York University Research Project on Medical Assistants**

2991 Mr. Balasa received the following invitation from a professor at New York University:

2992

Dear Mr. Balasa,

2993

I am an Assistant Professor at NYU who studies the job quality and work environments
2994 of health care workers. Over the past few years, I have published some papers on the
2995 importance and role of MAs in primary care (see [Lai et al. 2022](#), and [Lai et al 2022](#)).

2996

2997

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

2998 needed around medical assistants in primary care. This project is supported by the NYU
2999 Discovery Fund for Human Health. Given your role as CEO of AAMA, we
3000 are hoping for a chance to talk to you.

3001
3002 Mr. Balasa agreed to talk with Professor Lai. He found Mr. Balasa's insights to be helpful.
3003 Professor Lai intends to incorporate Mr. Balasa's comments in a future scholarly article.
3004

3005 **Credential Integrity Action Alliance**

3006 Mr. Balasa has been invited to participate in preliminary meetings of the Credential Integrity
3007 Action Alliance (CIAA). The following are excerpts from the CIAA website:

3008 The CIAA promotes initiatives and lobbies for legislative and policy changes that prevent
3009 commercial cheating and cheating-for-hire services from undermining academic and
3010 credential integrity in the United States. Members include universities, licensure and
3011 certification authorities, service partners, and individuals dedicated to promoting
3012 integrity.

3013
3014 Founded in 2023 to address the alarming growth of commercial cheating and cheating-
3015 for-hire services, the CIAA is a nonprofit corporation with a 501(c)(4) exemption from
3016 federal tax for lobbying purposes. Its six-member board of directors is elected by its
3017 members. Membership is open to all individuals, academic institutions, organizations that
3018 publish and administer assessments, and related associations that support the Alliance's
3019 mission. Prospective members (including their leadership) and individual members
3020 should not have a material financial interest in, or otherwise receive compensation or
3021 benefits from, companies that offer cheating services.
3022

3023 **Letter to Connecticut Department of Public Health**

3024 CEO Balasa was informed that educated and credentialed medical assistants were not being
3025 delegated vaccine administration as permitted by the 2022 legislation. He wrote the following
3026 April 9, 2024, letter to the Commissioner of the Connecticut Department of Public Health:

3027 As you are aware, in 2022 the Connecticut legislature enacted a bill that permits medical
3028 assistants who have met education and testing requirements to administer vaccines under
3029 the authority and supervision of licensed independent providers.
3030

3031 The attached document is found on the website of the Connecticut Department of Public
3032 Health (DPH). Note the following excerpt:

3033 *** CGS 19a-6s authorizes certain specially trained medical assistants to administer
3034 vaccines under the supervision, control, and responsibility of a physician, physician
3035 assistant, or advanced practice registered nurse. Chapter 368a
3036

3037 One of the primary reasons for the enactment of the 2022 legislation was the need to
3038 expand the availability of preventive services such as vaccines to Connecticut patients.
3039 This need is still significant in 2024. Deploying educated and credentialed medical
3040 assistants to administer vaccines not only increases the accessibility of vaccines, but also
3041 frees up physicians, nurse practitioners, and physician assistants to provide services that
3042 only they are allowed legally to provide.
3043

3044 Given this ongoing need, the AAMA and its Connecticut Society urge the Connecticut
3045 DPH to display more prominently and in several places on its website the existence of

3046 this vaccine option for medical assistants. Informing providers and medical assistants of
3047 this program would increase the number of medical assistant vaccinators and would
3048 redound to the benefit of Connecticut patients.
3049

3050 **Washington State Society and Bogus Trademark Inquiry**

3051 The Washington State Society of Medical Assistants received the following trademark request:

3052 This is [name withheld], Paralegal Officer from an Intellectual Property Office of
3053 Paramounts Consulting Group. I would like to bring to your knowledge that we have
3054 received the trademark application for the same business name as yours Washington State
3055 Society of Medical Assistants from the State of South Carolina while searching for this
3056 brand name, your information appeared. According to IP Protocols, your brand name is
3057 not registered with the Patent & Trademark Office that allow others to proceed with the
3058 registration.
3059

3060 However, as the Patent and Trademark office & IP Protocols suggest giving priority to
3061 the business owner over the new applicant. Therefore, we are reaching out to you for
3062 confirming whether would you be interested in reserving the federal trademark rights
3063 under your ownership for your name/mark.
3064

3065 If you wish to proceed, kindly reply to the same email so further steps can be shared.
3066

3067 Please note that if you choose not to register the trademark, the other applicant will
3068 proceed as the Patent & Trademark office processes applications on a first-come, first-
3069 served basis.
3070

3071 We would appreciate your prompt response, as the other applicant is still on hold until we
3072 receive your response. In case of no contact from you within the next 4 business days, the
3073 other applicant will be given the opportunity to begin their registration following the
3074 standard examination and filing procedure with the United States Patent & Trademark
3075 Office.
3076

3077 As per the Act of 1946 §§ 1051 et seq, it is mandatory to register your mark to hold the
3078 ownership rights federally.
3079

3080 Mr. Balasa's opinion was that this was a "phishing" attempt and should be ignored. General
3081 Counsel Christina Pannos agreed. The Washington State SMA leaders were informed.
3082

3083 **Updating and Republishing of "Best Practices for Practices"**

3084 At a meeting of the Educators Collaborative Task Force, some of the educators mentioned that
3085 they would appreciate an article from the AAMA that would point out to employers why they
3086 should be hiring CMAs (AAMA). Mr. Balasa reminded the educators about his 2015 article
3087 "Best Practices for Practices: Protect Your Office by Employing CMAs (AAMA)." They thought
3088 this was a good article and should be updated for republication in *Medical Assisting Today*. Mr.
3089 Balasa said that he would be happy to update the article.
3090

3091 **Articles for Council on Licensure, Enforcement, and Regulation (CLEAR) Regulatory**
3092 **Network**

3093 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

3142 **CEB Medical Ethics and Medical Law Monographs**

3143 Counselor Balasa is serving as the subject matter expert for these two monographs of the
3144 Continuing Education Board—*Foundations of Medical Ethics for the Medical Assistant* and
3145 *Foundations of Medical Law for the Medical Assistant*. He wrote case studies for the ethics
3146 monograph. He also wrote the questions for these monographs.

3147
3148 **Virtual Presentation for National Network of Health Career Programs in Two-Year**
3149 **Colleges (NN2) 2023 Conference**

3150 Mr. Balasa gave a virtual presentation entitled “Proposed USDE Regulations Would Impact
3151 Professional Preparatory Programs that Are ‘Too Short’ or ‘Too Long’” September 28, 2023.

3152
3153 **Federal Agencies Open Online Portal for Reporting Anticompetitive Practices in the**
3154 **Health Care Sector**

3155 In an April 18, 2024, press release, the United States Department of Justice (DOJ), the Federal
3156 Trade Commission (FTC), and the Department of Health and Human Services (DHHS) launched
3157 a joint online portal “for the public to report health care practices that may harm competition.”

3158
3159 The following statement by Assistant Attorney General Jonathan Kanter of the DOJ’s Antitrust
3160 Division in the press release articulates the purpose of this portal:

3161 “Competition in health care is crucial to ensuring fair and competitive wages across the
3162 healthcare sector and affordable and quality healthcare for all Americans. Today’s launch
3163 of [HealthyCompetition.gov](https://www.healthycompetition.gov) – a one-stop shop to report potential violations of our
3164 competition laws to the Justice Department and FTC – will allow the agencies to
3165 collaborate early and often, helping to promote economic opportunity and fairness for
3166 all.”

3167
3168 One of the examples of “conduct that can harm competition in healthcare” in the press release is
3169 “unnecessary healthcare provider recertification or accreditation requirements.” It is described as
3170 follows:

3171 **Description:** Certifying bodies or accreditation organizations can impose unnecessary
3172 requirements on healthcare providers. Unnecessary requirements can raise the costs of
3173 practicing medicine. They can also reduce the number of healthcare practitioners
3174 participating in the marketplace. These requirements can harm competition and increase
3175 the cost of healthcare services.

3176 **Example:** Certifying bodies or accreditation organizations ask physicians to meet
3177 unnecessary requirements to stay certified.

3178
3179 Legal Counsel Balasa will monitor any actions by the federal agencies that may have an impact
3180 on medical assisting.

3181
3182 **MGMA Podcast**

3183 Mr. Balasa recorded a podcast for the Medical Group Management Association entitled
3184 “Exploring the Legal Landscape of Medical Assistants.” This podcast will be available no later
3185 than August of 2024.

3186
3187 Donald Balasa

3188 CEO and General Counsel

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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 Manger 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

3234 **Annual Conference Committee**

3235 Together with Committee Chair Novak, MarCom Department staff organizes project timelines,
3236 executing old and entirely new conference materials, and handles the logistics of running a
3237 successful conference.

3238 The MarCom Department has collaborated with the committee with the following projects:

- 3239 • Designed 2024 AAMA Annual Conference logo for approval
 - 3240 • Update and manage the 2024 Conference Cvent website and registration portals
 - 3241 • Collaborate with Conference Planner Kathy Basel on conference logistics
 - 3242 • Designing signage and executing branding of the 2024 Annual Conference hotel space
 - 3243 • Management and outreach of 2024 exhibitors and sponsors
- 3244

3245 **Awards Committee**

3246 Director Mokijewski and Director Sanks-Korenchan worked together with Chair Novak to
3247 update and revise the various aspects of the Excel Awards submission and judging processes.

- 3248 • Updated all forms and documents
 - 3249 • Order Awards of Distinction Pins
 - 3250 • Assisted Chair Novak in researching different vendors and award styles for the Awards
3251 of Distinction trophies for 2024
- 3252

3253 **Career Professional Development Committee**

3254 The Marketing Department has assisted with the branding of the Medical Office Basics courses
3255 and developed marketing plans for the committee’s approval. The committee has also begun
3256 work on a second series of courses for the Career Professional Development Series titled
3257 “Insurance Insights and Quality Measures,” for which we have designed a new digital badge.

- 3258 • Medical Office Basics (MOB)
 - 3259 ○ Redesign each Medical Office Basics course with AAMA branding and design
3260 elements
 - 3261 ○ Create 3 short videos for promoting of MOB on social media
 - 3262 ○ Create eblast for external marketing of MOB
 - 3263 • Insurance Insights and Quality Measures
 - 3264 ○ Designed digital badge for new program
- 3265

3266 **Marketing Strategy Team**

3267 At the guidance of Chair Thomas and her committee, the design team has been hard at work
3268 designing the new “Bridging the Gap Between Patients and Quality Care” theme for 2024
3269 MARWeek products, as well as offering new stickers, padfolios, and keychains for purchase to
3270 sport your AAMA pride.

- 3271 • Implemented and designed the committee’s “Building Bridges Between Patients and
3272 Quality Care” theme and design ideas
 - 3273 • Researched different padfolio options for sale at the AAMA Conference
 - 3274 • Redesigned “Who I Am Makes a Difference” buttons into new stickers with updated
3275 design
- 3276

3277 **Membership Committee**

3278 Director Mokijewski supported Chair Bogar by offering her support and guidance for the
3279 committee’s focus group endeavors. The design team has also been assisting the Membership
3280 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-Korenchan, 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

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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. 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 expired CMAs (AAMA) about recertification
- 3387
- Monthly: Email New CMAs (AAMA) and First-Time Recertifying CMAs (AAMA) e-Blast Series
- 3388
- 3389
- 3390

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

3392

3393

3394 Continuing Education

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

3396

3397

3398

3399 *New, In-Development Projects*

- CE self-study books reviews and updates (include editorial and design services)
 - *Phlebotomy*
 - *Introduction to Microbiology*
 - *Nutrition*
 - Others as directed by the CEB via CE and Membership Director Nick Mickowski
- 3400
- 3401
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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, and producing all print and electronic membership materials (e.g., enrollment brochures, membership renewal materials, social media banners, social media marketing campaigns, new-member e-blasts, and membership webpages).

3411

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3414

3415 E-Blasts

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

3417

3418

3419 *New, Published/Scheduled e-Blasts*

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

3422 *New, In-Development e-Blasts*

- Communications about this policy: Initial certificants may apply a maximum of 20 recertification points (AAMA-approved points or non-AAMA-approved points) earned in the three months prior to initial certification toward recertification. (*Pending CB approval*)
 - For AAMA Leaders/Program Planners
 - For Program Directors and Educators
 - For new CMAs (AAMA) [Years 2 through 4]
- 3423
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- 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 **American Association of Medical Assistants® (AAMA)**
3492 **Report of the Director of Continuing Education and Membership**
3493 **For Period Ending September 2024**

3494
3495 **OVERVIEW OF RESPONSIBILITIES**

3496 **Continuing Education and Membership Department**

- 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 **Continuing Education Board (CEB) Liaison**

- 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 **AAMA Website Update Project**

3587
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 **Medical Assistant Partnership for Healthy Pregnancies and Families – AAMA E-Learning** 3592 **Center Courses**

3593
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.

3613 **New Monographs**

3614
3615 Director Mickowski assisted the CEB with their development of three new monographs:

- 3616
3617 *Nutrition*
3618 *Foundations of Medical Law for Medical Assistants*
3619 *Foundations of Medical Ethics for Medical Assistants*

3620
3621 Development for all three monographs began with CEB creation of outlines to identify relevant
3622 material and general structure. The monographs were then developed by Learn Ethos, with
3623 consistent and thorough input from a subset of the CEB through a series of review rounds and
3624 weekly calls. Director Mickowski joined the calls, along with CEO Balasa, and facilitated the
3625 process by reviewing the content, consolidating CEB input, and conducting check-change
3626 reviews to ensure feedback had been effectively addressed.

3627
3628 **Career Professional Development Committee Projects**

3629 Director Mickowski assisted the committee with the launch of the Assessment-Based
3630 Recognition in Medical Office Basics program to the AAMA e-Learning Center. The initial
3631 launch included the first five courses and went live on February 15, 2024, with the remaining
3632 three courses to be added and launched around the end of July 2024.

3633
3634 **Membership Development Committee Projects**

3635
3636 The committee developed letters to welcome new AAMA members and a flier with member
3637 benefits to assist states in promoting membership. Director Mickowski assisted with review of
3638 these documents and provided a staff perspective. These letters and the flier were posted to the
3639 website in an officer-only content block on the “Guidelines and Forms” page under the
3640 “Volunteers” tab.

3641
3642 Director Mickowski also assisted in messaging focus group survey responders who were
3643 nonmember CMAs (AAMA) with a free E-learning course and a letter regarding benefits of
3644 membership that was developed by the committee.

3645
3646 The committee has worked with Beneplace to increase usage of this AAMA member benefit. An
3647 eblast and social media posts were created with the help of MarCom colleagues to promote
3648 Healthcare Month (May) on the Beneplace platform. Additional collaboration with Beneplace is
3649 ongoing and expected for the annual conference and for MARWeek.

3650
3651 **STAFF**

3652
3653 Director of Continuing Education and Membership Mickowski would like to thank the
3654 Continuing Education and Membership team members for their ongoing excellent work: Janet
3655 Arreola, Natasher Dixon, Manager Erika Mercado, and Essence Patterson.

3656
3657 Nick Mickowski
3658 Director of Continuing Education and Membership

3659

***COMMITTEE
REPORTS***

3660 **American Association of Medical Assistants® (AAMA)**
3661 **Report of the Annual Conference Committee**
3662 **For the Period Ending September 2024**
3663

3664 The charge of this committee is to review and oversee the functions and proceedings of the
3665 AAMA Annual Conference and identify opportunities to enhance events and schedules for the
3666 members and attendees. This committee also collects the bids for future annual conferences and
3667 works with the AAMA meeting planner to research options in those submitted areas. Once the
3668 top three options are presented by the meeting planner the committee will present these to the
3669 Board of Trustees to vote on the best option for the event activities and the membership
3670 attendees. The Board of Trustees also voted to make the Chair of the Annual Conference
3671 Committee to be the role, duties, and responsibilities of the AAMA Immediate Past President.
3672 The rationale for this decision was that the Chair needs to have witnessed all aspects of the
3673 Conference Events, contracts, negotiations, set ups and conference budget. After no less than 3
3674 years on the MSC the IPP has fully been exposed to all the important parts that occur during the
3675 AAMA Annual Conference.

3676 The 68th Annual Conference will be held in Grand Rapids, Michigan at the Amway Grand Plaza
3677 on September 20–23, 2024. The conference committee continues to hold monthly meetings to
3678 review all areas of the conference. During our May meeting we included Kathy Basel our
3679 AAMA meeting planner in which to review our event space room layouts. This was extremely
3680 helpful to all event chairs and officers in preparation for sessions. This information was also
3681 shared with the educational boards, as they also need updates as they prepare for their
3682 sessions/presentations.

3683 This chair continues to get a monthly update from our meeting planner on room pick-ups and
3684 attendee registration. Currently we are over 66% of our room guarantee. Registration as of the
3685 time of this report was over 350 registrations with 9 weeks to go. Historically this is what we see
3686 each year at this time.

3687 Marcom Senior Director Mokijewski is overseeing the Exhibitors and sponsors. To date we have
3688 nine paid exhibitors. Another opportunity to increase revenue is through sponsors of events,
3689 activities, and ads, which can be placed on the Cvent application and several event
3690 communications. To date, we have three states who have committed to sponsoring either a
3691 breakfast or happy hour session. Eblast information was sent out to include these sponsorship
3692 opportunities to our state leaders as well as to our past exhibitors.

3693 The Michigan Host Society Chair Smith & CCETF Chair Ley has confirmed all the speakers and
3694 topics for the upcoming 2024 annual conference. CCETF Chair Ley has also shared conference
3695 education topics for 2025 conference education host society from Virginia. At the June CEB and
3696 BOT Summer meeting we had the opportunity to meet with some of the Virginia Committee
3697 members to discuss responsibilities and to answer any questions from the hosting society.

3698 This officer has also had monthly meetings, as well as many conference calls, with our meeting
3699 planner and staff regarding needs and requests for conference events. Food and beverage options
3700 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

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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

3802 **American Association of Medical Assistants® (AAMA)**

3803 **Report of Bylaws and Resolutions**

3804 **For the Period Ending September 2024**

3805
3806 The Bylaws and Resolutions committee is responsible for officially notifying each constituent
3807 society of all changes to the AAMA Bylaws and explaining how the changes may impact
3808 constituent society bylaws. If there are AAMA Bylaws changes that the constituent societies are
3809 mandated to include in their bylaws, this committee must notify the constituent societies and
3810 provide a deadline by which each society must send their revised bylaws for this committee to
3811 review.

3812
3813 **Mandated Bylaws Changes**

3814 This committee initially met virtually in November 2023 and discussed the mandatory changes
3815 from the 2023 HOD and the process for notifying State Societies. After this meeting, Chair
3816 Miller collaborated with Manager Flynn, along with CEO Balasa in formulating a letter to be
3817 sent to the state Presidents and President Elect/or Vice Presidents, with the mandated changes.
3818 Below is the mandated change to the Bylaws:

3819
3820 1. SECTION 2. Qualifications.

3821 A. ACTIVE—An Active member shall be one of the following:

3822 1. A credentialed medical assistant holding current status through a National
3823 Commission for Certifying Agencies (NCCA)-accredited certification program
3824 and whose credential has not been revoked as provided by the respective
3825 credentialing body...

3826 2. Anyone who was an active member on 12/31/87, who has never been a CMA
3827 (AAMA), and who has maintained continuous active membership. Continuous
3828 active membership shall be defined as having dues postmarked or submitted
3829 electronically to the AAMA Executive Office by December 31 (the controlling
3830 time is that of sending, not that of receiving)

3831 This letter was emailed to all state society Presidents and President Elects/or Vice Presidents on
3832 January 3, 2024. As per the AAMA Bylaws, revised bylaws are due back to AAMA within 30
3833 days of notification. These changes were due by February 2, 2024. Initially, updated Bylaws
3834 were received from fifteen states. These bylaws were distributed amongst the Bylaws Committee
3835 for review. After the first influx, this chair reviewed the state bylaws as they came in, a few at a
3836 time January 24, 2024, a reminder email was sent to the states who had not sent mandatory
3837 changes, with the due date of February 2, 2024. Some states responded by sending their bylaws.
3838 February 16, 2024, an email was sent to the remaining sixteen states who had not sent their
3839 bylaws asking when they would be able to comply. During the next few weeks mandated bylaws
3840 changes were received sporadically from eleven more states, making them compliant. May 23,
3841 2024, an email was sent to the last five states, not in compliance stating:

3842
3843 “Constituent Societies not in conformity with the mandated sections of the AAMA
3844 Bylaws 30 days prior to the opening of the AAMA House of Delegates shall not be
3845 allowed Delegate representation at the AAMA House of Delegates”.

3846
3847 After this email, three more states responded with their updated bylaws. This chair telephoned
3848 the two remaining state presidents on June 7, 2024, asking if help was needed for their
3849 mandatory bylaws' submission. Neither state asked for added help or information. One state sent
3850 their bylaws that day. On July 9, 2024, a certified letter was sent to the remaining state who is
3851 not in compliance, saying the following:

3852
3853 According to AAMA Bylaw ARTICLE IV, Section 7, Constituent Societies not in conformity
3854 with the mandated sections of the AAMA Bylaws 30 days prior to the opening of the AAMA
3855 HOD shall not be allowed Delegate representation at the AAMA HOD”.

3856
3857 As of July 21, 2024, one state is not compliant. This state has 30 days before the 2024 House of
3858 Delegates start, to be seated at the HOD. Prior to sending, all letters were reviewed by CEO
3859 Balasa. Except for the one state, all states were emailed that their Bylaws were in compliance
3860 with AAMA's mandatory changes from the 2023 HOD.

3861 **Bylaws Review**

3862 The committee met virtually on January 24, 2024. They reviewed the PBAs not approved from
3863 the last two year's HOD for potential resubmission at the 2024 HOD. This chair asked the
3864 committee to continue to think about which PBAs they would like to revisit and discuss at the
3865 next meeting. This committee met in person on February 9, 2024, in Chicago. Proposed bylaws
3866 changes were discussed, and decisions were made on which ones would be their focus. Chair
3867 Miller asked the members to email her with suggested wording and rationale to be discussed at
3868 their next meeting. She also asked the members to review the entire bylaws to look for any other
3869 potential PBAs. During the next two virtual meetings, there was continued discussion on
3870 wording and rationale for the PBAs. During their May virtual meeting, it was decided they
3871 would send two PBAs to the BOT for their approval. In June, there was continued discussion on
3872 the wording and rationale and in July, proposed wording and rationale was agreed on. This was
3873 emailed out to the BOT for their review and approval.

3874 **Bylaws Tracking**

3875 This chair worked closely with Sharon Flynn and a spreadsheet has been developed with all the
3876 states listed to keep track of when Bylaws were last received and reviewed by the Bylaws
3877 Committee. This also has a tab for the mandatory changes. This will make it easier for the
3878 Bylaws Committee to keep track of when the states Bylaws were reviewed for compliance, both
3879 mandatory and complete state bylaws. This tool will be a valuable resource in upcoming years
3880 for the Bylaws committee and the AAMA staff to check compliance of each state's bylaws. Prior
3881 to this, no documentation for tracking the bylaws was found.

3882
3883 The Bylaws Committee will continue to review entire state bylaws for compliancy with AAMA
3884 Bylaws.

3885 **New Opportunity**

3886 Additionally, this Chair proposed to the Bylaws Committee, that the AAMA Bylaws Committee
3887 be open to volunteers with an AAMA Active membership, and that is opportunity be included on
3888 the Volunteer Leadership Form beginning 2024–2025. The Bylaws Committee agreed, and this
3889 was voted on by the BOT and approved. She feels this will be well received by AAMA members
3890 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

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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
Grand Total	439

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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.

3965 MarCom has advertising going out to other organizations such as MGMA, AAFP, and
 3966 PAHCOM. LinkedIn and social media are being used to place banners and videos for
 3967 advertising. Members will receive e-blasts indicating what is available. MarCom has worked
 3968 with this committee to complete a wonderful package as promotion of this course.
 3969

3970 The committee is working hard to complete our next project that will be part of the Population
 3971 Health Badge. The project should be completed and announced soon. Modules in the Population
 3972 Health series have netted over \$345,000. Here are the current numbers on Population Health as
 3973 of July 2024.
 3974

3975 **Population Health**

3976 Revenue: \$345,170
 3977
 3978

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

3979
 3980
 3981 This Career Professional Development team has been generous with their time, patience, and
 3982 commitment to the two projects we were charged with this year. The Chair would like to thank
 3983 the team members for their ideas, suggestions, contributions, and hard work to ensure the success
 3984 of the team's goals. The Chair would like to thank Director Mokijewski and her staff for the
 3985 collaboration and wonderful work that they developed for the team. Thank you, Donald Balasa
 3986 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

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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

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

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

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

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

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

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

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

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

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

Members:

Sherry Bogar, CMA (AAMA) – Vice Speaker

Natasha Geno, CMA (AAMA)

Candy Miller, CMA (AAMA)

4141 **American Association of Medical Assistants® (AAMA)**

4142 **Report of the Nominating Committee**

4143 **For the period Ending September 2024**

4144

4145 The Nominating Committee is responsible for soliciting, screening, and presenting a slate of
4146 nominees for officers and trustees in accordance with Articles VIII and IX of the AAMA
4147 Bylaws.

4148

4149 This chair contacted the members of this committee via email to welcome them to the
4150 Nominating Committee. The members were asked to start thinking of members who would be
4151 eligible candidates for the open Officer and Trustee positions. This chair provided each member
4152 with the following resources:

- 4153 • Guidelines for the AAMA Nominating Committee
- 4154 • AAMA Officer Qualifications
- 4155 • *Medical Assisting Today* Platform & Vital Stats Form
- 4156 • Officer & Trustee Nomination Form
- 4157 • Copy of email to State Leaders regarding the process for nominations
- 4158 • Deadline Date for nominations as May 1, 2024

4159 An e-mail and eblast were sent to all state society leaders on January 16, 2024, to inform them of
4160 the May 1, 2024, deadline for submission for the following five elective open positions for
4161 2024–2025:

- 4162 • Vice President
- 4163 • Secretary – 2-year term
- 4164 • Trustee positions (two-year positions) – 3 open positions

4165 A copy of this information was also sent to the current members of the AAMA Board of trustees
4166 as a reminder if they wish to be a candidate for any of the open positions they must also apply for
4167 on or before May 1, 2024. Additional eblast reminders were sent out by the MarCom
4168 Department.

4169

4170 Due to multiple unforeseen resignations because of personal/family obligations or current BOT
4171 members deciding to campaign for a newly open board position the following positions have
4172 become available for election after the first membership notification of open positions for the
4173 2024 HOD.

- 4174 • President
- 4175 • Vice Speaker – 1 year term
- 4176 • Speaker of the House – 1 year term

4177 After a review and discussion by the MSC, which includes Don Balasa, JD, MBA CEO & Legal
4178 Counsel, and taking the opinions of the 2023 & 2024 HOD Parliamentary Advisor, it was
4179 determined a 10-day nomination submission period for the final open position of the speaker of
4180 the house was in order within the AAMA Bylaws and Roberts Rules. This position became open
4181 after the deadline date for members to submit applications to serve for this position. An
4182 additional announcement went out to all State Society Presidents/President Elects/Vice

4183 Presidents on June 8, 2024, instructing them to notify their members of this latter open position.
4184 E-blast notices were also sent to all AAMA membership on June 10, 2024. The deadline for
4185 submission of the open position of Speaker of the House ended on June 18, 2024.

4186
4187 The following candidates were added to the AAMA 2024 nominating slate:

- 4188 • President – Virginia Thomas, CMA (AAMA), from the Virginia State Society
- 4189 • Vice President – Sherry Bogar, CMA (AAMA), from the Texas State Society
- 4190 • Secretary – Loxie Kistler, CMA (AAMA), from the Ohio State Society (2-year term)
- 4191 • Vice Speaker – Claire Houghton, CMA (AAMA), from the Texas State Society (1-year term)
- 4192 • Speaker of the House – Jane Seelig, CMA-A (AAMA), from the Indiana State Society (1-year
4193 term)

4194
4195 *There will be three open Trustee positions for election:*

- 4196 • Trustee – Cameron Smith, CMA (AAMA), from the North Carolina Society (2-year term)
- 4197 • Trustee – Pam Neu, CMA (AAMA), from Indiana State Society (2-year term)
- 4198 • Trustee – Candy Miller, CMA (AAMA), from the Oregon State Society (2-year term)

4199
4200 After receiving the verification for each candidate by the staff office and all committee members,
4201 this chair forwarded each candidates documentation required to run for AAMA Trustee/Officer.
4202 This included the process and dates and times of the two upcoming virtual Meet the Candidates
4203 and the on-site during the recess of the morning session of the HOD. The notice included the
4204 following information:

4205
4206 The first Virtual “Meet the Candidates” will be held on August 3, at 12:30 p.m. EST. This will
4207 be a virtual team meeting open to the AAMA membership and consist of each candidate
4208 introducing themselves and their qualifications and experience. The second Virtual “Meet the
4209 Candidates” will be held September 7, 2024, at 12:45 p.m. EST. This will be a Q & A session.
4210 Each candidate will be given 2-3 questions to be prepared to answer. The last session of “Meet
4211 the Candidates” will be in-person following the first session of the 2024 HOD in Grand Rapids.
4212 Candidates will have 3-4 minutes to present their speech and will be stationed in specified areas
4213 of the HOD room to answer questions from the delegates and membership attendees of the HOD.
4214 Instructions, dates, and timelines have been sent to each eligible candidate, as well as future
4215 requirements and dates of 2024-2025 mandatory in person meetings required if elected.

4216
4217 All correspondence was responded to promptly. This chair will continue to maintain contact with
4218 the committee members should any nominees come forward to be nominated from the floor.

4219
4220 This officer would like to extend a sincere “thank ou” to the members of this committee for their
4221 hard work and understanding during this unusual chain of events. Their attention to details and
4222 quick turnaround on assignments was commendable. This officer would also like to thank
4223 President Case, CEO & Legal Counsel Don Balasa, and staff liaison Sharon Flynn for their
4224 guidance and support.

4225
4226 Deborah Novak, CMA (AAMA) – Chair
4227 Immediate Past President 2023–2024

4228
4229 Members:
4230 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)

4239

Report of the Social Media Committee

4240

For the Period Ending September 2024

4241

4242 The Social Media Committee is charged with developing new and creative ways to increase
4243 visibility and active participation with LinkedIn, Twitter, Facebook, and Instagram, as well as
4244 develop, implement, and maintain all strategic social media communications, public relations,
4245 outreach, and event activities and materials that align with the 2023–2024 Strategic Planning
4246 Goals #3 and #4.

4247

4248 Goal #3: Increase membership of medical assistants in the AAMA organization

- 4249 • Develop focus groups of all age groups to gain more knowledge of what they need and
4250 want – open to members, medical assistants of other credentials, non-members CMAs
4251 (AAMA), and students.
- 4252 • Assist educators and practitioners to inspire AAMA membership to all medical assistants
4253 of all credentials.

4254

4255 Goal #4: Enhance engagement and communications

- 4256 • Utilize digital platforms to share information and encourage meaningful conversations.

4257

4258 This committee continued to move forward with our discussions and ongoing projects. This chair
4259 has and will continue to conduct discussions, requests, and timelines via email and virtual
4260 meetings, in order to meet the above goals for this committee per the Strategic Issue Plan.

4261

4262 This chair has communicated with all committee members via email, including follow-up after
4263 team meetings with written minutes of discussion items and assigned tasks. Virtual meetings
4264 were held on:

4265

4266 ❖ November 21, 2023

4267 ❖ December 28, 2023

4268 ❖ January 25, 2024

4269 ❖ February 22, 2024

4270 ❖ May 23, 2024

4271 ❖ June 27, 2024

4272 Upcoming meetings (after report submission)

4273 ❖ July 25, 2024

4274 ❖ August 22, 2024

4275

4276 Discussion details based on the committees’ desire to continue working on pending projects from
4277 the previous year or to investigate new opportunities for this committee. Following the
4278 November and December virtual meetings, we decided on our top three priority projects.

4279

Project #1: Weekly Questions with “Reel” Answer

4281 This first project will be an ongoing project. The Committee will compile a list of questions to
4282 ask our volunteers, whether they are BOT members or State or Chapter leaders and have them
4283 answer the questions via a reel. This will then be posted on all the social media outlets. The

4284 committee would like to eventually see the members participate as well.

4285

4286 Currently, the committee members are compiling “reels” with leaders. It was suggested to the
4287 committee to have several completed (ten) before posting the first one. The goal is to post one
4288 every 2 weeks to start. The committee decided with the name: **“Reel” Talk with Medical**
4289 **Assistants**. The committee looks forward to showcasing these soon,

4290

4291 **Project #2: Continue with Representatives Bureau Assignments and Highlighting the States**

4292 The second project the committee would like to see completed by late summer after all the
4293 Representatives Bureau (RB) assignments have been completed. The committee will come up
4294 with information to put in the RB packets. For example:

4295

- 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.

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4305 Posts have been made with pictures from the RB assignments. Unfortunately, the QR code,
4306 which was a great idea, did not work out as planned. There was a data limit as to how many
4307 submissions would be accepted. The committee had photos through the busiest weekend in April
4308 but after that no other submissions would be accepted. An announcement at the May BOT
4309 meeting asked the BOT Reps to send pictures to the social media chair. The completed posts
4310 have been submitted and posted to all social media outlets.

4311

4312 **Project #3: Mini Mics**

4313 This committee would like to continue with this project that did not get finished at last year’s
4314 conference. The chair, on behalf of the committee members, submitted an agenda request for the
4315 June BOT meeting. The committee would like to purchase five (5) mini mics and a blank clapper
4316 board to use during the conference, this request was approved with the addition of purchasing
4317 five (5) clapper boards rather than just one. These would be used before/after the first timers’
4318 session, Welcome Banquet, Presidents’ Banquet, Awards, and other random times throughout
4319 the conference. These fun props will be used to make “reels” from members for the social media
4320 pages.

4321

4322 **Other Small Projects:**

4323 BOT members were asked at the planning session to write down positivity quotes for members.
4324 These quotes were made into posts for the social media accounts. These were posted every
4325 Tuesday until all the BOT members had submitted quotes.

4326

4327 This committee chair also took pictures of all the in-person meetings and made posts for social
4328 media. There were also posts made from the BOT highlighting the different holidays.

4329

4330 This chair would like to thank my committee for their hard work. This chair would also like to
4331 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

4348 **American Association of Medical Assistants® (AAMA)**
4349 **Report of the Strategic Issues Planning Committee**
4350 **For the period ending September 2024**

4351
4352 This committee is charged with advancing the goals and objectives of the association, the
4353 profession, and the CMA (AAMA) credential.

4354
4355 Prior to the Board of Trustees (BOT) Planning Session in November 2023, this Chair conducted
4356 two virtual meetings with members of this strategy team on October 5th, 2023, and October 19th,
4357 2023, to review the previous year’s Strategic Issues Plan (SIP) and make suggested changes. The
4358 revised plan was discussed at the BOT Planning Session.

4359
4360 During the BOT Planning Session in November 2023, this Chair conducted a session regarding
4361 the previous year’s SIP to show which goals were accomplished and to discuss if we need to
4362 change, delete, or add any new goals for the upcoming year. After a great brainstorming session,
4363 a newly revised SIP was created and approved by the BOT.

4364
4365 It was also discussed that each Committee/Strategy Team Chair should give a progress report to
4366 the SIP Chair prior to the BOT meetings to demonstrate that their committee/strategy team is
4367 progressing along with their respective goal(s). The tracking tool was updated and uploaded to
4368 the SIP Teams Channel on January 20, 2024. Each committee chair was encouraged to review
4369 the tool and update as appropriate. Several committee chairs have given updates as to the
4370 progress of meeting the SIP goals for their committee.

4371
4372 After approval by the BOT, this Strategy Team Chair posted the completed SIP to the 2023–
4373 2024 file folder of the Strategic Issues Planning Committee’s Teams channel and notified Staff
4374 Liaison Sharon Flynn. The plan is posted in the Members Only section of the AAMA website; a
4375 document with only the goals listed is placed for review by anyone accessing the AAMA
4376 website.

4377
4378 The current Strategic Issues Plan Goals are as follows:

- 4379
- 4380 ▪ Goal 1: Rebuild AAMA Website.
 - 4381 ▪ Goal 2: Strengthen the market share of the AAMA membership and CMA (AAMA)
4382 credential.
 - 4383 ▪ Goal 3: Increase membership of medical assistants in the AAMA organization.
 - 4384 ▪ Goal 4: Enhance engagement and communication.
 - 4385 ▪ Goal 5: Educate the decision makers on the value and utilization of credentialed medical
4386 assistants.
 - 4387 ▪ Goal 6: Expand educational opportunities.
 - 4388 ▪ Goal 7: Be the leading resource for medica assisting scope-of-practice information.

4389
4390 Sandra Williams, CMA (AAMA), Chair

4391
4392 Members:
4393 Sherry Bogar, CMA (AAMA), CN-BC
4394 Debby Houston, CMA (AAMA), CPC

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

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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

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American Association of Medical Assistants® (AAMA)

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Report of the Marketing Strategy Team

4478

For the period ending September 2024

4479

4480 The Marketing Strategy Team is charged with branding the AAMA as the resource for the
4481 profession by developing tools that assist members with promoting the profession and the
4482 AAMA. Also, it is charged with developing ways to promote the AAMA to the public, including
4483 employers, health agencies, and medical assisting programs.

4484

4485 As the Marketing Strategy Team began to strategize for the year 2023–2024, this team kept in
4486 mind the current AAMA Strategic Issues Plan. The charge of the Marketing Strategy Team is to
4487 increase the market share of the AAMA membership and the CMA (AAMA) credential and
4488 educate decision makers on the value and utilization of credentialed medical assistants.

4489

4490 AAMA President Monica Case, CMA (AAMA), held a Meet and Greet for all committee,
4491 strategy team, and task force members in attendance at the AAMA Annual Conference in
4492 Orlando, Florida. on Monday, September 25, 2023. After brief introductions from committee
4493 chairs and members, the Marketing Strategy Team members in attendance met to discuss the
4494 charge of the team and to brainstorm for the coming year. Discussion included: Medical
4495 Assistants Recognition Week (MARWeek) 2024, continuing projects from the previous year’s
4496 marketing strategy team, marketing to membership and employers, tips for resume writing,
4497 AAMA merchandise, and AAMA button redesign.

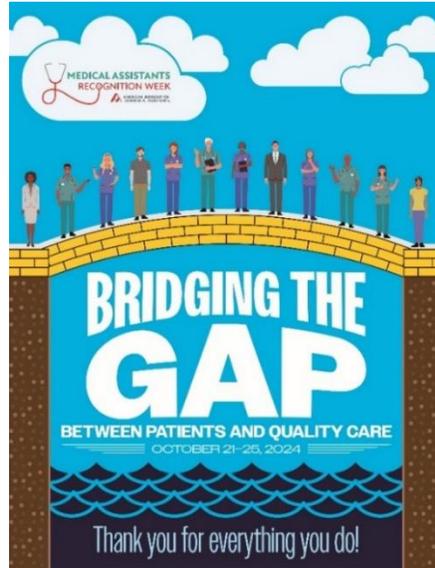
4498

4499 Following the AAMA Planning Session, this chair contacted team members to welcome them to
4500 the team and updated all team members with the information discussed at the AAMA Annual
4501 Conference Meet and Greet. The team was asked to email ideas for the 2024 MARWeek theme
4502 to this chair in preparation for a future virtual meeting. A second email was sent asking members
4503 to send ideas for the redesign of the AAMA button available to all state and chapter societies to
4504 promote the AAMA and medical assisting. A virtual meeting was set for December 30, 2023, at
4505 11 a.m. EST. During this meeting, the team discussed the ideas for the 2024 MARWeek theme
4506 and chose: “Medical Assistants: Bridging the Gap...” The idea of this theme reflects the diverse
4507 ways that medical assistants bridge the gap in health care for patients regarding insurance,
4508 medications, providers, etc. Also, during the meeting, the team discussed some ideas for a
4509 redesign of the AAMA button. A suggestion was made to make the button into a sticker that can
4510 be placed on laptops, water bottles, and more. Another suggestion was to make a downloadable
4511 image that states could use for marketing and promotional items with their state logo. This
4512 information was shared with Marketing and Communications Senior Director Mokijewski and
4513 was discussed at the Winter Board of Trustees meeting in Chicago, Illinois, February 9–10,
4514 2024.

4515

4516 The Marketing Strategy Team continued working after the Winter BOT meeting to develop the
4517 theme and poster concept/idea for Medical Assistants Recognition Week. This chair worked
4518 closely with Senior Director Mokijewski to bring the ideas of the committee to life via the
4519 Annual Conference poster. The theme was presented to the Board of Trustees at the winter board
4520 meeting and approved: Bridging the Gap between patients and quality care. Senior Director
4521 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

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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

4633 the team indicated that they felt there was too much information being placed in the general
4634 membership e-blasts that go out. They felt that the e-blast is targeting all the members and not all
4635 members are CMA (AAMA), there should be more information about the benefits of being an
4636 AAMA member being discussed in these e-blasts. The team felt that this e-blast was a great
4637 opportunity to discuss membership benefits, including Beneplace, highlight States and some of
4638 their activities, possibly include a member of the month or quarter or possibly even an employer
4639 of the quarter. They felt that maybe these highlights would appeal more to the members and
4640 possibly even encourage considering volunteer leadership. Team one discussed investigating
4641 Membership Loyalty pins. The suggestion was to start the pins at year 5 continue in 5-year
4642 increments to 30 years, and then go 10-year increments up to 50 years.

4643
4644 This chair worked with AAMA Staff and Trustee Quinn on the development of Membership
4645 Loyalty Lapel Pins. Several designs were submitted by Connor Satterlee, AAMA Graphic
4646 Designer. Two designs were sent to the team to vote on. The team voted for the design, however
4647 discussed that they wanted some additional changes made including the pin being done in silver.
4648 The pin was sent back to Connor for edits and a new design was returned. The team voted
4649 unanimously on the design. This chair requested that at least two quotes be provided to the team
4650 for review so a recommendation could be made to the BOT. After reviewing the two quotes
4651 provided, it was decided that the chair would research additional companies to compare cost of
4652 other vendors. Upon completion of the research the information will go back to MarCom for
4653 review of the selected vendor. To properly prepare this recommendation for the BOT, this chair
4654 asked the AAMA office for cost of shipping and envelopes for shipping the pins to members and
4655 number of members per year increment. Upon receipt of this information, this recommendation
4656 will go to the BOT for a vote to purchase, provide and sell Membership Loyalty Pins. The team
4657 hopes that the pins can be used for States to honor their members with the pins at award
4658 ceremonies or during MARWeek.

4659
4660 The entire team met to discuss the 2024 Early Bird discount and the 2023 CMA (AAMA) Non-
4661 Member survey results. The team discussed that the Early Bird discount was great but did not
4662 increase membership. The team felt that the discounts needed to be different for new members
4663 and loyal members. Suggestions for discounts included bulk year discounts (2-, 3-, 4-, 5-year
4664 bundles with and w/out CEUs), \$10.00 discount for new members and \$20.00 discount for
4665 renewing members and coupons based on the number of years you had been a member. It was
4666 also pointed out that the Early Bird discount was AAMA's way to help members during the
4667 pandemic. The team was informed that due to technology barriers these discounts that were
4668 mentioned would need to be held off on until the new AAMA website. The team's consensus
4669 was to withdraw the Early Bird Discount and have the suggestions of the new discounts looked
4670 at with the new website. During this meeting the team discussed the 2023 CMA (AAMA) Non-
4671 Member Survey results (sent out for all committee members to review). Several on the team
4672 expressed concerns that the survey indicated that the top three reasons for why these CMAs
4673 (AAMA) were not members included A) they forgot to pay because they didn't get a reminder,
4674 B) the AAMA Dues due date was at the end of the year and C) the cost of membership was too
4675 much at one time. Options that the team mentioned should be researched included 1) considering
4676 a new due date that does not fall within the last three months of the year, 2) quarterly payment
4677 plans, and 3) possible use of direct deposit through employer. The committee will be continuing

4678 to review the survey results and will use the results to help formulate the focus group
4679 discussions.

4680
4681 The entire team reviewed and made suggested edits to the previous committee's flyer. Upon their
4682 review this flyer was sent to the BOT for approval. Upon approval from the BOT the flyer was
4683 sent to MarCom for branding and formatting, after this was completed, the flyer was uploaded to
4684 the AAMA website. This chair worked with Chair Houghton, Chair of Leadership to have the
4685 flyer information sent out to state leaders through the AAMA Leaders Insider.

4686
4687 This chair received communication from a previous representative bureau assignment state
4688 leader that they were trying to build up their membership and were looking for templates of
4689 letters to send out to newly certified CMAs (AAMA) and would like to know if the AAMA had
4690 any on file. After discussion with President Case, it was decided that the Membership Team
4691 would take this project on. This task was assigned to Group One. While discussing the letter, it
4692 was decided by the team to develop a letter for non-member CMAs (AAMA) educating them on
4693 the benefits. The group took on the development of both letters with enthusiasm. Letters for both
4694 these groups were developed for both state leaders to use as a template and for the
4695 AAMA/President to send out. Before the letters could be used, they were sent to editorial
4696 department for editorial review, upon completion of editorial review the letter was submitted to
4697 BOT for approval. After the BOT approved, this chair met with Liaison Nick Mickowski, Board
4698 Services Sharon Flynn, CEO and Liaison Don Balasa, and President Case to discuss how AAMA
4699 would use the letters. It was decided that the new CMA (AAMA) letters would be mailed out the
4700 month after they obtained their CMA (AAMA) credential and that letters would go back to the
4701 start of April 2024, and the non-member CMA (AAMA) letters would go out at the end of
4702 August and again late November electronically. The letters from the AAMA will be signed by
4703 the current AAMA President and the state letters will allow for states to insert all their
4704 information into the appropriate places. The letters can also be cut and pasted into an email
4705 format for electronic distribution. The main objective for these letters is to assure that all our
4706 volunteer leaders that are recruiting members are providing our target audience with accurate and
4707 AAMA verified information. These individuals will now be receiving the same information from
4708 both the national and state/chapter level. All the tools that have been created by the Membership
4709 Development Team were sent out to our State and Chapter leaders via the AAMA Leaders
4710 Insider and have been placed on a members-only area for volunteer leaders, with the assistance
4711 of staff liaison Nick Mickowski.

4712
4713 With the assistance of Nick Mickowski, a meeting with the AAMA Beneplace Manager Isabelle
4714 Bode was scheduled with the team. The team met with Ms. Bode, President Case, Don Balasa,
4715 and Nick Mickowski to discuss how Beneplace can improve their offerings for the AAMA
4716 membership and to discuss how Beneplace AAMA Member Perks Program works for the
4717 members (demonstration was provided). Per Ms. Bode, in January 2024 a new Beneplace loyalty
4718 program was started that can be used with the AAMA Member Perks Program, within Beneplace
4719 where members can accumulate points for up to three years toward future Beneplace purchases.
4720 Members of the team reviewed the website for suggestions of vendors to provide to Beneplace to
4721 seek out discounts for AAMA Members. Beneplace will work on building a custom marketplace
4722 for AAMA to assure that the right vendors are accessible to AAMA Members. A list of 22

4723 vendors was submitted by the team to Beneplace to work on securing discounts for AAMA
 4724 Marketplace as well as specials for Medical Assistants Recognition Week in October. The list
 4725 included vendors that will sell scrubs, stethoscopes or other healthcare related items. Additional
 4726 items that the committee discussed was ways to highlight this benefit including a relaunch of
 4727 Beneplace as a member benefit via e-blast, a special banner will be to be placed on AAMA
 4728 Marketplace highlighting special events (i.e. Conference, MARWeek), possible sponsorship or
 4729 display at Conference, an ad in magazine and assuring that they are listed on future e-blasts to
 4730 AAMA members. Isabelle indicated that Beneplace could assist with other services including
 4731 tuition discounts and possible malpractice insurance.

4732
 4733 A report was provided by Beneplace to the Membership Team that indicated that there was an
 4734 increase in 40.6% in the first 6 months of 2024 over the entire year of 2023. The numbers show
 4735 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%

4737
 4738
 4739 AAMA placed information about Beneplace in the AAMA Representative Bureau Power Points
 4740 and placed ads in the AAMA e-blasts. It was suggested that the Membership Team continue to
 4741 look and evaluate the site quarterly for any necessary updates that may be applicable to the
 4742 AAMA members and submit them to Beneplace.

4743
 4744 In July Ms. Bode happily reported that Beneplace is still working on several of the vendors,
 4745 including the possibility of offering malpractice insurance. Beneplace is unable to join the
 4746 AAMA this year at conference however will send information to distribute to members and some
 4747 special giveaways. Ms. Bode was also excited to announce that they secured Uniform Advantage
 4748 (UA) as a special vendor for the AAMA Marketplace. They will offer the following discounts to
 4749 AAMA Members that use their AAMA Beneplace log in:

- 4750
- 4751 • 15% off all retail-priced items on their website
- 4752 • Logo cost discounted to \$5.99 from \$8.99
- 4753 • Each line of text embroidery will be discounted to \$5.99 from \$7.99 and will run various
 4754 online shipping options.

4755
 4756 Beneplace will coordinate a special discount code for any purchase made on Beneplace for
 4757 MARWeek 2024 and Uniform Advantage has indicated they will do something special for
 4758 MARWeek in addition to the Beneplace discount.

4759
 4760 The biggest project for the Membership Development Group Two and Three collaborated on was
 4761 the Focus Groups. It was decided that the groups would reach out to non-member CMAs
 4762 (AAMA) and members that had only been with the AAMA for 5 years or less. Group Two and

4763 Three provided this chair with available dates and a schedule was sent out to members of the
4764 groups for their assigned Focus Group Day. A basic form was developed for the Focus Group to
4765 sign up for participation. Email lists were formulated by Nick Mickowski who then sent the
4766 emails out to both groups advertising the opportunity to participate in the Focus Groups and
4767 posts were placed on AAMA social media platforms. A QR code was created by this chair for
4768 use in the AAMA Representative Bureau Power Point. Sign up for the Focus Groups opened on
4769 April 1st and within the first hour of the release for sign up there were over 85 individuals that
4770 had signed up. The sign up for Focus Groups was open from April 1–30th and approximately 300
4771 individuals signed up for participation. This chair took the sign up listed and divided the
4772 individuals into two groups, then placed them into an online application that randomly pulled
4773 25–30 individuals (https://www.abcya.com/games/random_name_picker) for each focus group
4774 session. It was decided that the team would host six focus groups, three for each medical
4775 assistant group. The focus groups were done via Teams. Several of the other team members
4776 requested to join the focus groups as did Don Balasa, President Case, and some of the members
4777 of the BOT. Each session lasted approximately one hour, and a series of questions were asked
4778 each focus group. Each membership team member present took notes and at the end of each
4779 session notes were compared. After all the sessions concluded the information was put together
4780 in a document and was sent to the BOT and Committee Chairs to assist in planning their future
4781 projects. Below is a list of questions with a summary of the answers received:
4782

4783 **CMA (AAMA) Non-Member Focus Group Engagement Questions:**

- 4784 • ***What drew each of you to becoming a medical assistant?***
 - 4785 ○ Answers varied from several wanted to go into nursing, others didn't like the admin
 - 4786 side of house, and a few indicated it was a second career
- 4787 • ***Do your employers offer any professional development or continuing education***
4788 ***support?***
 - 4789 ○ Only one indicated employer assisted with CEU/professional development
 - 4790 (\$300/year); most employers do not, and one employer refers employees to AAMA
 - 4791 website for CEUs resources and options
- 4792 • ***What discourages you from joining a professional association?***
 - 4793 ○ Several indicated not knowing anyone, the cost was a factor for almost all, several
 - 4794 indicated it was only good right before recertification time; several indicated they did
 - 4795 not know there was a difference between certification and membership, and one
 - 4796 indicated no local active chapter
- 4797 • ***What have you heard about AAMA membership? Who did you hear it from?***
 - 4798 ○ Many stated that they heard from their instructors or other medical assistants that
 - 4799 were preparing for recertification and stated indicated that members get a discount on
 - 4800 test and CEUs. A couple indicated that the dues are too expensive and there is no
 - 4801 incentive to join. Several mentioned that it appears that the AAMA is always asking
 - 4802 for money to purchase this or that.
- 4803 • ***If we offered/changed anything about membership would that make a big enough***
4804 ***difference to encourage you to join?***
 - 4805 ○ Free or discounted CEUs more often (one mentioned AAPC magazine CEUs are
 - 4806 free), virtual CEUs for all members not just AAMA Leaders, more AAMA products,
 - 4807 national should hold State Societies accountable for their activities and finally most

4808 indicated that payment plans would help or lower cost dues, reminder text messages
4809 for due.

4810

4811 **CMA (AAMA) 5-year Member Focus Group Engagement Questions:**

- 4812 • ***What drew each of you to becoming a medical assistant?***
4813 ○ Several were working in nursing homes, or they wanted to take care of others.
- 4814 • ***Do your employers offer any professional development or continuing education***
4815 ***support?***
4816 ○ Several indicated that they are offered education through employer (i.e. HIPAA,
4817 Diversity, and such courses).
- 4818 • ***Why did you join the AAMA?***
4819 ○ Several stated that it was required by educators; a couple of others mentioned
4820 professional recognition and all of the individuals mentioned the CEUs as being the
4821 only benefit.
- 4822 • ***Why do you continue to be a member of the AAMA?***
4823 ○ Access CEUs online and in magazine for discounts. Several mentioned the magazine
4824 was enjoyed as are emails that are distributed. Many did not understand the scope of
4825 practice information or protection and a few others mentioned access to discounted
4826 CEUs.
- 4827 • ***What areas of AAMA Membership can AAMA improve on?***
4828 ○ Almost all of the participants mentioned having lower cost CEUs, discounts on bulk
4829 year memberships and payment plans, different due date – not so close to holidays;
4830 cost savings on retail good/services; better explanation of the membership model-
4831 certification versus membership
- 4832 • ***What have you heard about AAMA membership? Who did you hear it from?***
4833 ○ Several mentioned that they had heard from their local chapters and educators about
4834 the AAMA. Local Chapters discussed the importance of obtaining CEUs and how
4835 membership will provide them discounts. Educators talk about the importance of the
4836 professional networking
- 4837 • ***If we change anything about the AAMA Membership, what would it be?***
4838 ○ Discounted CEUs or free CEUs from magazine, use of social media or virtual
4839 platform for AAMA CEUs. Eblasts should be more topic focused (membership,
4840 CEU, certification/recertification, conference and practitioner and educator). Practice
4841 Management Classes or classes to help medical assistance on the career lattice.
4842

4843 The committee was pleased with the response to the Focus Groups and wanted to make sure we
4844 kept these individuals engaged. The committee recommended to the BOT that a free CEU was
4845 provided to those CMA (AAMA) non-members that signed up to participate. The BOT agreed to
4846 allow access to those individuals to one of the CASAT sponsored CEUs. The CMA (AAMA)
4847 Non-Members were sent the CMA (AAMA) non-member letter educating them about the
4848 benefits of membership along with access to the free CEU. These individuals were allowed to
4849 take advantage of this CEU opportunity from June 1–30, 2024. Approximately 20% of those
4850 individuals that received the email took advantage of this opportunity, in addition 9% of those
4851 individuals also joined the AAMA. The committee also recommended awarding membership to
4852 an individual that participated in one of the focus group sessions. The individuals were placed in
4853 the same online application used to select them for the Focus Groups. The winner was notified
4854 via email by this chair along with Director and Liaison Nick Mickowski. Several participants of

4855 the Focus Groups have kept in touch with this chair, and information about their state society and
4856 the names of their state leaders has been provided.

4857
4858 After reviewing this data from the Focus Groups, the Membership Development Team and our
4859 staff liaisons discussed what could be trialed to help build up membership while still providing
4860 our current members with what they needed. The Membership Development Team
4861 recommended to the BOT and CEB that we should increase the number of CEUs available in the
4862 magazine and allow members to purchase 3 CEUs for the price of 2. In addition, it was
4863 recommended that since by law AAMA may increase the non-members cost by 50%, we
4864 increase their costs of CEUs available to \$40.00 per CEU. This recommendation was presented
4865 by Don Balasa to the CEB and to the BOT at the Summer 2024 meeting. The recommendation
4866 was approved by the BOT. The pilot of this incentive will start with the Sept/Oct 2024 issue and
4867 run through July/Aug 2024 edition. The MarCom and Communications Directors will work on
4868 the advertising of this new incentive.

4869
4870 This chair met with Tyler Michel from ID.me in January 2024 to discuss possibly hosting an
4871 AAMA portal on their website. This portal would allow our members to put in their membership
4872 numbers and be recognized by ID.me for discounts on merchandise and services through them.
4873 During the discussion Mr. Michel, from ID.me mentioned that ID.me could verify the CMA
4874 (AAMA) credential. ID.me is not only a discount savings program but they also do credential
4875 verification for the US Military, IRS, Social Security, and Department of Employment Services
4876 to just name a few. They are used by many hospital organizations with verification of physician's
4877 digital identities that includes their credentials, licenses and other important information.
4878 Another option to consider is ID.me to verify's an individual's membership and status they will
4879 be able to download a digital card for their electronic wallet to obtain discounts at many local
4880 stores and services. After multiple discussions with Mr. Michel, he indicated at the time ID.me
4881 only has limited ability to link and verify the status of one's association membership. However,
4882 hoped by third quarter of 2024 they should have the ability to offer an AAMA portal. The portal
4883 will offer discounts and verification of credentials if AAMA desires to pursue this. This chair
4884 followed up with Mr. Michel in July 2024. Due to the size of the project, content of the project
4885 and need for technology to work together this project will have to be carried over to the next
4886 committee.

4887
4888 This chair would like to thank the spectacular work of the Membership Development Team,
4889 Summer O'Neal, Dawn Jordan Leblanc, Marsha Benedict, Leann Buneta, Paula Schubert, and
4890 Melinda Rhynes, along with my AAMA BOT Team members Natasha Geno, Aimee Quinn and
4891 Candy Miller, without this team none of this would have been accomplished. This chair is
4892 absolutely humbled by the hard work and dedication of these individuals to the AAMA. Your
4893 willingness to take time out of your day for the members of this association was inspirational.
4894 Thank you for always being engaged throughout this last year.

4895
4896 This Chair would also like to express a huge amount of gratitude to our staff partners Nick
4897 Mickowski and Don Balasa for their knowledge, support and always willingness to help or
4898 answer questions (and we have so many)! Your openness and willingness to try new things with
4899 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***

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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%20MF%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

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

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

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

Acceptance letters were sent out to the following members:

- Christine Dzoga, CMA (AAMA), from Illinois
- Jolene Guenther, CMA (AAMA), from Wisconsin
- Laura McClain, CMA (AAMA), from South Carolina
- Lisa Nash, CMA (AAMA), from Alaska
- Annette Wilhelm, CMA (AAMA), from Indiana

Additional members on this committee were:

- Claire Houghton, CMA (AAMA)
- Patty Licurs, CMA (AAMA)
- Shirley Sawyer, CMA (AAMA)
- Shannon Thomas, CMA (AAMA)
- Diane VanderPloeg, CMA (AAMA)

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

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

5066 d. Swag specifically for students

5067

5068 The June 5, 2024, meeting was held virtually and discussed:

- 5069 1. A congratulations letter for presentation to the BOT for approval.
- 5070 a. A letter was presented to the task force that cannot be modified.
- 5071 i. State and local chapter links may be included
- 5072 ii. Second letter option may include an introductory letter from the
- 5073 program and then the AAMA letter to follow
- 5074 2. An Educators' Tab has been submitted to the Website manager with links such as:
- 5075 a. CAAHEP, ABHES, and MAERB websites
- 5076 b. Opportunity for CEUs specifically for educators
- 5077 c. Fact/Q & A Sheet specific to students/educators
- 5078 d. List of Program Directors

5079 This will be submitted to the BOT for approval.

- 5080 3. Educators' Forum for presentation to the BOT for approval then forwarded to
- 5081 MarCom to create and manage
- 5082 a. Create a Facebook group just for Educators that would be private invite only
- 5083 4. Discuss with the Certifying Board the need to allow CEUs that can be used for
- 5084 recertification for a longer length of time prior to initial certification.
- 5085 a. Information was given that the students may use twenty (20)
- 5086 recertification points earned during the three (3) months prior to obtaining
- 5087 their CMA (AAMA) for initial recertification.

5088 5. Educating medical facilities on why having the CMA (AAMA) credential is

5089 important.

5090 b. Don will have an article in the Nov/Dec *Medical Assisting Today*

5091 i. Updating past article

5092 c. AMA-Steps Forward

5093 i. www.edhub.ama-assn.org/steps-forward

5094 1. This was introduced by one of the educators as a possible help for

5095 ideas and tools.

5096 d. Morning Huddles

5097 i. Meeting every morning for short meetings of needs and thoughts for the

5098 day.

5099 6. Create AAMA Introduction Video directed towards students on YouTube—Presented

5100 to the BOT then forwarded to MarCom to create

5101 a. 2–5 minutes long

5102 b. Visually stimulating

5103 c. Not dated

5104 d. Diversity Included

5105 e. Action Filled

5106

5107 The July 18, 2024, virtual meeting was held. Items that the members discussed:

5108 1. We welcomed Diane VanderPloeg, CMA (AAMA), Liaison from the

5109 Certifying Board to our group. We look forward to working with her.

5110 2. Articles that Don Balasa, JD, MBA, CEO, Legal Counsel, sent out:

5111 a. United States Department of Education final Gainful Employment rule

5112 i. Members discussed the possibilities of getting this information to all

5113 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

5155 **American Association of Medical Assistants® (AAMA)**

5156 **Report of the Partnership Task Force**

5157 **For the Period Ending September 2024**

5158

5159 The Partnership Task Force is charged to develop and research partnership
5160 opportunities with outside allied health organizations, governmental agencies,
5161 corporations, and/or associations where a partnership would provide mutual benefits
5162 and market our organization. The purpose of a partnership is marketing our organization
5163 while keeping in mind the AAMA mission statement and the current Strategic Issue
5164 Plan.

5165 The AAMA continues to be active in the current partnerships with the Center for the
5166 Application of Substance Abuse Technologies out of the University of Nevada, Reno
5167 CASAT/FASD, The National Colorectal Cancer Round Table (NCCRT), The American
5168 Cancer Society (ACS) which includes HPV, and The National Association of Health
5169 Unit Coordinators (NAHUC).

5170

5171 **THE SUN BUS:**

5172

5173 At the time of this report, we are waiting to receive a Memorandum of Understanding
5174 (MOU) from the Sun Bus administration. Once both organizational leaders agree and
5175 sign this MOU, The Sun Bus will be added to our Partnerships. We are looking forward
5176 to working with the Sun Bus with the initiative to provide early detection of skin
5177 disorders. This partnership will allow volunteer opportunities for our members to be
5178 educated in testing procedures and the opportunity to provide patient education on
5179 preventive care and sun safety to prevent and or detect skin cancer. This is a grant
5180 funded organization which will provide this service regardless of location,
5181 socioeconomic status, or insurance coverage. Once we receive the MOU and schedule
5182 of Sun Bus events and locations we will reach out to State and/or local chapters to
5183 inform them of this initiative and opportunities within their state. Members who
5184 volunteer will earn Continuing Education & Training on Melanoma and Skin Cancer
5185 Detection & Prevention. This officer has spoken to the Sun Bus Medical Director, Dr.
5186 Karen Nern, three times by phone in the last month. Dr. Nern informed me that they
5187 have had some staffing changes and delays; however she assured me this week that she
5188 will be our direct contact for the Sun Bus. She stated the MOU was in process, and she
5189 shared with this officer the completed and the detailed power point clinical and
5190 administrative educational training components. Not only will the AAMA members
5191 benefit from the education and learning of this community wide issue, but they will also
5192 actively be able to help educate and screen the public preventively. Dr. Nern has also
5193 agreed to provide a speaker to present a clinical CEU session related to the Detection,
5194 Prevention, and treatment of skin cancers. Here is a link to the Sun Bus for more info:
5195 <https://www.thesunbus.org/>

5196

5197 **AAMA Current Partnerships Updates:**

5198

5199 National Colorectal Cancer Roundtable Partnership

5200 • The National Colorectal Cancer Roundtable will hold their Annual Meeting Nov.

5201 20–22, 2024, in Fort Worth, Texas. AAMA usually sends one staff member and one
5202 board member to participate in this meeting. CEO Don Balasa has asked Sharon
5203 Flynn, Board Services Manager and Partnership Liaison to attend this year’s
5204 NCCRT meeting along with President Case who will represent the Board of
5205 Trustees.
5206

5207 **Additional Relationships and connections:**
5208

5209 The AAMA continues to have relationships with Medical Group Management
5210 Association
5211 (MGMA). There was a virtual meeting on June 12, 2024. At this meeting we discussed
5212 future opportunities and co-branding with MGMA. It was suggested by MGMA for
5213 Don to participate in a co-branded MGMA podcast. Connections and conversations
5214 followed with President Case and CEP Balasa and within a week the podcast was
5215 recorded and at the time of this report was in editing review. This podcast will be shared
5216 with AAMA members and can be shared on other social media platforms. We also
5217 continue communications with the American Academy of Family Physicians (AAFP),
5218 the American Cancer Society (ACS), and the Ohio Partners for Cancer Control (OPPC).
5219

5220 The Partnership Task Force members were assigned to specific potential organizations
5221 to see if a collaboration/partnership may be considered. Outreach is in progress and
5222 hopefully we will have more to report by the Pre-Conference Board Meeting. Here is a
5223 list of some of the potential organizations:
5224

- 5225 • The Shriners Hospital for Children
 - 5226 • Good Rx
 - 5227 • Exact Science
 - 5228 • American Medical Group Association
- 5229

5230 This officer would like to thank the members of this committee as well as President
5231 Case, Don Balasa, and our committee staff liaisons for their engagement, participation,
5232 and support.
5233

5234 Deborah Novak, CMA (AAMA)
5235 PTF Chair
5236

5237 **MEMBERS:**

5238 Candy Miller, CMA (AAMA)
5239 Monica Case, CMA (AAMA)
5240 Natasha Geno, CMA (AAMA)
5241 Shirley Sawyer, CMA (AAMA)
5242

5243 **STAFF LIAISONS**

5244 Don Balasa, CEO and Legal Counsel
5245 Gina Mokijewski, Senior Marketing and Communications Director
5246 Sharon Flynn, Board Services Manager
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***BOARDS
AND
COUNCILS
REPORTS***

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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

5294 continues to be used frequently on the AAMA website. As of July 2024, 22,858 practice
5295 exams had been purchased.

5296
5297 The CB asked North and South Carolina state societies, who agreed, to host the “CMA
5298 (AAMA) Knowledge Bowl” at the 2024 AAMA Annual Conference. The event continues
5299 to be well-received and a member-favored event.

5300
5301 Per Ms. Gottwaldt, the CMA (AAMA) examinee statistics for 2023 are as follows:
5302

2023 CMA (AAMA) Examinees	Total	Pass Rate Percent (%)
Initial	4,742	65%
Recertification	2,046	97%
ALL	6,788	75%

5303
5304 **Total Exam Applications in 2023 = 7,913**

5305
5306 Thank you to the Certifying Board for its ongoing dedication and determination to protect
5307 the credential.

5308
5309 Thank you to AAMA President Case, AAMA Immediate Past President Novak, and the
5310 Board of Trustees for their hard work.

5311
5312 Thank you to Certification Director Katie Gottwaldt, Assistant Director of Operations and
5313 Certification Operations Manager Lee Rumpel, Certification Department staff, and Chief
5314 Executive Officer and Legal Counsel Donald Balasa for their continued support and
5315 dedication.

5316
5317 Respectfully submitted,

5318
5319 Carolyn Fuller CMA (AAMA)
5320 Certifying Board Chair, 2024–2025

5321
5322 Members of the CB:
5323 Carolyn Fuller, CMA (AAMA), Chair
5324 Vicki Sokolnik, CMA (AAMA), Immediate Past Chair
5325 Nikal Redwine, CMA (AAMA), RN, BSN, TFTC Co-Chair
5326 Alisha Graham, CMA (AAMA), TFTC Co-Chair
5327 Diane Vander Ploeg, CMA (AAMA), MS, Second Vice Chair
5328 Melinda Garcia, CMA (AAMA), TFTC Vice Chair
5329 Aribell McRae-Spencer, FNP

5330
5331 Public Members:
5332 Beth Jaeger, SPHR, SHRM-SCP

5333
5334 Staff Liaison:
5335 Katie Gottwaldt, Certification Director

5336

5337 **American Association of Medical Assistants® (AAMA)**

5338 **Report of the Director of Certification**

5339 **For the Period Ending September 2024**

5340
5341 Director Gottwaldt provides administrative direction for the American Association of
5342 Medical Assistants (AAMA) Certification Department and serves as the primary liaison
5343 and support to the Certifying Board (CB) of the AAMA. Director Gottwaldt’s duties
5344 include, but are not limited to, the following responsibilities or functions:
5345

- 5346 • Serves as the primary liaison to the CB of the AAMA
- 5347 • Provides assistance and professional support to the CB, including coordinating
- 5348 meetings and developing agendas
- 5349 • Assists with the coordination for the CB, Task Force for Test Construction (TFTC)
- 5350 and other meetings as required for the ongoing effectiveness of the Certification
- 5351 Program
- 5352 • Assists the CB in recruiting volunteers for service on the CB and committees of the
- 5353 CB
- 5354 • Assists the CB with strategic and budgetary planning, ensuring financial stability
- 5355 • Monitors department resources and expenditures to ensure fiscal stability
- 5356 • Serves as the primary liaison to PSI and other certification vendors and contractors
- 5357 • Negotiates contracts for test consulting and administration in consultation with the
- 5358 CEO and the CB
- 5359 • Monitors and ensures the CMA (AAMA) Certification Program complies with the
- 5360 reliability, validity, security, and impartiality standards required by the National
- 5361 Commission for Certifying Agency (NCCA)
- 5362 • Oversees the Certification Department staff
- 5363 • Establishes and implements departmental policies and procedures
- 5364 • Collaborates with AAMA staff and directors of other volunteer boards within the
- 5365 organization to facilitate seamless communication and achieve unified
- 5366 organizational objectives
- 5367 • Coordinates with staff and stakeholders to promote the value of the credential
- 5368 • Facilitates the revision and production of all internal and external certification
- 5369 documents
- 5370 • Oversees the production and distribution of certification documents

5371
5372 Director Gottwaldt has provided guidance and direction for the following certification
5373 initiatives in 2024:
5374

- 5375 • Live Remote Proctoring (LRP) through PSI
 - 5376 • Non-AAMA CEU submission tool
 - 5377 • Initial Research: Occupational Analysis for the CMA (AAMA) Certification
 - 5378 Program
 - 5379 • Website upgrade – Certification-specific sections
- 5380

5381 Currently, Director Gottwaldt serves as a Board Member for the Certification Network
5382 Group (CNG), a non-profit organization that creates education and networking events
5383 for credentialing professionals. The annual CNG Board meeting is held each year in
5384 December, and the CNG Board meets virtually on a monthly basis. Her term on the
5385 CNG Board will be ending at the end of 2024. Director Gottwaldt also serves on the
5386 Program Committee of the Institute for Credentialing Excellence (I.C.E.). The Program
5387 Committee meets virtually on a monthly basis to review and approve the sessions for
5388 the I.C.E. annual conference, the I.C.E. Exchange. The I.C.E. Exchange will be held
5389 November 17–20, 2024 in Miami Beach, Florida.

5390

5391 Respectfully submitted,
5392 Katie Gottwaldt
5393 AAMA Director of Certification

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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,

5441 served as the subject matter expert for both monographs. Both monographs are in the
5442 final stages of development and are expected to be available for purchase by the end of
5443 2024.

5444
5445 Documents Updates

5446 The CEB has completed a comprehensive review of the Standing Rules, Policies and
5447 Procedures, and Volunteer Leadership Position Descriptions. Proposed changes to these
5448 documents have been completed and sent to the Board of Trustees for review and
5449 approval.

5450
5451 Assessment Based Certificates (ABCs)

5452 The Continuing Education Board offers the following ABC courses:

- 5453 • Assessment-Based Certificate Program in Geriatrics
- 5454 • Assessment-Based Certificate Program in Allied Health Education
- 5455 • Assessment-Based Certificate Program in Pediatrics
- 5456 • Assessment-Based Certificate Program in Practice Management

5457
5458 ABC-Practice Management was reviewed during the 2023–2024 fiscal year and will
5459 continue to be reviewed every two years. ABC-Geriatrics, launched at the beginning of
5460 2022, is scheduled for review during the 2024–2025 fiscal year and every two years
5461 thereafter. To reduce costs, the CEB will consider a proposal from a private medical
5462 writer for updates to ABC-Geriatrics, instead of utilizing Learn Ethos.

5463
5464 Initially, ABC-Pediatrics held I.C.E. accreditation, but during the summer 2024 CEB
5465 meeting, it was decided to discontinue this accreditation. ABC-Pediatrics was last
5466 reviewed in June 2023 and will now follow a two-year review cycle. The ABC-Allied
5467 Health Education is the only Assessment-Based Certificate course that holds I.C.E.
5468 accreditation at this time. ABC-Allied Health Education underwent its first review during
5469 the 2023–2024 fiscal year and is scheduled for annual reviews moving forward to ensure
5470 compliance with I.C.E. accreditation requirements.

5471
5472 Volunteer Appointments

5473 At each meeting, the Continuing Education Board reviews and votes on every volunteer
5474 leadership application submitted by individuals who wish to serve on the Continuing
5475 Education Board or one of its task forces. After the CEB votes to accept or approve an
5476 appointment, the CEB Chair forwards the appointment to the Board of Trustees for their
5477 review and final approval or denial.

5478
5479 Budget

5480 A comprehensive budget proposal was developed by the Continuing Education Board
5481 and presented to the Board of Trustees during their summer meeting. These areas
5482 encompass updates to the e-Learning Center (ELC) articles, revisions to ABC programs,
5483 enhancements to monographs, and funding for new projects. Additionally, the budget
5484 covers marketing initiatives and the LEAP preconference workshop and introduces a new
5485 line item for a software purchase to support the ongoing and future needs of ABC
5486 programs.

5487
5488 Conference Continuing Education Task Force (CCETF)

5489 The Conference Continuing Education Task Force is charged with developing continuing
5490 education session topics, with descriptions and objectives, for the Annual Conference.
5491 This includes research of previous conference topics, solicitation of current topics of
5492 interest, and development of future topics.

5493
5494 The CCETF Chair provided the 2024 Conference Education Chair with initial guidelines,
5495 and a list of approved Annual Conference topics and outlines and has been available to
5496 provide general oversight and assistance as the hosting state coordinates speakers.
5497 Additionally, the CCETF Chair has already initiated contact with the 2025 Conference
5498 Education Chair of the hosting state and provided initial guidelines, a list of approved
5499 annual conference topics, and outlines.

5500
5501 Additionally, the CCETF Chair, Clare Ley, has attended the Board of Trustee Conference
5502 Committee meetings and collaborated with Chair Novak to update the education template
5503 for the 2025 AAMA Annual Conference.

5504
5505 The Conference Continuing Education Task Force is actively researching and developing
5506 topics, including objectives, descriptions, and potential speakers, for the 2026 AAMA
5507 Annual Conference. This year, over 40 conference topics have been submitted and
5508 reviewed by the Continuing Education Board members.

5509
5510 Leaders in Education and Practice (LEAP)

5511 On Thursday, September 21, 2023, LEAP held its first annual LEAP Pre-Conference
5512 Educator Workshop. There were 63 paid registrations and attendees received 4 CEUs for
5513 their attendance and participation. Topics presented included:

- 5514
- 5515 • A Review of Learning Theories and How to Apply them in the Classroom, presented
5516 by Dr. Angela Belnap
 - 5517 • Fostering Collaborative Excellence: Implementing Interprofessional Education in
5518 Medical Assistant Programs, presented by Dr. Rachel Houston
 - 5519 • Curriculum Development

5520
5521 In addition to the CEU presentations mentioned above, educators in attendance
5522 participated in a strategy session facilitated by LEAP members. This session featured
5523 active discussions on learning theories, curriculum development, and the implementation
5524 of interprofessional education exercises. Attendees expressed high satisfaction with the
5525 workshop and provided positive feedback to the Task Force. Many participants later
5526 reported using their attendance at the workshop to enhance their professional portfolios as
5527 they sought academic rank or promotion in their educator roles.

5528
5529 LEAP also held its annual LEAP Forum at the 2023 AAMA Annual Conference. This
5530 event was well attended and received positive feedback from those in attendance. The
5531 Forum focused on implementation strategies for curricular updates and continued strategy
5532 planning from the LEAP Pre-Conference Educator Workshop.

5533
5534 LEAP plans to host its second annual LEAP Pre-Conference Educator Workshop on
5535 September 19, 2024, in Grand Rapids, Michigan. The planning for this workshop has
5536 been a major focus throughout the 2024 calendar year. The educational sessions will

5537 cover a range of topics, including Education Terminology, Artificial Intelligence in the
5538 Classroom, and an active learning session on Preventing Burnout in Medical Assistant
5539 Education and Practice.

5540
5541 In addition to planning the LEAP Pre-Conference Educator Workshop, LEAP members
5542 have been working on the submission of educator conference sessions for the 2026
5543 AAMA Annual Conference to the Conference Continuing Education Task Force
5544 (CCETF) to be reviewed by the Continuing Education Board.

5545
5546 Practice Managers Task Force (PMTF)

5547 The Practice Managers Task Force is charged with encouraging credentialed medical
5548 assistants to pursue practice management and supervisory roles and to develop and offer
5549 advanced practice management educational sessions at the AAMA Annual Conference.
5550 This year, the PMTF Chair has been coordinating with the 2024 PMTF Keynote Speaker.
5551 Additionally, PMTF members have been working on the submission of advanced practice
5552 management conference sessions for the 2026 AAMA Annual Conference to the
5553 Conference Continuing Education Task Force (CCETF) to be reviewed by the
5554 Continuing Education Board.

5555
5556 As we wrap up a successful year, I want to extend my thanks to the members of the
5557 Continuing Education Board for their exceptional hard work and dedication. I also want
5558 to express our immense gratitude to our staff liaison, Nick Mickowski. We could not
5559 have accomplished what we did without his unwavering support and expertise. His
5560 contributions have been vital to our success.

5561 Respectfully,

5562
5563 Amber Greer, BS, CMA (AAMA), PBT(ASCP), CEB Chair

5564
5565 Members:

5566 Clare Ley, CMA (AAMA) – CCETF Chair

5567 Susan Hawes, CMA (AAMA), MBA, FACMPE – CEB Vice Chair

5568 Rachel Houston, DHSc, CMA (AAMA) – LEAP Chair

5569 Frances Mooney, ATA, CMA (AAMA) – LEAP Vice Chair

5570 Brian Stimpson, Sr., CMA (AAMA)

5571 Linda Vitzthum, CMA (AAMA) – PMTF Chair

5572
5573 Staff Liaison:

5574 Nick Mickowski, Continuing Education and Membership Director

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American Association of Medical Assistants® (AAMA)

Report of the Judicial Council

For the Period Ending September 2024

The Judicial Council exercises jurisdiction in all questions involving membership interpretation and any controversies arising from interpreting the AAMA Bylaws and/or the Code of Ethics of the Association.

No issues or concerns were presented to the Judicial Council for consideration during the 2023–2024 association year.

Debby B. Houston, CMA (AAMA), CPC-I
Chair

Members:

Patty Licurs, CMA (AAMA), Vice Chair

Sue Hawes, CMA (AAMA)

Lisa Lee, CMA (AAMA)

Julie Flaatten, CMA (AAMA)

Staff Liaison: Donald Balasa, JD, MBA

***PROPOSED
BYLAWS
AMENDMENTS***

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American Association of Medical Assistants® (AAMA)

Proposed Bylaws Amendment #1

Article XII-Board of Trustees

Section 6. Management Steering Committee

Current Wording

SECTION 6. The Management Steering Committee shall consist of the President, Vice President, Immediate Past President, Secretary, and Chief Executive Officer.

Proposed Wording

SECTION 6. The Management Steering Committee shall consist of the President, Vice President, Immediate Past President, Secretary, and Chief Executive Officer as an Ex-Officio member, without a vote.

Rationale

Making the Chief Executive Officer (CEO) as an ex officio member of the Management Steering Committee without a vote offers several advantages. It allows the committee to benefit from the CEO's expertise in organizational operations and strategy without influencing voting outcomes. By abstaining from voting, the CEO maintains neutrality and focuses solely on providing informed advice to committee members. It is worth noting that the CEO currently (and throughout his tenure as AAMA CEO) has not exercised his right to vote.

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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	American Association of Medical Assistants® (AAMA)		
5669	2024 Delegates and Alternates		
5670	(Current as of August 2, 2024 - Subject to Later Revision)		
5671			
5672			
5673			
5674	<u>STATE</u>	<u>DELEGATES</u>	<u>ALTERNATES</u>
5675			
5676	Alabama	Crystal Gersh, CMA (AAMA)	Ashley Faulkner, CMA (AAMA)
5677		Brandy Owen, CMA (AAMA)	Tracie Fuqua, CMA (AAMA)
5678		Melanie Strain, CMA (AAMA)	
5679			
5680	Alaska	Jessican Jensky, CMA (AAMA)	
5681		Tamarack Brottem, CMA (AAMA)	
5682		Lisa Nash, CMA (AAMA)	
5683			
5684	Arkansas	Melinda Rhynes, CMA (AAMA)	
5685		Misty Ross, CMA (AAMA)	
5686			
5687	California	Virginia Marquette, CMA (AAMA)	Katelyn Marie Dixon, CMA (AAMA)
5688		Nancy Lizon, CMA (AAMA)	
5689		Julie Thomas, CMA (AAMA)	
5690			
5691	Colorado	Christine Hollander, CMA (AAMA)	
5692			
5693	Connecticut	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	Florida	Jeanette Tyler CMA (AAMA)	
5698		Christine Sears, CMA (AAMA)	
5699		Deniece Jozefiak, CMA (AAMA)	
5700		Mary Lou Allison, CMA (AAMA)	
5701			
5702	Georgia	Christina McRee, CMA (AAMA)	
5703		Vickie Cottrill, CMA (AAMA)	
5704		Sabrina Edge, CMA (AAMA)	
5705			
5706	Hawaii	Mae Dorado, CMA (AAMA)	
5707			
5708	Idaho	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	Illinois	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	Indiana	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	Iowa	Michele Sears, CMA (AAMA)	Jacquelyn Hellyer, CMA (AAMA)
5726		Katie Wahl, CMA (AAMA)	
5727		Rachel Ozbrun, CMA (AAMA)	
5728		Lucinda Wilson, CMA (AAMA)	
5729		Deanna Schnebbe, CMA (AAMA)	
5730			
5731	Kentucky	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	Maine	Barbara Marchelletta, CMA (AAMA)	
5738		Dominic Sanchez, CMA (AAMA)	
5739		Sue Hawes, CMA (AAMA)	
5740			
5741	Massachusetts	Dawn Jordan Leblanc, CMA (AAMA)	Ramona Sterczala, CMA (AAMA)
5742		Sarah Godin, CMA (AAMA)	
5743		Jean Lynam, CMA (AAMA)	
5744			
5745	Michigan	Kathy Stuu, 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	Minnesota	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	Missouri	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	Montana	Lori Schalk, CMA (AAMA)	Angela Wood, CMA (AAMA)
5763		Joleen South, CMA (AAMA)	
5764			
5765	Nebraska	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	Nevada	Carol Cohen, CMA (AAMA)	
5770			
5771	New Hampshire	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	New Jersey	Susan Henderson, CMA (AAMA)	
5776		Marianne Van Deursen, CMA (AAMA)	
5777		Nitza Sheehan, CMA (AAMA)	
5778	New Mexico	Jennifer Benton, CMA (AAMA)	Lori Rager, CMA (AAMA)
5779		Toni Coffman, CMA (AAMA)	Jeremy Soto, CMA (AAMA)
5780			
5781	New York	Todd Lasher, CMA (AAMA)	
5782		Kim Battaglini, CMA (AAMA)	
5783		Cindy Ryder, CMA (AAMA)	
5784			
5785	North Carolina	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	Ohio	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	Oklahoma	Julie Benson, CMA-AC (AAMA)	
5803		Leann Buneta, CMA (AAMA)	
5804			
5805	Oregon	Christy Oldenstadt, CMA (AAMA)	
5806		Paula Purdy, CMA (AAMA)	
5807		Shawn Molnar, CMA (AAMA)	
5808		Alexandria Holcomb, CMA (AAMA)	
5809			
5810	Pennsylvania	Jennifer Gonzalez, CMA (AAMA)	
5811		Kellie Ann Humma, CMA (AAMA)	
5812		Janet Mills, CMA (AAMA)	
5813		Mary Louise Ninehauser, CMA (AAMA)	
5814			
5815	South Carolina	Crissy Taylor, CMA (AAMA)	
5816		Patty Licurs, CMA (AAMA)	
5817		Lisa Kianos, CMA (AAMA)	
5818		Jacquelin Harris, CMA (AAMA)	
5819			
5820	South Dakota	Susan Hookie, CMA (AAMA)	Erica Arends, CMA (AAMA)
5821		Amanda Schroeder, CMA (AAMA)	
5822		Alexius Thorpe, CMA (AAMA)	
5823			
5824	Tennessee	Dawn Alter, CMA (AAMA)	
5825		Marilyn Huddleston-Reeder, CMA (AAMA)	

5826	Texas	Dina Harrett, CMA (AAMA)	
5827		Donna Gibbins, CMA (AAMA)	
5828		Charlene Couch, CMA (AAMA)	
5829			
5830	Utah	Suzy Johnson, CMA (AAMA)	
5831		Heather Mendy CMA (AAMA)	
5832		Angela Belnap, CMA (AAMA)	
5833			
5834	Virginia	Deborah Benson, CMA (AAMA)	
5835		Amanda Harris, CMA (AAMA)	
5836		Debby Houston, CMA (AAMA)	
5837			
5838	Washington	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	Wisconsin	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

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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

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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

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of American Association of Medical Assistants, Inc. internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about American Association of Medical Assistants, Inc. ability to continue as a going concern for a reasonable period of time.



Costabile & Steffens P.C.
Certified Public Accountants

The Board of Directors
American Association of Medical Assistants, Inc.
Chicago, Illinois

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Costabile & Steffens PC

COSTABILE & STEFFENS PC
Certified Public Accountants

Rolling Meadows, Illinois 60008
December 2, 2023

American Association of Medical Assistants, Inc.STATEMENT OF FINANCIAL POSITION June 30,
2023

<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>

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

	Without Donor Restrictions
REVENUE AND OTHER SUPPORT	
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	6,530,743
EXPENSES	
Programs	2,759,769
General and administrative	2,512,025
Fundraising	143,774
Total Functional Expenses	5,415,568
Increase in Net Assets	1,115,175
Net Assets - Beginning of the Year	10,415,025
Net Assets - End of Year	\$ 11,530,200

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:

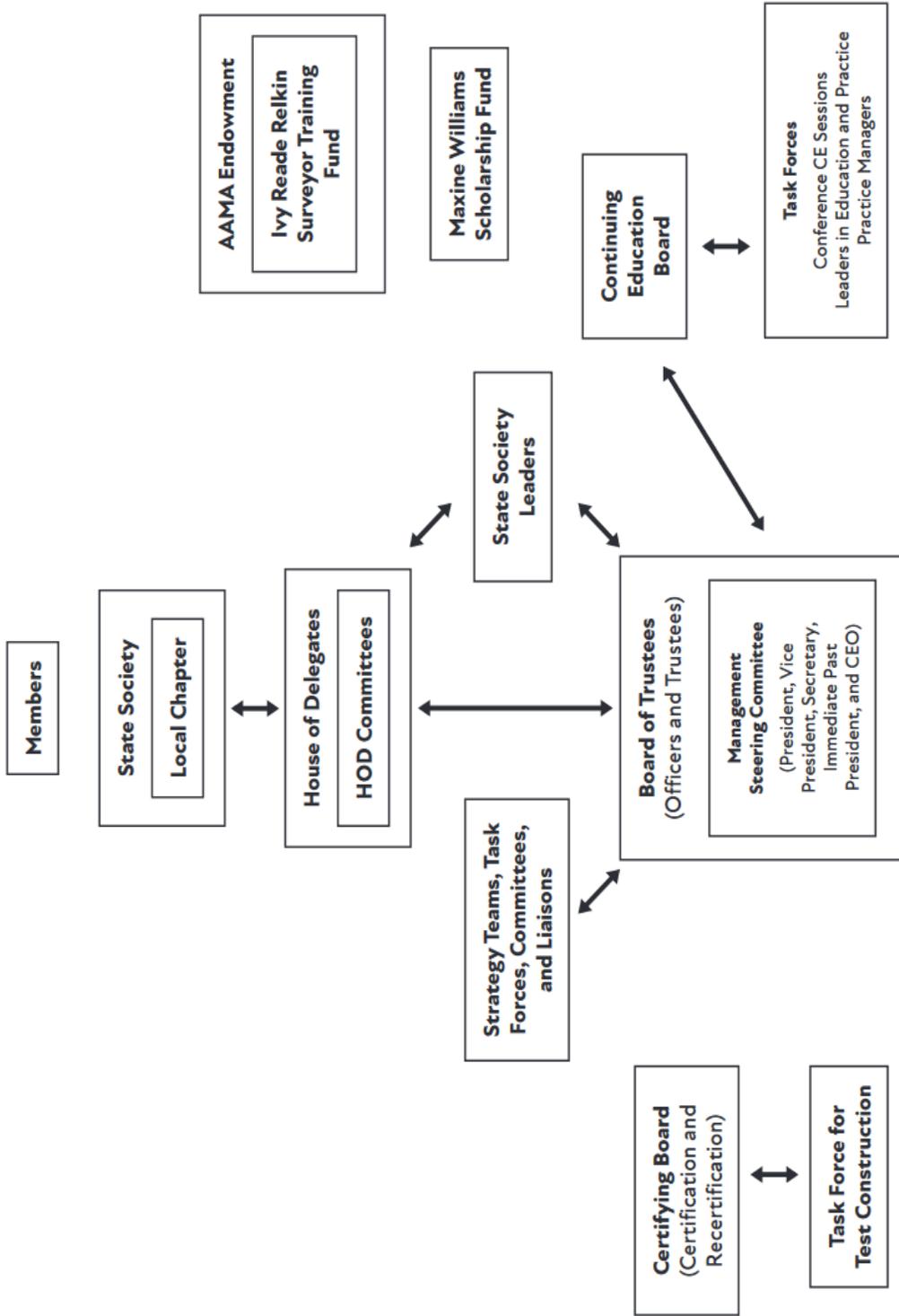
- President
- Vice President
- Secretary
- Speaker of the House
- Vice Speaker of the House
- Immediate Past President
- Seven Trustees

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

Initials	Description
AAFP	American Academy of Family Physicians
AAMA	American Association of Medical Assistants
AAMAE	American Association of Medical Assistants Endowment
AAPC	American Academy of Professional Coders
ABHES	Accrediting Bureau of Health Education Schools
ACS	American Cancer Society
ACCSC	Accrediting Commission of Career Schools and Colleges
ACICS	Accrediting Council for Independent Colleges and Schools
ADA	American Dental Association
ADAA	American Dental Assistants Association
AFC	Association Forum of Chicagoland
AHDI	Association for Healthcare Documentation Integrity
AHIMA	American Health Information Management Association
AMA	American Medical Association
AMT	American Medical Technologists
ASAE	American Society of Association Executives
ASMT	American Society of Medical Technicians
BOT	Board of Trustees
CAAHEP	Commission on Accreditation of Allied Health Education Programs
CASAT	Center for the Application of Substance Abuse Technologies
CB	Certifying Board (AAMA)
CCETF	Conference Continuing Education Task Force (CEB)
CEB	Continuing Education Board (AAMA)
CEU	Continuing Education Unit
CMA (AAMA)	Certified Medical Assistant (AAMA)
CMA-A (AAMA)	Certified Medical Assistant (AAMA) – Administrative
CMA-C (AAMA)	Certified Medical Assistant (AAMA) – Clinical
CMA-P (AAMA)	Certified Medical Assistant (AAMA) – Pediatric
CPC	AAPC-Certified Professional Coder
DOE	United States Department of Education
FSMB	Federation of State Medical Boards
HOSA	Health Occupations Students of America
HPN	Health Professions Network
I.C.E.	Institute for Credentialing Excellence
LEAP	Leaders in Education and Practice
MAERB	Medical Assistant Education Review Board
MARWeek	Medical Assistants Recognition Week
MSC	Management Steering Committee
MWSC	Maxine Williams Scholarship Committee
NACCLS	National Accrediting Agency for Clinical Laboratory Sciences
NCSBN	National Council of State Boards of Nursing
NCCA	National Commission for Certifying Agencies

Medical Assisting Creed

The Medical Assisting Creed of the AAMA sets forth medical assisting statements of belief:

- **I believe in the principles and purposes of the profession of medical assisting.**
- **I endeavor to be more effective.**
- **I aspire to render greater service.**
- **I protect the confidence entrusted to me.**
- **I am dedicated to the care and well-being of all people.**
- **I am loyal to my employer.**
- **I am true to the ethics of my profession.**
- **I am strengthened by compassion, courage, and faith.**

Proposed Motion Form

Clearly write down the motion.

I move _____

Motion made by: _____

Second: _____

PASSED

FAILED

After the motion has been moved and seconded, the form must be sent to the Speaker of the House via a Page.

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®**

20 N. WACKER DR., STE. 3720
CHICAGO, ILLINOIS 60606

www.aama-ntl.org

800/228-2262