



AMERICAN ASSOCIATION
OF MEDICAL ASSISTANTS®

State Management Guide

Revised June 2026

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All documents for the AAMA have been developed in accordance with policies established by the AAMA Board of Trustees. Any discrepancies in policy statements inconsistent with current policies should be brought to the attention of the AAMA Executive Office and the Board of Trustees. The AAMA Board of Trustees will make the final decision on discrepancies. The AAMA Board of Trustees apologizes for any inconvenience this may cause.

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INITIALISMS

<u>Initialism</u>	<u>Description</u>
AAFP	American Academy of Family Physicians
AAMA	American Association of Medical Assistants®
AAMC	Association of American Medical Colleges
AAPC	American Academy of Professional Coders
ABHES	Accrediting Bureau of Health Education Schools
ABR-OE	Assessment-Based Recognition in Order Entry
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 (AAMA)
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	Certified Professional Coder (American Academy of Professional Coders)
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 (BOT)
MWSC	Maxine Williams Scholarship Committee (BOT)
NACCLS	National Accrediting Agency for Clinical Laboratory Sciences
NCSBN	National Council of State Boards of Nursing
NCCA	National Commission for Certifying Agencies
NCCRT	National Colorectal Cancer Roundtable
PLTF	Practice Leadership Task Force (CEB)
PSI	PSI Services LLC
RMA(AMT)	Registered Medical Assistant (American Medical Technologists)
SACS	Southern Association of Colleges and Schools Strategic Issues Planning (BOT)

SIP	Society of Past Presidents
SoPPs	Task Force for Test Construction (CB)
TFTC	Terminal Performance Objective
TPO	<i>Volunteer Leadership Position Descriptions</i>
VLPD	Western Association of Schools and Colleges
WASC	

THE NATIONAL ORGANIZATION

The American Association of Medical Assistants® Inc. (AAMA) consists of a combination of volunteer members and a paid staff. The Board of Trustees and members of the House of Delegates are all active members of AAMA who volunteer their time and efforts with some expenses reimbursed by the AAMA or the state societies. Staff members are all employees of the AAMA at the executive office in Chicago.

The House of Delegates (HOD) is the governing body of the national organization. It amends the bylaws, conducts the election of officers and trustees and acts upon such business that comes before it. *(See the section on "AAMA Delegates and Alternates" for the descriptions and qualifications of delegates.)*

Refer to the AAMA website and the *Volunteer Leadership Position Descriptions* for additional information.

AAMA Executive Office

Address:

American Association of Medical Assistants
20 N. Wacker Drive, Suite 3720
Chicago, IL 60606-2903

Telephone: 800/228-2262 (800/ACT-AAMA) or 312/899-1500

Website: <https://www.aama-ntl.org/>

HOW TO ORGANIZE A NEW STATE SOCIETY

The first step is to send a notice to all medical assistants in the state for the purpose of deciding to form an affiliate state society of the AAMA. This notice should include the place, date, time, and purpose of the meeting. AAMA membership should be a requirement for organizing individuals.

The Membership Department at the executive office in Chicago can provide the organizational committee with the names of AAMA members-at-large, email addresses, mailing labels, AAMA bylaws, a state management guide, AAMA fact sheet,

organizational chart, membership materials, and certification materials. If desired, the name and contact information of the state society presidents of neighboring states are available. These members can be valuable assets as questions arise and may be available to attend your organizational meeting.

Steps to follow at the organizational meeting:

1. Organizing committee decides who will call the meeting to order.
2. After the appointed person calls the meeting to order, they ask for nominations from the floor for a temporary chairperson (chairperson pro tem).
3. Chairperson pro tem is elected by majority vote.
4. Chairperson pro tem opens floor for nominations for a temporary secretary (secretary pro tem) who is elected by majority vote.
5. Chairperson pro tem asks for the adoption of a parliamentary authority, which is usually *Robert's Rules of Order, Newly Revised*, and the adoption of rules for debate.
6. Chairperson pro tem recognizes the person who will fully explain the purpose of the meeting. This person is usually a member of the organizing committee.
7. Chairperson pro tem allows for debate, calls for the vote and announces the results of the decision.

Once the decision is reached to form a state society, a committee to draft bylaws is appointed by the chairperson pro tem. These society bylaws must conform to the AAMA bylaws. Sample bylaws and guidelines for bylaws development are provided in this manual and available on the AAMA website for assistance with the process. The first set of bylaws is presented at the next meeting and is adopted by majority vote after all amendments are agreed upon. Any future amendments to the bylaws will require a two-thirds (2/3) vote for adoption.

After adoption of the bylaws (which take effect immediately), the chairperson pro tem recesses the meeting for the purpose of enrolling members. Those who wish to join sign a permanent record sheet which is filed with the organizational papers. These members are considered charter members of the society. They should complete the online membership application prior to the conclusion of the meeting if they are not an AAMA member-at-large.

The chairperson pro tem reconvenes the meeting and has the secretary pro tem read the names of those who signed the enrollment record. This serves as an official roll call and only those members whose name appear on this roll are allowed to vote and participate in the nominations and election of the officers who will replace the temporary chairperson and secretary. The chairperson pro tem calls for nominations from the floor for the officers as outlined in the bylaws.

Election is usually by ballot and must be so stated in the bylaws and is by majority vote. The newly elected officers usually immediately replace the chairperson and secretary pro tem.

The newly elected president then notifies the AAMA President by email or U.S. mail at the executive office requesting affiliation with the AAMA. The bylaws, names of officers and membership list must accompany this communication. The BOT will review these documents and vote on acceptance. The AAMA President will inform the state society of the BOT decision. A charter from AAMA is usually presented at the next AAMA annual meeting after acceptance of dues and approval of the BOT.

Membership in a state society is required by the AAMA bylaws unless there is no constituent society; therefore, those persons who were members-at-large prior to the formation of the society are required to maintain membership in the new society.

The AAMA will issue only one charter per state. States will issue charters to local chapters within their geographic limits as these chapters are formed.

It is suggested that a state society have a minimum of 25–30 members to allow greater opportunity for leadership potential since the work of the society can be more easily delegated.

SOCIETY PRESIDENT

According to their bylaws, societies usually hold regular meetings and have regular board of directors' meetings. The society officers are elected by the membership at the society's annual meeting, and these officers may have more than one job assigned to them depending on the size of the society membership.

The president presides at all meetings in accordance with the bylaws of the board of directors, appoints all committees and chairs except the nominating committee, and is an ex-officio member of all committees except the nominating committee. The president also represents the state society at all functions, including state and national meetings.

The president should be familiar with parliamentary procedure and *Robert's Rules of Order, Newly Revised* and be comfortable asking for guidance from the parliamentary advisor. The president, however, does make the final ruling.

The President appoints a parliamentary advisor/parliamentarian and any other appointed officers in accordance with the bylaws and with the approval of the board of directors and fills all vacancies of committee chairs and all board members except the president-elect or vice president. Should the office of president-elect or vice president become vacant, a special election may be held, or the office remains vacant until the next annual meeting in accordance with the bylaws.

The President may attend committee meetings as an ex-officio member, except the nominating committee, but it is not required to attend. However, the committee should keep the president informed of its activities and progress on all projects.

The President prepares a packet of general information for the members of the board of directors at the beginning of the year. This packet should contain a directory of names and contact information for each officer and committee chair and an outline of the duties of each officer/committee chair to assist the member in fulfilling these duties. A copy of society bylaws and policy manual should also be included.

The president should copy the officers on all appropriate correspondence so they will be informed of all activities involving the society.

The President should prepare an agenda for each meeting. Ideally, a copy of the agenda should be available prior to the meeting to all members attending the meeting.

The president should attend the State Leaders meeting at the AAMA Annual Conference, House of Delegates as first delegate and Board of Trustees meetings so they will be fully informed on the AAMA activities.

The president should distribute a calendar of events and deadlines for the year to all officers and committee chairs and keep them informed of all activities.

The President should be able to co-sign all checks for the society.

At the close of the state's annual meeting, a list of new officers, the names of delegates and alternates to the AAMA HOD and any notice of state or chapter dues changes should be forwarded to the AAMA Executive Office by the president.

The president should verify that an audit of the society financial records has been done and will be presented at the next meeting following the close of the fiscal year. The president should verify that all tax returns required by the IRS have been filed on time.

The President submits a report of AAMA activities to the state as soon as possible after the close of the AAMA Annual Conference.

The president also verifies that the bonding of the president and treasurer has been obtained and that the invoice for this bond has been paid.

SAMPLE AGENDA

----- SOCIETY OF MEDICAL ASSISTANTS

Place:

Date:

CALL TO ORDER

Time:

INVOCATION/REFLECTION (*Optional*)

READING OF THE MEDICAL ASSISTANT CREED (*Optional*)

ESTABLISHMENT OF A QUORUM

READING AND APPROVAL OF MINUTES

CORRESPONDENCE

TREASURER REPORT

OFFICER REPORTS

President

President-Elect

Vice President

Secretary

Treasurer

Immediate Past President

STANDING COMMITTEE REPORTS *(Placed in alphabetic order)*

Budget and Finance

Bylaws

Certification

Education

Membership

Program

Publicity

Public Policy

Ways and Means

SPECIAL COMMITTEE REPORTS

UNFINISHED BUSINESS

NEW BUSINESS

ANNOUNCEMENTS

ADJOURNMENT

Time:

SAMPLE DIALOGUE FOR THE CHAIR

Call to Order: Rap the gavel one time. "The meeting of the _____ Society of Medical Assistants will now come to order."

Invocation/Reflection: Recognize the Chaplain or designated individual to give the invocation. *(Optional)*

Medical Assistant Creed: Recognize the individual assigned to lead the reading of the creed by the body present. *(Optional)*

Quorum: Verify with the secretary (or credentials chair) that a quorum is present. The report may include the number in attendance, voting power, majority, and 2/3 numbers. If a quorum is not present, the president announces that no vote(s) can be conducted and may choose to adjourn the meeting.

Reading and Approval of Minutes: “The secretary will now read the minutes of the last meeting.” The secretary then reads the minutes unless the minutes were provided to the membership in advance by email or printed in a newsletter, in which case the president says, “The minutes of the last meeting were provided to the membership. Are there any additions or corrections to the minutes?” After a pause, “The minutes are approved as read (or circulated) or as corrected.”

Correspondence: “Will the secretary please read any correspondence?” The name of the author is read before the body of the correspondence. The entire document does not need to be read but may be summarized. Any correspondence that requires action of the membership will be addressed under new business.

Treasurer Report: “The treasurer will now give the financial report. [The treasurer reads the beginning balance on hand, total income, total expenses/distributions and current balance on hand only] Are there questions of the treasurer? This report will be filed for audit.” It is appropriate at this time to ask for any non-budgeted bills to be presented for approval. “The following bills have been submitted for approval. The chair will entertain a motion regarding these bills.” A member should then move to either pay or deny payment of the bills. Any budgeted item does not have to be brought before the membership, and payment can be approved by the president.

Officer and Committee Reports: The chair calls for the officer and committee reports. Each officer should report their activities since the last meeting including the secretary which are not included in another report. The minutes are not the report of the secretary but represent the events and business of the meeting. After each report, the chair states, “The report of the _____ will be filed for reference.”

Unfinished Business: This is no longer referred to as “old” business. The president does not call for unfinished business since they will know from the minutes of the last minutes of the last meeting any items that were not completed. The chair states, “The next item of business is _____.”

New Business: After the chair addresses any new business on the agenda, they then ask the membership, “Is there other new business to come before the membership?”

Announcements: The chair now makes all announcements of which they have knowledge then asks the membership, “Are there any other announcements?”

Adjournment: A motion to adjourn is not necessary but a member may move to adjourn.

This motion requires a second and a majority vote and is not debatable. The chair, however, may state, "If there is no further business and no objection, the meeting will adjourn, the time is now ____." After a pause, the chair then states, "This meeting is adjourned."

TIPS FOR A SUCCESSFUL MEETING

There are some basic requirements for conducting a successful meeting:

- Begin and end the meeting on time.
- Prepare and distribute an agenda.
- Be familiar with and have present current copies of the chapter, state, and AAMA bylaws.
- Be familiar with and have present a copy of *Robert's Rules of Order, Newly Revised* (or the most current edition) or some other appropriate parliamentary reference book.

Beginning and ending the meeting on time will do more for the general morale of the members than can be measured. If the agenda is prepared in advance, the items will be in the correct order and the members will know which items are scheduled for discussion and will be prepared to express their views in a more orderly manner. It is imperative to be familiar with the bylaws of all three levels of the AAMA and have them and other organization guidance materials available for reference during a meeting. While it is important for the presiding officer to have a working knowledge of parliamentary procedure, it is far more important that the meeting be conducted with fairness to all members.

It is the responsibility of the presiding officer to keep the discussion focused on the agenda item being considered. If an item of business cannot be resolved in a reasonable length of time, it should be referred to a committee for further consideration and brought back to the next meeting.

The president may prepare a script for their use at the meeting if this would assist him/her in conducting a successful meeting.

SOCIETY PRESIDENT-ELECT/VICE PRESIDENT

Not all societies have a president-elect so the duties of this office with Vice President are usually interchangeable or defined by the society bylaws.

If the society does have a president-elect, this officer will automatically assume the presidency at the close of the annual meeting if the bylaws so provide. If there is no president-elect, the bylaws usually provide that the vice president will automatically assume the presidency at the close of the annual meeting. The reason for this automatic

assumption of presidential duties is to provide for continuity of society activities, ideals, and goals.

The duties may include being the chair of the program committee and appointing the parliamentary advisor/parliamentarian, any other appointed officers and committee chairs for the upcoming year for approval at the annual meeting of the society. This officer should attend the AAMA HOD as second delegate.

His/her year will be a period of training and preparation and should be used wisely. This officer should attend all general membership and board meetings as part of the preparation for the upcoming year. They may ask to attend by invitation all committee meetings except the nominating committee. Remember that the vice president must be ready to assume the office of the president should an emergency or vacancy arises so they must be as knowledgeable as the president of all society activities.

This officer should become familiar with society bylaws, parliamentary procedure, and *Robert's Rules of Order, Newly Revised*.

If the bylaws provide, they shall accompany the president as the official society representative.

They select the location for the installation of officers, the theme of the installation, the installing officer and prepares an orientation of the new board members for a smooth transition of leadership (optional according to society policy).

(RECORDING) SECRETARY

The (recording) secretary should have a good knowledge of correct grammar, punctuation, and spelling. They should also have a working knowledge of parliamentary procedure to ensure that the minutes do record the business of the society as its history.

The (recording) secretary should attend all meetings of the society and board of directors. The minutes of these meetings shall be kept in separate record books. They should be the custodian of all record books and papers belonging to the chapter.

If they are unable to attend a meeting, they should notify the president as soon as possible so the president can make arrangements for a secretary pro tem. The (recording) secretary should obtain the minutes of the missed meeting and present them to the general membership and/or board of directors at the next regular meeting. These minutes are to be maintained in the permanent record of the society.

The minutes should include the headings listed on the agenda, include all motions and results of action taken. Minutes should be brief, and sentences should be concise. Each subject matter should be typed in a separate paragraph. The secretary's opinion is never recorded in the minutes. Minutes are a recording of the business conducted during the meeting, not decisions made after the adjournment of the meeting such as a change in a future meeting date.

The (recording) secretary should send the minutes of the previous meeting to the board for review prior to submission to the membership or for publication in accordance with the bylaws and make any corrections necessary. After the approval/correction, the date should be entered at the end of the minutes and the minutes are then filed in the permanent record of the society.

The minutes should be sent to the president within the time stated in the society's policy manual. If there is no policy manual, the usual time is ten (10) working days after the meeting. Ideally, the minutes should be sent to all members of the executive board. Minutes of the board of directors' meetings should be sent to all members of the board.

In some instances, the minutes contain the names of the persons present for the meeting. However, the more common method is for the (recording) secretary to maintain a roll call or a sign-in log as a record of those in attendance. This also eliminates the necessity of listing those in attendance in the minutes. The roll call/sign-in log should become a part of the permanent record of the society.

If the president and vice president are absent at a meeting, the recording secretary calls the meeting to order and presides at the election of a chairperson pro tem for the meeting.

Note: Some societies have a minutes review or audit committee which reviews and corrects the minutes prior to distribution to the membership. Minutes may still be open for correction by the membership if your society chooses to use such a committee. It is suggested that the secretary be provided a copy of the *AAMA Guidelines for State/Chapter Secretaries*, which includes general information about minutes and samples of formats for minutes.

CORRESPONDING SECRETARY

(Optional)

The duties of this position are to assist the president and other officers with handling the society correspondence.

The corresponding secretary reports briefly on the correspondence sent in the name of the society and reads any correspondence received that requires action by the society. It is not necessary that every piece of correspondence be read but only a brief summary of the correspondence is reported.

All official correspondence sent on behalf of the society is written on society letterhead using proper sentence structure and form. The correspondence should not contain any misspelled words or other errors since it is a reflection on the society itself. The corresponding secretary may sign letters with their title, indicating they have written on behalf of the society. The president may wish to sign these letters himself/herself. Personal comments should not be included in letters written on behalf of the society.

Copies of all correspondence should be sent to the members of the executive board and chairs of any committees mentioned in the correspondence.

A permanent file of all correspondence should be maintained.

The corresponding secretary usually writes the official thank you from the society to all speakers at the general membership meeting.

If there is no need for a separate corresponding secretary, the (recording) secretary performs these duties.

If appointed, the corresponding secretary serves without vote at all meetings.

TREASURER

The treasurer has a very important role in the society. They are required to keep accurate financial records of income and disbursements of all monies in the society's name. They should, therefore, be adept in bookkeeping and knowledgeable of the federal and state tax regulations of non-profit organizations, especially if the society is incorporated.

The Treasurer should attend all meetings of the general membership and board of directors and may also serve on or chair the budget and finance committee. The bylaws should state the treasurer's position on the budget and finance committee.

The treasurer will receive and deposit all monies of the society and pay all invoices by society check upon approval of the president and/or board of directors. They should not pay any invoice that is not budgeted until the invoice has been approved by the board of directors and/or membership for payment. Payment should only be issued after submission of expense voucher and receipt for budgeted and non-budgeted expenses.

The Treasurer should present a financial report at all meetings of both the board of directors and general membership. This report should be copied to all members of the board of directors and available to the membership upon request. Financial records should be kept current and available for audit according to society bylaws and/or policy manual. Verbal reports should only include beginning balance on hand, total income, total expenses/distributions, and current balance on hand.

The treasurer should be prepared to work on the books regularly so these records will be both accurate and current. The bank statement must be reconciled monthly.

All tax returns (if any) must be filed by the specified deadline as necessary.

After the installation of the new officers, be sure the books have been audited before accepting them from the previous treasurer. The treasurer should be present at the audit to provide information only.

One of the first functions of a new society treasurer is to secure a checking and/or savings account for the society or transfer signing authorization to the current officers.

This should be done following the election of officers so there will not be a delay in depositing of checks and in paying society debts.

Should the society wish to continue using the same checking account, the bank would require a resolution stating which date the new officers were elected and their names. Signature cards signed by the officers entitled to sign checks should be given to the bank promptly. It is recommended that a copy of the signature cards be maintained in the treasurer's file.

Each society should secure a federal tax identification number and not use the social security number of any member. Form SS4 from the Internal Revenue Service (IRS) can be obtained from the bank or the IRS website and is simple to complete. After filing with the IRS, the society will receive an identification number that should be used on all its bank accounts. This notification should become part of the permanent record of the treasurer.

The accounts which best serve the society's interest should be opened with society's approval. The minutes should reflect the type of accounts authorized, the number of accounts authorized, the number of signatures required for withdrawals, the number of persons authorized to sign, the officer who will usually sign for withdrawals, and who may sign during the unavailability of the usual signatures.

The following types of checks are usually available to non-profit organizations:

1. One-signature check which can be signed by the treasurer or the president. In this case, a voucher system should be used so that approval is obtained first from an officer other than the one signing the check before the check is issued.
2. Two-signature check, which is signed by two out of three or four officers, authorized to sign checks. This is usually the president and the treasurer.
3. Under no circumstances should one person sign one or more blank checks leaving the second person to fill in the payee, amount, etc. If this is done, the check becomes a one-signature check and the purpose of having two signatures is negated.

A bank will usually require the federal tax identification number, a copy of the bylaws, the resolution authorizing the opening of the account, etc., and signature cards to open a new account.

The treasurer should be bonded as well as any other person authorized to sign checks on the society's behalf. The number of authorized persons should be stipulated in the bylaws and/or policy manual.

It is recommended that a blanket or individual bond be purchased by the society for, at least, the society treasurer. It is also a good idea to have the bond cover all persons authorized to sign checks. The cost for a bond is usually reasonable and may be purchased for all officers as managers of the society funds.

This should not be construed to imply any dishonesty but as a recognition that monies can be stolen enroute to the bank, get lost in the mail, or through some other human error. The society needs protection and usually the ones who are covered under the bond will feel better because of this insurance coverage.

The amount of insurance coverage should reflect the amount of annual cash flow, not just the average bank balance. More money than one would realize at first flows through society treasury funds from dues, seminars, fundraising projects, etc.

If the bond covers individuals, then the insurance company needs to be notified annually of the names and addresses of those authorized to sign checks and/or withdraw money from the bank. If the bond covers the position, the insurance company does not need to be notified when officers change. There may be a premium discount if the bond is purchased for a multiple year period.

Other tips include:

1. Never use correction fluid to correct errors. Instead draw a single line through the error, initial, and write the correction above.
2. Always use ink.
3. Never make checks payable to cash.
4. Do not use "miscellaneous" to categorize an expense.
5. Avoid voiding checks. Retain all voided checks.
6. Be sure to number and title pages and entries in the ledger book.

SPEAKER OF THE HOUSE OF DELEGATES (HOD)/GENERAL ASSEMBLY

The speaker of the house presides over the HOD/General Assembly of the society. In some societies with a general assembly, the society president presides over this body.

The speaker should have a good knowledge of the society and AAMA bylaws and *Robert's Rules of Order, Newly Revised* and be well organized and able to conduct a large meeting with firmness and impartiality.

The duties of this office also include the appointment of a credentials committee, a teller committee, pages, parliamentary advisor/parliamentarian, and timekeeper, compilation, and distribution of the delegates' packet within the time specified in the society bylaws (usually 30-60 days before the meeting); attends all meetings of the board of directors and executive committee and recommends the seating arrangement of the HOD.

In some societies, the speaker is also responsible for appointing members to serve on reference committees. The reference committee hearings are usually conducted on bylaws, officers and committee reports and miscellaneous business and are held for the purpose of allowing the members of the society to express the opinions and concerns about the business of the society that is to be presented to the HOD.

VICE SPEAKER OF THE HOUSE OF DELEGATES (HOD)/GENERAL ASSEMBLY

Each society that elects a speaker of the house/general assembly should also elect a vice speaker of the house/general assembly to assist the speaker and to preside in the speaker's absence. Some societies include the duties of the speaker and vice-speaker with those of the president and vice president and do not elect a speaker and vice speaker.

PARLIAMENTARY ADVISOR/PARLIAMENTARIAN

The parliamentary advisor/parliamentarian should be knowledgeable about the general principles of *Robert's Rules of Order, Newly Revised*, most current edition and the state and AAMA bylaws. They are an advisor to the presiding officer and the members on points of parliamentary procedure.

They give clarification on parliamentary matters when requested by the presiding officer or members, but the final decision rests with the presiding officer.

They serve, without vote, at the house of delegates or general membership meeting, board of directors, and executive board meetings.

They are available for assistance and provide instructions to the election tellers and monitors the vote tally.

IMMEDIATE PAST PRESIDENT

The immediate past president is a member of the executive board and the board of directors and acts as an advisor to the president.

They may be assigned various duties in the bylaws but the most common are parliamentary advisor/parliamentarian, coordinator of installation banquet, bylaws, historian, or program director.

CHAPLAIN

(Optional)

The chaplain is appointed by the president and is responsible for delivering invocations and benedictions, usually at the opening and closing of meetings, banquets, and other events. They may also be asked to deliver a memorial for a member who has died. Other duties may include phone calls, cards, flowers, etc., at the discretion of the president and/or policy manual.

HISTORIAN

(Optional)

The historian is appointed by the president for the purpose of keeping a pictorial and narrative history of the state's activities. Most states have more than one history book so one may be presented to the president at the end of their term of office and one presented to the state society for its records.

The history book includes newspaper clippings, invitations to state functions, pictures, programs from state events and installation of officers, etc.

A budget should be set by the society for the history book and the historian should submit vouchers for covered expenses as well as a final report of expenses at the end of the year.

In some cases, the state society will request that chapters send clippings, pictures, etc., to the state historian to be included in the state history book.

The state history book(s) should be brought to the state meetings periodically so the members can browse through it/them.

An alternate should be appointed for the historian in case of an illness or emergency of the historian.

CONFERENCES AND SEMINARS

It is the custom in most state societies to allow the chapters to bid as host of the annual conference and educational seminars. Some states elect to host the annual conference as a society. State educational seminars are usually held in the fall and winter. State conferences are usually held in the spring. The state will award the hosting of this event to a chapter after a majority vote or by a predetermined schedule. The bylaws should stipulate how seminars and conferences are assigned if no bids are received.

The first and most important appointments are the chair and vice-chair (optional). The vice-chair must be ready to assume the duties of the chair in the absence of the chair.

The next step is to select a site that will have ample room to handle the number of attendees, meeting room space, and meal function space. The state president will provide the chapter with the dates, times, and room arrangements for any necessary meetings. The speaker of the house or presiding officer of the general assembly will provide the chapter with the room arrangements, date, and time for the HOD/General Assembly.

Some states will provide the hosting chapter with an advance for conference expenses, such as the minimum amount required to open a checking account for the conference. This amount is returned to the state treasury as soon as the chapter has funds available.

The following points should be confirmed in writing with the hotel:

1. Available guest rooms and rates
2. Space and proper equipment for registration

3. Meeting rooms facilities and access to visual aids for the speakers' use. Be sure to obtain the cost of this equipment and meeting rooms. Usually meeting room cost is waived by the hotel if a certain number of registrants are also registered as hotel guests.
4. Facilities for all meal functions as required
5. Selection of menus and costs of all meals including tax and tips. Sometimes hotels cannot project food prices one year in advance; be sure to take the cost of inflation into account when setting registration fees.
6. Any special room arrangements for state president and visiting AAMA representative. Some hotels will provide a suite for the state president or AAMA representative if this is planned in advance and contained in the written contract with the hotel.

The conference committee should then decide upon a theme for the conference/seminar so all committee members can begin their work.

The members of the previous hosting chapter will be able to provide invaluable information about the financial and other responsibilities of the hosting chapter.

Chapter Responsibilities

Appoint a chair and vice-chair (optional). Remember: the vice-chair should be able to serve in the absence of the chair.

Suggested committees:

1. Budget and Finance
2. Decorations (*Optional*)
3. Donations and Door Prizes (*Optional*)
4. Entertainment (*Optional*)
5. Exhibitors (*Optional*)
6. Hospitality and Reception (*Optional*)
7. Printed Program
8. Program and CEUs
9. Protocol Officer (*Optional*)
10. Publicity and Promotion
11. Registration

The above suggested committees are meant to serve as a guideline. Each chapter is responsible for determining its own needs.

The committee chairs under the direction of the general chair make up the conference/seminar board and coordinate these activities. This board should hold regular meetings and make regular reports on progress. It is recommended that reports be written for record-keeping purposes.

Chair Responsibilities

General Duties

The chair is responsible to the state board of directors and should look to them for advice. The chair will preside at all meetings of the conference/seminar board and appoint committees as necessary. It is vital to maintain communication with each committee to keep abreast of its progress and accomplishments.

Specific Duties

- Meet with the site representative periodically to ensure appropriate meeting arrangements.
- Secure the site as soon as possible (state board of directors may need to approve site).
- Seek approval of the program from the state board of directors as soon as possible.
- Set the deadline for registration and hotel reservations (will need to have forms placed on the website for distribution to membership).
- Coordinate program and registration information publication with state bulletin editor, webmaster, and social media chair (will need to be aware of publication deadlines for submission of this information in an appropriate time frame).
- Prepare final report for chapter/state board of directors (usually submitted within 30 days of event; includes detailed financial report noting income and expenses; any profit and/or advance will be forwarded to state treasurer as outlined in state bylaws and/or policy manual).

Committee Responsibilities

1. Budget and Finance

- Establish a budget.

Expenses: postage, printing, name badges, speaker expenses, entertainment, exhibits, meals/refreshments, equipment rental.

Income: registration fees, donations, exhibit space rental, etc.

2. Decorations (*Optional*)

- Plan/prepare table decorations for meal functions.
 - Prepare and stay within budget.
3. Donations and Door Prizes (*Optional*)
- Collect door prizes from chapters, local merchants, etc.
 - Collect donations/door prizes from pharmaceutical companies, employers, local merchants, or businesses.
 - Provide a list of donors/donations for publication in the program.
4. Entertainment (*Optional*)
- Plan entertainment during meal functions (installation banquet or other functions).
 - Prepare and stay within budget.
5. Exhibits (*Optional*)
- Contact exhibitors.
 - Obtain rental fee for space as set in the budget.
 - May choose to include meal fee in rental fee to allow exhibitors to attend meal functions.
 - Arrive early on the day of exhibits to welcome and assist in setup.
 - May arrange a ribbon-cutting ceremony to open the event.
 - Prepare/provide a registration packet (program, name badges, meal tickets, etc.).
6. Hospitality and Reception (*Optional*)
- Plan welcoming event/hospitality function (if planned).
 - Plan entertainment/refreshments.
7. Printed or Electronically Produced Program
- Coordinate publication with chair or production agent.
 - Program should include:
 - Schedule of events
 - List of state board of directors
 - Speaker information
 - Other pertinent information
8. Program and CEUs

- Coordinate educational speakers and business meeting needs.
- Allow time for attendees to view exhibits.
- Choose speakers for knowledge in the given field.
- Obtain written confirmation of presentations.
- Request CV information.
- Submit for program approval for CEUs.
- Prepare the attendee program attendance form.
- Invite speakers to the meal function nearest their presentation. *(Optional)*
- Submit record of attendees to AAMA for CEU credit for sessions attended.

9. Protocol Officer *(Optional)*

- Plan seating for guests and speakers.
- Request proclamation from local city official.
- May be responsible for AAMA representative (travel from/to airport and hotel, meals, etc.).

10. Publicity and Promotion

- Prepare articles/notices promoting seminar.
- Arrange for publications of above in:
 - State publications
 - Local newspapers
 - Flyers for distribution to offices, hospitals, etc.
 - Social media outlets

11. Registration

- Maintain a list of all registrants.
- Prepare registration packets to include:
 - Meal tickets
 - Name badges
 - Program
 - Program attendance form
 - Map of hotel
 - Local attractions

- Provide accurate meal count to the caterer.
- Coordinate the scheduling of workers to coincide with registration times published in the program.

Final Report

The conference chair is responsible for coordinating the preparation of the final report to the chapter and state board of directors. This report should be submitted within 30 days of the event. The final report will include a detailed financial report of the income and expenses. Any excess of revenue over expense will be forwarded to the state treasurer as outlined in the state bylaws and/or policy manual.

STATE SOCIETY COMMITTEES

Budget and Finance

Each society must have an operating budget to ensure that monies are spent for the benefit of all members.

The budget should be approved at the beginning of each society's fiscal year. The general membership should have the opportunity for input into the raising and spending of society monies with a majority vote determining these issues.

The treasurer should be the chair of the budget committee. The committee should consist of no less than three (3) members. The previous treasurer, as well as previous budget committee members, should be asked for input. The budget committee should begin to meet and formulate a budget for the upcoming year at least 2–3 months before the beginning of the new fiscal year. In preparing the new budget, members should have available to them previous year's records which should include the audited treasurer's books as well as reports of all fundraising activities (cost vs. revenue) and all expenses of the society for the previous year. The committee needs to have available all projected costs of the upcoming year to determine the actual amount of monies needed to keep the society fiscally secure.

The budget committee needs to keep a realistic viewpoint in determining the monies that will permit the officers to pay expenses for society functions throughout the year. Not all societies will require the same amount of funds to operate. This will be determined by the society bylaws which direct the expenses for which the society is responsible.

Once the budget has been prepared, it is presented to the Board of Directors and membership for review. The time for review before approval by vote should be specified in the bylaws. After final approval of the society members, the business of the society should be able to be conducted without returning to the membership for expenditure approval. The budget can be amended during the year by a majority vote of the

membership should a fiscal shortage occur or a special expenditure not in the budget need approval.

Part of the responsibility of the society treasurer is to keep the society officers always updated on the bank balances, income and expenses compared to the budgeted amounts. This will allow for adjustments as necessary and keep the society fiscally sound. This information should be reported by the treasurer as a part of their report at the regular meetings of the membership. The treasurer should be able to produce a copy of the budget, a copy of all bills that have been presented and paid and any other information necessary to substantiate any income or expense that affects the society budget should the executive board or general membership have a question.

A sample budget format is enclosed. Remember this is just a guideline since all societies will differ in their income and expense items. It is important to remember when using this format that revenues and expenses are determined by society locations, community support and resources. Not included on this sample is reserve fund amount. Some societies do designate a specific amount (\$100-\$200) for reserve. This amount is then listed on the treasurer's report as a reserve amount and would not be used except in cases of extreme necessity.

Society officer expenses and society committee expenses should be minimal, except for the publication, membership, and public relations committees. These will require monies for postage, publication, and special recruitment activities. Stationary needs (e.g., letterhead, envelopes) should be a society expense and all officers and committee chairs should be supplied from this one expense. Expenses for travel and accommodations for officers should be dictated by the society bylaws. Not all societies are financially able to reimburse for total expenditure but make allowances for partial reimbursement. Each society will need to determine its fiscal ability and then determine what requirements/reimbursement will be allowed for its officers.

It is a good idea to review the finances of the society for the last three years to serve as a guide for averaging income and expenses.

Consider the following carefully during the budget preparation:

Income

- What has the average income from dues been over the past three years? Or what do you anticipate the dues income to be? Has there been a yearly increase, decrease or stabilization?
- If there are donations, are the amounts about the same and consistent?
- Do you have successful ways and means projects that bring in revenue every year?
- Do you have an interest-bearing checking account?

Expenses

- Average cost of general expenses, supplies, postage, and gifts
- Costs for educational sessions, speakers, and materials
- Publication expense
- Bank check charges and/or service charges
- Delegate expense

Sample Budget

INCOME

Dues	\$1,250.00
Ways and Means Projects	\$2,000.00
Donations	\$100.00
Interest Earned	<u>\$25.00</u>
Total Income	<u>\$3,375.00</u>

EXPENSES

	\$200.00
Postage	\$625.00
Publication or Website	\$200.00
Ways and Means Projects	\$200.00
Membership	\$200.00
Stationery	\$200.00
Annual Conference	\$1,200.00
Gifts	\$100.00
Delegates Expenses	\$400.00
Public Relations	\$150.00
Bank Charges, Including Checks	<u>\$100.00</u>
Total Expenses	<u>\$3,375.00</u>

BYLAWS

Bylaws are the guidelines by which the organization operates. Society bylaws must be in compliance with the AAMA Bylaws.

The required articles of any bylaws are name of the organization, its objective, members, officers, executive board, committees, meetings, and parliamentary authority. Additional AAMA mandated articles are affiliation, purpose, organizational policy, membership privileges, dues, reciprocity, dissolution, and representation in the AAMA HOD.

Bylaws contain the rights and privileges of members and are so important that they cannot be changed without prior notice to the members and usually require two-thirds (2/3) vote of the voting body for adoption.

Bylaws should be clear and concise and should not be restrictive. The society may develop a policy manual or standing rules document to outline specific duties and policies that can be changed with a majority vote at any meeting.

Sample society bylaws are available from the AAMA Executive Office and on the AAMA website for the convenience of a society in developing or updating its bylaws.

Bylaws should be sent to the AAMA Executive Office and the current AAMA Bylaws Chair for review after they are adopted by the society. Any recommendations made by the AAMA for compliance are incorporated in the society bylaws without vote of the membership but are distributed to the membership as information.

The society president should appoint a bylaws committee each year to review the bylaws.

A policy manual or standing rules manual may also be developed to outline more specific duties of officers and committees, reimbursement policies, guidelines for correspondence, banquet protocol, etc. Either of these documents may be amended by a majority vote at any meeting.

They are intended to expand on the bylaws and may not be in conflict with them.

Certification

The Certification committee is responsible for recognizing members who are newly certified or recently recertified. The requirements for certification and recertification can be found on the AAMA website. Recognition can be in the form of a ceremony at the annual conference or any scheduled meeting of the membership.

Education/Program

The Education/Program committee is responsible for offering the membership AAMA CEU approved education so they can maintain their certification credential.

Requirements for topics and speakers can be found on the AAMA website in the *AAMA Program Planners Guide*, *Occupational Analysis of Medical Assistants*, and *Content Outline for the CMA (AAMA) Certification Exam*.

FINANCIAL AUDIT

A yearly audit of the financial records is essential for good business practice in any organization to see that the society's finances are in order.

The audit committee is appointed by the president and should consist of no less than three (3) people. The president and treasurer should not be members of this committee. The treasurer should be available during the audit for clarification purposes.

The audit should be completed within 30 days of the society's fiscal year end. The audit committee must have access to the checkbook register, all cancelled checks, all bank statements, all income and expense ledgers/vouchers with receipts, all receipts for interest paid on investments, and all financial statements for the year to be audited.

1. Bank deposits must total the same as the income recorded in the ledger.
2. The written checks must total the amounts shown as expenses in the ledger.
3. All voided checks must be accounted for.
4. The beginning balance plus deposits minus checks written should equal an ending balance that coincides with the balances shown on the financial reports.
5. Bank charges and interest income must be accounted for.

It is recommended that the committee perform the audit and report together. A written report and a final financial report should be prepared with the results of the audit and any recommendations and/or suggestions. All discrepancies must be explained and resolved. This report is presented to the general membership for adoption.

The incoming society president and treasurer should not accept the signature cards and the books until the audit report is finalized and, ideally, accepted by the executive committee of the board of directors.

The audit committee should indicate the areas where the budgeted amounts were not met or were exceeded.

Be sure that the books are closed on the last day of the state's fiscal year, no deposits were made, and no checks were written after this date.

Sample Audit Report

INCOME

Dues	\$250.00
Ways and Means Projects	\$1,000.00
Donations	\$100.00
Interest Earned	<u>\$75.00</u>
Seminars	<u>\$1,500.00</u>

Total Income	<u>\$2,925.00</u>
EXPENSES	
Postage	\$200.00
Ways and Means Projects	\$750.00
Delegates Expenses	\$425.00
Gifts	\$75.00
Stationery	\$250.00
Printing	\$250.00
Educational Materials	\$500.00
Publication	\$400.00
Bank Charges	<u>\$50.00</u>
Total Expenses	<u>\$2,900.00</u>
Difference Between Revenue and Expenses	\$25.00
Fund Balance Beginning of Year	\$2,000.00
Investment	\$5,000.00
Total Cash Available as of Last Day of Fiscal Year	\$7,075.00

Audit Conducted on [Date] by [Name]

MEMBERSHIP

The state society should assist the chapters in nurturing, retaining, and recruiting members. This committee may consist of the membership chairs from each of the component chapters. A copy of the *AAMA Membership Manual* may be found on the AAMA website or requested from the AAMA Executive Office to help in membership recruitment and retention efforts.

Membership must start at the chapter level so the member will progress to the state and national level. The membership committee must work on an active, concentrated schedule to promote the chapter, state, and national membership benefits to stimulate interest and maintain membership in the AAMA.

To promote membership, this committee must know the benefits of belonging to the AAMA and take the time to know the prospective member. It is important to know what the member expects from the AAMA and be able to answer those needs and/or offer

alternatives to their objections. One way is to survey the membership each year to determine the members' needs.

It is suggested that a membership brochure be developed for the state society and include the benefits both for the employer and employee of belonging to the AAMA. Be sure to keep an ample supply of membership brochures and applications available for distribution. This information should also be easily found on the society website.

This committee should contact all new credentialed medical assistants in the area to invite them to the meetings. The list of new CMAs (AAMA)[®] is available on the AAMA website at any time to state officers after log in within the "My Account" section, after clicking "View Member Reports" from the left-side menu. The president should then forward this list to the membership chair.

Follow up on all referrals and contact potential new members as soon as possible. Contact the non-member CMAs (AAMA) and non-renewing AAMA members to encourage membership and renewal. The list of each group is available via the AAMA website.

Societies are encouraged to develop an informal mentoring program that allows new members to interact with veteran members. This helps the new members to feel welcome and to learn about the state society and how it functions.

Membership retention is sometimes harder than recruiting new members. Communication is the first and most effective step in fulfilling the needs of the members and keeping them interested in the organization.

Other suggestions include a society newsletter, recognition of professional achievement of members, recognition or special award for long-term members and the distribution of information from the state and national level on their activities.

The AAMA presents awards at its annual conference for societies with greatest increase in membership and membership retention. Information regarding the criteria for these awards is available on the AAMA website and from the AAMA Executive Office.

Nominating

The nominating committee is elected by the membership at a society's annual meeting or as designated in the bylaws. This committee usually consists of a chair and two or three members.

The president *cannot* serve on this committee in any capacity.

The duties of this committee are to solicit candidates for the offices of president-elect, vice president, recording secretary, treasurer and any other positions designated in the bylaws. The committee also verifies that each nominee meets the qualifications for office as outlined in the bylaws. It should also be noted that the members considered for

candidacy should be those who possess proven leadership qualities and commitment to the society's goals.

The committee submits a written report to be presented to the membership. It is recommended that the slate of nominees with their qualifications be sent to all society members prior to the election. This gives the members an opportunity to review the candidates and decide on those which will best meet the needs of the society.

A member of the nominating committee may be selected as a candidate for office provided they meet all the qualifications listed in the bylaws.

The president or speaker of the house will ask for the chair to read the report to the members and then call for nominations from the floor before the election is held.

Public Policy

The duties of this committee are to keep the membership informed on any proposed legislation, regulations, and court decisions pertaining to the medical assisting and allied health professions.

This committee usually consists of a chair and two members and maintains communication with the legislative state public policy committee chair for the legislative issues.

If there is any significant development affecting medical assistants and other allied health professionals, a report should be given at the state meeting. If necessary, a newsletter may be sent to the general membership.

This committee may also contact AAMA Executive Office Leadership at 800/ACT-AAMA with any questions or issues regarding public policy that will have an impact on medical assistants.

Publicity/Public Service

The purpose of this committee is to communicate to the general public the activities of the society, the medical assisting profession, and the benefits of belonging to all three levels of AAMA. Good publicity builds recognition for the organization, educates the general public, and promotes membership. This committee should coordinate publicity efforts with the website and social media committee.

Suggestions for this committee are to advertise the state society conferences and seminars, educational programs, and activities especially during Medical Assistants Recognition Week.

The committee should develop and maintain contacts with the news media, be truthful in the information that is distributed, be positive in the comments given to the press, remain cool and calm when being questioned by the press, and invite members of the press to attend meetings or workshops.

If asked to appear on radio or television, be sure that the AAMA is mentioned in the comments, know the focus of the story and rehearse several times before the appearance, forget the cameras, look at the interviewer, and appear confident and relaxed.

Public service announcements (PSAs) should be sent to the local media outlets and should be free of charge. Always submit AAMA fact sheets with the news releases. Releases should be factual, follow email guidelines or typed, double-spaced, and sent in duplicate. Send a thank you letter after the release is published or posted.

The AAMA Marketing and Communications (MarCom) Department has a variety of resources available to help this committee and they can be contacted by calling 800/ACT-AAMA or emailing MarCom@aama-ntl.org.

Ways and Means

The Ways and Means Committee is responsible for developing and implementing money-making projects throughout the fiscal year in order to supplement the state's working capital. Often the state shares in the profits obtained from state sponsored seminars and conferences with the hosting chapter(s).

This committee is appointed by the president and usually consists of a chair and three members.

New projects must have the approval of the board of directors prior to their implementation. A budget for the project should be presented to the board at the time of presentation. Some suggestions for projects include the sale of T-shirts, sweatshirts, key chains, cookbooks, raffles (if allowed by your state and local laws), white elephant sales, and silent auctions.

The efforts of the ways and means, education and membership committees should be coordinated so their projects will not interfere but complement each other.

WEBSITE AND SOCIAL MEDIA

It is essential that each state society has a presence on the internet. The chair of this committee needs to work with the webmaster to ensure the information on the society webpage is current and accurate. All social media outlets should be monitored so questions or concerns can be answered promptly and correctly.

AAMA DELEGATES AND ALTERNATES

State societies send delegates to the AAMA HOD annually in accordance with the membership of the society and the AAMA bylaws. Delegates and alternate delegates (i.e., alternates) must be active members in good standing.

1. Delegates are elected for a period of one year from the convening of the HOD

until the next convening of the HOD the following year and must be familiar with the bylaws of the state society and the AAMA.

2. Delegates should review the material presented in delegates packets (mailed and/or emailed).
3. Delegates should discuss the material with the state society membership.
4. Delegates need to be familiar with parliamentary procedure as it pertains to the election of officers, amendments to bylaws, the presentation of resolutions and other new business in the HOD.
5. Alternates should be as well prepared as the delegates since they may need to assume the duties of the delegates at any time.
6. Delegates and alternates may be called upon at any time during the annual meeting for any business; therefore, they should be prepared to forego other activities.
7. Delegates represent their state societies when voting at their annual meeting. Decisions should be made based upon the general welfare of the AAMA, the state society, and the chapters. Delegates should use their judgment when voting on issues presented.
8. The state president and president-elect/vice president are usually the first two delegates. States vote for the additional delegates and alternate delegates as determined by their society member roster as of 12/31 of the preceding year.
9. Delegates are expected to attend all delegate orientation sessions (virtual and/or in person), reference committee meetings, all business meetings (including the HOD), meet the candidates session, and any other sessions, as directed by their state society.
10. Delegates should report the proceedings of the annual meeting to their society at their first state meeting following the AAMA Annual Conference.
11. If an alternate must replace a delegate, the parties involved should contact the speaker of the house and the credentials committee chair immediately.
12. If a delegate/alternate is unable to fulfill the responsibilities of the office, they shall reimburse the state society for any monies given for this assignment.

LEGAL ISSUES OF RELEVANCE TO STATE SOCIETIES AND LOCAL CHAPTERS

Employer Identification Number

To open a checking account or transact other business, a state society or local chapter will often be required to furnish an employer identification number (EIN), also known as a *taxpayer identification number* (TIN). Aside from the practical necessity of having an EIN, the AAMA recommends that each affiliated state society and local chapter obtain an EIN.

An entity need not have employees to obtain an EIN. (The term *TIN* is therefore more accurate than *EIN*). A state society may not and should not use the EIN of the AAMA or social security number of a member for any purpose. Similarly, a local chapter should not use a member's social security number or the EIN of its state society.

An EIN can be obtained quickly and easily by filling out and submitting Form SS-4. This federal form can be obtained from an IRS office or website, Social Security office, bank, library, or from certain state or local government offices. Form SS-4 is not difficult to complete, and there is no fee for submitting the form. An EIN can also be obtained via an 800 number and the internet. If there are any questions about how to complete the form, please contact the AAMA Executive Office Leadership.

Federal Income Tax Exemption

The AAMA is exempt from federal income tax according to Section 501(c)(6) of the Internal Revenue Code. The section accords an exemption to professional associations that demonstrate compliance with the organizational and operational requirements of the law.

The AAMA does not have a group exemption which covers its state societies and local chapters.

Therefore, any AAMA affiliate must file for its own exemption from federal income tax if it so desires.

IRS Form 1024 is used for applying for an exemption under Section 501(c)(6). Unlike Form SS4, Form 1024 is rather long and difficult to complete. Although some state societies and local organizations have obtained an exemption letter from the IRS, there are many factors which must be considered when deciding on the wisdom of seeking federal income tax exemption. Please contact AAMA Executive Office Leadership if you have questions about whether to and how to apply for this exemption.

Incorporation

Incorporation is a process whereby a state society or local chapter is recognized as a formal legal entity. Incorporation is governed by the laws of each state rather than by federal law. As a result, a department of the state office of the Secretary of State (or similar state office) usually has jurisdiction over the incorporation of not-for-profit entities.

Incorporation offers some benefits for state societies and local chapters, the primary one being the limitation of liability to the assets of the society or chapter if a civil action is successfully brought against the society/chapter. However, because state and local affiliates vary in the degree of potential legal liability, the prudence of incorporation should be decided on a case-by-case basis.

The cost and complexity of incorporating varies from state to state, but it is usually not an expensive or difficult process. Nevertheless, there are legal and practical factors which should be examined thoroughly before embarking upon the process of incorporating. AAMA Executive Office Leadership is available to assist states and local chapters in determining whether incorporation is advisable.

Exemption from State Sales Tax and Other State Taxes

It is important to distinguish between exemption from federal income tax and exemption from state sales tax. In virtually every state, professional associations exempt from federal income tax on the basis of 501(c)(6) of the Internal Revenue Code are *not* eligible for exemption from state tax (or other similar state levies) when purchasing products at stores, renting space at hotels or motels, or entering into contracts for the purchase of services. Only charitable, religious, and similar entities are eligible for any special sales tax exemption.

Obtaining federal income tax exemption or incorporating as a not-for-profit entity under the laws of a state, usually have nothing to do with procuring an exemption from state (and sometimes local) sales and use tax. There may be reasons for obtaining an income tax exemption letter from the IRS and a certificate of incorporation from the Secretary of State but attempting to secure an exemption from state sales tax is not one of the reasons. The AAMA and its state and local affiliates are almost never eligible for state sales tax exemption and should not think that submitting Form 1024 to the IRS or filing articles of incorporation with the Secretary of State will have any effect on becoming exempt from state sales tax.

A state society or local chapter will not get into trouble if it accumulates money in a savings account, money market fund, or other investment vehicle.

Generally, state societies and local chapters will not get into trouble with federal or state authorities and not jeopardize their tax-exempt status or their not-for-profit

incorporation if the interest earned on investments is intended to be used to further the professional purposes of the society or the chapter.

Usually, there is cause for concern only if the society or chapter has accumulated an enormous reserve dollar amount, and the society/chapter is not operating in a manner consistent with its purpose of “promoting the professional identity and stature of its members and the medical assisting profession through education and credentialing.”

It is a good economic practice to have on reserve one year’s expenditures so that if unexpected expenses occur it will keep the society “in the black.”

CHAPTER FORMATION AND MANAGEMENT

The basic organization of the AAMA is the local chapter. In densely populated areas, there may be more than one chapter in an area. In sparsely populated areas, local chapters may draw members from more than one county/area.

State societies are responsible for encouraging the formation of local chapters and for managing those component chapters. The *Chapter Management Guide* is available on the AAMA website that contains detailed information on how to form a chapter. It is suggested that the state society obtain a copy of this guide and make it available to those members interested in forming new chapters.

Included in this guide are appendices:

- Appendix A: New Chapter Checklist
- Appendix B: Inactive Chapter Procedure
- Appendix C: State Society Disbandment

Any questions or issues regarding the local chapter should be referred to the AAMA Membership Director, who can provide advice and guidance.

APPENDIX A

New Chapter Checklist

Updated March 2026

Local chapters are chartered by and directly affiliated with a state society. State societies are chartered by and directly affiliated with the American Association of Medical Assistants® (AAMA). When a state has chartered a new chapter, they notify the AAMA Executive Office so that the new chapter can be created in the database. **The AAMA Executive Office must be notified in writing by the current state society president.** When the Executive Office receives all the information about the name, location, and officers, members can be assigned to that chapter, and dues will be collected for and rebated to that chapter.

Below is information that the Membership Department *must have* to create a new chapter in the database.

Letter From the State Society President

- The letter must be on state society letterhead and emailed or mailed to the AAMA Executive Office.

Email (preferred): Membership@aama-ntl.org

CC: NMickowski@aama-ntl.org (AAMA Director of CE and Membership)

Subject line: [Insert local chapter name] Creation Notification

Mail: AAMA Attn: Membership
C/O Nick Mickowski, Director of CE and Membership
20 N. Wacker Dr., Ste. 3720
Chicago, IL 60606

- The letter should notify the AAMA Executive Office of the newly chartered/affiliated chapter and give the official name and charter/affiliation date.

The information below should be attached to, or contained within, the letter from the state president:

List of ZIP Codes to Be Assigned to the New Chapter

- It is **mandatory** to provide a list of all the ZIP codes covered by the chapter, as the database assigns members to chapters by ZIP code. **The chapter cannot be created in the database without the complete and correct list of ZIP codes.** (If you send ZIP Codes already assigned to another chapter, those ZIP codes will not be entered, unless the AAMA Executive Office receives formal instruction from the State Society President to move the ZIP codes from the original chapter to the

newly created chapter.) You may request assistance from your local post office in obtaining a ZIP code list, or you may look up ZIP codes online: www.getzips.com.

□ Chapter Officers

- Chapter officers must be current AAMA members.
- Use the [State & Chapter Officer Election Notification Form](#) if possible. Please include all current officers for the chapter. The most commonly held officer positions are listed on the form, while the “Additional Contact” fields can be used for all other chapter officers who hold additional titles.

*Please note that all officers listed on the State & Chapter Officer Election Notification Form will have access to the chapter’s roster and have the ability to both submit program approval requests and add CEU attendance on behalf of their chapter.

Members reassigned to the new chapter will not be billed for chapter dues by the AAMA Executive Office at the time of the new chapter’s creation. During the next membership dues remittance period, which occurs annually, the new chapter’s dues will be reflected in the member’s online quotation and mailed remittance form. **If you have any questions, please call the Membership Department at 800/228-2262 or email Membership@aama-ntl.org and CC: NMickowski@aama-ntl.org.**

APPENDIX B

Inactive Chapter Procedure

The AAMA Membership Department adds new chapters and deletes disbanded chapters from the database *only* when notified by the state society. As long as a chapter remains active in the database AAMA will continue to assign new members to that chapter and collect and rebate dues. When the chapter is identified as “disbanded” in the database, all the members in that area become state members-at-large. If a chapter is identified as “disbanded” in the database, the AAMA membership department would need written notification from the state society to reactivate the chapter.

At times, the Executive Office has had requests for a chapter to become “inactive” for a period of time rather than disband and be deleted in the database. State societies have expressed a desire to keep a chapter in the database while it is reorganized.

An alternative to disbanding an inactive chapter would be a temporary “inactive” status. The state treasurer could be assigned as treasurer for that chapter. This would enable all chapter dues to be rebated to the state treasurer for management of those funds until the chapter was reorganized and had new officers. The state would be responsible for contacting the members assigned to that chapter regarding the inactive status of the chapter. The state society would have to decide to refund the dues or hold them for the chapter until the chapter is reorganized. The chapter dues and member information would be sent separately from the state society dues rebates. This would have the advantage of identifying the members assigned to a chapter so the state society could work with that group to get reorganized.

A chapter should be maintained as an inactive chapter, without officers or meetings, for more than one year. If a chapter cannot be reorganized and active within one year the chapter should be disbanded and the members given the option of another chapter or at-large status.

Procedure: If a state society chooses to manage an inactive chapter during a reorganization effort, they should follow this procedure: *First, the state society must be certain that this procedure is not in conflict with their state bylaws or with the wishes of the members in the chapter.*

Second, the president of the state society should notify the AAMA Membership Department that a chapter has become “inactive,” and the state society will take responsibility for managing the chapter funds during the reorganization period. The letter should be on state society letterhead and provide the following information:

- Name of the chapter
- Name of the state treasurer who will be assigned as treasurer of the chapter

- Name of the contact person that members of that chapter should call if they have questions about their chapter status

When a chapter has been reorganized, the state society should send written notification by U.S. mail or email to the AAMA Membership Department providing the following information.

- Name of the chapter
- A list of the chapter officers
- Request to lift the inactive status of the chapter and remove the state treasurer as the chapter treasurer

Note, when there is a change in the state treasurer, the Executive Office must be notified of the change for the state, and of any inactive chapters that the state treasurer is managing, so that all records can be correctly updated. If you have any questions regarding this procedure, please contact the AAMA Membership Department via 800/228-2262 or Membership@aama-ntl.org.

APPENDIX C

State Society Disbandment

How It Will Affect Members and Local Chapters

Individual Members

Members in states without an affiliated state society are considered national members-at-large. These members only pay national dues and have all the national benefits of AAMA membership that they currently enjoy (e.g., *Medical Assisting Today*, discounts on products and services, group insurance). They will not be receiving any benefits from an affiliated state society. If a state society disbands, the AAMA Membership Department will change the state codes for the members and issue them new membership cards that reflect the change to member-at-large on the state and local chapter level.

Local Chapters

Local chapters are chartered by and directly affiliated with the state society that is affiliated with AAMA. If there is no state society for the local chapter to be affiliated with, then the link of affiliation to the AAMA is broken and the local chapter will cease being affiliated with the AAMA. This will have the following effect on local chapters:

- **Dues collection.** New members sending dues to the Executive Office will only pay national dues and be assigned as a “member-at-large” with no state society or local chapter affiliation.
- **Continuing education program approval.** AAMA CEU program approval processing for affiliated state societies, and local chapters affiliated with those state societies, is provided free of charge. A program submitted for AAMA CEU credit approval that is not sponsored or co-sponsored by an affiliated state society, an affiliated state society’s local chapter, or a CAAHEP-accredited medical assisting program must have an approved sponsor. Nonaffiliated organizations may apply for Independent Sponsor status.
- **Mailing labels.** Member information for creation of mailing labels for membership promotion purposes or continuing education programs are available on the AAMA website (www.aama-ntl.org). The AAMA also provides labels free of charge to local chapters that are affiliated with an AAMA affiliated state society.

If you have any questions about this information, please call the AAMA Membership Department toll-free at 800/228-2262 or email Membership@aama-ntl.org.