Delegates Packet
67th Annual Conference

September 22–25, 2023 • Hilton Orlando Lake Buena Vista–Disney Springs Area • Lake Buena Vista, FL
# AMERICAN ASSOCIATION OF MEDICAL ASSISTANTS

## 67th ANNUAL HOUSE OF DELEGATES

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Preliminary Agenda

SATURDAY, SEPTEMBER 23, 2023

8:00 a.m.  HOUSE OF DELEGATES

Presentation of the Colors
National Anthem
Pledge of Allegiance

Keynote Speaker  Donald A. Balasa, JD, MBA
CEO, Legal Counsel, AAMA

** 10-minute break for Nondelegates to leave the room.
Delegates need to remain seated and may NOT leave during this time **

Call to Order  Aimee Wicker, CMA (AAMA)
Speaker of the House

Opening Reflections  Aimee Wicker, CMA (AAMA)
Introductions  Aimee Wicker, CMA (AAMA)

Report of the Credentials Chair

Approval of Agenda  Aimee Wicker, CMA (AAMA)
Orientation of Delegates  Sherry Bogar, CMA (AAMA)
Adoption of House Rules  Vice Speaker of the House
Appointment of Reference
Committees and Tellers

Supplemental Report  Deborah Novak, CMA (AAMA)
AAMA President

Report of the Nominating Committee  Patty Licurs, CMA (AAMA)
Nominations from Floor  Aimee Wicker, CMA (AAMA)
“Meet the Candidates”—This follows the morning session of the House, and the specific time will be announced at the end of the morning session.

Reference Committee Schedule

1 p.m. Reports, Bylaws, Resolutions

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

6:30 p.m. HOUSE OF DELEGATES RECONvenes

Call to Order Aimee Wicker, CMA (AAMA)

Report of the Credentials Chair

Voting: Officers, Trustees, Nominating Committee

Report of the Tellers

Report of the Reference Committees:

▪ Reports Aimee Wicker, CMA (AAMA)
▪ Bylaws Sherry Bogar, CMA (AAMA)
▪ Resolutions Aimee Wicker, CMA (AAMA)

Unfinished Business Aimee Wicker, CMA (AAMA)

New Business Aimee Wicker, CMA (AAMA)

Good and Welfare Statements (Please note only 10 minutes will be allowed)

Announcements

Adjournment

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

Letter to Delegates and Alternate Delegates

Dear Delegate or Alternate Delegate:

Congratulations on your election as delegate or alternate to the 2023 House of Delegates of the American Association of Medical Assistants (AAMA). A delegate is a person given authority to act for others and who serves as a decision and policy maker for medical assistants. This is a serious responsibility that requires preparation, commitment, and performance.

Preparation

A. Delegates and Alternates must review the entire Delegated Packet prior to arrival at the national conference. A printed copy may be requested from the Executive Office if needed.

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

Commitment

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

Performance

A. Motions must be written on a motion form prior to being presented to the House for consideration. After the motion is made, send the written motion, via a Page, to the Speaker as quickly as possible.

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

The reference committee hearings are open to everyone, and it is particularly important for delegates and alternates to attend each hearing. These hearings provide an opportunity for all members to express opinions and hear the opinions of others. Following the hearings, the reference committees go into executive session to complete written reports to present to the House. Should you not be in agreement with the reports, you will have ample opportunity to express your views during the next session of the House.

On Friday only those with CHANGES to delegates or alternates from their original submissions or those that need PROXIES, MUST check in at the Credentials Desk.

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

Friday, September 22, 2023 1:00–2:00 p.m.
The following protocols must be observed for the House of Delegates:

- On Saturday, each delegate and alternate must check in with the Credentials Desk prior to each session. The Credentials Desk will be open, outside the House of Delegates, as follows:
  - Saturday, September 23: 6:30–7:30 a.m.
  - Saturday, September 23: 5:30–6:15 p.m.

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

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

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

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

All delegates and alternates will receive a Delegates Packet electronically by email. (It also will be posted to the AAMA website. A very limited number of packets will be printed and available to other attendees, by request, until they are gone.)

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

_Aimee Wicker, CMA (AAMA)_
_Speaker of the House_

_Sherry Bogar, CMA (AAMA)_
_Vice Speaker of the House_
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 designated deadline (which is at least ninety days prior to 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:

A. Check-In Process

Each delegate and alternate must arrive no later than 30 minutes prior to the Opening Session of the House of Delegates and check in at the Credentials Desk. The Credentials Committee will verify the delegate’s or alternate’s status in their records.

B. Seating of Delegates

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

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:

1) Contact the alternate.

2) 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.)

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

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

Introduction of Business

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

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

Resolutions

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

Procedure for Emergency or Late Resolutions
A. Copies of the resolution of emergency nature should be in the hands of the Speaker by noon of the day preceding the opening of the House of Delegates.

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

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

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

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

Presentation of Resolutions to the House of Delegates

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

Reference Committees

Reference committees are groups of approximately five delegates selected by the Speaker to conduct open hearings on matters of business of the association. Having heard discussion on the subject before it, the committee draws up a report offering MOTIONS to the House. These motions will propose the action that is needed based on the submitted reports, proposed Bylaws amendments, and proposed resolutions.

Reference Committee Hearings

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

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

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

Reference Committee Reports

- Reference committee reports comprise the bulk of the official business of the House of Delegates. Reference committees shall present reports to determine the best course of action to be taken by the House. They will be written after completion of the hearings and made available in written form to the delegates. Reference committees may present MOTIONS (to adopt, to not adopt, to table, to refer to the Board of Trustees, to amend, or to consolidate related resolutions).

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

Handling of Reference Committee Reports

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

- If a reference committee proffers a motion (e.g., to refer to a committee or the board of trustees) for consideration by the House of Delegates, the item of business before the House of Delegates is the motion, not the original proposal.

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

Nominating Committee

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

Only a delegate may nominate a member to the Nominating Committee. Each person nominating must come to the microphone, be recognized, and identify himself or herself as “a delegate from” his or her state.

New Business

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

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

Voting

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

Voice Vote

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

Standing Vote or Show of Hands Vote

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

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

2. Seating

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

3. Voting Body

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

4. Orders

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

5. Motions

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

6. Discussion

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

7. Debate

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

8. POINT OF INFORMATION

A delegate who does not understand the question and needs clarification should rise to a “point of information.”
BOARD
OF
TRUSTEES
REPORTS
American Association of Medical Assistants®

Report of the Board of Trustees

For the Period Ending September 2023

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 2022–2023 BOT consists of six officers and seven trustees. The three education board chairs and the first Vice Chair may attend the BOT meetings with voice but without vote.

The 2022–2023 BOT has met numerous times (in person and virtually) since the 66th AAMA Annual Conference held in Myrtle Beach, South Carolina.

- AAMA Post Conference BOT Meeting │ Myrtle Beach, SC—Oct. 24, 2022
- AAMA BOT Planning Session │ Asheville, NC—Nov. 6–7, 2022
- AAMA BOT Meeting │ Virtual—Nov. 29, 2022
- AAMA BOT Meeting │ Virtual—Dec. 4, 2022
- AAMA BOT Meeting │ Virtual—Jan. 8, 2023
- AAMA MSC Budget & Finance Meeting │ Chicago, IL—Jan. 26, 2023
- AAMA BOT Winter Meeting │ Chicago, IL—Jan. 27–28, 2023
- AAMA Officers Meeting │ Virtual—Feb. 16, 2023
- AAMA MSC Meeting │ Virtual—March 13, 2023
- AAMA BOT Meeting │ Virtual—March 13, 2023
- AAMA BOT Meeting │ Virtual—May 21, 2023
- AAMA BOT MSC Meeting │ Virtual—May 31, 2023
- AAMA MSC/Budget & Finance Meeting │ Grand Rapids, Michigan—July 6, 2023
- AAMA BOT Special Executive Meeting │ Grand Rapids, Michigan—July 6, 2023
- AAMA BOT Summer Meeting │ Grand Rapids, Michigan—July 7, 2023
- AAMA BOT Executive Session │ Grand Rapids, Michigan—July 8, 2023
- AAMA BOT Meeting │ Virtual—August 6, 2023

The BOT approved the appointments of committees, strategy teams, task forces, boards, and liaisons for 2022–2023.

Committees

Chairs
Awards
Sherry Bogar, CMA (AAMA)

Annual Conference
Monica Case, CMA (AAMA)

Bylaws and Resolutions
Claire Houghton, CMA (AAMA)

Career Professional Development
Sandra Williams, CMA (AAMA)

Documents
Virginia Thomas, CMA (AAMA)

Editorial Advisory
Shelley Gingrich, CMA (AAMA)

HOD Minutes
Monica Case, CMA (AAMA)

Maxine Williams Scholarship
Monica Case, CMA (AAMA)

Nominating
Patty Licurs, CMA (AAMA), CPC

Social Media
Natasha Geno, CMA (AAMA)

Strategic Issues Planning
Patty Licurs, CMA (AAMA), CPC

Strategy Teams

Leadership Development
Jane Seelig, CMA-A (AAMA)

Marketing
Monica Case, CMA (AAMA)

Membership Development
Candy Miller, CMA (AAMA)

Task Forces

Advisory Task Force
Deborah Novak, CMA (AAMA)

Partnership Task Force
Aimee Wicker, CMA (AAMA)

ADHOC Committee

Educator Survey
Pam Neu, CMA (AAMA)

Education Boards and Councils

Continuing Education Board
Shirley Sawyer, CMA (AAMA), CPC

Certifying Board
Vicki Sokolnik, CMA (AAMA)

Medical Assisting Education Review Board
Karon Walton, MEd, CMA (AAMA)

Judicial Council
Sue Hawes, CMA (AAMA)

The following represents a partial list of the actions and decisions of the 2022–2023 BOT:
• Approved Continuing Education Board (CEB) appointments and CEB updates.
• Approved committee members/strategy team members/task force members.
• Approved the 2024 AAMA Annual Conference site for Amway Grand Plaza, Grand Rapids Michigan.
• Approved BOT Representatives Bureau assignments.
• Approved the lease and move of the AAMA office headquarters to the 37th floor of the Civic Opera Building.
• Approved a new AAMA marketing exhibit booth kit.
• Approved Career Professional Development Committee project and modules.
• Approved early bird package and pricing for online membership renewal presented by Membership Development Strategy Team.
• Approved the updated Strategic Plan.
• Approved the social media project for recognition of state conferences.
• Approved Awards Committee’s new awards and conference awards event.
• Approved MarCom timelines and priorities for all boards (BOT, CEB, and CB).
• Approved CVENT conference registration bundle for 2023–2025.
• Approved continued exhibit booth participation with the Medical Group Management Association for spring and fall.
• Approved continued exhibit booth participation with American Academy of Family Physicians.
• Approved the General Fund Budget for July 1, 2023–June 30, 2024.
• Approved MarCom Budget for 2023–2024.
• Approved the updated AAMA Volunteer Form.
• Approved a survey to be sent electronically to educators from the Ad Hoc Committee.
• Approved proposed Bylaws amendments to be presented to the House of Delegates.
• Approved attendance at the NCCRT Annual Meeting by Partnership Chair Aimee Wicker, CMA (AAMA), and AAMA CEO and Legal Counsel Donald Balasa, JD, MBA.
• Approved the Audit Report from Cedarstone for the fiscal years of 2021 and 2022.
• Approved 2023 conference registration fees.
• Approved the conference logo pin, theme, and event themes.
• Approved the CEO Annual Review.
• Approved the MARWeek theme for 2023.

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

The BOT is especially thankful to CEO Balasa for his dedication and support and to the AAMA staff for their hard work and dedication to the AAMA.

Deborah Novak, CMA (AAMA)

2022–2023 AAMA President
American Association of Medical Assistants®

Report of the President

For the Period Ending September 2023

The AAMA President serves as an officer of the AAMA Board of Trustees (BOT) and the Chair of the BOT, the Budget and Finance Committee, and the AAMA Maxine Williams Scholarship Fund. The President is also ex-officio to all boards, committees, and strategy teams, including task forces and excluding the Nominating Committee. The President represents the AAMA at all official functions as needed during the time of office. Additionally, this officer chairs the Advisory Task Force. This officer assumed the duties of the AAMA President at the close of the House of Delegates in Myrtle Beach, South Carolina, on October 22, 2022.

This officer serves as the Advisory Task Force Chair. (Refer to the Report of the Advisory Task Force.)

Meetings Attended

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

- AAFP Meeting | Washington, DC—Sept. 21–24, 2022
- MGMA Meeting | Boston, Massachusetts—Oct. 9–11, 2022
- AAMA 2022 Annual Conference | Myrtle Beach, SC—Oct. 21–23, 2022
  - First Timers and Students Reception | Myrtle Beach, SC—Oct. 21, 2022
  - BOT Pre Conference meeting/Executive Session | Myrtle Beach, SC—Oct. 21, 2022
  - Welcome and Awards Celebration | Myrtle Beach, SC—Oct. 21, 2022
  - 66th AAMA House of Delegates | Myrtle Beach, SC—Oct. 22, 2022
  - Meet the Candidates | Myrtle Beach, SC—Oct. 22, 2022
  - Reference Committee Hearings: Reports, Bylaws | Myrtle Beach, SC—Oct. 22, 2022
- AAMA BOT Meeting with the SoPPs | Myrtle Beach, SC—Oct. 23, 2022
- Presidents Banquet | Myrtle Beach, SC—Oct. 23, 2022
- AAMA State Leaders Session | Myrtle Beach, SC—Oct. 23, 2022
- BOT Orientation | Myrtle Beach, SC—Oct. 24, 2022
- Post Conference BOT and Maxine Williams Scholarship Fund Executive Sessions | Myrtle Beach, SC—Oct. 24, 2022
AAMA 2022-2023 Committees, Strategy Teams, and Task Forces Meet and Greet
| Myrtle Beach, SC—Oct. 24, 2022

- AAMA CEB Planning Session | Asheville, NC—Nov. 4–5, 2022.
- AAMA BOT Planning Session | Asheville, NC—Nov. 6–7, 2022
- AAMA BOT | Virtual Meeting—Nov. 29, 2022
- Monthly Virtual Meeting with CEO & Marketing Director | Virtual—Nov. 30, 2022
- AAMA BOT Meeting | Virtual—Dec. 4, 2022
- Conference Direct Meeting on 2023 Conference | Virtual—Dec. 21, 2022
- AAMA BOT Meeting | Virtual—Jan. 8, 2023
- AAMA Leadership Strategy Team Committee Meeting | Virtual—Jan. 16, 2023
- AAMA Meeting with Amway Grand staff | Virtual—Jan. 18, 2023
- AAMA Partnership Committee Meeting | Virtual—Jan. 18, 2023
- AAMA Career Professional Development Meeting | Virtual—Jan. 19, 2023
- MSC/Budget and Finance Meeting | Chicago, IL—Jan. 26, 2023
- AAMA Winter BOT Meeting | Chicago, IL—Jan. 27–28, 2023
- AAMA Bylaws Committee Meeting | Chicago, IL—Jan. 28, 2023
- AAMA Career Professional Development Committee Meeting | Chicago, IL—Jan. 28, 2023
- AAMA Leadership Strategy Team Committee Meeting | Virtual—Feb. 6, 2023
- Meeting with Conference Direct, CEO, Conference Chair, and Staff | Virtual—Feb. 8, 2023
- AAMA Officers Meeting | Virtual—Feb. 16, 2023
- AAMA CB Board Meeting | Orlando, FL—Feb. 24–25, 2023
- Meeting with Hilton Orlando Conference Manager for Event Space Tour | Feb. 25, 2023
- AAMA Awards Committee Meeting | Virtual—Feb. 28, 2023
- Meeting with Marketing Director | Virtual—March 2, 2023
- AAMA CEB Board Meeting | Charleston, SC—March 3-4, 2023
- AAMA Leadership Development Committee Meeting | Virtual—March 6, 2023
- Career Professional Development Meeting | Virtual—March 9, 2023
- AAMA MSC Meeting | Virtual—March 13, 2023
• AAMA BOT Meeting | Virtual—March 13, 2023
• Monthly Meeting with Marketing Director and CEO | Virtual—March 24, 2023
• AAMA Leadership Meeting | Virtual—March 25, 2023
• AAMA BOT Meeting | Virtual—April 2, 2023
• AAMA Board Leaders Priorities Meeting | Virtual—April 11, 2023
• Meeting with Marketing Director, Communications Director, AAMA Vice President, and CEO | Virtual—April 19, 2023
• Representatives Bureau Assignment | Lima, OH—April 20–22, 2023
• Monthly Virtual Meeting with CEO & Marketing Director | April 28, 2023
• Bylaws Committee Meeting | Virtual—May 16, 2023
• Meeting with CEO | Virtual—May 18, 2023
• AAMA BOT Meeting | Virtual—May 21, 2023
• Career Professional Development Meeting | Virtual—May 22, 2023
• Monthly Meeting with AAMA VP, CEO & Marketing Director | Virtual—May 26, 2023
• MSC Meeting | Virtual—May 31, 2023
• Career Professional Development Meeting | Virtual—June 8, 2023
• Meeting with CEO & Director of Membership & Cont. Education | Virtual—June 20, 2023
• MSC/Budget and Finance Committee Meeting | July 6, 2023
• AAMA Summer BOT Meeting | July 6–8, 2023
• AAMA Summer CEB Meeting | July 9–10, 2023
• Advisory Task Force Meeting | Virtual—August 2, 2023
• AAMA BOT Meeting | Virtual—August 6, 2023

AAFP Conference—Washington, DC—September 21–23, 2022

This officer attended the AAFP Annual FMX Experience in Washington, DC, September 21–23, 2022, and helped staff the AAMA exhibitor booth. This officer was able to answer questions from attendees as well as give information and handouts regarding the AAMA organization and organizational resources to the AAFP attendees who visited our booth. The common questions asked by attendees were these: (1) How to find a medical assistant?; and (2) Where can we find additional training/education to provide to our current staff? Many scope of practice questions were asked in which AAMA CEO and Legal Counsel Donald Balasa, JD, MBA, was available and able to respond to all questions as presented.
MGMA Conference—Boston, MA—October 9–11, 2022
This officer attended the MGMA Annual Conference in Boston, representing the AAMA at the AAMA exhibitor booth. This officer was available to answer questions and provide AAMA resource handouts to attendees who stopped by our booth. Along with CEO Balasa and Immediate Past President Patty Licurs, I participated in a short chat with members from American Medical Technologists (AMT) (RMA(AMT)) about similar issues related to the shortage of certified medical assistants and students in accredited programs. CEO Balasa had the opportunity as a speaker to talk on medical assisting scope of practice and current legislative affairs pertaining to medical assistants, which was well received by the attendees.

Post-Conference BOT Meeting—Myrtle Beach, SC—October 24, 2022
This officer presided at the post-conference BOT meeting, which included a one-hour education and training session on communication. This session was viewed by the 2022–2023 BOT, the Chairs and Vice Chairs (respectively) of the Continuing Education Board (CEB) and Certifying Board (CB), and several staff directors and managers. This session was presented by Rebecca Walker, CMA (AAMA). This session helped everyone who attended to be more aware and informed on best practice communications while serving in leadership roles. This meeting was then followed by a brief initial orientation of the newly elected BOT members. Dates and upcoming timelines were also reviewed at this time.

2022–2023 AAMA Committee Member Meet and Greet—Myrtle Beach, SC—October 24, 2022
This session allowed for introductions of AAMA committee chairs and members. In this hour+ session, members learned of the committee charges and initiatives which led to exchanging of ideas by those in attendance. Positive feedback was given by those who attended, and the chairs felt this gave them a head start on learning what the committees’ objective would be for the year.

2022–2023 BOT Planning Session
This officer presided over the BOT Planning Session. The first day of the planning session was a four-hour how-to orientation. The Board of Trustee Policy and Procedures Manual along with board member job descriptions were reviewed, and time was spent on best practice leader communications when working with committees, volunteers, and staff. The afternoon session was a review of our Strategic Plan and how all our committee initiatives should relate and enhance the strategic plan and goals. Also, an AAMA email was set up for all BOT members along with access to use Microsoft Teams for virtual meetings and file storage and sharing. Michael Knight, AAMA IT consultant, gave a tutorial on both the Outlook email and Teams software. On day two, the committees met and plans of action by each committee were discussed and approved. During the afternoon, the BOT called a meeting to order. The board conducted formal business during this time and CEO Balasa presented new information and discussed unfinished business.
BOT Virtual Monthly Meetings

Virtual meetings were held in most of the months to allow for continuation of work and business throughout our term. These meetings allowed for updates on committee projects, approvals, and recommendations as needed. Each chair was given the opportunity to discuss the work of their committee. Officers were also given time to discuss timelines or needs that pertained to their office and/or responsibilities. This was found to be very beneficial. See highlights of the report of the BOT.

BOT Virtual Committee Meetings

As President and Ex-Officio of the BOT, I attended most of the virtual committee meetings to be available for support if needed. All these committee meetings engaged all the team members to participate and contribute to the ideas and future plans. These meetings were all found to be productive and successful in the growth of our organization.

CEB Meetings

This officer attended the CEB Planning Session, Winter Board Meeting, and Summer Board Meeting as the AAMA President and Ex-Officio of the CEB. It was interesting to see the process and depth of work that is conducted by the CEB to ensure that all educational products meet all standards and continue to be available to members.

CB Meetings

This officer attended the Winter CB Board Meeting in Orlando, Florida, as the AAMA representative. This meeting was a productive meeting and this board worked diligently to complete their assignments and tasks at hand. Please see the report of CB Chair Vicki Šokolnik, CMA (AAMA), for more information.

Conference Direct Virtual Meetings

This officer attended a virtual meeting on December 21, 2022, with Conference Direct Representatives, AAMA Annual Conference Committee Staff Liaison Nick Mickowski, 2023 AAMA Annual Conference Committee Chair Monica Case, CMA (AAMA), and CEO Balasa regarding needed contract revisions for 2023. These revisions were related to room usage and room block. This officer also participated in several follow-up virtual meetings regarding site search for 2024 and 2025.

Winter Board Meeting—Chicago, IL—January 27–28, 2023

At this meeting Cedarstone Accounting notified the board that the audit for 2021 was completed and showed a good reflection of a sound financial status. They are currently working on the 2022
fiscal year audit. It was approved by the BOT to hold the 2024 AAMA Annual Conference at the Amway Grand Plaza in Grand Rapids, Michigan, September 19–24, 2024. Updates on the IT and website project were reviewed with tentative timelines for early 2024.

CMA Today President’s Message

This officer provided Director of Communications Miranda Sanks-Korenchan with messages for all issues of the CMA Today and the 2023 conference program.

Board Communications

This President has been in regular communications with the Management Steering Committee (MSC), BOT members, and CEO Balasa and other AAMA staff, including email and virtual video or conference call meetings. This has enabled the BOT to stay connected regarding the work of each group, conduct further planning, and work on new ideas and projects.

Representatives Bureau Assignment—Ohio State Society of Medical Assistants

This President attended the 66th Annual OSSMA Conference with the theme of “Medical Assistants in Wonderland.” There was an increase in attendance this year with over 74 full registrations, nine student registrations, and 11 single day registrations. Members had the ability to obtain 15 CEUs. The speakers were all very knowledgeable and informative. This year the conference utilized a QR code system for checking in and obtaining their CEUs, and it was a very seamless transition. It was amazing that both the Governor’s office and State Congressman Jim Jordan’s office sent a spokesperson to not only present a proclamation from their jurisdictions, but both representatives gave a very touching appreciative thanks to all the medical assistants for all they do helping patients and communities. You could tell from their speech they fully understood the role of medical assistants. The leadership in Ohio is strong, and it is apparent that this society is being very creative to provide opportunities to their members through the nine chapters and the state society. This officer presented the AAMA PowerPoint, which highlighted member benefits and resources. This officer was asked to assist in the installation of the newly elected officers. This officer thanks OSSMA for their warm hospitality and overwhelming support. Congratulations to 2022-2023 OSSMA President Aimee Quinn for her innovated forward thinking and technology advancements used at this conference. The OSSMA Mary Buckley Scholarship fund awarded five students with $1,000 scholarships.

Email Votes Conducted 2022–2023

- Approval of appointments to the CEB and/or committees.
- Approval of AAMA volunteers for AAMA Strategy Teams and Committees.
- Approval of the 2024 AAMA Annual Conference site—Amway Grand Plaza.
- Approval of the AAMA headquarters downsizing and moving to the 37th floor.
- Approval of additional members to the AAMA Strategy Teams.
• Approval of membership online early bird registration discounts/perks.

• Approval of new AAMA awards.

Other

This officer has participated in numerous conference calls and virtual meetings throughout the year. This officer has worked closely with the CEO Balasa and many of the staff directors and managers to meet all deadlines and complete all necessary duties brought before this officer. All correspondence has been responded to in a timely manner and all deadlines have been met.

This President is grateful to the members of the BOT for their hard work, dedication, and volunteered hours. The members of the BOT continue to do an outstanding job to promote this organization and the profession. I appreciate all they have done and contributed to our continued success as a highly recognized membership organization. It has been my honor and privilege to have worked with all of you.

This officer would like to thank the members of the BOT for their dedication and leadership as well as CEO Balasa and all of the AAMA staff for their support and guidance. This officer would also like to thank the members of the CEB, CB, and Society of Past Presidents for all they do for our organization and to thank all the members who represent our profession and organization every day.

Deborah Novak, CMA (AAMA)

2022–2023 AAMA President
The AAMA Vice President serves as an officer of the AAMA Board of Trustees (BOT) and the AAMA Endowment. This officer is available to assist the President and the BOT members or staff upon need or request. This officer has participated in multiple phone conversations, virtual meetings, and emails regarding the business of the AAMA BOT. Duties of the Vice President includes:

- Serves as a member of the BOT and Endowment
- Serves as a member of the Management Steering Committee
- Serves as a member of the Budget and Finance Committee
- Serves as the Chair of the Maxine Williams Scholarship Committee
- Serves as a member of the AAMA Representatives Bureau
- Assigns Representatives Bureau assignments for annual state meeting requests.

Additionally, this Vice President was appointed to serve on the following:

- Annual Conference Committee—Chair
- Marketing Strategy Team—Chair
- Advisory Task Force—Member
- Awards Committee—Member
- CASAT-FASD—Member
- Partnership Task Force—Member

This officer also serves as the House of Delegates (HOD) 2022 Minutes Committee—Chair.

Additionally, this officer was granted appointment to the Educators Survey Ad Hoc Committee—Member.

**Other Duties**

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

- AAFP Meeting │ Washington, DC—Sept. 21–24, 2023
- 66th AAMA HOD │ Myrtle Beach, SC—Oct. 22, 2022
  - Meet the Candidates │ Myrtle Beach, SC—Oct. 22, 2022
o Reference Committee Hearings: Reports, Bylaws  │ Myrtle Beach, SC—Oct. 22, 2022
o AAMA BOT Meeting with the SoPPs  │ Myrtle Beach, SC—Oct. 23, 2022
o General Session Knowledge Bowl  │ Myrtle Beach, SC—Oct. 23, 2022
o Presidents Banquet  │ Myrtle Beach, SC—Oct. 23, 2022
o AAMA State Leaders Session  │ Myrtle Beach, SC—Oct. 23, 2022
o Communication Presentation Session  │ Myrtle Beach, SC—Oct. 23, 2022
o AAMA BOT Orientation  │ Myrtle Beach, SC—Oct. 24, 2022
o Post Conference BOT/Maxine Williams Scholarship Fund Executive Session  │ Myrtle Beach, SC—Oct. 24, 2022
o 2022-2023 AAMA Committees, Strategy Teams, and Task Forces Meet and Greet  │ Myrtle Beach, SC—Oct. 24, 2022

- AAMA Continuing Education Board (CEB) Planning Session  │ Asheville, NC—Nov. 4–5, 2022
- AAMA BOT Planning Session  │ Asheville, NC—Nov. 6–7, 2022
- AAMA BOT Meeting  │ Virtual—Nov. 29, 2022
- AAMA BOT Meeting  │ Virtual—Dec. 4, 2022
- AAMA BOT Bylaws Meeting  │ Virtual—Dec. 7, 2022
- Conference Direct, President Novak, AAMA CEO and Legal Counsel Donald Balasa, JD, MBA, and Annual Conference Committee Staff Liaison Nick Mickowski  │ Virtual—Meeting—Dec. 21, 2022
- Conference Schedule Review Virtual Meeting with President Novak, CEO Balasa, and Annual Conference Committee Liaison Mickowski—Jan. 4, 2023
- Marketing Strategy Team Meeting  │ Virtual—Jan. 5, 2023
- AAMA BOT Meeting  │ Virtual—Jan. 8, 2023
- AAMA Leadership Strategy Team Committee Meeting  │ Virtual—Jan. 16, 2023
- Partnership Committee Meeting  │ Virtual—Jan. 18, 2023
- Career Professional Development Meeting  │ Virtual—Jan. 19, 2023
- CASAT-FASD Meeting  │ Virtual—Jan. 19, 2023
- AAMA Management Steering Committee (MSC)/Budget and Finance Meeting  │ Chicago, IL—Jan. 26, 2023
- Conference Committee Meeting  │ Chicago, IL—Jan. 26, 2023
- AAMA Winter BOT Meeting  │ Chicago, IL—Jan. 27–28, 2023
• Bylaws Committee Meeting  │  Chicago, IL—Jan. 28, 2023
• Career Professional Development Meeting  │  Chicago, IL—Jan. 28, 2023
• Leadership Development Committee Meeting  │  Virtual—Feb. 6, 2023
• Conference Direct, CEO, President Novak, and Staff  │  Feb. 8, 2023
• AAMA Officers Meeting  │  Virtual—Feb. 16, 2023
• AAMA Certifying Board (CB) Meeting  │  Orlando, FL—Feb. 24–25, 2023
• Hilton Orlando Conference Manager event space tour meeting  │  Orlando, FL—Feb. 25, 2023
• Awards Committee  │  Feb. 28, 2023
• AAMA CEB Meeting  │  Charleston, SC—March 3–4, 2023
• Leadership Development Committee Meeting  │  Virtual—March 6, 2023
• CASAT-FASD Meeting  │  Virtual—March 7, 2023
• Career Professional Development Meeting  │  Virtual—March 9, 2023
• AAMA MSC Meeting  │  Virtual—March 13, 2023
• AAMA BOT Meeting  │  Virtual—March 13, 2023
• Leadership Development Virtual Leaders CEU Presentation—March 25, 2023
• Career Professional Development Meeting  │  Virtual—March 30, 2023
• AAMA BOT Meeting  │  Virtual—April 2, 2023
• MarCom and CB, CEB, and BOT Marketing and Communications Priorities Review  │  Virtual—April 11, 2023
• Leadership Development Meeting  │  Virtual—April 17, 2023
• OrgSource New Website Meeting  │  Virtual—April 18, 2023
• MarCom Directors, President Novak, and CEO Balasa Meeting  │  Virtual—April 19, 2023
• Leadership Development Meeting  │  Virtual—May 15, 2023
• AAMA BOT Meeting  │  Virtual—May 21, 2023
• Career Professional Development Meeting  │  Virtual—May 22, 2023
• Conference Chair Updates President Novak, Marketing Director Mokijewski, and CEO Balasa Meeting  │  Virtual—May 26, 2023
• AAMA MSC Meeting  │  Virtual—May 31, 2023
• Career Professional Development Meeting  │  Virtual—June 8, 2023
• Leadership Development Committee Meeting | Virtual—June 12, 2023
• Marketing Strategy Team Meeting | Virtual—June 14, 2023
• CASAT-FASD Meeting | Virtual—June 14, 2023
• Maxine Williams Scholarship Fund Meeting | June 22, 2023
• Awards Committee | June 25, 2023
• CVENT updates President Novak, Immediate Past President Licurs, Secretary-Treasurer Thomas, CEO Balasa, IT, and Marketing Director Meeting | Virtual—June 29, 2023
• AAMA MSC/Budget and Finance Committee Meeting | Grand Rapids, Michigan—July 6, 2023
• Meeting with Amway Hilton Curio Conference Manager | Grand Rapids, Michigan—July 6, 2023
• AAMA Summer BOT Meeting | Grand Rapids, Michigan—July 6–8, 2023
• AAMA Summer CEB Meeting | Grand Rapids, Michigan—July 9–10, 2023
• AAMA BOT Meeting | Virtual—August 6, 2023

American Academy of Family Physicians Conference—Washington, DC—September 21-23, 2022
This officer attended the American Academy of Family Physicians (AAFP) Annual FMX Experience in Washington, DC, in September 21–23, 2022, and helped staff the AAMA exhibitor booth. This officer was able to answer questions from attendees as well as give information and handouts regarding the AAMA organization and organizational resources to the AAFP attendees who visited the booth. Some attendees did not know there was an organization for medical assistants. The frequent questions asked by attendees: (1) How to find a medical assistant? (2) Where can we find additional training/education to provide for our current staff? Many scopes of practice questions were asked that CEO Balasa was available and able to respond to as presented.

66th AAMA Annual Conference—Myrtle Beach, South Carolina—October 21–24, 2022
This officer participated in all required assignments at the AAMA Annual Conference as well as was available and met with members who requested time to meet. This officer attended the post-conference board meeting, which included a one-hour educational and training session on communications, which was presented by AAMA Past President Rebecca Walker, CMA (AAMA). This session was highly informative, well received, and a great start for the attendees and for their 2022-2023 leadership roles. This officer also attended the 2022-2023 AAMA committees and strategy teams meet and greet. This was well attended and helped the chairs and members to begin collaborating on objectives and goals for the upcoming year.
BOT Planning Session—Asheville, North Carolina—November 6–7, 2023
This officer attended the BOT planning session which included orientation, policy, procedures, and communications. The AAMA email was set up for each BOT member. This was a great interactive planning session. Refer to the report of the President.

This officer attended the BOT Winter Board meeting, which included all committees reporting updates and time was allowed to meet with the committees’ staff liaisons and information about the website updates was shared. Refer to the report of the President.

BOT Summer Board Meeting—Grand Rapids, Michigan—July 7–8, 2023
This officer attended the BOT Summer Board meeting. Updates were presented by all BOT, CEB, CB, and staff. This officer attended as conference chair a tour of the Amway Grand Plaza, Curio Collection, the site of the 2024 AAMA Annual Conference. Refer to the report of the President.

CEB Meetings
This officer attended the CEB Planning Session and winter and summer meetings. This officer enjoyed learning more about the CEB, how it functions under the BOT, working processes, and continuing educational products developed. This officer thanks CEB Chair Shirley Sawyer, CMA (AAMA); CEB First Vice Chair Amber Greer, BS, CMA (AAMA), PBT(ASCP); and member attendees for productive and informative meetings. Refer to the report of the CEB chair.

CB Meetings
This officer attended the Winter CB board meeting in Orlando, Florida. This meeting was informative and productive. This officer also attended the summer CB board meeting in Chicago, Illinois. This board continues to diligently work to complete their charge. Continuing open communication between the CB and BOT is important for the future of the medical assisting profession and our goals. This officer thanks CB Chair Vicki Sokolnik, CMA (AAMA); First Vice Chair Carolyn Fuller, CMA (AAMA), ATA, CPC; and member attendees for productive and informative meetings. Refer to the report of CB Chair Sokolnik.

Representatives Bureau Assignments
Oregon Society of Medical Assistants In-Person Meeting—Eugene, Oregon—April 20–22, 2023
This officer attended the OSMA Annual Conference April 20–22, 2023, at the Holiday Inn Express in Springfield, Oregon. The title of the conference was “Medical Assistants: The VITAL Link,” with a total of 118 registrants. There was a total of 35.5 CEUs offered provided by
twenty-three speakers. The educational sessions were excellent, and the speakers were truly knowledgeable.

There were seven exhibitors, and this representative was allotted space in the exhibitors’ area. All attendees received a passport card to get stamped daily by each exhibitor they visited. At the end of the day, the attendees whose passport cards were completed were entered into a daily gift card drawing. This process gave this representative the opportunity to engage daily with the attendees, answer questions, and provide attendees with AAMA information. The AAMA informative PowerPoint sparked many questions which afforded this representative the opportunity to provide this presentation on a continuous loop in the exhibitors’ area. This officer was given opportunities at every event to present AAMA information and encourage the attendees.

The General Assembly was held during lunch to encourage attendance. It was well organized, and this representative assisted with passing out and collecting voting ballots. Due to the declining of local chapters participation, the General Assembly voted and passed that all OSMA chapters disband and the OSMA would become a bilevel organization. These members were positive about this move and felt they would be able to participate more on the state level. Many attendees stepped up and volunteered for committees. Officers were also nominated and elected during this meeting as well as delegates to the AAMA Annual HOD to be held in Orlando, Florida.

Fun night incorporated dinner also with BINGO for FUN providing CEUs. This interactive two-hour session encouraged networking, learning, and knowledge. This session was well received, and the networking was outstanding and valuable.

During the Presidents Luncheon and Awards, many awards were given including OSMA Life Member awarded to Candy Miller, CMA (AAMA), and this officer was honored to be present.

This representative would like to thank the 2022-2023 OSMA President Virginia Chambers, CMA (AAMA); 2023-2024 OSMA President Alexandria Holcomb, CMA (AAMA); Conference Co-Chairs Candy Miller, CMA (AAMA), and Joyce Garibay, CMA (AAMA); OSMA officers; and the attendees for allowing this officer to attend, renew old friendships, and form new ones. This officer will always cherish this opportunity and learning experience received and was grateful for allowing the opportunity to share AAMA information.

North Carolina Society of Medical Assistants In-Person Meeting—Cherokee, North Carolina—May 4–7, 2023

This officer attended the 56th NCSMA Annual Convention on May 4–7, 2023, at the Harrah’s Cherokee Hotel & Casino Resort in Cherokee, North Carolina, hosted by the Haywood County Chapter. The convention theme was centered around Harry Potter with President Sawyer’s message including, “You have arrived to Hogwarts School of Magic via your Hogwarts Express. At the school, you will experience fun and exciting educational classes and the professors have been waiting for your arrival.” This was an all in-person convention with a total of 180 registrants, which included 24 first timers and five students. There was a total of 13 CEUs offered provided by 11 speakers. The educational sessions were excellent, and the speakers were very engaging and knowledgeable.

There were six exhibitors present including the NCSMA Ways and Means table, which included new state logo items for purchase. Chapters donated themed gift baskets, and tickets were sold as part of a fundraising event. The convention attendees were encouraged to bring items for the
NCSMA Can-Can Food Drive, and this was a success.

The HOD was well organized, and this representative served as timekeeper. During the HOD, the reorganized Charlotte Chapter and chapter president was recognized as an active chapter. NCSMA officers, nominating committee and AAMA Delegates/Delegate Alternates were elected as NCSMA is entitled to ten delegates to AAMA Annual Conference to be held in Lake Buena Vista, Florida.

This officer was given time for “Meet the AAMA Representative,” and this officer went over the AAMA updates and informative PowerPoint presentation. Many questions were asked; this continued in the exhibitors’ area as the attendees were excited about the NCSMA and the AAMA. The Welcome Party included dinner and a networking event with a fact-finding scavenger hunt where attendees learned more about each other and their medical assisting careers. This allowed this representative more opportunities to engage with the attendees. The evening concluded with bowling, and the entire event was well received by the attendees.

A students session, sponsored by the North Carolina Medical Assisting Educators, was very interactive and engaging. These students were recognized and encouraged by the state officers, leaders, and educators. This representative was given time to address and encourage the students about AAMA membership, becoming certified, and the importance of maintaining certification. Each student received gift items and this representative provided a few AAMA items as giveaways. A first timers’ session was held and all NCSMA officers and leaders were given opportunities to speak about NCSMA, CEUs, and membership. This representative addressed this group as well.

At the Awards Luncheon many were recognized, awards were presented, and this representative had the honor to be present as NCSMA honored Rebecca Walker, CMA (AAMA), with NCSMA Life Member. The Knowledge Bowl was sponsored by the North Carolina Educators, was well attended and attendees received 2 CEUs while increasing their medical assisting knowledge. This event is always a highlight of the conventions, and this representative participated as a judge.

The Presidents Banquet included honoring the NCSMA past presidents, chapters, and 2022-2023 state officers. The 2023-2024 state officers were installed and the theme for the installation was Toy Story. Each officer was given a character to represent their office, and the newly installed President Smith’s character was Woody as the leader.

Many NCSMA chapters are strong, but some chapters are struggling as other chapters are across the nation. The NCSMA leadership is strong and NCSMA officers and leaders are connecting with these chapters, offering guidance and help.

This officer would like to thank the NCSMA 2022-2023 President Shirley Sawyer, CMA (AAMA), and the 2023-2024 newly installed President Cameron Smith, CMA (AAMA), for the opportunity to represent the AAMA. This representative wants to thank all the officers and the attendees for allowing this officer to attend, renew old friendships, and form new ones. This officer will always cherish this opportunity and learning experience received and was grateful for the opportunity to share AAMA information.

Massachusetts Society of Medical Assistants Hybrid Meeting—Representative Virtual—April 29, 2023

This officer attended some of the virtual portions of the MSMA annual meeting. This state
society was excited to be able to hold an in-person meeting. The leaders of the MSMA are strong and excited about moving this society forward.

There was a total of thirty-three registrants, which included one student and one non-MSMA member. This one-day meeting offered a total of 4.5 CEUs provided by three speakers. The educational sessions were excellent, and the speakers were very engaging and knowledgeable.

This society awarded one student scholarship in the amount of $500 and a one-year student membership to the AAMA.

The MSMA officers were also nominated and elected during this meeting. Also, the delegates to the AAMA Annual HOD to be held in Lake Buena Vista, Florida, were elected.

This representative was allowed time to virtually address the attendees and present the AAMA informative PowerPoint. Attendees were engaged and asked many questions of this officer. This officer went over the AAMA Excel Awards submissions, including the new AAMA Rising Star Awards and deadline for submissions. This representative encouraged the attendees to share the Student Essay contest information and the Medical Assistant Employers of the Year Award. This officer shared and encouraged participation on the AAMA national level and went over the volunteer leadership application and deadline.

Although this was a virtual meeting, this officer cherishes the opportunity and learning experience received from this state and was grateful for the opportunity to share AAMA information and updates. This officer would like to thank MSMA President Dawn Jordan LeBlanc, CMA (AAMA), for the opportunity to represent the AAMA. This representative wants to thank all the officers and the attendees for allowing this officer to attend virtually and engage with the attendees.

Maxine Williams Scholarship Committee—Chair

As Vice President, this officer serves as Chair of this committee. This officer contacted the members of this committee about assignments and guidelines. All assignments were completed. Refer to the report of the chair.

Representatives Bureau Requests

This officer reviewed with President Novak and staff members materials that needed to be included in the Representatives Bureau packet. This included feedback and suggestions from the BOT, CEB, CB, and CEO Balasa. This officer updated the BOT Representatives Bureau Availability Form. This form was sent to the BOT members for completion. A total of twenty-two requests were received from state societies. This officer and President Novak worked to ensure all states that submitted a request received a representative. The states that submitted requests prior to the January 2023 Winter BOT meeting, the BOT members received their assignments in a sealed envelope during the Winter BOT meeting. Social Media Chair Natasha Geno took pictures as each BOT member opened their envelope and revealed their assigned state. This was the social media project kickoff to highlight state conferences and representative assignments. This officer sent an email to the state society contact introducing their BOT representative. Also included were the representative bureau packet guidelines for state requests responsibilities. The PowerPoint presentation, created by Speaker of the House Aimee Wicker,
was updated and utilized if time permitted during the representatives’ assignment. This
information allowed the BOT members to use as is and or add and enhance as additional
information was received. The BOT representatives’ assignment reports were received and
reviewed. New this year, a document was created that included any issues and concerns or none
from the states. This information was referred to the appropriate AAMA department, board, or
individual. CEO Balasa requested the staff research and respond accordingly. This member
document will be a useful tool for moving forward. This officer would like to thank all the state
societies who requested an AAMA BOT representative. This officer thanks the AAMA BOT
members for their willingness to serve and represent the AAMA.

The following members of the Board of Trustees were assigned and attended the following state
requested meetings either in person or virtually.

<table>
<thead>
<tr>
<th>State</th>
<th>Date</th>
<th>Name</th>
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<tbody>
<tr>
<td>Virginia</td>
<td>March 10–12, 2023</td>
<td>Virginia Thomas, CMA (AAMA) Sec-Treas</td>
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<tr>
<td>Washington</td>
<td>March 11, 2023</td>
<td>Natasha Geno, CMA (AAMA) Trustee</td>
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<tr>
<td>South Carolina</td>
<td>March 16–19, 2023</td>
<td>Pam Neu, CMA (AAMA) Trustee</td>
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<tr>
<td>New Hampshire</td>
<td>March 25, 2023</td>
<td>Aimee Wicker, CMA (AAMA) Speaker</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>March 30–April 2, 2023</td>
<td>Candy Miller, CMA (AAMA) Trustee</td>
</tr>
<tr>
<td>Oregon</td>
<td>April 20–22, 2023</td>
<td>Monica Case, CMA (AAMA) Vice Pres.</td>
</tr>
<tr>
<td>Montana</td>
<td>April 20–23, 2023</td>
<td>Claire Houghton, CMA (AAMA) Trustee</td>
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<tr>
<td>Ohio</td>
<td>April 20–22, 2023</td>
<td>Deborah Novak, CMA (AAMA) President</td>
</tr>
<tr>
<td>Florida</td>
<td>April 21–23, 2023</td>
<td>Sandra Williams, CMA (AAMA) Trustee</td>
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<tr>
<td>Illinois</td>
<td>April 21–22, 2023</td>
<td>Shelley Gingrich, CMA (AAMA) Trustee</td>
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<tr>
<td>Michigan</td>
<td>April 21–23, 2023</td>
<td>Jane Seelig, CMA-A (AAMA) Trustee</td>
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<tr>
<td>New York</td>
<td>April 27–29, 2023</td>
<td>Sandra Williams, CMA (AAMA) Trustee</td>
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<tr>
<td>Nebraska</td>
<td>April 28–29, 2023</td>
<td>Sherry Bogar, CMA (AAMA) Vice Speaker</td>
</tr>
<tr>
<td>Indiana</td>
<td>April 28–30, 2023</td>
<td>Virginia Thomas, CMA (AAMA) Sec/Treas</td>
</tr>
<tr>
<td>Maine</td>
<td>April 29, 2023</td>
<td>Patty Licurs, CMA (AAMA) IPP</td>
</tr>
<tr>
<td>North Carolina</td>
<td>May 4–7, 2023</td>
<td>Monica Case, CMA (AAMA) Vice Pres.</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>May 12–14, 2023</td>
<td>Aimee Wicker, CMA (AAMA) Speaker</td>
</tr>
<tr>
<td>Idaho</td>
<td>March 31–April 1, 2023</td>
<td>Jane Seelig, CMA-A (AAMA) Trustee</td>
</tr>
<tr>
<td>New Hampshire</td>
<td>March 25, 2023 (Virtual)</td>
<td>Aimee Wicker, CMA (AAMA) Speaker</td>
</tr>
<tr>
<td>Alaska</td>
<td>June 17, 2023 (Virtual)</td>
<td>Claire Houghton, CMA (AAMA) Trustee</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>April 29–2023 (Virtual)</td>
<td>Monica Case, CMA (AAMA) Vice Pres.</td>
</tr>
</tbody>
</table>
HOD 2022 Minutes Committee—Chair

As Chair of this committee, this officer contacted the committee with their assignment to review the 2022 HOD minutes. All assignments were completed. Refer to the report of the Chair.

The following are the committees, strategy teams, and task force assignments as of the time this report was prepared:

Annual Conference Committee—Chair

As Chair of this committee, this officer contacted the members and staff liaisons by email with introductions and email exchange list. Committee’s work was completed by phone, email, and virtual meetings. Refer to the report of the Chair.

Marketing Strategy Team—Chair

As Chair of this strategy team, this officer contacted the team with a welcoming email and exchanged team member contact information. The strategy team’s work and decisions were completed by phone, email, and virtual meetings. Refer to the report of the Chair.

Advisory Task Force—Member

This task force member received email updates, reviewed this member bio sheet for updates and feedback assigned. All assignments completed. Refer to the report of the chair.

Awards Committee—Member

This committee member participated in emails for the 2023 committee work. Assigned to submit suggested student essay topics, agreed, and voted on the student essay topic for 2023. Assigned and provided suggestions for the name of a new AAMA award, provided feedback for the criteria, qualifications, and suggestions for how recipients would be honored. Also, assigned to review grading criteria and sheets for the AAMA Excel Awards. Discussed the Welcome and Awards Celebration planning. All assignments completed. Pending as of the time this report was prepared is the awards judging. Refer to the report of the Chair.

Partnership Task Force—Member

This task force member attended a virtual meeting on January 19, 2023. This member reviewed emails and materials as assigned. Refer to the report of the chair.

Other Assignments

CASAT-FASD—Member
This member attended the virtual Medical Assistant Partnership for Healthy Pregnancies and Families Steering Committee meetings January 19, 2023, March 7, 2023, and June 14, 2023. These meetings were very informative as these initiatives are moving forward.

**Educators Survey Ad Hoc Committee—Member**

This committee member provided feedback for survey questions and approval. This committee member was assigned to review the survey results and provide feedback. All assignments were completed. Refer to the Chair.

This officer was also assigned to review the AAMA Volunteer Leadership Application.

Assignment was completed.

This officer participated in monthly virtual meetings scheduled by the President.

This officer received e-ballots from President Novak and completed all by the deadline provided.

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

As Vice President, this officer has participated in all MSC calls, meetings, or emails. Also, reviewed committee chairs correspondence when copied and attended virtual meetings when invited. This officer has participated in at least weekly meetings with President Novak to review and discuss updates and the status of projects and information. This officer has participated in conference calls, virtual meetings, and emails with President Novak, CEO Balasa, and staff as requested. This officer is preparing meeting agendas, committee chair appointments, and volunteer appointments in preparation for the 2023-2024 AAMA year.

This officer would like to thank President Novak for her leadership as well as CEO Balasa for their dedication, support, and guidance. This officer would like to thank the entire AAMA staff for their input with projects and deadlines as the AAMA continues to move forward. This officer would also like to thank the members of the BOT, CEB, CB, and the Society of Past Presidents for their dedication and all they do for our organization and the profession. This officer wants to thank all the AAMA members for electing and supporting her and allowing her to serve and promote this membership organization. As members we represent our profession and organization every day.

Monica Case, CMA (AAMA)

2022-2023 Vice President
The AAMA Immediate Past President serves as an officer of the AAMA BOT. The officer also serves as a member of the AAMA Representatives Bureau. This officer is serving as or has also been appointed as Chair of the Nominating Committee, Chair of the Strategic Issues Planning Committee, a member of the Management Steering Committee, Budget and Finance Committee, Bylaws Committee, Career Professional Development Committee, Advisory Task Force, and Annual Conference Committee.

Meetings Attended

- 66th AAMA HOD including Officer meeting requirements and obligations  │  Myrtle Beach, SC—Oct. 22, 2022
  - Meet the Candidates  │  Myrtle Beach, SC—Oct. 22, 2022
  - Reference Committee Hearings: Reports, Bylaws  │  Myrtle Beach, SC—Oct. 22, 2022
- AAMA BOT Meeting with the SoPPs  │  Myrtle Beach, SC—Oct. 23, 2022
- General Session Knowledge Bowl  │  Myrtle Beach, SC—Oct. 23, 2022
- Presidents Banquet  │  Myrtle Beach, SC—Oct. 23, 2022
- AAMA State Leaders Session  │  Myrtle Beach, SC—Oct. 23, 2022
- Communication Presentation Session  │  Myrtle Beach, SC—Oct. 23, 2022
- AAMA BOT Orientation  │  Myrtle Beach, SC—Oct. 24, 2022
- Post Conference BOT/Maxine Williams Scholarship Fund Executive Session  │  Myrtle Beach, SC—Oct. 24, 2022
- BOT Planning Session  │  Asheville, NC—Nov. 5–8, 2022
- BOT MSC Meeting  │  Virtual—Dec. 4, 2022
- BOT Meeting  │  Virtual—Dec. 4, 2022
- Bylaws Committee Meeting  │  Virtual—Dec. 7, 2022
- MSC Meeting  │  Virtual—Jan. 5, 2023
- BOT Meeting  │  Virtual—Jan. 8, 2023
The Maine Society of Medical Assistants (MSMA) held their annual conference on April 28–30, 2023. It was held at the Eastern Maine Community College in Bangor, Maine. This was a great meeting with approximately 70 attendees present. The CEU session topics included Aortic Valve Replacement, Human Trafficking and the Role of the MA, Drug Recognition and Evaluation, and Mentoring for the Healthcare Team. The speakers were fantastic and deeply knowledgeable in their presentations. This officer was scheduled to give a PowerPoint presentation regarding AAMA updates. This was the first in-person meeting since COVID, and all attendees were extremely excited to be meeting in person and seeing their colleagues again. This officer would personally like to thank the MSMA leadership for their hospitality during her visit with them. This officer had a great time and was excited to meet the members of the MSMA.
Committee Activity

Please see each committee report for more information.

Advisory Task Force: All correspondence has been responded to in a timely manner.

Annual Conference Committee: All correspondence has been responded to. This officer attended the Annual Conference Committee virtual meeting as detailed above.

Bylaws Committee: All correspondence has been responded to and deadlines met. This officer attended the Bylaws Committee meetings as detailed above.

Career Professional Development Committee: All correspondence has been responded to in a timely manner. This committee member contacted AAMA Past President Debby Houston, CMA (AAMA), CPC, to inquire if she would be willing to write a module regarding medical coding, in which she agreed. The deadline was given to Past President Houston and the review was done of the completed module. The module was forwarded to Chair Sandra Williams, CMA (AAMA), by Past President Houston. This officer attended the Career Professional Development Committee meetings as detailed above.

Nominating Committee: This officer contacted each member of the committee via email to welcome them to the committee and to seek out members who would be great candidates for Trustee/Officer. This officer has been in communication with the staff liaisons regarding the verification of each candidate for Trustee/Officer. In turn, this officer has sent the appropriate documentation to each committee member regarding candidates for Trustee/Officer to receive verification from each committee member. The deadline was set for June 11. More information is given in the Nominating Committee Chair report.

Strategic Issues Planning Committee: The Strategic Issues Plan (SIP) was discussed during the BOT Planning Session held in November 2022 as detailed above. Each item of the SIP was discussed and was either deleted, revised, or stayed the same. Please see the Strategic Issues Planning Committee report for more information.

All correspondence and communication have been responded to in a timely manner, and this officer promptly participated in all email ballots during this time. This officer has remained available to the AAMA President and the MSC throughout the year.

This officer would like to thank AAMA President Deborah Novak, CMA (AAMA), Past President Debby Houston, CMA (AAMA), CPC, and AAMA CEO Donald Balasa for all their support and guidance during this year. This officer would also like to thank the members of the AAMA for the great privilege of serving the AAMA for the past 8 years; it has been a true honor.

Patty Licurs, CMA (AAMA), CPC

2022–2023 Immediate Past President
American Association of Medical Assistants®

Report of the Secretary-Treasurer

For the Period Ending September 2023

The duties of a Secretary-Treasurer are as follows:

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

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

- Documents—Chair
- Marketing Strategy Team—Member

Meetings Attended

- 2022 AAMA Annual Conference │ Myrtle Beach, SC—Oct. 21–24, 2022
  - First-Timers and Students Reception │ Myrtle Beach, SC—Oct. 21, 2022
  - BOT Pre-HOD Meeting/Executive Session │ Myrtle Beach, SC—Oct. 21, 2022
  - Delegates/Alternates, credentials, reference committees, pages, and Sergeant of Arms—Available for on-site orientation │ Myrtle Beach, SC—Oct. 21, 2022
  - Welcome and Awards Celebration │ Myrtle Beach, SC—Oct. 21, 2022
  - House of Delegates │ Myrtle Beach, SC—Oct. 22, 2022
  - Meet the Candidates │ Myrtle Beach, SC—Oct. 22, 2022
  - Reference Committee Hearings: Reports, Bylaws │ Myrtle Beach, SC—Oct. 22, 2022
  - Meeting with the SoPPs │ Myrtle Beach, SC—Oct. 23, 2022
  - State Leaders Session │ Myrtle Beach, SC—Oct. 23, 2022
  - Presidents Banquet │ Myrtle Beach, SC—Oct. 23, 2022
  - BOT Orientation │ Myrtle Beach, SC—Oct. 24, 2022
  - Post-HOD BOT/Endowment Executive Session │ Myrtle Beach, SC—Oct. 24, 2022
- BOT Planning Session │ Asheville, North Carolina—Nov. 6–7, 2022
- BOT Monthly Meeting │ Virtual—Nov. 29, 2022
• MSC Meeting │ Virtual—Dec. 4, 2022
• BOT Monthly Meeting │ Virtual—Dec. 4, 2022
• BOT Monthly meeting │ Virtual—Jan. 8, 2023
• MSC Meeting │ Chicago, Illinois—Jan. 26, 2023
• BOT Winter Meeting │ Chicago, Illinois—Jan. 27–28, 2023
• MSC Meeting │ Virtual—March 13, 2023
• BOT Monthly Meeting │ Virtual—March 13, 2023
• BOT Monthly Meeting │ Virtual—April 2, 2023
• BOT Monthly Meeting │ Virtual—May 21, 2023
• MSC Meeting │ Virtual—May 31, 2023
• MSC Meeting │ Virtual—June 29, 2023
• MSC Meeting │ Grand Rapids, Michigan—July 6, 2023
• BOT Summer Meeting │ Grand Rapids, Michigan—July 6–8, 2023
• BOT Monthly Meeting │ Virtual—Aug. 6, 2023

AAMA Representatives Bureau

Virginia Society of Medical Assistants, March 10-12, 2023, Richmond, Virginia

This officer attended the annual meeting of the Virginia Society of Medical Assistants March 10-12, 2023. There were twenty-two members in attendance at this in-person meeting. The Virginia Society provided 7 CEU sessions led by excellent speakers. All concerns brought to this representative were reported to the appropriate staff or committee/task force chair for further review. This representative was honored to attend this in-person meeting and appreciated the warm and friendly hospitality.

Indiana Society of Medical Assistants, April 28-30, 2023, Edinburgh, Indiana

This officer attended the annual meeting of the Indiana Society of Medical Assistants April 28-30, 2023. There were forty-one members in attendance at this in-person meeting. The Indiana Society provided 10 CEU sessions led by excellent speakers. All concerns brought to this representative were reported to the appropriate staff or committee/task force chair for further review. This representative was honored to attend this in-person meeting and appreciated the warm and friendly hospitality.

Committees and Strategy Team Assignments

• Documents—Chair
  o Refer to the report of the Strategic Issues Planning Committee.
• Marketing Strategy Team—Member
  o Responded to all emails from the committee chair.
  o Attended and participated in virtual meetings.
  o Refer to the report of the Documents Committee.

As of the January BOT meeting in Chicago, Illinois, this officer has sent the following minutes
for review: January 8, 2023, Virtual Executive Session, January 27–28, 2023, Winter Board of Trustees—Executive Session, March 13, 2023, Virtual Executive Session, and the April 2, 2023, Virtual Executive Session. All minutes have been approved by the BOT.

As of the July BOT meeting in Grand Rapids, Michigan, this officer has sent the following minutes for review: January 27–28, 2023, Winter BOT—Open Session, May 21, 2023, Virtual Executive Session. All minutes have been approved by the BOT. This officer is working on the minutes for the July 6–8, 2023, Summer BOT meeting in Grand Rapids, Michigan. Once these minutes are complete, this officer will forward the minutes to the MSC for review.

This officer is working on the process for recording minutes for the next Secretary-Treasurer who will be elected in 2024. With the addition of Microsoft Teams to the BOT, virtual meetings are recorded via Microsoft Teams and once available, the transcript is printed and used to assist with the minutes. As a backup, a digital recorder is still used to record the meeting in case the transcript did not pick up what an individual said during the meeting, or the wording was not clear. This process has made the completion of the minutes for review quicker.

This officer will continue to work with Michael Knight, AAMA information technology support staff, to streamline the process for recording. Also, with the assistance of Knight, a new channel was created on the AAMA Teams account for the final approved minutes to be uploaded. This will keep all minutes in one location and available to all members to refer to when they have a question from a previous meeting.

This officer participated in all e-ballots at the request of AAMA President Deborah Novak and completed by the deadline. All correspondence, requests for information and all assignments have been responded to in a timely manner and all deadlines were met.

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

Virginia Thomas, CMA (AAMA)
2022–2024 Secretary-Treasurer
The AAMA Speaker of the House presides at meetings of the House of Delegates, serves as an officer of the AAMA Board of Trustees, on the Endowment, and the AAMA Representatives Bureau.

This officer has been working with Vice Speaker Sherry Bogar in preparation for the 2023 AAMA House of Delegates (HOD). Numerous virtual meetings as well as phone meetings were held to prepare for the HOD.

Work completed includes:

- Creation of timeline of deadlines to ensure all work completed on time
- HOD representation
  - Reviewed and updated the 2023 HOD Representation Count Letter
  - Updated the form to include check boxes to indicate if the member would like to serve on a HOD committee or volunteer HOD position
  - Initial notification emailed to state societies on February 15, 2023
  - Reminders to those states that had not yet submitted delegates and alternates, emailed on June 8 and June 19
  - Personal contact was made by the Speaker to state presidents who had not submitted delegates and alternates on June 24, 2023
  - All state societies submitted their Delegates/Alternates within the deadline
  - Follow up was made to two societies with ineligible Alternates by AAMA staff
  - Speaker confirmed proxies needed by states without full complement of delegates to meet their total delegate count
- Created a Teams folder to upload data for the 2022 HOD and all associated documents for the 2023 HOD
  - Tracking spreadsheet utilized in Teams for Delegates/Alternates
  - Communication with AAMA staff, who updated the tracking spreadsheet for Delegates/Alternates
  - Worked with Vice Speaker Sherry Bogar to fill chairs/members of HOD committees
  - Tracking spreadsheet utilized for chairs/members of HOD committees
  - Outreach to chairs/members of HOD committees for confirmation and to provide information on virtual orientation dates
Folder created for upload of HOD reports for review/approval/creation of HOD packet

- Virtual Delegate/Alternate HOD orientation
  - Virtual orientation was presented on August 26 and two times on August 30 to accommodate different time zones.
  - Creation of PowerPoint presentation to be utilized in the training
  - Recording will be made and will be converted to a private YouTube link that can be made available for anyone unable to attend

- Virtual trainings for HOD committee/House volunteers were conducted prior to the HOD
- Worked with AAMA staff for any questions and planning for the HOD

This officer was appointed to chair the Partnership Task Force.

This officer was also appointed to serve as a member of the Awards Committee, Annual Conference Committee, Career Professional Development Committee, and HOD Minutes Committee.

The following are the committee(strategy team/task force assignments:

**Awards Committee**

- Participated in virtual meetings and responded to emails from Chair Bogar for committee tasks
- Completed all tasks within scheduled deadlines
- Refer to the report of the Chair

**Annual Conference Committee**

- Participated in virtual meetings and responded to emails from Chair Case for committee tasks
- Completed all tasks within scheduled deadlines
- Refer to the report of the Chair

**Career Professional Development Committee**

- Participated in virtual meetings and responded to emails from Chair Williams for committee tasks
- Completed all tasks within scheduled deadlines
- Refer to the report of the Chair

**HOD Minutes Committee**

- Participated in virtual meetings and responded to emails from Chair Case for committee tasks
• Completed all tasks within scheduled deadlines
• Refer to the report of the Chair

Representatives Bureau Assignments

• A PowerPoint presentation was created with AAMA updates and information. This PowerPoint was shared with the other members of the BOT for use at their Representative assignments.

• New Hampshire Society of Medical Assistants—report on file
  o March 18 & March 25, 2023 (Virtual)
    o They held a two-day virtual event. They had approximately 50 attendees for both dates. They had very engaging speakers with great topics.
    o I was able to attend and present virtually on both dates for the state society. I presented the 2023 AAMA PowerPoint and answered questions from the membership in attendance.

• Pennsylvania Society of Medical Assistants—report on file
  o May 13, 2023 (in person)
    o They held a one-day, in-person event. They had 12 attendees, which included AAMA members from Massachusetts and New Jersey.
    o They had very engaging speakers with great topics.
    o I presented a CEU presentation on leadership, and I presented the 2023 AAMA PowerPoint and answered questions from the membership in attendance.

Meetings Attended

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

• 2022 AAMA Annual Conference │ Myrtle Beach, SC—Oct. 21–24, 2022
  o First-Timers and Students Reception │ Myrtle Beach, SC—Oct. 21, 2022
  o BOT Pre-HOD Meeting/Executive Session │ Myrtle Beach, SC—Oct. 21, 2022
  o Delegates/Alternates, credentials, reference committees, pages, and Sergeant of Arms—Available for on-site orientation │ Myrtle Beach, SC—Oct. 21, 2022
  o Welcome and Awards Celebration │ Myrtle Beach, SC—Oct. 21, 2022
  o House of Delegates │ Myrtle Beach, SC—Oct. 22, 2022
  o Meet the Candidates │ Myrtle Beach, SC—Oct. 22, 2022
  o Reference Committee Hearings: Reports, Bylaws │ Myrtle Beach, SC—Oct. 22, 2022
Meeting with the SoPPs │ Myrtle Beach, SC—Oct. 23, 2022
State Leaders Session │ Myrtle Beach, SC—Oct. 23, 2022
Presidents Banquet │ Myrtle Beach, SC—Oct. 23, 2022
BOT Orientation │ Myrtle Beach, SC—Oct. 24, 2022
Post-HOD BOT/ Endowment Executive Session │ Myrtle Beach, SC—Oct. 24, 2022

- BOT Planning Session │ Asheville, NC—Nov. 5–6, 2022
- National Colorectal Cancer Roundtable Annual Conference │ Baltimore, MD—Nov. 16–18, 2022
- HOD Planning Meeting w/Vice Speaker Bogar │ Chicago, Illinois—Jan. 26, 2023
- AAMA Summer BOT Meeting │ Grand Rapids, Michigan—July 7–8, 2023

As of the date of this report, this officer attended the following virtual meetings:
- AAMA BOT Virtual Meeting—Nov. 29, 2022
- AAMA BOT Virtual Meeting—Dec. 4, 2022
- AAMA BOT Virtual Meeting—Jan. 8, 2023
- AAMA Awards Committee Virtual Meeting—Jan. 10, 2023
- AAMA Career Professional Development Virtual Meeting—Jan. 19, 2023
- AAMA Partnership Development Virtual Meeting—Jan. 19, 2023
- National Colorectal Cancer Roundtable Policy Action Team—Jan. 26, 2023
- AAMA Conference Committee—Feb. 16, 2023
- AAMA Awards Committee—Feb. 28, 2023
- National Colorectal Cancer Roundtable Health Systems Strategic Priority Action Team—March 1, 2023
- AAMA Career Professional Development—March 9, 2023
- AAMA BOT Virtual Meeting—March 13, 2023
- AAMA Career Professional Development—March 30, 2023
- AAMA BOT Virtual Meeting—April 2, 2023
- AAMA Conference Committee—April 5, 2023
• AAMA BOT Virtual Meeting—May 21, 2023

• AAMA Career Professional Development—May 22, 2023

• AAMA Career Professional Development—June 8, 2023

• AAMA Awards Committee—June 25, 2023

• AAMA Career Professional Development—July 20, 2023

• AAMA Career Professional Development—July 27, 2023

• AAMA Advisory Task Force—August 2, 2023

• AAMA BOT Virtual Meeting—Aug. 6, 2023

• AAMA HOD Delegate Orientation—Aug. 26, 2023

• AAMA HOD Delegate Orientation—Aug. 30, 2023

This officer participated in all e-Ballots and discussion requests from President Deborah Novak. This officer participated and provided feedback as requested by CEO Donald Balasa. All correspondence has been responded to in a timely manner, and all deadlines have been met.

I want to thank Vice Speaker Bogar for her assistance in preparing for the 2023 House of Delegates. I also want to thank the AAMA staff for the enormous amount of work they did to help prepare for the 2023 House of Delegates: Nick Mickowski, Miranda Sanks-Korenchan, Erika Mercado, and Donald Balasa.

Aimee Wicke, CMA (AAMA), MA-Law

2022–2023 Speaker of the House
The AAMA Vice Speaker of the House assists the Speaker in the appointment of committees and preparing for the House of Delegates (HOD), serves as an officer of the AAMA Board of Trustees, and serves as a member of the AAMA Representatives Bureau.

This officer was appointed to chair the Awards Committee and appointed to serve as a member of the Strategic Issues Planning Committee, the Partnership Task Force, the Annual Conference Committee, the Career Professional Development Committee, and the HOD Minutes Committee.

Meetings Attended

As of the date of this report, this officer attended the following meetings or events:

- AAMA 2022 Annual Conference │ Myrtle Beach, SC—Oct. 21–24, 2021
  - First Timers and Students Reception
  - BOT Pre-HOD meeting/Executive Session
  - AAMA Welcome and Awards Celebration
  - AAMA House of Delegates
  - Meeting with the SoPPs
  - General Session CMA (AAMA) Knowledge Bowl
  - State Leaders Session
  - Presidents Banquet
  - BOT Orientation
  - Post-HOD BOT/Endowment Executive Session

- AAMA BOT Planning Session Asheville, NC—Nov. 5–6, 2022
- AAMA BOT Meeting │ Virtual—Nov. 29, 2022
- AAMA BOT Meeting │ Virtual—Dec. 4, 2022
- AAMA BOT Meeting │ Virtual—Jan. 8, 2023
- AAMA BOT & Endowment Winter Meeting │ Chicago, IL—Jan. 27–28, 2023
- AAMA Awards Meeting │ Virtual │ February 28, 2023
- AAMA BOT Monthly Meeting │ Virtual—March 13, 2023
- AAMA Leadership Meeting │ Virtual—March 25, 2023
- AAMA BOT Monthly Meeting │ Virtual—April 2, 2023
Representatives Bureau Assignments

Iowa Society of Medical Assistants Annual Conference | Fort Dodge, IA—April 21–23, 2023
This officer attended the Iowa Society of Medical Assistants (ISMA) Annual Conference at the Best Western Starlite Village, in Fort Dodge, Iowa, April 21–23, 2023. ISMA offered in-person and virtual CEU opportunities. They had approximately 100 total attendees both in person and virtually. They offered 13 CEUs with their Annual House of Delegates and included events to allow time for networking. This officer was provided the opportunity to present the AAMA Update PowerPoint that included a preview of the 2023 AAMA Conference registration and hotel information. This officer volunteered to serve as Chair of Tellers for the ISMA House of Delegates. This officer had the honor of installing the new officers of ISMA at the President’s Banquet. Prior to attending the assignment, this officer was asked to participate in an ISMA Board meeting. This officer was presented with questions about Commission on Accreditation of Allied Health Education Programs (CAAHEP) accreditation and what the AAMA is doing about decline in CMA (AAMA)® candidates and AAMA membership. There were also questions presented about how CAAHEP, the Certifying Board, and boards collaborate. This officer worked with CEO Donald Balasa to obtain the answers in preparation for assignment. It was a great honor to attend the ISMA conference as the AAMA representative.

Nebraska Society of Medical Assistants Annual Meeting | North Platte, NE—April 28–29, 2023
This officer attended the Nebraska Society of Medical Assistants (NSMA) Annual Conference at the Ramada Inn, in North Platte, Nebraska, April 28–29, 2023. There were approximately 67 attendees, with many opportunities for networking. They offered 10 CEUs and hosted their annual General Assembly, where this officer served as Parliamentarian. This officer was able to network with some new members and discuss ways to volunteer for NSMA and AAMA. This officer was provided time to present the AAMA Update that contained information about many of the AAMA happenings. After the presentation this officer was approached by several past NSMA and AAMA leaders who expressed concerns about the declining membership, reduced number of CAAHEP programs, and communication changes from the AAMA office. Reassurance was given to these leaders that this information would be taken back to the BOT and AAMA office. This officer was proud to have been selected to attend the NSMA conference as their AAMA representative.
**House of Delegates Preparation**

This officer met with Speaker of the House Aimee Wicker on Jan. 26, 2023, to discuss the 2023 AAMA HOD, Delegate orientations, and development of a timeline for the HOD. This officer also attended a meeting with Speaker Wicker on May 31, 2023, virtually to discuss timelines for Delegates packets and reports. This officer assisted with the review of the delegate submission folder and list for accuracy. This officer continued to have weekly discussions with Speaker Wicker regarding the 2023 AAMA HOD, Delegate orientations, and review of Delegates packet materials and assignments for AAMA HOD reference committees. This officer attended and assisted with virtual HOD orientations on Aug. 26, 2023, and Aug. 30, 2023.

**AAMA Committees**

The following are this officers’ committee and strategy team assignments:

- Awards Committee—See separate report.
- Career Professional Development Committee
  - Attended virtual meetings on Jan. 10, 2023; March 9, 2023; May 22, 2023; June 8, 2023, July 27, 2023 (excused March 30, 2023, due to a family obligation and July 20, 2023, due to SWR conference)
  - This committee continues to work on their goals for this committee.
  - Refer to the report of the Chair.

- Conference Committee
  - This member was assigned to review the conference schedule for the awards presentation and provide any schedule changes if needed. This assignment was completed.
  - This member continues to be available as needed for discussions with the Conference Chair and committee to discuss awards program planning, including food and beverage selections.
  - All assignments have been completed as requested by the Chair.
  - Refer to report of the Chair.

- Partnership Task Force
  - The member attended the Jan. 18, 2023, virtual meeting.
  - This member has completed a review of National Colorectal Cancer Roundtable (NCCRT) video materials as requested by the Chair.
  - Refer to the report of the Chair.

- Strategic Issues Planning Committee
  - This member was assigned to review the Strategic Issues Plan.
This member completed a document for tracking purposes and uploaded it into Teams for all to access as requested by Chair Licurs.

Refer to the report of the chair.

This officer was also assigned to review the AAMA 2022 66th House of Delegates minutes. This assignment was completed.

This officer participated in a special virtual meeting on April 20, 2023, with IT Manager Michael Knight and consultants to discuss desired changes to the AAMA website.

This officer participated in all e-Ballots and discussion requests from President Deborah Novak.

This officer participated and provided feedback as requested by CEO Donald Balasa and President Novak. All correspondence has been responded to in a timely manner, and all deadlines have been met.

This officer wants to express my sincerest thanks to Speaker Wicker for her guidance in preparing for the 2023 House of Delegates. A huge thank you to the AAMA staff for the work they did to help prepare for the 2023 House of Delegates: Nick Mickowski, Miranda Sanks-Korenchan, Erika Mercado, and Donald Balasa.

This officer would like to thank the members and state leaders for their continued dedication and service to their patients and providers and their dedication to the AAMA and the medical assistant profession.

Sherry Bogar, CMA (AAMA), CN-BC

2022–2023 Vice Speaker of the House
American Association of Medical Assistants®

Report of Trustee Geno

For the Period Ending September 2023

The duties of a Trustee are as follows:

• Serve as a member of the AAMA Board of Trustees and the Endowment
• Serve as a member of the AAMA Representatives Bureau

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

• Social Media Committee—Chair
• Partnership Task Force—Member
• Maxine Williams Scholarship Committee—Member
• Awards Committee—Member
• Marketing Strategy Team—Member

Meetings Attended

• 2022 AAMA Annual Conference │ Myrtle Beach, SC—Oct. 19–25, 2022
  o First Timers and Students Reception │ Myrtle Beach, SC—Oct. 2022
  o BOT Pre-HOD meeting/ Executive Session │ Myrtle Beach, SC—Oct. 2022
  o Meeting with the SoPPs │ Myrtle Beach, SC—Oct. 2022
  o General Session CMA (AAMA) Knowledge Bowl │ Myrtle Beach, SC—Oct. 2022
• AAMA Welcome and Awards Celebration │ Myrtle Beach, SC—Oct. 2022
• AAMA Orientation of Committees; Credentials, Pages, Tellers, and Reference │ Myrtle Beach, SC—Oct. 2022
• AAMA Orientation of HOD Delegates/Alternates │ Myrtle Beach, SC—Oct. 2022
• State Leaders Session │ Myrtle Beach, SC—Oct. 2022
• AAMA House of Delegates │ Myrtle Beach, SC—Oct. 2022
• Meet the Candidates │ Myrtle Beach, SC—Oct. 2022
• Reference Committee Hearings: Reports and Bylaws │ Myrtle Beach, SC—Oct. 2022
1684  o  BOT Orientation  |  Myrtle Beach, SC—Oct. 2022
1685  o  Post-HOD BOT/ Endowment Executive Session  |  Myrtle Beach, SC—Oct. 2022
1686  o  Presidents Banquet  |  Myrtle Beach, SC—Oct. 2022
1687  •  AAMA BOT Planning Session  |  Asheville, NC—Nov. 5–8, 2022
1688  •  AAMA BOT Meeting  |  Virtual—Dec. 4, 2022
1689  •  AAMA BOT Meeting  |  Virtual—Jan. 8, 2023
1690  •  Marketing Strategy Meeting  |  Feb. 27, 2023
1691  •  Awards Committee Meeting  |  Feb. 28, 2023
1692  •  AAMA BOT Meeting  |  Virtual—March 5, 2023
1693  •  AAMA BOT Meeting  |  Virtual—April 2, 2023
1694  •  Awards Committee Meeting  |  April 8, 2023
1695  •  Zimmerman (website consultant) interview for feedback on website reconstruction needs  |  April 17, 2023
1696  •  AAMA BOT Meeting  |  Virtual—May 21, 2023
1697  •  Ohio Partners for Cancer Control, General Meeting HPV  |  May 6, 2023
1698  •  Awards Committee Meeting  |  June 25, 2023
1699  •  Marketing Strategy Meeting  |  June 14, 2023
1700  •  Maxine Williams Committee Meetings  |  Met multiple times via email to grade submissions.
1701  •  AAMA BOT Meeting  |  Grand Rapids, MI—July 5–9, 2023
1702  •  AAMA BOT Meeting  |  Virtual—Aug. 6, 2023
1703
1704
1705

Representatives Bureau Assignment

WSSMA Leadership Meeting in Person March 11–12, 2023

This Trustee attended the Washington State Society of Medical Assistants conference and was asked to present a 1 CEU session on leadership. The leadership meeting speakers were very informative and well organized. This Trustee was allowed to share AAMA information, and it was received well. There was a discussion on membership and how to keep members engaged on both state and local levels. Both Washington and Oregon would like to submit another bid for the national conference in the future.

Bill SB 5181 at the time was being opposed but soon did pass.

Committee/Strategy Team Assignments
Partnership Task Force Committee

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

Maxine Williams Scholarship Committee

This Trustee had contact with the members of the Maxine Williams Scholarship Committee. As a committee, we worked on scholarship entries and returned them to the Chair. We then met again to talk about our top-choice winners. All assignments were completed. Please see the Maxine Williams Scholarship Committee report for more information.

Social Media Committee Chair

I have met once a month with my committee to keep everyone updated on the process of the assignment pictures that the board turned in throughout the months of assignments. My committee and I are in the process of working on our initiative for the 2023 AAMA Annual Conference. Please see the Social Media Committee report for more information.

Other Assignments

This Trustee participated in all e-ballots from President Deborah Novak, CMA (AAMA).

All correspondence has been responded to promptly, and all deadlines have been met.

This Trustee would like to thank President Novak for her leadership, friendship, the productive year, and all the support I received during my second year as a Trustee.

This Trustee wants to thank CEO Donald Balasa and the MarCom staff for their dedication and support throughout the year. This officer would also like to thank the members of the BOT for their dedication, support, and all they do for the organization and profession.

This Trustee would like to thank the members of the AAMA for electing me two years ago to serve as a voice and for allowing me to serve and promote this organization.

Natasha Geno, CMA (AAMA), ATS

2021–2023 Trustee
The duties of a Trustee are as follows:

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

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

- Editorial Advisory Committee—Chair
- Documents Committee—Member
- Strategic Issues Planning—Member

Meetings Attended

- 2022 AAMA Annual Conference | Myrtle Beach, SC—Oct. 21–24, 2022
  - First-Timers and Students Reception | Myrtle Beach, SC—Oct. 21, 2022
  - BOT Pre-HOD meeting/Executive Session—Myrtle Beach, SC—Oct. 21, 2022
  - Welcome and Awards Celebration | Myrtle Beach, SC—Oct. 21, 2022
  - 66th AAMA House of Delegates | Myrtle Beach, SC—Oct. 22, 2022
  - Meet the Candidates | Myrtle Beach, SC—Oct. 22, 2022
  - Reference Committee Hearings: Reports, Bylaws | Myrtle Beach, SC—Oct. 22, 2022
  - AAMA BOT Meeting with the SoPPs | Myrtle Beach, SC—Oct. 23, 2022
  - General Session CMA (AAMA) Knowledge Bowl | Myrtle Beach, SC—Oct. 23, 2022
  - Presidents Banquet | Myrtle Beach, SC—Oct. 23, 2022
  - AAMA State Leaders Session | Myrtle Beach, SC—Oct. 23, 2022
  - BOT Orientation | Myrtle Beach, SC—Oct. 24, 2022
  - Post Conference BOT/Maxine Williams Scholarship Fund Executive Session | Myrtle Beach, SC—Oct. 24, 2022
Representatives Bureau Assignments

Illinois Society of Medical Assistants Annual Meeting—Normal, IL—April 21–22, 2023

This Trustee was honored to attend the annual meeting of the ISMA. While this society faces issues with declining membership, they remain strong. The educational offerings were superb. The kindness and hospitality shown to this Trustee after multiple travel issues was much appreciated. The camaraderie and laughing with new friends will always be fond memories.

Committee and Strategy Team Assignments

Editorial Advisory Committee: Chair—See separate report.

Documents Committee:

- This member met with the committee chair and members present at the AAMA BOT Planning Session in Asheville, NC, November 6, 2022. Due to illness this Trustee participated virtually.
- This committee discussed the purpose of this committee, goals, and activities.
- This member was available to the Chair for all assignments and discussions.
- Refer to the report of Chair Thomas.

Strategic Issues Planning Committee:

- This member met with the committee chair and members present at the AAMA BOT Planning Session in Asheville, NC, on November 6, 2022. Due to illness this Trustee participated virtually.
- This committee discussed the purpose of this committee, goals, and activities.
This member was available to the Chair for all assignments and discussions.

Refer to the report of Chair Licurs.

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

Shelley Gingrich, CMA (AAMA)

2022–2024 Trustee
Report of Trustee Houghton
For the Period Ending September 2023

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:

• Bylaws Committee—Chair
• Leadership Strategy Team—Member
• Partnership Task Force—Member

Meetings Attended

• AAMA 2022 Annual Conference | Myrtle Beach, South Carolina—Oct. 21–24, 2022
  o BOT Orientation | Myrtle Beach, South Carolina—October 2022
  o Post-HOD BOT/ Endowment Executive Session | Myrtle Beach, South Carolina—October 2022
• BOT Planning Session | Asheville, North Carolina—Nov. 5–8, 2022
• BOT Virtual Meeting | Nov. 29, 2022
• BOT Virtual Meeting | Dec. 4, 2022
• BOT Virtual Meeting | Jan. 8, 2023
• BOT Meeting | Chicago, Illinois—Jan. 27–28, 2023
• BOT Virtual Meeting | March 13, 2023
• AAMA Leadership Virtual CEU session | March 25, 2023
• BOT Virtual Meeting | April 2, 2023
• BOT Virtual Meeting | May 21, 2023
• AAMA BOT Summer & Executive Meeting | Grand Rapids, MI—July 6–8, 2023
• BOT Virtual Meeting | August 6, 2023

Planned Meetings to Attend (After Submission of Report)

• BOT Orientation for Delegates & Alternates | Virtual—August 26, 2023
• BOT Orientation for Delegates & Alternates | Virtual—August 30, 2023

Representatives Bureau Assignments

Montana Society of Medical Assistants
Trustee Houghton enjoyed the education that was offered. There were about 30 attendees. Trustee Houghton has taken back to the Management Steering Committee the concerns of this state. Trustee Houghton is keeping an open dialogue with these state leaders. All reports and issues have been sent to the State President, appropriate staff, or the Management Steering Committee.

Alaska Medical Assistants Society
Trustee Houghton enjoyed the education offered. There were about 25 virtual attendees. Trustee Houghton has taken back to the Management Steering Committee the concerns of this state. Trustee Houghton is keeping an open dialogue with these state leaders. All reports and issues have been sent to the State President, appropriate staff, or the Management Steering Committee.

Committee and Strategy Team Assignments

Leadership Strategy Team—Please refer to the report of the Chair.
Partnership Task Force—Please refer to the report of the Chair.

Other Assignments
This trustee or officer received E-Ballots from President Novak and completed them by the deadline.
All correspondence has been responded to in a timely manner and all deadlines have been met. Trustee Houghton would like to thank President Novak for all her leadership and guidance through her service on the Board of Trustees. This Trustee would also like to thank Donald Balasa, JD, MBA, for all the guidance he gives to this organization. This Trustee would like to thank the staff for their hard work over the last year. There have been many changes that they have had to handle. Trustee Houghton would like to thank the members for all they do for their states. This Trustee would like to thank the Board of Trustees, Continuing Education Board, and the Certifying Board for their continued work on behalf of the members.

Claire M. Houghton, CMA (AAMA)
2022–2024 Trustee
American Association of Medical Assistants®

Report of Trustee Miller

For the Period Ending September 2023

The duties of a Trustee are as follows:

• Serve as member of the Board of Trustees and the Endowment
• Serve as a member of the AAMA Representatives Bureau

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

• Membership Development Strategy Team—Chair
• Career Professional Development Committee—Member
• HOD Minutes Committee—Member

Meetings Attended

• 2022 AAMA Annual Conference │ Myrtle Beach, SC—Oct. 20–24, 2022
  o First-Timers and Students Reception │ Myrtle Beach, SC—Oct. 21, 2022
  o BOT Pre-HOD Meeting/Executive Session │ Myrtle Beach, SC—Oct. 21, 2022
  o Welcome and Awards Celebration │ Myrtle Beach, SC—Oct. 21, 2022
  o House of Delegates │ Myrtle Beach, SC—Oct. 22, 2022
  o Meet the Candidates │ Myrtle Beach, SC—Oct. 22, 2022
  o Reference Committee Hearings: Reports, Bylaws │ Myrtle Beach, SC—Oct. 22, 2022
  o Meeting with the SoPPs │ Myrtle Beach, SC—Oct. 23, 2022
  o CMA (AAMA) Knowledge Bowl │ Myrtle Beach, SC—Oct. 23, 2022
  o State Leaders Session │ Myrtle Beach, SC—Oct. 23, 2022
  o Presidents Banquet │ Myrtle Beach, SC—Oct. 23, 2022
  o BOT Orientation │ Myrtle Beach, SC—Oct. 24, 2022
  o Post-HOD BOT/ Endowment Executive Session │ Myrtle Beach, SC—Oct. 24, 2022
Representatives Bureau Assignment

Wisconsin State Society Annual Conference—Meeting—March 30 to April 1, 2023

There were 70 pre-registered attendees for their educational sessions and two registered at the door. They had 13 CEUs available, including Friday night Welcome Party with Kahoot! Knowledge Bowl. They had sessions on stress, professionalism, medical/dental issues, vision loss and blindness, pediatric eye care, tips for interacting with deaf or hard of hearing individuals, and modern pain neuroscience.

Wisconsin State Society of Medical Assistants leaders are very concerned of their declining membership. I shared with them that many other states are having a decline in membership too. There was a question about the number of outside organizations paying for AAMA CEUs and whether this is impacting the number of members and attendees to their meetings. Discussion ensued about the different credentials and pathways along with the quality of training/education.
They have a decline in volunteer leaders on the chapter and state level which is very concerning to them too.

Representative Candy Miller thanks the Wisconsin SMA for their hospitality. Friendships were renewed, and new friendships were made. It was an honor and pleasure to represent the AAMA.

Committees and Strategy Team Assignments

HOD Minutes Committee

2022 HOD minutes were reviewed and audited as requested.

This Trustee was asked to serve on the 2023 HOD Minutes Committee.

Career Professional Development Committee

Trustee Miller reviewed all documents and power point presentations as assigned by Chair Sandra Williams. Input was given when asked and all assignments were completed.

Refer to the report of Chair Williams.

Membership Development Strategy Team—Chair

See separate report.

This Trustee received e-ballots from President Deborah Novak, and they were completed and submitted by the deadlines.

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

Trustee Miller also wishes to thank President Novak for her support and leadership, CEO and Legal Counsel Donald Balasa, JD, MBA, for his guidance and ever-willingness to answer questions, the AAMA staff for their support and eagerness to assist, and the entire AAMA BOT for their assistance, guidance, and never-ending support for this Trustee.

It has been an honor and pleasure to serve as an AAMA Trustee.

Candy Miller, CMA (AAMA)

2021–2023 Trustee
American Association of Medical Assistants®

Report of Trustee Neu

For the Period Ending September 2023

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:

• Bylaws and Resolutions Committee—Member
• Documents Committee—Member
• Membership Development Task Force—Member

Meetings Attended

• 2022 AAMA Annual Conference │ Myrtle Beach, South Carolina—Oct. 21–24, 2022
  o Post conference BOT/Endowment Executive Session │ Myrtle Beach, South Carolina—Oct. 24, 2022
• AAMA BOT Planning Session │ Asheville, North Carolina—Nov. 6–7, 2022
• AAMA BOT Meeting │ Virtual—Nov. 29, 2022
• AAMA BOT Meeting │ Virtual—Dec. 4, 2022
• AAMA BOT Meeting │ Virtual—Jan. 8, 2023
• January BOT Meeting │ Chicago, Illinois—Jan. 27–28, 2023
• Summer BOT Meeting │ Grand Rapids, Michigan—July 6–8, 2023
• AAMA BOT Meeting │ Virtual—August 6, 2023

Representatives Bureau Assignment

South Carolina Society of Medical Assistants

This Trustee attended the South Carolina Society of Medical Assistants Annual Conference in Spartanburg, South Carolina, March 16–19, 2023. The conference hosted 91 attendees and 13 students. Their speakers were informative and presented extremely well. The conference had a variety of vendors and a green board for pictures. The House of Delegates met in a timely and
organized manner. There were 21 delegates in attendance, and the business of the state was carried out. This Trustee was honored to install the newly elected officers at the President’s banquet on Saturday evening.

2007 Committee and Strategy Team Assignments

2008 Bylaws and Resolutions Committee

- This Trustee actively participated in all virtual committee meetings and emails regarding the proposed Bylaws amendments.
- All assigned tasks were completed.
- Refer to the report of Chair Claire Houghton.

2008 Documents Committee

- This Trustee actively participated in the meeting.
- Refer to the report of Chair Virginia Thomas.

2008 Membership Development Strategy Team

- This Trustee actively participated in all virtual committee meetings.
- All assigned tasks were completed.
- Refer to the report of Chair Candy Miller.

2008 Maxine Williams Scholarship Committee

- Worked on the applications and returned to Chair Case.
- Refer to the report of Chair Case

2008 Additional Assignments

This Trustee participated in e-balls conducted by President Deborah Novak. All correspondence has been responded to in a timely manner and all deadlines have been met.

2028 Pamela L. Neu, MBA, CMA-A (AAMA)

2029 2022–2023 Trustee
American Association of Medical Assistants®

Report of Trustee Seelig

For the Period Ending September 2023

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:

- Annual Conference Committee—Member
- Bylaws and Resolutions Committee—Member
- Career Professional Development Committee—Member
- Leadership Development Strategy Team—Chair
- Membership Development Strategy Team—Member

Meetings Attended

- 2022 AAMA Annual Conference │ Myrtle Beach, South Carolina—Oct. 21–24, 2022
  - First-Timers and Students Reception │ Myrtle Beach, South Carolina—Oct. 21, 2022
  - BOT/Endowment │ Myrtle Beach, South Carolina—Oct. 21, 2022
  - Welcome and Awards Celebration │ Myrtle Beach, South Carolina—Oct. 21, 2022
  - House of Delegates (HOD) │ Myrtle Beach, South Carolina—Oct. 22, 2022
  - Meet the Candidates │ Myrtle Beach, South Carolina—Oct. 22, 2022
  - Reference Committees │ Myrtle Beach, South Carolina—Oct. 22, 2022
  - CMA (AAMA) Knowledge Bowl │ Myrtle Beach, South Carolina—Oct. 23, 2022
  - State Leaders │ Myrtle Beach, South Carolina—Oct. 23, 2022
  - MAERB Forum │ Myrtle Beach, South Carolina—Oct. 23, 2022
  - Presidents Banquet │ Myrtle Beach, South Carolina—Oct. 23, 2022
  - BOT │ Myrtle Beach, South Carolina—Oct. 24, 2022
  - AAMA Committees, Strategy Teams, and Task Force Meeting │ Myrtle Beach, South Carolina—Oct. 24, 2022
  - BOT Planning Session │ Asheville, North Carolina—Nov. 6–7, 2022
This Trustee attended all virtual BOT meetings at the request of President Novak.

- Nov. 29, 2022
- Dec. 4, 2022
- Jan. 8, 2023
- March 13, 2023
- April 2, 2023
- May 21, 2023
- August 6, 2023

This Trustee participated in all e-ballots conducted by President Novak.

**Representatives Bureau Assignment**

**Idaho Society of Medical Assistants**

This Trustee attended the Idaho Society of Medical Assistants conference in Twin Falls, Idaho, March 30–April 2, 2023. The conference was well organized, with 80 in-person and virtual attendees. Student attendees greeted attendees and performed registration duties. The speakers were well-informed about their audience, providing high-quality education. A QR code was utilized to record workshop attendance. Their General Assembly was held between CEU sessions, so all attendees were in attendance. The society approved updated bylaws and is encouraging members to assume leadership responsibilities. There were many candidates for AAMA Delegates and Alternates but insufficient candidates for officer positions. Volunteers to complete the state officer positions were accepted following the conclusion of the conference. Leadership is interested in finding ways to encourage board volunteers and state representatives to attend the July BOT meeting. This Trustee was honored to provide guidance regarding parliamentary and bylaw issues.

**Michigan Society of Medical Assistants**

This Trustee attended the Michigan Society of Medical Assistants (MSMA) in Traverse City, Michigan, April 20–23, 2023. The membership was welcoming, allowing for private discussions with many attendees. There were 51 registered attendees. Members expressed concerns about declining membership numbers and the declining number of educational programs approved to produce candidates eligible to sit for the CMA (AAMA) Certification Examination. MSMA is actively seeking state legislative action for CMA (AAMA) licensure. A registered parliamentarian assisted with the HOD which was held on a day without CEU sessions. This officer was honored to serve as Head Teller for the ballot votes taken. All officers were reelected to their current position, with several volunteers appointed to serve as first-time committee chairs and members. MSMA voted to elect no alternates to serve in the AAMA HOD to reduce the cost...
of sending representation. Mary Dey, CMA (AAMA), was recognized for her service to MSMA by being presented Life Membership. CEU sessions were scheduled for the rest of the conference, which resulted in greater attendance on Saturday and several attendees for the post conference board meeting. The CEU sessions were very interesting and timely. All speakers were familiar with the scope of practice for medical assistants. MSMA is looking forward to hosting the 2024 AAMA Conference in Grand Rapids. State representatives attended the July BOT meeting.

Committee and Strategy Team Assignments

Annual Conference Committee

- This Trustee actively participated in virtual committee meetings.
- Refer to the report of Chair Monica Case.

Bylaws and Resolutions Committee

- This Trustee actively participated in all virtual committee meetings and emails regarding the proposed Bylaws amendments.
- All assigned tasks were completed.
- Refer to the report of Chair Claire Houghton.

Career Professional Development Committee

- This Trustee actively participated in all virtual committee meetings and responded to all emails requesting editorial suggestions.
- Refer to the report of Chair Sandra Williams.

Membership Development Strategy Team

- This Trustee actively participated in all virtual committee meetings and responded to all emails requesting suggestions.
- Refer to the report of Chair Candy Miller.

Leadership Development Task Force—Please refer to separate report.

Other Assignments

All correspondence has been responded to in a timely manner and all deadlines were met. This trustee would like to thank President Novak for her leadership, the members of the BOT for their guidance and thoughtful consideration of issues, as well as CEO Donald Balasa, JD, MBA, and all the AAMA staff, for their support.
This trustee also thanks all volunteer leaders and members of the BOT, CEB, and CB for all that they do for our organization, and all the members who represent our profession and organization every day.

Jane B. Seelig, CMA-A (AAMA)

2021–2023 Trustee
American Association of Medical Assistants®

Report of Trustee Williams

For the Period Ending September 2023

The duties of a Trustee are as follows:

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

Additionally, this Trustee was appointed to the following:

- Career Professional Development—Chair
- Membership Development Strategy Team
- Strategic Issues Planning Committee
- Leadership Development Strategy Team
- Center for the Application of Substance Abuse Technologies (CASAT) Steering Committee

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

- 2022 AAMA Annual Conference │ Myrtle Beach, SC—Oct. 20–24, 2022
  - First-Timers and Students Reception │ Myrtle Beach, SC—Oct. 21, 2022
  - BOT Pre-HOD meeting/Executive Session │ Myrtle Beach, SC—Oct. 21, 2022
  - BOT meeting with members of the CB │ Myrtle Beach, SC—Oct. 21, 2022
  - Welcome and Awards Celebration │ Myrtle Beach, SC—Oct. 21, 2022
  - House of Delegates │ Myrtle Beach, SC—Oct. 22, 2022
  - Meet the Candidates │ Myrtle Beach, SC—Oct. 22, 2022
  - Reference Committee Hearings: Reports, Bylaws │ Myrtle Beach, SC—Oct. 22, 2022
  - Meeting with the SoPPs │ Myrtle Beach, SC—Oct. 23, 2022
  - CMA (AAMA) Knowledge Bowl │ Myrtle Beach, SC—Oct. 23, 2022
  - State Leaders Session │ Myrtle Beach, SC—Oct. 23, 2022
  - Presidents Banquet │ Myrtle Beach, SC — Oct. 23, 2022
  - BOT Orientation │ Myrtle Beach, SC—Oct. 24, 2022
As of the date of this report, this Trustee attended the following virtual meetings:

- BOT meeting—Nov. 29, 2022
- BOT meeting—Dec. 4, 2022
- BOT meeting—Jan. 8, 2023
- BOT meeting—March 13, 2023
- BOT Meeting—April 2, 2023
- Interview with Zimmerman (website)—April 18, 2023
- BOT Meeting—May 21, 2023
- BOT Meeting—Aug. 6, 2023

Committee and Strategy Team Assignments

Career Professional Development: See separate report.

Membership Development Strategy Team: Trustee Sandra Williams has responded to inquiries from Chair Candy Miller as well as forwarded correspondence from the previous year’s committee to Chair Miller. Trustee Williams plans to attend the scheduled committee meeting on January 12, 2023. See the report of the Chair.

Strategic Issues: Trustee Williams has reviewed the Strategic Issues Plan as requested by Chair Patty Licurs. This plan has been approved by the BOT and is posted on the AAMA website.

Leadership Development Strategy Team: Trustee Williams has responded to emails as requested by Chair Jane Seelig and attended the strategy team meetings. This member participated in the virtual session on leadership on March 25, 2023. See the report of the Chair.

CASAT Steering Committee: Attended the virtual steering committee meetings on January 19, 2023, and June 14, 2023.

Representatives Bureau Assignments

This Trustee attended the Florida Society of Medical Assistants (FSMA) Annual Conference
April 21–22, 2023, in Orlando, Florida. The conference was attended by 33 people and excellent speakers offered a total of 6 CEUs. This trustee was honored to attend the General Assembly as Parliamentarian. This trustee presented AAMA updates on Saturday morning and there were many opportunities for interaction with the membership and to provide information about volunteer leadership in the AAMA.

This Trustee also attended the New York State Society of Medical Assistants (NYSSMA) annual conference April 27–30, 2023, in Rochester, New York. This meeting was attended by 23 members. 12 CEUs were offered. The speakers were excellent and the information timely. NYSSMA is experiencing issues with membership and getting new leaders to take officer roles. However, the newly elected secretary is a first-time state officer. One of the chapters was disbanded due to inadequate membership in that chapter. The NYSSMA Today newsletter is actively distributed and a great source of information for the members. This trustee presented AAMA updates during the installation of officers and discussed volunteer leadership with those present.

This trustee received E-Ballots at the request of President Deborah Novak and completed and submitted them by the deadline.

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

This Trustee wishes to thank President Novak for her leadership; CEO and Legal Counsel Donald Balasa, JD, MBA, for his wise counsel; and all the AAMA staff for their support and their loyalty to the BOT and the AAMA membership.

Sandra Williams, CMA (AAMA)

2021–2023 Trustee
The following is a summary of Chief Executive Officer (CEO) Donald Balasa’s priorities and accomplishments and an update on pertinent developments, since (approximately) the American Association of Medical Assistants (AAMA) Annual Conference, October 21 through 24, 2022, in Myrtle Beach, South Carolina.

The CEO’s focus has been on facilitating the AAMA’s accomplishment of its mission and Strategic Issues Plan by (1) assisting President Deborah Novak 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.

Partnership Presentations

Medical Group Management Association (MGMA) Financial and Operations Conference

CEO Balasa attended the Medical Group Management Association (MGMA) Financial and Operations Conference March 19 through 21, 2023, and presented “A Comparative Analysis of Recent Ambulatory Care Staffing Models.” This session was different from the ones he gave at MGMA meetings in 2022. As the title implies, this talk focused more on economic analysis than scope of practice issues.

In addition, these attendees were in a wider variety of categories of management than those who typically attend the MGMA Leadership Conference. They were, for example, human resource, operations, and financial managers and had different foci than the chief executive officers who constitute the majority of attendees at the MGMA Leadership Conference.

The following are excerpts from his presentation:

Three (3) principles of staff utilization

• Staff should be utilized to the “top of their education/licensing/certification.”

• Staff should be trained to assume as many roles as feasible (as permitted by law and as long as they are competent in each role).

• To the greatest extent possible, staff should be retained.

…

Ready, Risk, Reward white paper, Premier Inc.

• “Optimizing Primary Care Model Design to Improve Performance,” August 8, 2019

• Three (3) primary care paradigms:
  • Medical assistants only—42%
  • Medical assistants and either RNs or LPNs—54%
Medical assistants, RNs, and LPNs—24%

• “Clinics with MA-only models and comparable staff-to-provider clinical full-time equivalent ratios were just as likely to achieve top quartile performance as higher skill-mix models, inclusive of RNs.”

• Primary care delivery settings with medical assistants only were just as productive as settings with the other two paradigms.

Pacific Northwest Regional MGMA Medical Management Conference

On May 8, 2023, CEO Balasa presented “How Effective Utilization of Medical Assistants Can Result in More Efficient Delivery of Healthcare” in Tacoma, Washington, for the Pacific Northwest Regional MGMA Medical Management Conference. His talk was so favorably received that he was asked to give the same presentation that afternoon, which he did.

MGMA State Conference Presentations

In addition to the national MGMA events (in person and virtual) and the Pacific Northwest Regional Conference, in 2022 and 2023 CEO Balasa presented on similar topics for the Illinois, Virginia, and Ohio MGMA affiliates.

National Colorectal Cancer Roundtable

CEO Balasa is a member of the Policy Action Team of the National Colorectal Cancer Roundtable (NCCRT). This position enables him to utilize his public policy expertise to assist the NCCRT in accomplishing its legislative and regulatory objectives. He participated in a virtual meeting of the Policy Action Team April 27, 2023.

Center for the Application of Substance Abuse Technologies (CASAT) and the CDC

CEO Balasa and AAMA Past President Rebecca Walker, CMA (AAMA), were part of a panel presentation sponsored by the Center for the Application of Substance Abuse (CASAT) and the Centers for Disease Control and Prevent (CDC) entitled “Promoting Substance-Free Pregnancy: What Medical Assistants Need for Effective Practice.” This session was recorded and will be available on the AAMA website as a continuing education course.

MARWeek Interview for Fox News-Chicago

CEO Balasa was interviewed during Medical Assistants Recognition Week (MARWeek), October 17 through 21, 2022, by Fox News-Chicago. His interview was aired on the Fox News-Chicago station.

Subgrantee under a New CDC Grant

Beginning in 2015 the AAMA has been a subgrantee under grants awarded by the Centers for Disease Control and Prevention (CDC) to the Center for the Application of Substance Abuse Technologies (CASAT) of the University of Nevada, Reno (UNR). These grants are part of a coordinated national effort to prevent fetal alcohol spectrum disorders (FASDs) by preparing medical assistants to assist their overseeing providers in reducing alcohol-exposed pregnancies.

The AAMA has been designated as a subgrantee under a new grant awarded by the CDC to the
CASAT of the UNR. This grant is for national partnerships to address prenatal alcohol and other
substance use and FASDs. The following is a description of this specific project under this grant:

The University of Nevada, Reno and the American Association of Medical Assistants (AAMA)
are serving medical assistants through the Medical Assistant Partnership for Healthy Pregnancies
and Families (MAP). Activities implemented by MAP will achieve the following short-term
outcomes: 1) Demonstrated collaboration between clinical and public health partners dedicated to
prenatal alcohol/other substance use and FASD-related services; 2) Improve capacity of state and
local networks to reach affected populations with relevant, evidence-based messaging and
services; 3) Increased identification of AAMA member knowledge, current practices, and
organizational needs; 4) Increased use of evidence-based information and resources by MAs
about prenatal alcohol/other substances use; 5) Increased use of evidence-based information and
resources by MA educators in courses about prenatal alcohol/other substances; and 6) Increase
knowledge related to the risks of prenatal alcohol and other substance use.

NCCRT Annual Meeting
Speaker of the House Aimee Wicker, CMA (AAMA), PCMH CCE, and CEO Balasa attended
the National Colorectal Cancer Roundtable (NCCRT) 2022 Annual Meeting, November 16
through 18, 2022, in Baltimore, Maryland. The NCCRT volunteer leaders and staff continue to
recognize the AAMA as a valuable partner in the crusade to reduce (and eventually eliminate)
the incidence of colorectal cancer in the United States.

Article for PAHCOM Journal
Legal Counsel Balasa was asked by the Professional Association of Health Care Office
Management (PAHCOM) staff to write an article about medical assistants for the PAHCOM
Journal. (He has written articles for PAHCOM in the recent and distant past.) He submitted an
article entitled “Recent Changes in State Law Clarify and Expand Medical Assistants’ Scope of
Work.” This article was published December 28, 2022.

In June of 2023 CEO Balasa was asked to submit another article for publication in the PAHCOM
Journal. He submitted “Steps for Determining Medical Assistants’ Scope of Practice under State
Law.” It will be published in a future issue of the PAHCOM Journal.

Educators Forum Article
CEO Balasa wrote an article for Educators Forum in the May/June 2023 issue of CMA Today
entitled “Amendments to Education Regulations: How Potential Revisions Could Affect Health
Programs.”

Presentation to the 2022 House of Delegates
Legal Counsel Balasa gave a presentation for the 2022 AAMA House of Delegates (October 22,
2022) about the Certifying Board (CB) of the AAMA, the Continuing Education Board (CEB) of
the AAMA, and the Medical Assisting Education Review Board (MAERB), and the bodies to
which each board is accountable.
The CMA (AAMA)® Certification Program and the CB of the AAMA are accredited (respectively) by the National Commission for Certifying Agencies (NCAA) and the International Accreditation Service (IAS). The CB must be in compliance with (1) the NCAA Standards for the Accreditation of Educational Programs; and (2) International Standard ISO/IEC 17024:2012(E), Conformity assessment—General requirements for bodies operating certification of persons, to maintain these accreditations. The CMA (AAMA) Certification Program is the only medical assisting certification that is accredited both by the NCAA and under ISO 17024.

Some of the CEB’s assessment-based certificates are accredited by the Institute for Credentialing Excellence (I.C.E.) under I.C.E. 1100:2019–Standard for Assessment-Based Certificate (ABC) Programs. The CEB’s ABCs that are accredited must be in compliance with I.C.E. 1100 to maintain their accreditation. The CEB is the only provider of medical assisting continuing education that has accreditation for some of its assessment-based certificates.

MAERB is a committee on accreditation (CoA) of the Commission on Accreditation of Allied Health Education Programs (CAAHEP). MAERB must abide by CAAHEP policies to remain a CoA of CAAHEP. CAAHEP is recognized as a programmatic accreditor by the Council for Higher Education Accreditation (CHEA). CAAHEP (and, indirectly, its committees on accreditation such as MAERB) must abide by the CHEA Standards and Procedures for Recognition to maintain recognition by CHEA.

Testimony at Arizona Medical Board Hearing

The Arizona Medical Board proposed the following amendment to its medical assisting rules:

**ARTICLE 4. MEDICAL ASSISTANTS**

**R4-16-401. Medical Assistant Training Requirements**

A. After the effective date of this Section, a supervising physician or physician assistant shall ensure that before a medical assistant is employed, the medical assistant completes either one of the following:

1. An approved training program identified in R4-16-101; or

2. An unapproved training program and successfully passes the medical assistant examination administered by a certifying organization accredited by either the National Commission for Certifying Agencies or the American National Standards Institute; or

3. A training program that meets the requirements of A.R.S. § 32-1456(D) and is designed and offered by a physician.

**A.R.S. § 32-1456(D)** is as follows:

D. The board by rule shall prescribe medical assistant training requirements. The training requirements for a medical assistant may be satisfied through a training program that meets all of the following:

1. Is designed and offered by a physician.

2. Meets or exceeds any of the approved training program requirements specified in rule.
3. Verifies the entry-level competencies of a medical assistant as prescribed by rule.

4. Provides written verification to the individual of successful completion of the training program.

CEO Balasa attended a December 7, 2022, virtual hearing of the Arizona Medical Board and urged it to amend its proposed amendment as follows:

3. A training program that meets the requirements of A.R.S. § 32-1456(D) and is designed and offered by a physician and successfully passes the medical assistant examination administered by a certifying organization accredited by either the National Commission for Certifying Agencies or the American National Standards Institute

**Colorado Health Care Workforce Coalition**

Colorado Society of Medical Assistants President Chris Hollander, CMA (AAMA), and CEO Balasa continue to participate in the virtual meetings of the Colorado Health Workforce Coalition, a collaborative public policy group organized by the Colorado Hospital Association in early 2022 to draft omnibus legislation that included funding for medical assisting programs. The legislation was signed into law and the Coalition continues to meet and work to ensure that the provisions of the legislation are put into effect.

**Exhibiting at the AAMC Annual Conference**

CEO Balasa and Marketing Director Gina Mokijewski staffed an exhibit booth at the Annual Conference of the Association of American Medical Colleges (AAMC) in Nashville, Tennessee, November 12 through 14, 2022.

**Public Affairs Articles**

Legal Counsel Balasa wrote the following “Public Affairs” articles for *CMA Today*:

- “Two State Nursing Boards Recognize Educated and Credentialed Medical Assistants”
- “Why Professional Regulation Laws Vary from State to State”
- “Principles for Determining Whether to Develop a Microcredential”
- “Why the Certifying Board of the AAMA and the Medical Assisting Education Review Board Are Accountable to Third Parties”
- “Boards of Nursing Should Authorize APRNs to Delegate to Medical Assistants”
- “How Optimal Utilization of Allied Health Professionals (Including Medical Assistants) Can Result in More Effective Delivery of Health Care”

**CAAHEP Symposium Presentations**

CEO Balasa, who is serving as President of the Commission on Accreditation of Allied Health Education Programs (CAAHEP), co-presented the following two sessions at the CAAHEP Symposium January 20 and 21, 2023, in Tampa, Florida:
“CAAHEP Update & Strategic Plan”
“Balancing Innovation with Regulation in Health Professions Education and Accreditation”

ATP Annual Conference Presentation
CEO Balasa copresented “Accommodations 101” at the Association of Test Publishers (ATP) Innovations in Testing Annual Conference March 12 through 15, 2023, in Dallas, Texas.

CLEAR Articles
CEO Balasa had two of his articles posted on the website of the Council on Licensure, Enforcement, and Regulation (CLEAR). These articles are “Response Article to Remote Proctoring Room Scan Decision” (September 8, 2022) and “Continuing Education Provider Sues Certifying Board on Antitrust Grounds” (October 5, 2022).

Here are excerpts from the second of these two articles:

“Continuing Education Provider Sues Certifying Board on Antitrust Grounds”
On September 13, 2022, the Association of Surgical Assistants (ASA), a national provider of continuing education for surgical assistants, sued the National Board of Surgical Technology and Surgical Assisting (NBSTSA), a national board that certifies surgical technologists and surgical assistants, in federal district court alleging that the NBSTSA violated the federal and Colorado antitrust laws that prohibit unreasonable restraint of trade and monopolizing.

…
In its complaint the Association of Surgical Assistants asserts that the National Board of Surgical Technology and Surgical Assisting is violating Section 1 of the federal Sherman Act that forbids any [unreasonable] contract, combination, or conspiracy in restraint of trade. Note the following from the complaint:

- … [NBSTSA leaders] conspired to cause NBSTSA to effectively boycott ASA.
- … NBSTSA’s actions have caused an unreasonable restraint on trade in the market space for continuing education credits for…surgical assistants by ensuring the Association of Surgical Technologists (AST) is the sole provider and processor of these credits in the nation.
- … NBSTSA’s actions have damaged ASA by devaluing the ASA membership and have prevented ASA from engaging in its business of providing and processing continuing education credits for…surgical assistants.

The ASA complaint also avers that the NBSTSA is in violation of Section 2 of the Sherman Act that prohibits monopolization and attempts at monopolizing. The complaint includes the following:

- … [NBSTSA leaders] caused NBSTSA to exclude ASA from seeking accreditation as a provider and processor of continuing education credits for…surgical assistants.
- As a result, [NBSTSA leaders] and NBSTSA ensured AST maintains the entire market share for providing and processing continuing education credits for…surgical assistants nationwide.
• NBSTSA has a longstanding relationship with AST, as referenced in the October 22, 2021, letter. NBSTSA stands to benefit by keeping AST as the sole provider and processor of continuing education credits for…surgical assistants.

• By refusing to allow ASA to apply for accreditation [of its surgical assisting continuing education], [NBSTSA leaders] and NBSTSA have created a monopoly in favor of AST by ensuring AST retains one hundred percent of the market share for providing and processing continuing education credits for…surgical assistants nationwide.

I.C.E.


CLEAR Midyear Business Meeting

CEO Balasa was appointed to leadership positions with the Council on Licensure, Enforcement, and Regulation (CLEAR). He attended the CLEAR Midyear Business Meeting in Savannah, Georgia, January 11 through 13, 2023.

House Legal Counsel Responsibilities

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

Legislative and Executive Branch Advocacy

After the 2022 legislative and executive branch victories in Connecticut, South Carolina, Delaware, and South Dakota, there have been some positive developments and one negative development during the first half of 2023.

Arkansas

CEO Balasa received the following email from a staffer of the Arkansas State Board of Nursing:

I am with the Arkansas State Board of Nursing. We are looking at revising our delegation rules for APRNs delegating to MAs. I found the AAMA website doing some research on medical assistants and various state laws regarding nursing delegation.

He informed the staffer about the amendments to the respective regulations of the Delaware and South Dakota Boards of Nursing addressing delegation to educated and credentialed medical assistants and forwarded language he had drafted previously for the Arkansas Board of Nursing.
CEO Balasa contacted a government affairs colleague on the staff of the American Association of Nurse Practitioners (AANP) with whom he has worked for eight years. He informed her that he was planning to contact all American boards of nursing and urge them to adopt regulations (or draft legislation) that would permit advanced practice registered nurses (APRNs)—especially nurse practitioners—to delegate certain types of injections (including vaccines) to appropriately educated and currently credentialed medical assistants. Collaboration between the AANP and the AAMA could facilitate other state boards of nursing adopting amendments to their rules similar to those of the Delaware and South Dakota Boards of Nursing.

**New York**

Similar to Connecticut law, New York medical assisting law has been restrictive for many decades. The New York State Society of Medical Assistants (NYSSMA) has worked hard for over thirty years to get the law changed. Two new allies have come forth who are working with the NYSSMA to broaden the scope of practice for medical assistants through legislation or amended regulations. These allies are the Medical Health Associates of Western New York and the Community Health Care Association of New York State. The former submitted a resolution that was adopted by the House of Delegates of the Medical Society of the State of New York (MSSNY) at its April 2023 annual meeting. The resolution reads as follows:

**Limited Expansion of Scope of Work for Credentialed Medical Assistants to Perform Vaccinations:**

At the House, our physicians testified how it has become unsustainable for practices to remain open and be able to afford to continue to perform vaccinations. As such, our 8th District Delegates and physicians throughout the State plead for NYS to replicate measures already enacted in other jurisdictions throughout the country where Certified Medical Assistants are authorized to administer vaccines.

The AAMA and the NYSSMA stand ready to help in any way with forthcoming legislation.

**North Carolina**

On April 19, 2023, a bill was introduced into the North Carolina legislature that would create a pilot program for medical assistants to serve as “school medical assistants.” This is likely the first legislation of its kind in the history of medical assisting. It is uncertain how much support this bill will garner. Regardless, this legislation evidences the growing recognition of medical assistants as being valuable and versatile allied health professionals.

**Washington**

A bill was introduced into the Washington legislature on January 5, 2023. Note the following comments that were submitted jointly by the AAMA and the Washington State Society of Medical Assistants:

**Comments of the American Association of Medical Assistants (AAMA) and the Washington State Society of Medical Assistants (WSSMA) on ESHB 1073, An Act Relating to Medical Assistants**

March 9, 2023

*Basis of opposition to ESHB 1073*
The American Association of Medical Assistants (AAMA) and its affiliated state society the Washington State Society of Medical Assistants (WSSMA) wish to express our grave concern about certain provisions of ESHB 1073, An Act Relating to Medical Assistants. The AAMA and the WSSMA take the position that amending the medical assisting statute to permit medical assisting-registered (MA-Rs) who, by definition, have not necessarily completed formal medical assisting education and have not passed a national medical assisting examination measuring medical assisting knowledge, would jeopardize the health and welfare of Washington residents.

As stated in the above Basis of opposition to ESHB 1073, MA-Rs are not required to have formal medical assisting training or pass a medical assisting examination. This lack of verification of medical assisting knowledge and skill by third-party entities argues against expanding the scope of practice of MA-Rs to include advanced clinical tasks that pose a greater likelihood of injury to patients if performed negligently.

Proposed statutory amendments that pose a threat to patient safety

The following addition of delegable duties to MA-Rs under ESHB 1073 potentially threatens the well-being of patients:

(4) A medical assistant-registered may perform the following duties delegated by, and under the supervision of, a health care practitioner:

…

(i) Administering medications:

(i) A medical assistant-registered may only administer medications if the drugs are:

(A) Administered only by unit or single dosage, or by a dosage calculated and verified by a health care practitioner. For purposes of this section, a combination or multidose vaccine shall be considered a unit dose;

(B) Limited to legend drugs, vaccines, and Schedule III through V controlled substances as authorized by a health care practitioner under the scope of his or her license and consistent with rules adopted by the secretary under (i)(ii) of this subsection; and

(C) Administered pursuant to a written order from a health care practitioner.

(ii) A medical assistant-registered may only administer medication for intramuscular injections. A medical assistant-registered may not administer experimental drugs or chemotherapy agents. The secretary may, by rule, further limit the drugs that may be administered under this subsection (4)(i). The rules adopted under this subsection must limit the drugs based on risk, class, or route.

(j) Intramuscular injections. A medical assistant-registered may administer intramuscular injections for diagnostic or therapeutic agents under the immediate supervision of a health care practitioner if the medical assistant-registered meets minimum standards established by the secretary in rule.

Unfortunately, despite the opposition of the AAMA and the WSSMA, this Washington bill was enacted into law.

Legal Advocacy
Nebraska

Legal Counsel Balasa was informed by leaders of the Nebraska Society of Medical Assistants that the initialism “CMA” was being used to refer to medication aides. CEO Balasa wrote a legal memorandum and forwarded it to the Nebraska SMA leaders. The following is an excerpt from this memorandum:

References to Medication Aides in Nebraska Law

Nebraska statutes and regulations contain the phrase “medication aide,” not “certified medication aide.” See Title 172, “Professional and Occupational Licensure,” and Chapters 95 and 96, “Administration Of Medications By Medication Aides And Medication Staff,” of the regulations of the Nebraska Department of Health and Human Services. The latter includes the following language:

002 DEFINITIONS: For the purposes of the Act and these regulations, the following definitions apply: …

Medication aide means an individual who has met all requirements of Title 172 Chapter 96 for registration and is listed on the Medication Aide Registry operated by the Department [of Health and Human Services].

Therefore, there is no basis under Nebraska law to refer to medication aides as “certified medication aides” or to use the initialism “CMA” to refer to a medication aide.

Alaska

CEO Balasa was contacted by a leader of the Alaska Medical Assistants Society in regard to a misuse of the phrase “certified medical assistant.” He emailed the following to the party who was misusing the phrase:

Apprenticeship programs can play an important role in the health care labor market. However, because the American Association of Medical Assistants (AAMA) has registered the phrase “certified medical assistant” with the United States Patent and Trademark Office to mean a medical assistant holding the CMA (AAMA), the description in the attached should read “medical assistant” and not “certified medical assistant.” Please see my attached article.

The AAMA requests that you change the reference in the attached from “certified medical assistant” to “medical assistant.”

He received the following response:

Dear Mr. Balasa,

Thank you for bringing this to our attention. This was an oversight on our part. We understand and appreciate the significance of the “certified medical assistant” (CMA (AAMA)) title.

We will remove all reference to this specific title on our apprenticeship materials and marketing.

North Carolina

Counsel Balasa was notified by a leader of the North Carolina Society of Medical Assistants that—similar to the Alaska incident described immediately above—the phrase “certified medical assistant” was being used incorrectly. He sent the following email:

The attached has been brought to my attention.

Because the American Association of Medical Assistants (AAMA) has registered the phrase
“certified medical assistant” with the United States Patent and Copyright Office to mean a medical assistant holding the CMA (AAMA), the description on page 7 of the attached should read “medical assistant training program” and not “certified medical assistant training program.”

Please see my attached article.

The AAMA requests that you change the reference in the attached from “certified medical assistant” to “medical assistant.”

He received the following response:

Thank you. We will make the necessary changes!

**Minnesota**

CEO Balasa received the following questions from a senior workforce strategist of a health system in Minnesota:

Here is what we would like to learn more about from the AAMA CAAHEP/ABHES standpoint and your perspective:

What qualifies programs to be accredited through the AAMA?

Why are there other MA programs in existence that are not accredited through the AAMA CAAHEP/ABHES?

Is it the curriculum that determines which programs are accredited through the AAMA?

Are there other requirements that MA programs must meet in order to be accredited through the AAMA?

Are there requirements for these programs beyond becoming accredited through the AAMA that the schools must adhere to?

What makes the AAMA accredited programs desirable for healthcare institutions to provide externships and then eventually employment?

Plus any other questions from our leadership that would be beneficial for us to understand.

CEOs responded thusly:

Thank you for your email. I am happy to help! I am free for a video or audio meeting next Monday and Thursday, April 10 and 13.

Let me answer some of your questions.

A medical assisting program must be offered by a postsecondary school or be a part of a consortium affiliated with a postsecondary institution. The postsecondary school must be accredited by an institutional accrediting body recognized by the United States Department of Education (USDE) or the Council for Higher Education Accreditation (CHEA).

The program must meet the attached CAAHEP Standards and Guidelines for the Accreditation of Medical Assisting Programs. CAAHEP is the body that accredits medical assisting programs, upon the recommendation of the Medical Assisting Education Review Board (MAERB). The AAMA does not accredit medical assisting programs.

The two bodies authorized to accredit medical assisting programs are CAAHEP and ABHES, as you know. There are many medical assisting programs that are not CAAHEP- or ABHES-accredited. This is partly due to the fact that medical assisting is not a licensed profession in most states. These non-CAAHEP- or ABHES-accredited medical assisting programs are often shorter
than a CAAHEP- or ABHES-accredited program. They might teach just clinical or just administrative medical assisting. They may be at the high school/secondary level.

Meeting the curriculum requirements is an essential part of becoming and remaining CAAHEP accredited. There are other requirements, however. The attached addresses other requirements of CAAHEP accreditation.

I have attached articles and documents that may be of interest.

Graduates of CAAHEP-accredited medical assisting programs are generally excellent hires because of their thorough education. Many graduates of accredited programs take a national certification exam and obtain a medical assisting credential, such as the CMA (AAMA).

I hope this is helpful as an initial response. I look forward to meeting with you and your colleagues next week.

**Updating of Occupational Outlook Handbook**

CEO Balasa talked with an economist at the United States Department of Labor who is updating the entry for medical assistants in the *Occupational Outlook Handbook*. He provided information that was appreciated by the economist.

**Acceptable Use Policy**

House Legal Counsel Balasa drafted an “Agreement to Abide by AAMA Acceptable Use Policy for AAMA Digital Services.” This agreement has been reviewed and signed by AAMA volunteer leaders.

**Accreditation of ABC-AHE under I.C.E./ANSI 1100**

The AAMA Continuing Education Board (CEB) submitted its Assessment-Based Certificate in Allied Health Education (ABC-AHE) for accreditation under the American National Standard I.C.E./ANSI 1100. CEO Balasa assisted the CEB, Continuing Education and Membership Director Nick Mickowski, and LearnEthos (the assessment-based certificate vendor for the CEB) in preparing the application for accreditation under I.C.E. 1100.

**Presentations for State Societies, Local Chapters, and Medical Assisting Programs**

**New York Medical Assisting Program**

On March 31, 2023, CEO Balasa copresented virtually with B. David Sylvia, CMA (AAMA), a New York medical assisting educator and leader of the New York State Society of Medical Assistants (NYSSMA), to medical assisting students in a New York program. They spoke about initiatives to protect the scope of practice for medical assistants in New York and the benefits of student membership in the AAMA and the NYSSMA.

**Virginia Society of Medical Assistants**

CEO Balasa gave a virtual presentation on March 11, 2023, for the Virginia Society of Medical
Assistants about the legal and accreditation requirements that certifying and academic accreditation-recommending bodies must meet.

*Springfield Chapter of the Missouri Society of Medical Assistants and Missouri Society of Medical Assistants*

CEO Balasa gave a March 2, 2023, virtual continuing education session for the Springfield Chapter of the Missouri Society of Medical Assistants. The talk was received favorably. The President of the Missouri Society of Medical Assistants was in attendance and asked CEO Balasa to give a similar virtual session for the April 15, 2023, annual meeting of the Missouri Society of Medical Assistants. This session was also appreciated by the attendees.

**Other Articles and Presentations**

**Ohio Room Scan Court Decision**

CEO Balasa has written and spoken about *Aaron M. Ogletree v. Cleveland State University*, an Ohio federal district court decision. The following is an excerpt from his article “How Public Test Offerors Can Minimize Legal Exposure in Light of Ogletree v. Cleveland State University” that was published in the Winter 2023 issue of CLEAR Exam Review.

The August 22, 2022, grant of summary judgment by a federal district court in favor of a student who alleged that his constitutional rights were violated by his college’s room scan policy for remotely proctored exams has caused considerable confusion and consternation among test offerors. The purpose of this article is: (1) to clarify the factual background and legal bases for the trial court’s opinion in *Ogletree v. Cleveland State University*; and (2) to offer suggestions on how public test providers can avoid legal entanglements in light of *Ogletree*.

(In analyzing *Ogletree* it is important to remember that the Fourth Amendment applies only to government actors and not to private sector entities. Consequently, Cleveland State University—not the testing vendors providing services to the school—was sued for allegedly violating Mr. Ogletree’s constitutional rights.)

**Ogletree v. Cleveland State University**

*Essential Facts*

Aaron Ogletree was a student at Cleveland State University during the spring 2021 semester. Mr. Ogletree was required by the school to take all tests remotely because of “various health issues that impact[ed] his immune system and put him at particular risk [during] the COVID pandemic.” The original syllabus for his General Chemistry II class stated that the instructor and proctors “reserve the right to ask any student before, during, or after an exam to show their surroundings, screen, and/or work area.” Ogletree objected to this policy and the instructor removed it from the syllabus. An exam for this class was given February 21, 2021. Approximately two hours before the test the Cleveland State Testing Service emailed Mr. Ogletree and informed him that “the proctor would be checking your ID, your surroundings, and your materials.” In his response to the email Ogletree stated that he “currently [had] confidential settlement documents in the form of late arriving 1099s (a federal tax form) scattered about [his] work area (which was also his bedroom) and there is not enough time to secure them.” At the beginning of the exam Mr. Ogletree was asked by the proctor to scan his room and he complied.

*Holding by the Court*
Mr. Ogletree filed suit in federal court claiming that the room scan was an unreasonable search and seizure under the Fourth Amendment of the United States Constitution (as applicable to Cleveland State under the Fourteenth Amendment Due Process Clause because it is an instrumentality of the state of Ohio). The court first expounded at length on applicable Fourth Amendment case law:

The Fourth Amendment protects “[t]he right of the people to be secure in their persons, houses, papers, and effects against unreasonable searches and seizures.”…A Fourth Amendment search “occurs when the government violates a subjective expectation of privacy that society recognizes as reasonable.”…Even in the expressly protected location of a house, which receives heightened protection under the Fourth Amendment, a search within the meaning of the Constitution does not occur unless “the individual manifested a subjective expectation of privacy in the object of the challenged search,” and society is “willing to recognize that expectation as reasonable.” [Citations omitted.]

He has given co-presentations on this case for the Certification Network Group (CNG) and will be giving a presentation later this year for the Council on Licensure, Enforcement, and Regulation (CLEAR).

Audit Report for the Fiscal Year Ending June 30, 2022

According to the audit report for the fiscal year ending June 30, 2022, the revenue for the AAMA corporation (tax-exempt under Section 501(c)(6) of the Internal Revenue Code) was $7,361,786. The expense was $6,391,365. This reflects an excess of revenue over expense of $970,421. The net assets/net worth as of June 30, 2022, was $10,415,025.

Projections for the fiscal year ending June 30, 2023, are for an excess of revenue over expense.

Meeting with Congressional Staff on Behalf of CAAHEP

In his capacity as President of the Commission on Accreditation of Allied Health Education Programs (CAAHEP), CEO Balasa—along with CAAHEP Executive Director Gina Scarboro and CAAHEP Washington, DC, Counsel Brandon Sherman, Esquire—met with congressional staffers in their offices on Capitol Hill on May 22, 2023, to discuss education and accreditation policy issues being debated by congressional committees and the United States Department of Education.

Move to Suite 3720 of the Civic Opera Building

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

Devices that Monitor Blood Glucose and Compliance with the ADA in Examination
On April 14, 2023, CEO Balasa attended a meeting at the office of the Certification Board for Diabetes Care and Education in Schaumburg, Illinois. The topic was medical devices in exam situations and how to maintain test security while complying with the Americans with Disabilities Act.

Donald Balasa
AAMA CEO and Legal Counsel
COMMITTEE REPORTS
American Association of Medical Assistants®

Report of the Annual Conference Committee

For the Period Ending September 2023

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

The 67th Annual Conference will be held in Orlando, Florida, at the Hilton Orlando Lake Buena Vista–Disney Springs Area on September 22–25, 2023. A welcoming email was sent out to the Annual Conference Committee to share the charge of the committee and all committee members’ contact information. The committee members were given directions to start their list of questions and needs pertaining to their event as chair, committee, and functions related to the conference. The conference committee members also were informed of the following:

- The recent 66th Annual Conference in Myrtle Beach, South Carolina, had an overwhelming attendance. The Chair informed the committee that the 2023 Orlando, Florida, conference hotel contract was reviewed, and the contract will not meet the AAMA needs. Conference Direct, outside conference management, was contracted for the 2022 Myrtle Beach and the 2023 Orlando conference. With the anticipation of an increase in attendees, Conference Direct was given the direction to contact the hosting hotel, Hilton Orlando Lake Buena Vista–Disney Springs Area, to revise the contract. The revisions were to negotiate an increased number of sleeping rooms and meeting space to meet the AAMA’s needs.

- Exhibitors had been inquiring about participating in the 2023 conference. No exhibitors would be confirmed, or any contracts signed, until all the meeting room space was confirmed.

- This conference committee will be informed when the revised final contract has been worked out and we will move forward with our work.

- Conference Direct was working on the received Requests for Proposals (RFPs) for the 2024 conference. Again, meeting the number of sleeping rooms, meeting space, and schedule are the top priorities.

Conference Direct negotiated the contract for the 2023 AAMA Annual Conference at the Hilton Orlando Lake Buena Vista–Disney Springs Area. The contract added more sleeping and meeting rooms. The conference committee and the Board of Trustees (BOT) were informed.

This Chair held a virtual meeting with the committee members. The structure of the committee was discussed and how to best utilize the time of the committee members. Committee members would only be discussing or giving input on their respective areas of the conference they participate in or if a decision was needed by the entire committee.

This Chair exchanged communications with Florida Society of Medical Assistants, the hosting state, education chair, Marsha Benedict, CMA (AAMA). This Chair answered questions pertaining to the hosting state’s responsibilities, areas they are involved in and areas of interest.
The conference logo was designed by the Marketing and Communications Department (MarCom) with the theme of “Community Connexion.”

A conference information flyer was developed by MarCom and was utilized by the BOT to share during representatives bureau assignments and was sent in an e-blast to AAMA members the end of April 2023. This included registration and hotel room block release dates, an increase in 2023 conference pricing registration, and a QR code to scan, which provided a link to explore the conference hotel. This information and flyer were shared with the conference committee prior to its utilization by the BOT and its release.

The exhibitor and sponsorship form were updated and finalized. This included an increase in exhibiting days and times to maximize conference attendee’s access to the exhibitors, exhibiting early bird fees, and expanded opportunities for sponsorship were developed. As of July 2023, the date this report was prepared, there are thirteen two-day confirmed exhibitors and eight sponsorships.

The conference pin and charm design were created based on comments from conference attendees to go back to a pin much like previous conference years. This included reducing the size, better quality, and more reflective of the conference site and year, instead of the conference theme. After collaboration with Marketing Director Gina Mokijewski, the design was approved by the conference committee and the BOT.

Feedback from previous conferences attendees, including attendees who did not attend the House of Delegates, was that they wanted CEU opportunities. It was agreed by the BOT and Continuing Education Board (CEB) to offer CEUs on the day of the House of Delegates and related activities taking place. The conference template was updated, and additional CEU opportunities were slated on the schedule. This was provided to the hosting state education chair. Forms, guidelines, and questions related to CEUs, and speakers were coordinated by the Conference Continuing Education Task Force’s Clare Ley, CMA (AAMA), functioning under the Continuing Education Board and AAMA staff liaison Nick Mickowski. All speaker slots and back up speakers have been confirmed with a total of 50 CEUs being presented by 15 speakers. The most one individual attendee could earn would be 26 CEUs.

AAMA Annual Conferences are not to be a money maker, but its profit should go back into enhancements and improvements for the conference and attendees. Looking at the past 10 years’ trend, there has been a profit.

Enhancements to the conference were considered and discussed by the BOT and AAMA staff to improve online registration, on-site name badge printing, and conference packets. A means to streamline the tracking of attendance of CEU sessions and attended functions and meals were a top priority. The decision was made and voted by the BOT that CVENT would be utilized to
give attendees a pleasurable and professional experience. This would start with the registration process. With name badges having a QR code imprinted on the badge for scanning capabilities, this will provide more up-to-date tracking of all functions including CEU sessions and meal functions. This in turn will lessen the burden of staff manually entering attended CEU sessions for attendees. This process will provide more accurate registration income and expenses for the conference. Everyone involved realizes this process is new to attendees and a learning curve for all will be taken into consideration. These enhancements were shared with the conference committee and were well received.

Conference Direct presented the RFPs for the 2024 conference sites. The BOT voted and approved the 2024 68th AAMA Annual Conference in Grand Rapids, Michigan, for September 20–23, 2024, at the Amway Grand Plaza, Curio Collection by Hilton.

Michigan Society State President 2022-2023 Christa Smith, CMA (AAMA), and the CEB were notified.

This Chair communicated with Conference Direct, the committee, individual committee members, and AAMA staff via virtual meetings, email, and phone calls to answer and coordinate events.

The conference committee and AAMA staff will continue moving forward as we are still preparing for the 2023 conference.

This Chair wants to thank the committee members, Liaison Mickowski, Director Mokijewski, the AAMA staff, and IT consultant Michael Knight, as each of these individuals have a different role in making this a successful conference experience. I would also like to thank President Deborah Novak, CMA (AAMA), and CEO and Legal Counsel Donald Balasa, JD MBA, for their many hours spent for the success of the conference. This Chair also would like to thank President Novak for the opportunity to serve as the Annual Conference Committee chair.

Monica Case, CMA (AAMA), Chair

Members:

Marsha Benedict, CMA-A (AAMA)

Sherry Bogar, CMA (AAMA)

Debbi Houston, CMA (AAMA)

Clare Ley, CMA (AAMA)

Patty Licurs, CMA (AAMA)

Shirley Sawyer, CMA (AAMA)

Jane Seelig, CMA-A (AAMA)

Aimee Wicker, CMA (AAMA)

Staff Liaison: Nick Mickowski

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The charge of this committee is to review submissions for the AAMA Excel Awards and Awards of Distinction, develop the topic for the AAMA Student Essay Award, and view the submissions and plan the Welcome and Awards Celebration for the AAMA Annual Conference.

The committee met virtually on January 10, 2023, and several times throughout the year to ensure that goals were met. Goals that the committee set included working on the AAMA essay contest, AAMA Award forms, AAMA Excel categories, AAMA Employer of the Year categories, and AAMA award submission dates. The committee worked with the MarCom staff on the AAMA Excel Awards, Awards of Distinction, and essay contest forms. The committee recommended that the submission forms for each award be separated by the award type (Excel, Awards of Distinction, and essay contest) and be fillable PDFs. The committee recommended that each form has a checklist on it, to assist each submitter with ensuring that each submission has the required materials. The committee also recommended that each individual award submission request a photo for each nomination. This will assist with recognition of individual winners on AAMA marketing platforms.

The committee developed the AAMA essay contest topic. To reach a broader audience MarCom sought out outside sources for hosting the essay contest. The committee revamped the Excel Awards categories for the first time since 2007. The committee recommended to the BOT the following changes for each section to allow a more equitable division of states. The new Excel Awards categories for 2023 are as follows:

- Section A: 1–175 members
- Section B: 176–400 members
- Section C: 401–900 members
- Section D: 901+ members

The committee also revised size categories for AAMA Employer of the Year Awards and requested that MarCom ensure that marketing for this award emphasized the new categories so that all employers could be included. The new size categories are as follows:

- Section A: 1–50 employees
- Section B: 51–499 employees
- Section C: 500–2,499 employees
- Section D: 2,500+ employees

The committee revised submission deadlines for awards. Individual awards that required engraving were moved to a deadline of July 15, 2023, and all Excel Award submissions were moved to August 1, 2023.
The committee met virtually to develop a new AAMA Excel Award for individual members. The committee developed and presented to the BOT a new excel award: the AAMA Rising Star Award for future leaders within the organization. The committee recommended and received approval of the AAMA Rising Star Award. This new award will be to recognize rising stars within the AAMA at the state and chapter levels. Award criteria include nominees must be AAMA members in their early years of the medical assisting career and be on their AAMA leadership journey. Nominees for this award will be nominated by a state or chapter officer for outstanding leadership and demonstrable influences in their state society or local chapter. The requirements for the award will be:

- to be within the first five to seven years of the medical assisting career,
- must be a credentialed medical assistant for at least two years, must be an AAMA member, and
- must have attended meetings and demonstrated dedication as a state or chapter champion (being a past or current officer is not currently required).

Along with a submission form for the award, a letter of recommendation will be required from either an instructor or employer. In addition, a letter of recommendation from a current or past state or chapter president, and a copy of their résumé will be required for each nominee. Up to four individuals will be honored. Winners cannot be from the same state and an individual can only win once. Winners will be provided with a certificate, a pin, and a plaque. The committee met on June 25, 2023, to discuss the grading criteria and submitted the form to MarCom for future use.

The committee discussed themes, awards agenda, and giveaways for the 2023 AAMA Awards Celebration. The committee decided that moving the Awards of Distinction back to the awards celebration, would allow more time for the winners of each award to be honored. With the assistance of MarCom it was decided that the Awards of Distinction would have sponsors attached to them will be presented at the event that allows the sponsor to participate. This year the Golden Apple Award is again sponsored by PSI and the essay contest will be sponsored by McGraw-Hill. The Employer of the Year Awards will be presented at the event that they will be present at.

The committee was provided the submissions for grading by MarCom. This committee received the following for the 2023 submissions for the Awards of Distinction, Excel Awards, Medical Assistant Employer of the Year Awards, AAMA Rising Star Awards, and Student Essay Award as of July 17, 2023:

- Awards of Distinction
  - Golden Apple: 4 Nominees
  - Medical Assistant of the Year: 3 Nominees
  - Leadership and Mentoring: 2 Nominees
  - Medical Assistant Employer of the Year: 2

- Student Essay: 14
- AAMA Rising Star: 4
• Excel Awards
  o Community Service: 5
  o Marketing, Promotion, and Publicity: 4
  o Publishing: 8
  o Website Development: 7

Each member graded each submission and nominee and forwarded the grading sheets to the Chair. This Chair submitted winners in each category to Communications Director Miranda Sanks-Korenchan and Marketing Director Gina Mokijewski. Director Sanks-Korenchan and Director Mokijewski assisted with all needed materials for the Welcome and Awards Celebration.

This Chair would like to thank the committee members for their engagement, contributions, and hard work over the last year. A huge thank you to the MarCom staff who assisted with the many projects that were presented this year, Director Mokijewski, Director Miranda Sanks-Korenchan, and Communications Manager Laura Niebrugge.

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

Members:
  Monica Case, CMA (AAMA)
  Natasha Geno, CMA (AAMA)
  Aimee Wicker, CMA (AAMA)

Staff Liaisons:
  Gina Mokijewski
  Laura Niebrugge
  Miranda Sanks-Korenchan
The Bylaws and Resolutions Committee is responsible for officially notifying each constituent society of all changes to the AAMA Bylaws and explaining how the changes may impact constituent society bylaws. If there are AAMA Bylaws changes that the constituent societies are mandated to include in their bylaws, this committee must notify the constituent societies and provide a deadline by which each society must submit their revised bylaws for this committee to review.

The Chair worked with AAMA CEO and Legal Counsel Donald Balasa, JD, MBA, and the Bylaws and Resolutions Committee members to finalize work for all the proposed Bylaws amendments and rationales, which we then presented for approval to the Board of Trustees at the July 2023 board meeting. All were reviewed and voted on as to whether they were ready to be submitted for the 2023 House of Delegates at Lake Buena Vista, Florida.

There were no mandated bylaws changes for the AAMA year ending 2022 House of Delegates.

As of July 1, 2023, one state society had submitted their bylaws for review.

This Chair wishes to thank the members of the Bylaws and Resolutions Committee, CEO Balasa, Continuing Education and Membership Director Nick Mickowski, AAMA President Deborah Novak, CMA (AAMA), and Vice President Monica Case, CMA (AAMA), for their assistance, suggestions, and guidance throughout the review of the AAMA Bylaws. Chair Houghton would also like to thank President Novak for the opportunity to serve this membership as the Bylaws Chair.

Claire M. Houghton, CMA (AAMA), Chair

Members:

Patty Licurs, CMA (AAMA)
Pamela Neu, CMA (AAMA)
Jane Seelig, CMA (AAMA)

Staff Liaison: Donald Balasa, JD, MBA
American Association of Medical Assistants®

Report of the Career Professional Development Committee

For the Period Ending September 2023

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

The AAMA had been approached by many employers at different events, such as the national annual MGMA conference, asking for tools and education to help train non-medical individuals to fill the non-clinical front desk positions in their organizations. At the January Board of Trustees (BOT) meeting, it was decided to develop a CE product that employers and those individuals could utilize to gain basic information that would help to prepare them for a position within a medical office. Two Continuing Education Board members were appointed to join the committee on this project. They are Susan Hawes, CMA (AAMA), MBA, RHIT, FACMPE, and Linda Vitzthum, CMA (AAMA).

The committee met and decided to develop the Assessment Based Recognition in Medical Office Basics (ABR-MOB) as an educational tool that employers could utilize to provide basic education to those individuals. The intent is to provide basic education so that they can be better prepared to be a key part of the medical practice team. CE modules were developed with topics that would give the basic essential education to have the tools to perform quicker at a higher level than someone with no education. The ABR module will also include information on Medical Assisting as a career and resources for how they can find an accredited program to further their education.

The committee met during the January BOT meeting to develop the outline of the project. It was decided that these modules would be developed utilizing a virtually recorded speaker, presenting a PowerPoint presentation as the educational format with a test at the end of each module. The committee has also met on the following dates via Teams: March 9, 2023, March 30, 2023, May 22, 2023, July 20, 2023, and July 27, 2023.

The completed program will consist of eight recorded PowerPoint modules for a total of 14–16 hours. The program will include the following topics:

1. Medical Terminology—Susan Hawes, CMA (AAMA), MBA, RHIT, FACMPE
2. Basic Coding—Debby Houston, CMA (AAMA), CPC
3. Registration and Insurance—Deborah White, CMA (AAMA), MS/HPE
4. Communication and Professionalism—Loxie Kistler, EdD, MS, BSN, RN, CMA (AAMA)
5. Anatomy and Physiology—Mary Elizabeth Regis, CMA (AAMA), MEd
6. Medical Law and Ethics—Donald Balasa, JD, MBA
7. Health Care Compliance—Linda Vitzthum, CMA (AAMA)

The authors listed above have been contracted and have submitted their PowerPoint presentations. Initial editing has been completed by CEO Donald Balasa, JD, MBA, and the MarCom Department will complete the editing with AAMA branding and format. This process is scheduled to be completed by August 18. The PowerPoints will then be returned to the authors for the recordings to be completed and returned by September 1st. Our goal is to present the completed program at the AAMA Annual Conference in Lake Buena Vista, Florida during the open session of the BOT.

This is an exciting project, and we plan to market it to uncredentialed individuals wishing to enter the medical office as well as to employers for staff training purposes.

As of the completion of this report, pricing has not been finalized. This information will be available before the AAMA Annual Conference.

This chair thanks her committee, AAMA staff, and our contracted authors for their hard work on this project.

Sandra Williams, CMA (AAMA), Chair

Members:

Sherry Bogar, CMA (AAMA), CN-BC
Susan Hawes, CMA (AAMA), MBA, RHIT, FACMPE
Patty Licurs, CMA (AAMA), CPC
Candy Miller, CMA (AAMA)
Jane Seelig, CMA-A (AAMA)
Linda Vitzthum, CMA (AAMA)
Aimee Wicker, CMA (AAMA)

Staff Liaisons:

Donald Balasa, JD, MBA
Nick Mickowski
Gina Mokijewski
The Documents Committee is charged with reviewing AAMA documents to ensure such documents are up to date as well as consistent with other documents.

This chair sent an email to the committee members December 18, 2022, updating the members with a list that was received at the Board of Trustees (BOT) Planning Session for the committee to begin to review:

- Volunteer Leadership Position Description: Each BOT member was asked by AAMA President Deborah Novak to review their current BOT position as well as the committee(s) they will chair. The documents committee will also review the sections of the Certifying Board and the Continuing Education Board to see if there are any updates these boards need to make. This Chair has also reached out to past chairs of new BOT committees that are not currently listed in the VLPD: Career Professional Development Committee, Documents Committee, Social Media Committee, and Advisory Task Force.

- Committee members were asked to visit the Guidelines and Forms section of the AAMA website and see if there are any forms that need to be updated.

This Chair has reached out to the committee to see if there has been any update on the original assignments and asked for an update by January 31, 2023. The committee is working to update the Volunteer Leadership Position Descriptions (VLPD) document. Members of the committee have reached out to the chairs of the Continuing Education Board and the Certifying Board to ask for updates to these areas. The committee will be working to complete this document and submit to President Novak for an e-vote of the BOT.

This committee was looking at updating the AAMA Volunteer Leadership Application with the hope of creating an electronic version for use once the website project is completed. Committee members will continue to work to gain suggested changes from the Continuing Education Board and the Certifying Board as well as committee chairs for any changes to the printable version. The hope for the electronic version is for easier submission of supporting documents required as well as more detailed information about each board, committee, strategy team, and task force duties with a link to the updated VLPD document.

This Chair received an email from a board member with a suggestion to review the Guidelines of State/Chapter Treasurer and Secretary. This will be brought to the committee members to begin a review as this document has not been updated since 2003. This Chair requested a copy of these guidelines from Communications Director and staff liaison Sanks-Korenchan and will forward the document to committee members for review and suggested updates. Once all suggestions have been reviewed and compiled, the document will be forwarded to President Novak for an e-vote of the BOT.

This Chair would like to thank the committee members for their hard work. This chair would also like to thank the Chairs of the Continuing Education Board and Certifying Board, their committee members, and their staff liaisons for taking time to review the parts of these
documents that pertained to their board. This chair would also like to thank President Novak for her leadership and the opportunity to chair this committee.

Virginia Thomas, CMA (AAMA), Chair

Members:
Shelley Gingrich, CMA (AAMA)
Debby Houston, CMA (AAMA)
Pam Neu, CMA (AAMA)

Staff Liaison: Miranda Sanks-Korenchan
The Editorial Advisory Committee is charged with assisting *CMA Today* Managing Editor Miranda Sanks-Korenchan and staff by suggesting topics for magazine articles and possible interviewees.

Three potential topics, addressing clinical, managerial, and educational areas, are requested prior to the deadlines of December 1, March 1, and June 1 each year, for a total of nine topics per member. Members are also asked to review manuscripts as assigned and make recommendations before publication in the *CMA Today*.

Guidelines and submission forms were emailed to committee members by this Chair prior to each deadline. The ideas suggested have been interesting and the topics timely.

This Chair wishes to thank the members of this committee for their diligence and hard work in presenting informative topics. Many thanks also to Sanks-Korenchan and *CMA Today* Senior Editor Laura Niebrugge for their assistance to this Committee Chair and to President Deborah Novak for her encouragement.

Shelley Gingrich, CMA (AAMA), *Chair*  

**Members:**

Natasha Ferrette, CMA (AAMA)  
Doreen Hoch, CMA(AAMA)  
Joshua Lehrer, CMA(AAMA)  
Tonya Milam, CMA (AAMA)  
Diana Rogers, CMA(AAMA)  
Paula Schubert, CMA(AAMA)  

**Staff Liaison:** Miranda Sanks-Korenchan
The HOD Minutes Committee is charged with reviewing the minutes of the AAMA House of Delegates (HOD) for accuracy.

The minutes were reviewed and posted to the AAMA website. Any member wishing to view the minutes of the AAMA HOD 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 2022 AAMA HOD to the Delegates and Alternate Delegates of the 2022 AAMA HOD.

This information was also emailed to the 2021–2022 and 2022–2023 AAMA Board of Trustees; AAMA Society of Past Presidents: 2022–2023 AAMA state society presidents and presidents-elect/vice presidents, and AAMA staff directors and managers.

The minutes were posted to the AAMA website. Any member wishing to view the minutes of the AAMA HOD 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.

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

Monica Case, CMA (AAMA), Chair
2021–2022 Speaker of the House

Members:
Sherry Bogar, CMA (AAMA), CN-BC
Candy Miller, CMA (AAMA)
Aimee Wicker, CMA (AAMA), PCMH CCE

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

This Chair contacted the members of this committee via email, welcoming them to the committee and asking them to start thinking of members who would be suitable candidates for Trustee/Officer.

This Chair provided each member with the Guidelines for the AAMA Nominating Committee, Sample Candidate Evaluation Form, and AAMA Officer Qualifications. The deadline for submission of applications was May 1, 2023.

An e-blast was sent to all state society leaders to inform them of the May 1, 2023, deadline for submission for the open positions for the 2023–2024 year after the Board of Trustees (BOT) meeting in January.

A reminder was sent to the BOT informing all that, if they wished to be a candidate for any of the open positions, they must apply by May 1, 2023.

Following the deadline of May 1, 2023, to submit applications for Trustee/Officer, this committee Chair contacted the staff liaisons to see if there were any more applications submitted.

Following confirmation of no further applications received, this Chair requested staff liaison Continuing Education and Membership Director Nick Mickowski to verify each candidate’s eligibility from the information found in the AAMA database.

After receiving the verification for each candidate, this Chair forwarded each candidate’s documentation required to run for Trustee/Officer, as well as the nomination verification forms for each candidate completed by Continuing Education and Membership Director Mickowski. In addition, each committee member was asked to fill out a nomination verification form for each candidate from the documentation they received with a deadline of June 11, 2023, to return the nomination verification forms to the Chair.

All nomination verification forms were received from each committee member. Each candidate was then notified via email by this Chair of their verification along with the guidelines for campaigning.

The following candidates for officer/trustee are:

1. Vice President: Aimee Wicker, CMA (AAMA), MA-Law

2. Speaker of the House: Sherry Bogar, CMA (AAMA), CN-BC

3. Vice Speaker of the House:
   - Natasha Geno, CMA (AAMA), ATS
   - Jane Seelig, CMA-A (AAMA)
4. Trustees

- Candy Miller, CMA (AAMA)
- Aimee Quinn, CMA (AAMA)
- Shirley Sawyer, CMA (AAMA), CPC
- Shannon Thomas, CMA (AAMA)
- Sandra Williams, CMA (AAMA)

There are seven elective offices open for the 2023–2024 year:

- Vice President
- Speaker of the House
- Vice Speaker of the House
- Trustee positions (two-year positions)—four positions

All correspondence has been responded to in a timely manner. This Chair will continue to maintain contact with committee members should any nominees come forward to be nominated from the floor during the House of Delegates.

This Chair would like to thank the members of the Nominating Committee and AAMA staff liaisons Mickowski and Communications Director Miranda Sanks-Korenchan for their dedication and support this year.

Patty Licurs, CMA (AAMA), CPC, Chair

Members:

- Paula Cooke, CMA (AAMA)
- Dawn Jordan Leblanc, CMA (AAMA), RMA, AS, JP
- Leigh Newell, CMA (AAMA)
- Melinda Rhynes, CMA (AAMA), MEd

Staff Liaisons:

- Nick Mickowski
- Miranda Sanks-Korenchan
American Association of Medical Assistants®

Report of the Social Media Committee

For the Period Ending September 2023

The Social Media Committee is charged with developing new and creative ways to increase visibility and active participation with LinkedIn, Twitter, Facebook, and Instagram. They are also charged with developing, implementing, and maintaining all strategic social media communications, public relations, outreach, and event activities and materials that align with the 2022–2023 Strategic Planning Goal #3.

This Chair developed a plan to consistently increase the visibility and reputability of the organization which included:

- Develop and update an organizational social media presence.
- Work closely with the AAMA Communications Chair to update the website.
- Create web content to help recruit new members.

This committee continued to move forward with discussions and ongoing projects. This Chair has and will continue to conduct discussions, requests, and timelines via email and virtual meetings.

This Chair communicated with the committee members via email to make them aware of agenda topics for the virtual meetings. The committee met virtually on:

- January 4, 2023
- March 20, 2023
- April 17, 2023
- May 15, 2023
- July 17, 2023

At the January virtual meeting, the committee met and discussed whether we wanted to continue working on previous projects from the following year or investigate something new. The committee decided on two projects which would be prioritized from January to June 2023. This committee, the BOT, Marketing Director Gina Mokijewski and Social Media and Marketing Manager Felicia Eldridge finished our first assignment listed below.

Representatives Bureau Assignments

- These posts highlighted the states that were visited and included questions that the committee came up with which included:
  - Where is the Trustee from
  - Where is the Representatives Bureau assignment
Director Mokijewski, Manager Eldridge, and others in the MarCom Department posted these Representatives Bureau assignments after editing, periodically posting on all our social media platforms with great feedback.

This committee worked diligently on our next project, Career Corner/Community Corner from June until the 2023 AAMA Annual Conference. We asked members to participate by providing information about the different stages of their careers to include:

- What is their current position?
- What do they do in that position?
- What was their leadership pathway at their local, state, or national levels?
- What are things they would like to do or accomplish in the future?

None of the proposed initiatives we worked on required any budgetary expenses.

We discussed highlighting national leaders, MarCom staff, and other AAMA employees who would be willing to participate. This is still an ongoing discussion to be included as a future focus.

The committee expressed a need to monitor other medical assisting social media pages, especially Facebook pages. (NHA-AMT-NCCT) There was a concern that many of these pages have inaccurate information about our profession, but more importantly, about our organization. The committee wants to monitor what our competitors are doing and what is successful on their pages.

This committee will revisit the scavenger hunt project that was approved last year under Trustee Sherry Bogar. There is a possibility of renaming it and repurposing this project; Director Mokijewski will give feedback after she discusses it with Manager Eldridge.

I would like to thank my committee for their hard work. I would also like to thank AAMA staff members Director Mokijewski and Manager Eldridge for their assistance.

Natasha Geno, CMA (AAMA), ATS, Chair

Members:
3356  Susie Henderson, CMA (AAMA)
3357  Jeanette Tyler, CMA (AAMA)
3358  Michelle VanHandle, CMA (AAMA)
3359
3360  **Staff Liaisons:**
3361  Gina Mokijewski
3362  Felicia Eldridge
This committee is charged with advancing the goals and objectives of the association, the profession, and the CMA (AAMA)® credential.

During the Board of Trustees (BOT) Planning Session in November 2022, the then current Strategic Issues Plan (SIP) was reviewed and discussed. The current SIP was formulated, voted on, and approved for the 2023–2024 year. A document was created and uploaded to the Strategic Issues channel on Microsoft Teams by committee member Sherry Bogar, CMA (AAMA), CN-BC, for each committee/task force chair to fill out, showing their progress regarding their respective committee’s objective(s)/goal(s) outlined in the SIP. This was conveyed to the BOT members during the May 21 BOT virtual meeting and again restated during the July BOT meeting. This is a great source for the next SIP Chair to see the progress made this year when planning for the next year.

The current SIP goals are as follows (the complete SIP with goals and objectives can be found under the “Member Downloads” section of the AAMA website):

- Goal 1: Be the leading resource for medical assisting scope of practice.
- Goal 2: Strengthen the marketing behind the AAMA and medical assisting profession.
- Goal 3: Enhance engagement and communications.
- Goal 4: Update the AAMA website
- Goal 5: Increase participation of medical assistants with the AAMA.
- Goal 6: Influence the decision makers to increase the compensation of medical assistants.

This Chair would like to thank the members of this committee, AAMA President Deborah Novak, CMA (AAMA), and AAMA CEO Donald Balasa, for their guidance and support.

Members:

- Sherry Bogar, CMA (AAMA), CN-BC
- Shelley Gingrich, CMA (AAMA)
- Debby Houston, CMA (AAMA), CPC
- Sandra Williams, CMA (AAMA)

Staff Liaison: Donald Balasa, JD, MBA
The Educator’s Survey Ad Hoc Committee was developed to assess the needs of the educators in Commission on Accreditation of Allied Health Education Programs (CAAHEP) medical assisting programs.

The survey was created during the post-conference Board of Trustees meeting in Myrtle Beach, South Carolina, by the committee chair, members of the team, and CEO and Legal Counsel Donald Balasa. It was placed on SurveyMonkey to be sent out by Communications Director Miranda Sanks-Korenchan. We received 188 responses from the educators.

The survey included 12 questions such as:

- What area is your program located? Urban or Rural
- What credentials does your program have their students sit for upon graduation? CMA (AAMA), RMA, CCMA, NCMA, CMAC, Other
- How long is your program?
- What accreditation does your program hold?
- What credential does your program director hold?
- At what salary do your grads start?
- Do you encourage your student to join a professional organization? Which organization?
- How do you market to your prospective students?
- What practicum/externship sites do you use?
- How is the AAMA best able to help you and your program?
- Do you have other concerns you would like to express?
- Would you like to participate in a focus group with other program directors/educators? If so, please provide your email address.

The chair and the committee received and analyzed the results of the survey. The educators were sent emails to acknowledge their responses and willingness to serve on a focus group in the future.

These questions gave the committee a great deal of information that will be passed on to the 2023–2024 leaders to work on.

This chair would like to thank the committee members for their input on the survey and liaison Director Sanks-Korenchan for helping to send the surveys and implementing the charts from the results received.
Pamela L. Neu, MBA, CMA (AAMA), Chair

Members:
Sherry Bogar, CMA (AAMA), CN-BC
Monica Case, CMA (AAMA),
Natasha Geno, CMA (AAMA), ATS
Claire Houghton, CMA (AAMA)
Patty Licurs, CMA (AAMA), CPC
Virginia Thomas, CMA (AAMA)

Staff Liaison: Miranda Sanks-Korenchan
STRATEGY
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Report of the Leadership Development Strategy Team

For the Period Ending September 2023

This committee is charged with developing the State Leaders Session for the 2023 AAMA Annual Conference and deciding the direction, projects, and activities for the committee while keeping in mind the Strategic Issues Plan.

The Leadership Development Task Force met for an initial welcome and meet and greet of the committee members in Myrtle Beach, South Carolina, on Monday, October 24, 2022. At this meeting, open discussion was held to prompt the team members to consider our charge and focus points for 2022–2023. The discussion items considered by Task Force members for evaluation are the current Leader e-blasts sent by the MarCom Department, methods of contact to ensure leaders are receiving information, identification of available leadership tools and how to access them, requirements to obtain leadership positions, monitoring the Facebook Leadership page, sponsorship of at least two virtual leadership CEU sessions, and the State Leaders Session at the Annual Conference.

On December 19, 2022, all MarCom-identified leaders who had unsubscribed to AAMA e-blast communications were sent a personal email by the Chair to contact MarCom or the Leadership Development Task Force Chair to ensure receipt of future emails. Two members responded to the chair that they were receiving leadership emails.

Virtual committee meetings were held January 16, March 6, April 17, May 15, June 12, and August 14 for members to brainstorm the most effective plans to best meet the objectives of this task force.

Facebook Monitoring

Team members Frances Mooney, Summer O’Neal, Julie Fogt, Christa Smith, and Bobbie Blood monitor the AAMA Leaders Facebook Group. No issues requiring additional attention have been reported to date.

Virtual CEU Session

Clare Ley, CMA (AAMA), from the Continuing Education Board notified our committee that Preethi Fernando, the PMTF featured speaker scheduled for the AAMA 2023 Conference, offered to do two free webinar sessions for 2023. The team selected Mental Toughness in an Emotionally Fragile World from the offered topics and March 25, 2023, at 12:30 p.m. EST as the date and time. Over 140 AAMA leaders participated in her lively, entertaining, and informative presentation. The team decided to allow the 2023–2024 Leadership Development Strategy Team to present the second webinar offered by Preethi Fernando.

State Leaders Session

The committee is very pleased with the information-sharing and team-building opportunities
planned for attendees. Two round table sessions are planned with different discussion questions for each session. There will also be a wrap-up session in which reference materials will be reviewed and distributed.

Appreciation to President Deborah Novak for her confidence in assigning this responsibility for leadership guidance as well as Vice President Monica Case for her thoughtful contributions during discussions. Special appreciation to Communications Director Miranda Sanks-Korenchan and CEO Donald Balasa, JD, MBA, for their contributions and support. This Chair is grateful to all committee members for their active participation in discussions and thoughtful decisions made on behalf of the members who have volunteered their time and efforts as leaders on all AAMA levels. Chairing this group of individuals has been a very rewarding experience.

Jane Seelig, CMA-A (AAMA), Chair

Members:

Angela Belnap, CMA (AAMA)
Bobbie Jo Blood, CMA (AAMA)
Julie Fogt, CMA (AAMA)
Claire Houghton, CMA (AAMA)
Jacqueline McRae-Mitchell, CMA (AAMA)
Frances Mooney, CMA (AAMA)
Summer O’Neal, CMA (AAMA)
Paula Purdy, CMA (AAMA)
Carla Ruiz, CMA (AAMA)
Christa Smith, CMA (AAMA)
Sandra Williams, CMA (AAMA)

Staff Liaison: Miranda Sanks-Korenchan
The Marketing Strategy Team is charged with branding the AAMA as the resource for the profession by developing tools that assist members with promoting the profession and the AAMA. Also, it is charged with developing ways to promote the AAMA to the public, including employers, health agencies, and medical assisting programs.

As we began our strategies for 2023, this team kept in mind the current AAMA Strategic Issues Plan. Marketing of the AAMA organization continues to be a top priority. The charge to the Marketing Strategy Team is to strengthen the marketing behind the AAMA and medical assisting profession and influence the decision-makers to increase the compensation of medical assistants.

AAMA President Deborah Novak, CMA (AAMA), held a meet and greet on Monday, October 24, 2022, during the conference in Myrtle Beach, SC. Any already appointed volunteer committee members present were invited. This Chair and any members present discussed the charge of the Marketing Strategy Team.

Discussion included:

- Medical Assistants Recognition Week (MARWeek) 2023
- MARWeek 2022 and start thinking about theme for 2023
- Any current ongoing projects
- Possibly any new directions given to the team after the Board of Trustees (BOT) planning session
- Marketing arenas
- Marketing targets
- AAMA vendor and pursuing a new vendor

After the BOT Planning Session, this Chair contacted the Marketing Strategy Team members with a welcoming to the team email. This also included exchanging team members’ contact information, updating about the previous on-site conference team members present meeting, and discussion.

This Chair met with Marketing Director Gina Mokijewski concerning the Marketing Strategy Teams goals, previous ongoing projects, current projects, possible new projects, and direction for 2023. Director Mokijewski provided thoughts about directions and how to market the AAMA.

The team was emailed a virtual meeting date and included a meeting agenda for discussion. This Chair also included the Strategic Issues Plan goals and recommended actions assigned to the Marketing Strategy Team. The team was assigned to start thinking about MARWeek 2023 and send to this Chair one or two MARWeek suggestions, wording, concept, or thoughts by the deadline January 4, 2023.
This Chair held a virtual meeting with the Marketing Strategy Team. Discussion included the Strategic Issues Plan goals and recommended action items assigned to this team and how our projects would relate to these goals.

The team also discussed any previous ongoing projects, current projects, and newly formulated projects. President Deborah Novak, CMA (AAMA), assigned each committee Chair to provide their committee’s top priority projects with requested timelines and what help would be needed from Marketing and Communications Department (MarCom) staff. After much lengthy discussion from the committee, the outcome bullet points of the meeting are as follows.

- MARWeek October 16–20, 2023—team to work on this again for 2023
  - The AAMA logo developed in 2022 is used ongoing yearly
  - Theme is formulated every year and assigned committee members who have not sent their suggestions to this Chair
  - Assigned to review 2022 MARWeek packet on website/toolkit
  - Next meeting will discuss any updates or changes needed in materials, free promotional items, and purchasable items for 2022 and 2023
  - Discuss targeted audiences for 2023:
    - Medical assistants
    - Employers
    - Partnerships
    - Medical Group Management Association (MGMA)
    - Students
    - Other
  - Work with Director Mokijewski on the development of design, materials, and promoting
- Bright Ideas Campaign
  - Review this campaign for continuance.
- AAMA Vendors
  - Kuhl’s Hot Sportspot vendor: Products are still available but limited
  - Revisit new vendor considering costs and supply and demand issues
  - Create promotional items for purchase to promote AAMA/medical assistant
  - Evaluate current logo items inventory
  - Work with Director Mokijewski
- Website Updating
  - Employers and Hiring Decision-Makers area
  - Explore adding a new section for listing employment opportunities (job board)
  - Work with MarCom for posting updates, creating correct branding, and formatting
  - To be determined by website new updating and design
- Tip/Fact Sheets/Brochure for Employers
  - Work with MarCom for final formatting including branding and design of documents.
- Medical Assisting Professional Topic Facts/Talking Points
  - Create a PowerPoint for states/chapters to present if attending state MGMA or other conferences and/or other opportunities
  - Send to MarCom for branding
- Promoting the Professional Medical Assistant
  - Tips for medical assistants to advocate for themselves
  - Creating a separate section on the website
    - Send to MarCom for final formatting including branding of documents, posting, and promoting
  - Create professional video series “How to Advocate for Yourself”
    - MarCom to place branding and promoting project
- Mainstream Media Advertising
  - Explore Professional Broadcast Media per the BOT direction
  - Work with MarCom for project management time, cost, and outsourcing
  - Already discussed with Director Mokijewski
  - Targeted timeline for 2023–2024

This team’s marketing targets will include employers, managers, MGMA, human resources, medical assistants, partnerships, students, and schools accredited by the Commission on Accreditation of Allied Health Education Programs (CAAHEP) or the Accrediting Bureau of Health Education Schools (ABHES).

This Chair shared with President Novak the Marketing Strategy Teams projects. The projects of all boards were shared with the staff for discussion and priorities of projects were established for all. The following were the priorities and where the Marketing Strategy Teams projects fell in timelines.

The committee continued to move forward with ideas and formulating each project in order of when each should be completed or be ongoing.

MARWeek Oct. 16–20, 2023—Project ongoing at the time this report was prepared.
The Marketing Strategy Team’s members completed their assignment for ideas and suggestions for concepts, ideas, or themes for MARWeek to this Chair. A list was compiled and sent to the team to vote for their top two and send to this Chair. The top two themes/concepts were sent to Director Mokijewski. This Chair and Director Mokijewski discussed these ideas and possibly how to combine these into one concept. This Chair presented the theme to the team during a virtual meeting. The team held in-depth discussions about the theme celebrating medical assistants and picked a concept to bring to fruition that has not been utilized by other organizations.

The MARWeek theme for 2023 is:

“Medical Assistants Shine Bright”

Thank You

For the Light You Bring to Every Medical Setting!

This team wanted greater awareness and recognition; this was also shared with Director Mokijewski who agreed with this direction.

The MARWeek AAMA logo will still be utilized throughout MARWeek materials and promotion.

Director Mokijewski provided design themes to this Chair. Suggestions and ideas were discussed with this Chair and Director Mokijewski.

Two designed posters were received and shared with the team. Discussion took place with the team and feedback was sent to Director Mokijewski. The theme and design were shared during the summer BOT meeting for changes or concerns. Some changes were made and shared with Director Mokijewski.

The team was assigned to review the toolkit used for 2022 on the AAMA website including materials for ordering and downloadable materials. These were updated in 2022 by the Marketing Strategy Team. The team discussed the toolkit, and all agreed no changes were needed for 2023. This information was shared with Director Mokijewski so the MarCom team could continue moving forward.
The free promotional items in the MARWeek packet were discussed by the team. The team still liked the magnet and the new card developed in 2022. The card had great reviews, was utilized well, and felt to be a good marketing tool. This Chair did report to the team that there were 10,000 ordered for 2022 and the supply ran out before MARWeek. The team agreed to continue the magnet and card with the 2023 theme. Also, the team requested to order more cards for 2023. The MARWeek packets include these free materials for two reasons: (1) the AAMA and the medical assisting profession gets out into various avenues which meets our Strategic Issues Plan; and (2) this is a free membership benefit. Director Mokijewski was informed of these decisions.

MARWeek purchasable promotional items were discussed with the team as a possible new vendor has been narrowed down. The price points were discussed, only a couple of items for sale and many suggestions were made for products. Discussion took place as to what audiences we are targeting for 2023. The targeted audiences are medical assistants, employers, and managers (MARWeek would be a fantastic way to reach this audience; make them aware and appreciate their medical assistants), medical assisting students (CAAHEP- and ABHES-accredited schools include information about joining the AAMA and benefits), MGMA, etc. The team felt MARWeek was a great marketing tool to reach these audiences to bring more recognition to the AAMA and medical assistants. AAMA partnerships are to be contacted and encouraged to share our MARWeek information on their websites and social media platforms. This information was shared with Director Mokijewski.

This team discussed community outreach with suggestions for MarCom, which included the United Way, American Red Cross, Autism Foundation, and current AAMA partnerships. This was shared with Director Mokijewski as she asked for ideas from the team.

The team discussed CEUs discounts during MARWeek. Everyone agreed and voiced what type of discounts. This discussion will be ongoing, and possible recommendations will be made later.

This Chair notified Director Mokijewski of the teams’ ideas, formulated projects, and timelines and discussions took place.

**AAMA Vendors**—*Project ongoing at the time this report was prepared.*

Kuhl’s Hot Sportspot vendor: Products are still available, order at:

https://www.cincysportsshop.com/aama-apparel.php

Name will be $8, and CMA (AAMA) will be an additional $5 available on ordered items. *(Credential will be verified.)*
B5160 Port Authority Panel Tote Bag. Secure zippered top and adjustable webbing handles. Price: $20

BG80 Port Authority Colorblock Cinch Bag. Embroidered
Price: $12

BP10 Fleece Stadium Blanket with Strap, 100% spun polyester fleece. Price: $21

F223 Port Authority Microfleece Unisex Jacket. Available in black or grey. Price: $32

K500 Port Authority Silk Touch Unisex Polo. Available in black, red, or white. Price: $19

K500LS Port Authority Long Sleeve Silk Touch Unisex Polo. Available in white, black or red. Price: $26

AAMA logo items were discussed by the team. Comments were about keeping the items at a lower cost as some individuals, including students, could afford a much lower-priced item. Suggestions for AAMA logo items were discussed, and this Chair showed the team some examples of items. The team suggested a few items and two were more popular than others.

A new vendor is being explored for MARWeek and AAMA logo purchasable items. Shipping cost is a factor, and this has been explored. Another key factor is how vendor sites can integrate with the AAMA current website. The new website is still in the development stage but with newer technology, this will be more user-friendly. Updates will be provided.
Employer/Manager Marketing—Project ongoing at the time this report was prepared.

The team was divided into two teams to discuss what information is important to share to reach this audience. Also, the teams were to explore the AAMA website to see what is currently available and if it fits our needs for this outreach. Information was shared with the Chair and discussed with the team. Comments were made about how the website has useful information, but it is difficult to locate, and some information should be under the employer’s section. With the development of the new website, the team felt it would not be beneficial to move information around at this time. The new website sections should be more intuitive for employees. Until the website is up and running, considering a new look and logo, no new material should be created and printed as it would become outdated. The content created for marketing to this group will be utilized when the website is finished.

The direction for the employer and manager outreach was discussed. An e-blast will be created with only a few key points, as too much content at one time is easily overlooked and readers lose interest. Content would include that the AAMA is the only organization solely for medical assistants and to mention a few other key points and where to find:

- Scope of practice answers
- AAMA vision, mission, core values
- CEU opportunities
- Professional development
- How to check the status of an employee’s CMA (AAMA) credential
- CEO and Legal Counsel Donald Balasa’s publications and Legal Eye information
- Keeping your medical assistant credentialed
- Value of employing educated, multiskilled medical assistants
- Advisory Task Force information (valuable to employers)
- Information about the medical assisting profession and the CMA (AAMA) credential

After the discussion of what employers are asking for, the team decided on three or four key points to start with and include more information as outreach continues. The e-blast outreach had been discussed with Director Mokijewski previously and this Chair provided content. Employers and managers list on file, including MGMA, the AAMA has obtained and is utilizing. There were other suggestions for manager contacts for outreach and discussions for ideas to help with promoting.

Newly added project—Project ongoing at the time this report was prepared.

Replace the AAMA “Who I am Button.” The AAMA is currently out of this item, and it is time to be replaced. This project will be moved to the category of more urgent in the hope to be completed by September 2023 in time for conference. The team started discussing what this would be used for, size, quality, and usage. Project moved to the priority list.
Other Projects Discussed

Promoting the Professional Medical Assistant (“How to Advocate for Yourself”)

This is a toolkit for medical assistants to advocate and market themselves.

Suggestions were documents for résumé tips, advocate for themselves in their current job, understanding the importance of a credential, CMA (AAMA) Fact Sheet, etc. Discussed after toolkit is completed, create a short video recording, (snippet of information) with QR codes to lead to the AAMA website where the documents can be found. It was suggested at the end to refer to a document to find out more information. A QR code or link could lead to the AAMA website where this information can be located.

Medical Assistant Professional Fact PowerPoint

Create a short PowerPoint for chapters and states to utilize to present if attending other professional conferences such as MGMA, other opportunities, medical assisting schools, etc.

Provide AAMA website information and where to find resources. MarCom to ensure correct branding and CEO Balasa to review for any legality issues. It was also suggested that the PowerPoint could be put on a continuous loop for viewing.

The digital marketing ads and e-blasts continue to be effective, and continued emphasis will be placed on these.

When the AAMA new website is completed and up and running, this will enhance the Marketing Strategy Team’s projects.

We will continue to research and explore the avenue in which to accomplish our strategy team goals as outlined in The Strategic Issues Plan.

This team is very engaged and enthusiastic with their ideas for marketing the AAMA.

The Chair would like to thank the team members for their ideas, suggestions, contributions, and commitment to the success of the goals of this team. The Chair would also like to thank Director Mokijewski and her staff for the collaboration and for the magnificent work and work ahead. This Chair also would like to thank President Novak for the opportunity to serve as the Marketing Strategy Team’s Chair.

Monica Case, CMA (AAMA), Chair

Members:

Sherri Dykes, CMA (AAMA)
Natasha Geno, CMA (AAMA)
Donna Gibbins, CMA (AAMA)
Amanda Harris, CMA (AAMA)
Paula Purdy, CMA (AAMA)
3806  Aimee Quinn, CMA (AAMA)
3807  Lori Rager, CMA (AAMA)
3808  Brian Stimpson, CMA (AAMA)
3809  Virginia Thomas, CMA (AAMA)
3810
3811  **Staff Liaison:** Gina Mokijewski
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Report of the Membership Development Strategy Team

For the Period Ending September 2023

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

This Chair met with the committee members present at the 2022–2023 AAMA Committees, Strategy Teams, and Task Forces Meet and Greet in Myrtle Beach, South Carolina, Oct. 24, 2022. Thoughts and ideas were discussed and were reviewed at the next virtual meeting in January 2023.

Email communication was sent to members welcoming them to this strategy team. The email included topics that this team would need to review. This Chair also asked the team to think about other issues that they’d like to potentially discuss. This Chair also requested members to respond back with their meeting time preferences.

This Chair has received information from last year’s Chair Sandra Williams for review. She has also reached out to Continuing Education and Membership Director Nick Mickowski for membership information to be shared with the team. She also shared information about ID me to the members of this team.

They met on January 12, February 2, February 23, March 23, May 4, and June 15, 2023, virtually.

This Chair met with members Pam Neu, Jane Seelig, and Sandra Williams as well as staff liaison Mickowski on January 27 at the AAMA Board of Trustees (BOT) meeting in Chicago. Thoughts and ideas were shared regarding member benefits, incentives for completing the survey, and the early bird registration. This information was discussed at the February 2 virtual meeting of the team.

Many topics were discussed to determine what this team thought was the most important to work on during this year. The following are topics that we determined would be our focus:

**AAMA Member Benefits**

Beneplace: Current offers available and ideas for other discounts we would like them to pursue to see if other offers might be available. Several team members were not aware of Beneplace, and they were concerned that other AAMA members did not know the discounts Beneplace offered.

Member Melinda Rhynes created a flyer regarding the affordability of membership. The committee decided on the top three membership benefits, and they were added on the flyer. They are: “View CEUs Daily”, “Beneplace,” and “Discounted Continuing Education.”

This flyer is available for all members to use and will be made available.

**Non-Member CMAs (AAMA)**
A survey was created to be emailed to all non-member CMAs (AAMA) using the list AAMA has. It will be a three-step process.

After completing the first survey, they will be entered into a drawing for five $50 Amazon gift cards and five AAMA memberships.

They will receive a follow-up email thanking them which will include a link to membership and the online early bird discount and free CEU opportunity along with benefits of membership.

After the committee evaluates the responses, a follow-up survey will be sent with the top three issues from the initial survey.

The above requested incentives were approved by the BOT.

**Early-Bird Online Registration**

This committee recommended to the BOT that we offer the $8 online discount again this year. They also asked for a free CEU session to be included with the early-bird registration. This discount and free CEU will be given to all who complete their online registration between July 1, 2023, and midnight October 31, 2023. The BOT approved both requests.

They also have reached out to the Marketing and Communications Department (MarCom) about the possibility of adding the online early-bird discount to the banner that scrolls on the website.

**Focus Groups**

This committee was assigned the duty, along with the Social Media Committee, to investigate reaching out to different groups of medical assistants to see their concerns about the career of medical assisting.

The committee discussed the focus group topic at length and have suggestions to be discussed with the Social Media Committee Chair Natasha Geno.

**Additional Topics**

This committee discussed other topics and will continue to brainstorm on potential ways to increase/retain AAMA membership.

This Chair thanks the members of this committee for their active participation during the meetings. She appreciates their time and dedication for the good of the AAMA. This Chair also thanks our staff liaison Mickowski for his knowledge, support, and his constant willingness to help or answer questions (and we have so many)! Appreciation to President Deborah Novak and Vice President Monica Case, CEO and Legal Counsel Donald Balasa, and the AAMA BOT for their guidance to this committee.

Candy Miller, CMA (AAMA), Chair

Members

Jennifer Amaral, CMA (AAMA), RPT
Leann Buneta, CMA (AAMA), CMSS, BS, AAS
Lisa Connelley, CMA (AAMA)
Stephanie Hodgin, CMA (AAMA)
Alexis Holcomb, CMA (AAMA), BSHA
Marilyn Huddleston-Reeder, CMA (AAMA), CNA, CHUC
Deniece Jozefiak, CMA (AAMA)
Jill Moore, CMA (AAMA)
Pamela Neu, CMA (AAMA), MBA
Linda Prince, CMA (AAMA), COA, OCT-C
Aimee Quinn, CMA (AAMA)
Melinda Rhynes, CMA (AAMA), MEd
Jane Seelig, CMA-A (AAMA)
Sandra Williams, CMA (AAMA)

Staff Liaison: Nick Mickowski
TASK
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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 who hire medical assistants as well as provide advisory support to employers on the utilization of medical assistants in the outpatient settings. The service became available after COVID-19 in 2021-2022 and includes access from our own AAMA subject matter experts in their primary roles such as scope of practice, management, education, billing and coding, care coordination, patient-centered medical home, clinical leads/instructors, customer service, and human resource management.

This year, Rebecca Walker, CMA (AAMA), was added to this task force. The terms of this task force are currently for 5 years, which can then be extended. The rationale is to add (a) member(s) yearly to create different time spans of terms which will allow for sound experience and subject matter experts to serve on the Advisory Service Panel.

This Chair has had two meetings with CEO Donald Balasa, JD, MBA, and AAMA Marketing Director Gina Mokijewski on the priorities needed for the marketing of this product and service. Priorities for marketing and employer exposure were delayed this year. However, at the request of CEO Balasa, this has been moved to the marketing team’s top priority. Our newly assigned task force liaison Director Mokijewski has shared some great ideas and new timelines that are set to be in progress prior to the AAMA Annual Conference in September 2023.

Completed marketing initiatives in 2023 include:

- Purchase and usage of new exhibit marketing materials which have been used at MGMA in March 2023. This utilizes the current AAMA logos and colors along with some highlights of services provided under the Advisory Service.

- Update of the Advisory Service brochure and team bios to include online or virtual 90-minute-or-more sessions for employers or administrators to speak with any of the Advisory Service Panel members for Q and A sessions. This service could generate minimal revenue; however, it would facilitate the AAMA market exposure as well. A section was added to outline the speaker service from our Advisory Task Force subject matter experts. This brochure can be viewed on the AAMA website located under the “Employers” tab: https://www.aama-ntl.org/employers/advisory-task-force.

Our hopes are that with a good marketing plan and some additional exposure we may pick up clients who will want to utilize the Advisory Service.

I would like to thank CEO Balasa and Director Mokijewski for their guidance and support in this ongoing initiative and project.

Deborah Novak, CMA (AAMA), Chair
Members:

- Monica Case, CMA (AAMA)
- Julie Flaatten, CMA (AAMA)
- Sue Hawes, CMA (AAMA)
- Debby Houston, CMA (AAMA)
- Lisa Lee, CMA (AAMA)
- Patty Licurs, CMA (AAMA)
- Paula Purdy, CMA (AAMA)
- Rebecca Walker, CMA (AAMA)
- Aimee Wicker, CMA (AAMA)

Additional Virtual Resource Members Only:

- Loxie Kistler, CMA (AAMA)
- Betty Springer, CMA (AAMA)

Staff Liaisons:

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

The purpose of our partnerships is marketing our organization while keeping in mind the AAMA mission statement and the current Strategic Issues Plan.

The AAMA continues to be active in the current partnerships with the Center for the Application of Substance Abuse Technologies (Fetal Alcohol Spectrum Disorders) out of the University of Nevada, Reno, (CASAT/FASD), The National Colorectal Cancer Round Table (NCCRT), the American Cancer Society (ACS), the National Association of Health Unit Coordinators (NAHUC), the Medical Group Management Association (MGMA), and the Professional Association of Health Care Office Management (PAHCOM).

National Colorectal Cancer Roundtable (NCCRT)

This officer had the opportunity to represent the AAMA at the NCCRT Annual Conference November 16–18, 2022, in Baltimore, Maryland, which included:

- Attended numerous sessions over the three days of this conference
- Participated in the meeting NCCRT Strategic Priority Team: Professional Education & Practice Implementation: Healthcare Systems
  - This strategic priority team did a brainstorming session for future projects for the NCCRT. There were mention of several opportunities for the AAMA to partner with the NCCRT for educational opportunities.
  - Agreed to join this priority team as a representative of the AAMA
- Attended NCCRT Policy Action Team Virtual Meeting—Jan. 26, 2023
- Attended NCCRT PEPI Health Systems Strategic Priority Virtual Meeting—March 1, 2023

Committee Project

The AAMA received $1,000 in grant money in 2021 from the NCCRT. This grant money is to support continued work in the area of promoting colorectal cancer screenings. Grant funds may only be used for charitable, educational, scientific, or literary purposes.

The previous committee had decided to complete a project utilizing this money that would be aimed at educating medical assisting students on the need of colorectal cancer screening, what patient education is needed, and the roles a medical assistant would take in that education. The previous committee had completed a panel discussion in June 2022 for creation of education to
be utilized by medical assistants as well as a focus on medical assisting students.

This committee met virtually to further discuss how this project could be rolled out to all of the schools accredited by the Commission on Accreditation of Allied Health Education Programs (CAAHEP) or the Accrediting Bureau of Health Education Schools (ABHES) for their use. The committee decided with March being colorectal cancer screening month that it would be the best time to release the project.

Editing was completed on the recorded panel discussion for release in March in conjunction with Colorectal Cancer Awareness Month on the AAMA e-learning site. This was released as a free CEU opportunity for all members/non-members. This CEU panel discussion was made available in the AAMA e-Learning Center for purchase as of April 1, 2023. Current performance of the module is:

- Total free downloads for the month of March: 4,093
- Total Modules completed through July 7, 2023: 8,389
- Total revenue for NCCRT Panel Discussion CEU: $2,760

Direct marketing was also completed, including emails sent to all CAAHEP- and ABHES-accredited schools targeted as an educational opportunity for program directors to utilize in their lessons plan for their medical assisting students. Verbiage was included as to the important role that medical assistants have in educating patients on the need for colorectal cancer screenings.

This information was included in the AAMA representative PowerPoint presentation at state assignments.

American Cancer Society (ACS)

Several members continue to volunteer on their states Partners of Cancer Control committees. The committee will continue to work with the ACS and look for opportunities to partner.

Center for the Application of Substance Abuse Technologies (CASAT)

Beginning in 2015, the AAMA has been a subgrantee under grants awarded by the Centers for Disease Control and Prevention (CDC) to CASAT of the University of Nevada, Reno (UNR). These grants are part of a coordinated national effort to prevent fetal alcohol spectrum disorders (FASDs) by preparing medical assistants to assist their overseeing providers in reducing alcohol-exposed pregnancies.

The AAMA has been designated as a subgrantee under a new grant awarded by the CDC to the CASAT of the UNR. This grant is for national partnerships to address prenatal alcohol and other substance use and FASDs. The following is a description of this specific project under this grant:

The University of Nevada, Reno, and the American Association of Medical Assistants (AAMA) are serving medical assistants through the Medical Assistant Partnership for Healthy Pregnancies and Families (MAP). Activities implemented by MAP will achieve the following short-term outcomes: (1) Demonstrated collaboration between clinical and public health partners dedicated to prenatal alcohol/other substance use and FASD-
related services; (2) Improve capacity of state and local networks to reach affected populations with relevant, evidence-based messaging and services; (3) Increased identification of AAMA member knowledge, current practices, and organizational needs; (4) Increased use of evidence-based information and resources by medical assistants about prenatal alcohol/other substances use; (5) Increased use of evidence-based information and resources by medical assisting educators in courses about prenatal alcohol/other substances; and 6) Increase knowledge related to the risks of prenatal alcohol and other substance use.

The AAMA continues to work with CASAT to develop CEUs for members through this partnership. There will soon be another CASAT FASD-related CEU that will be free in the AAMA e-Learning Center on the AAMA website.

CASAT will be attending the 2023 AAMA Annual Conference and will have a vendor booth for members to visit and get additional information. They have also confirmed that they will be providing a speaker at the 2024 AAMA Annual Conference in Michigan.

Medical Group Management Association (MGMA)

The AAMA continues to work with MGMA. AAMA CEO and Legal Counsel Donald Balasa was able to present at the Financial and Operations Conference on the topic of “A Comparative Analysis of Recent Ambulatory Care Staffing Models.” This allowed the AAMA to present to additional types of management; those in attendance included human resources, operations, and financial managers.

Professional Association of Health Care Office Management (PAHCOM)

Outreach by AAMA staff was made to PAHCOM regarding potential sponsorship opportunities at the 2023 AAMA Annual Conference.

PAHCOM will be approving PAHCOM members who attend the 2023 AAMA Annual Conference to utilize the AAMA CEUs towards their required continuing education for their Certified Medical Manager (CMM) certification. Currently, PAHCOM does not hold an annual conference for their members, so they will be providing to their members with information about the 2023 AAMA Annual Conference as a way for them to receive CEUs.

It was approved for PAHCOM to do the following in partnership with the AAMA:

- They will approve CEUs for 20 sessions (42 CEUs) identified as appropriate for PAHCOM certifications
- Promote the AAMA Annual Conference on their website education calendar with a direct link to the 2023 AAMA Annual Conference registration page as well as social media and email campaigns
  - Give away a free attendee registration through their promotional material of the event

This committee continues to look at the current partnerships and also what other partnerships that the AAMA could enter into. I would like to thank President Deborah Novak for this appointment.
and also the committee and AAMA staff for all of their hard work towards our projects.

Aimee Wicker, CMA (AAMA), Chair

Members:
Sherry Bogar, CMA (AAMA)
Monica Case, CMA (AAMA)
Natasha Geno, CMA (AAMA)
Claire Houghton, CMA (AAMA)

Staff Liaisons:
Donald Balasa, JD, MBA
Gina Mokijewski
BOARDS AND COUNCILS REPORTS
The Certifying Board (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.

Due to work commitments, the CB Chair could not attend the American Association of Medical Assistants (AAMA) Board of Trustees (BOT) planning session on November 6–7, 2022, in Asheville, North Carolina. President Novak was informed in advance.

In January 2023, the CB approved the texting platform, SimpleTexting. New CMAs (AAMA) will receive welcome messaging, and all CMAs (AAMA) will receive recertification reminders via text message. Recipients may opt out of the text messaging if desired.

The CB Chair and First Vice Chair Carolyn Fuller CMA (AAMA), CPC, attended the AAMA BOT meeting on January 27–28, 2023, in Chicago, IL. Prior to the meeting, the agenda book was reviewed by both Chairs.

The CB Forms Review Meeting was held with PSI staff at the Embassy Suites in Orlando, Florida, on February 22–23, 2023. This was the first Forms Review meeting with PSI. The board reviewed the six exam forms and completed most of the review onsite. Several follow-up virtual meetings were held with PSI to finalize the forms. As of June 5, 2023, all six exam forms were approved for delivery in July 2023.

On February 24–25, 2023, following the Forms Review Meeting, the CB met for their winter meeting. The CB agreed to move the CMA (AAMA) Certification Exam Eligibility Education(al) Pathway to a permanent eligibility category. This will become Category 4 on the Certification Exam Applications. The board worked hard and had a very productive meeting.

In February 2023, the CB approved the use of a maximum of 20 recertification points (AAMA or non-AAMA approved) earned in the three months prior to initial certification to be applied toward first-time recertification. (Course credits earned and required for graduation from a medical assisting program may not be used towards initial recertification.)

The CMA (AAMA) Certification Practice Exam is frequently used on the AAMA website. As of June 6, 2023, 19,241 practice exams had been purchased.

The CB Chair and First Vice Chair will be attending the AAMA BOT meeting in Grand Rapids, Michigan, at the Amway Grand Plaza, Curio Collection by Hilton, on July 7–8, 2023.

The summer meeting of the CB will be held on July 21–22, 2023, at the Embassy Suites in Chicago, Illinois. The annual Recertification Audit is scheduled for July 20, 2023, at the AAMA Executive Office with public member Beth Jaeger, SHRM-SCP, SPHR, Diane Vander Ploeg, CMA (AAMA), and Alisha Graham, 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.
The CB asked North and South Carolina state societies, who agreed, to host the CMA (AAMA) Knowledge Bowl at the 2023 AAMA Annual Conference. The event continues to be well-received and a member-favored event.

The Task Force for Test Construction (TFTC) meeting is scheduled for October 12–13, 2023, at PSI corporate offices in Olathe, Kansas. The CB Pool Review meeting and Item Writing Workshop will be held on October 11, before the TFTC meeting.

Per Certification Director Katie Gottwaldt, the CMA (AAMA) Certification and Recertification candidate and examinee statistics for Calendar Year 2022 are as follows:

<table>
<thead>
<tr>
<th>Totals</th>
<th>Recertificants</th>
<th>Candidates for Initial Certification</th>
</tr>
</thead>
<tbody>
<tr>
<td>8,893 Exam Applications</td>
<td>2,202 applicants</td>
<td>6,691 applicants</td>
</tr>
<tr>
<td>8,292 Total Examinees</td>
<td>2,175 tested</td>
<td>6,117 tested</td>
</tr>
<tr>
<td>8,158 Examinees eligible to receive scores</td>
<td>2,067 passed the exam (95% pass rate)</td>
<td>3,906 passed the exam (65% pass rate)</td>
</tr>
</tbody>
</table>

Thank you to the CB for its ongoing dedication and determination to protect the credential. Thank you to AAMA President Novak and the BOT for their hard work. Thank you to Director Gottwaldt, Assistant Director of Operations and Certification Operations Manager Lee Rumpel, Certification Department staff, and CEO and Legal Counsel Donald Balasa for their continued support and dedication.

Respectfully submitted,

Vicki Sokolnik, CMA (AAMA)
2021–2023 CB Chair

Members of the CB:
Vicki Sokolnik, CMA (AAMA), Chair
Nikal Redwine, CMA (AAMA), RN, BSN, CPT, Immediate Past Chair
Carolyn Fuller, CMA (AAMA), CPC, First Vice Chair
Diane Vander Ploeg, CMA (AAMA), MS, Second Vice Chair
Johan Limbourg, CMA (AAMA), TFTC Chair
Melinda Garcia, CMA (AAMA)
Alisha Graham, CMA (AAMA), TFTC Vice Chair

Other Professional Members:
Charles Reed, MD

Public Members:
Beth Jaeger, SPHR, SHRM-SCP

Staff Liaison: Katie Gottwaldt
The Continuing Education Board (CEB) met on November 4–5, 2022, at the Hilton in Asheville, North Carolina, for the Planning Session. The CEB met March 3–4, 2023, at Charleston, South Carolina, for the winter meeting. President Deborah Novak and Vice President Monica Case were in attendance at both meetings. The CEB met on July 9–10, 2023, in Grand Rapids, Michigan, for the summer meeting.

The following have been updated: *Accounts Receivable and Collection; Understanding, Diagnosing, and Treating Attention-Deficit/Hyperactivity Disorder; Peripartum Depression;* and *Silent Sinus Syndrome.* These are ready to go to the printer. The *Fad Diets* course is undergoing a total overhaul, and the name will change to something different to focus on nutrition instead of diets. *Vitamin D* and *Workplace Bullying* will be assigned to writers and updated.

The board discussed and approved updating the Assessment-Based Certificate in Pediatrics (ABC-P). The Learn Ethos team worked on the updates, and it was reviewed and approved by the board. The ABC-P will be updated in the AAMA system and ready sometime in August.

The board reviewed volunteer applications for its task forces.

The LEAP Forum will be awarded CEU credits upon submission of an outline of their program to Continuing Education and Membership Director Nick Mickowski.

LEAP Chair Rachel Houston will have a half-day workshop on the Thursday afternoon of the AAMA Annual Conference for educators. There will be a separate registration for the workshop.

The board had a virtual meeting with Marketing Director Gina Mokijewski on December 15 to discuss advertising the Assessment-Based Certificate in Allied Health Education (ABC-AHE).

Chair Sawyer had a virtual meeting with President Novak to discuss priorities for advertising that the CEB had planned.

The board worked on an outline for a nutrition monograph and voted to give this project to Learn Ethos. Meetings were held with Learn Ethos and a timeline has been established to complete this project.

The application for the ABC-AHE has been submitted, edits have been done to the application, and it is waiting for the final approval for the I.C.E. accreditation.

The board reviewed the topics submitted to the Conference CE Sessions Task Force Chair for 2025 conference. The topics were submitted throughout the year by task force members.

The Chair would like to thank the board for all their hard work that they have done this year in getting things completed.

Shirley Sawyer, CMA (AAMA), CPC

Continuing Education Board Chair
Members:

Amber Greer, CMA (AAMA), BS, PBT(ASCP) Vice Chair

Kim Doerflinger, CMA (AAMA), MBA

Susan Hawes, CMA (AAMA), MBA, RHIT, FACMPE

Rachel Houston, CMA (AAMA), MPS

Clare Ley, CMA (AAMA)

Linda Vitzthum, CMA (AAMA)

Staff Liaison: Nick Mickowski
The Judicial Council exercises jurisdiction in all questions involving membership interpretation as well as any controversies arising from the interpretation of the AAMA Bylaws and/or the Code of Ethics of the association.

No issues were presented to the Judicial Council for consideration during the 2022–2023 association year.

Susan Hawes, CMA (AAMA), MBA, RHIT, FACMPE, *Chair*

**Members:**

- Debby Houston, CMA (AAMA), CPC, *Vice Chair*
- Julie Flaatten, CMA (AAMA), RN, CPC
- Lisa Lee, CMA (AAMA)
- Betty Springer, CMA-C (AAMA)

**Staff Liaison:** Donald Balasa, JD, MBA
PROPOSED
BYLAWS
AMENDMENTS
Article VIII—Qualifications of Officers and Trustees, Section 1 and Section 4B

Current Wording

SECTION 1. The Officers of the AAMA shall be a President, a Vice President, a Secretary-Treasurer, a Speaker of the House, a Vice Speaker of the House, and the Immediate Past President.

…

SECTION 4. Additional qualifications for specific offices shall be:

…

B. A candidate for Secretary-Treasurer shall:

1. have served two complete years as a member of the Board of Trustees or two complete years as Chair of the Certifying Board, Continuing Education Board, or the Medical Assisting Education Review Board.

Proposed Wording

SECTION 1. The Officers of the AAMA shall be a President, a Vice President, a Secretary-Treasurer, a Speaker of the House, a Vice Speaker of the House, and the Immediate Past President.

…

SECTION 4. Additional qualifications for specific offices shall be:

B. A candidate for Secretary-Treasurer shall:

1. have served two complete years as a member of the Board of Trustees or two complete years as Chair of the Certifying Board, Continuing Education Board, or the Medical Assisting Education Review Board.

Rationale

The duties of the Secretary-Treasurer do not require any handling of AAMA monies. The term “Secretary” is more appropriate to use for this office. If adopted, all other instances of Secretary-Treasurer in the Bylaws would be changed. The Board of Trustees in Article XII Section 2A states “SECTION 2. The Board of Trustees shall: A. have charge of the property and financial affairs of the AAMA.”

Listing of the Locations

ARTICLE X—OFFICERS AND TRUSTEES: TERM OF OFFICE, VACANCY IN OFFICE FAILURE TO PERFORM DUTIES. SECTION 1: B, D

ARTICLE XI—DUTIES OF OFFICERS
SECTION 4:

ARTICLE XII—BOARD OF TRUSTEES

SECTION 1, Section 6, A
Article VIII—Qualifications of Officers and Trustees

Current Wording

SECTION 4. Additional qualifications for specific offices shall be:

A. A candidate for Vice President shall:
   1. have been an elected member of the Board of Trustees for two complete
      AAMA years (an AAMA year is from annual meeting to annual meeting of
      the House of Delegates) or Chair of the Certifying Board, Continuing
      Education Board, or the Medical Assisting Education Review Board for two
      complete years;
   2. have served as one of the following: President, Vice President, President-
      Elect, Speaker, or Vice Speaker of a Constituent Society.

B. A candidate for Secretary-Treasurer shall:
   1. have served two complete years as a member of the Board of Trustees or two
      complete years as Chair of the Certifying Board, Continuing Education Board,
      or the Medical Assisting Education Review Board.

C. A candidate for Speaker of the House of Delegates shall:
   1. have served two complete years as a member of the Board of Trustees or two
      complete years as Chair of the Certifying Board, Continuing Education Board,
      or the Medical Assisting Education Review Board;
   2. have served as President of a Constituent Society and attended at least two
      previous AAMA meetings as a Delegate.

D. A candidate for Vice Speaker of the House of Delegates shall:
   1. have served two complete years as a member of the Board of Trustees or two
      complete years as Chair of the Certifying Board, Continuing Education Board,
      or the Medical Assisting Education Review Board.
   2. have served as President of a Constituent Society and attended at least two
      previous AAMA meetings as a Delegate.

E. A candidate for Trustee shall:
   1. have attended at least two previous AAMA meetings as a Delegate or served
      as Chair of the Certifying Board, Continuing Education Board, or the Medical
      Assisting Education Review Board;
   2. have served as one of the following: President, Vice President, President-
      Elect, Speaker or Vice Speaker of a Constituent Society;
3. have actively served for one full year on: (1) a national committee; (2) a national board (i.e., the Certifying Board, Continuing Education Board, or the Medical Assisting Education Review Board) or one of its committees, task forces or strategy teams; or (3) a national task force or strategy team whose medical assistant members are appointed or approved by the Board of Trustees.

**Proposed Wording**

**SECTION 4.** Additional qualifications for specific offices shall be:

**A.** A candidate for Vice President shall:

1. have been an elected member of the Board of Trustees for two complete AAMA years (an AAMA year is from annual meeting to annual meeting of the House of Delegates) or Chair of the Certifying Board, or Continuing Education Board or the Medical Assisting Education Review Board for two complete years;

2. have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

**B.** A candidate for Secretary-Treasurer shall:

1. have served two complete years as a member of the Board of Trustees or two complete years as Chair of the Certifying Board, or Continuing Education Board, or the Medical Assisting Education Review Board.

**C.** A candidate for Speaker of the House of Delegates shall:

1. have served two complete years as a member of the Board of Trustees or two complete years as Chair of the Certifying Board; or Continuing Education Board, or the Medical Assisting Education Review Board;

2. have served as President of a Constituent Society and attended at least two previous AAMA meetings as a Delegate.

**D.** A candidate for Vice Speaker of the House of Delegates shall:

1. have served two complete years as a member of the Board of Trustees or two complete years as Chair of the Certifying Board, or Continuing Education Board, or the Medical Assisting Education Review Board;

2. have served as President of a Constituent Society and attended at least two previous AAMA meetings as a Delegate.

**E.** A candidate for Trustee shall:

1. have attended at least two previous AAMA meetings as a Delegate or served as Chair of the Certifying Board, or Continuing Education Board, or the Medical Assisting Education Review Board;

2. have served as one of the following: President, Vice President, President-Elect, Speaker or Vice Speaker of a Constituent Society;
3. have actively served for one full year on: (1) a national committee; (2) a national board (i.e., the Certifying Board, or Continuing Education Board, or the Medical Assisting Education Review Board) or one of its committees, task forces, or strategy teams; or (3) a national task force or strategy team whose medical assistant members are appointed or approved by the Board of Trustees.

**Rationale**

In early July 2022, the AAMA and MAERB issued a joint information statement explaining that MAERB had sought and achieved its own legal incorporation. Therefore, the MAERB Board Chair does not attend the BOT meetings providing the needed exposure to issue discussions to qualify for officer candidacy. If adopted, all other instances of Secretary-Treasurer in the Bylaws would be changed.
American Association of Medical Assistants®

Proposed Bylaws Amendment 23-03

Article VIII—Qualifications of Officers and Trustees, Section 4A

Current Wording

A: A candidate for Vice President shall:

1. have been an elected member of the Board of Trustees for two complete AAMA years (an AAMA year is from annual meeting to annual meeting of the House of Delegates) or Chair of the Certifying Board, Continuing Education Board, or the Medical Assisting Education Review Board for two complete years;

2. have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

B: A candidate for Secretary-Treasurer shall:

1. have been an elected member of the Board of Trustees for two complete AAMA years (an AAMA year is from annual meeting to annual meeting of the House of Delegates) or Chair of the Certifying Board, Continuing Education Board, or the Medical Assisting Education Review Board for two complete years;

C. A candidate for Speaker of the House of Delegates shall:

1. have been an elected member of the Board of Trustees for two complete AAMA years (an AAMA year is from annual meeting to annual meeting of the House of Delegates) or Chair of the Certifying Board, Continuing Education Board, or the Medical Assisting Education Review Board for two complete years;

2. have served as President of a Constituent Society and attended at least two previous AAMA meetings as a Delegate.

D. A candidate for Vice Speaker of the House of Delegates shall:

1. have been an elected member of the Board of Trustees for two complete AAMA years (an AAMA year is from annual meeting to annual meeting of the House of Delegates) or Chair of the Certifying Board, Continuing Education Board, or the Medical Assisting Education Review Board for two complete years;

2. have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

Proposed Wording

A: A candidate for Vice President shall:

1. have served as an AAMA elected officer.
2. have been an elected member of the Board of Trustees for two complete AAMA years (an AAMA year is from annual meeting to annual meeting of the House of Delegates).

3. have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

B. A candidate for Secretary-Treasurer shall:

1. have been an elected member of the Board of Trustees for two complete AAMA years (an AAMA year is from annual meeting to annual meeting of the House of Delegates).

2. have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

C. A candidate for Speaker of the House of Delegates shall:

1. have been an elected member of the Board of Trustees for two complete AAMA years (an AAMA year is from annual meeting to annual meeting of the House of Delegates).

2. have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

D. A candidate for Vice Speaker of the House of Delegates shall:

1. have been an elected member of the Board of Trustees for two complete AAMA years (an AAMA year is from annual meeting to annual meeting of the House of Delegates).

2. have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

Rationale

To be more consistent with all officer qualifications. The officer candidate must have full knowledge of the current business of the Board of Trustees. The issues confronting the Board of Trustees have become more complex and specialized, therefore the chairs of the Certifying Board and Continuing Education Board would not have complete knowledge of the issues facing the Board of Trustees.
American Association of Medical Assistants®

Proposed Bylaws Amendment 23-04

Article VI—Membership, Section 2A

Current Wording

SECTION 2. Qualifications.

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

1. A CMA (AAMA) holding current credential status and whose CMA (AAMA) credential has not been revoked as provided by the AAMA Certifying Board Disciplinary Standards and Procedures for the CMA (AAMA).

2. Anyone who was an Active member on Dec. 31, 1987, who has never been a CMA (AAMA), and who has maintained continuous Active membership. Continuous Active membership shall be defined as having dues postmarked or submitted electronically to the AAMA Executive Office by December 31 (the controlling time is that of sending, not that of receiving).

Suggested Wording

SECTION 2. Qualifications.

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

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

2. Anyone who was an Active member on Dec. 31, 1987, who has never been a CMA (AAMA), and who has maintained continuous Active membership. Continuous Active membership shall be defined as having dues postmarked or submitted electronically to the AAMA Executive Office by December 31 (the controlling time is that of sending, not that of receiving).

Rationale

As the AAMA is proud to be the only organization solely representing all medical assistants, and as multiple state societies allow associate members who hold other medical assistant credentials to serve as officers, this will give those credentialed medical assistants the opportunity to contribute to the AAMA as an active member.
Article VI—Membership, Section 3

Current Wording

SECTION 3. Privileges.

AAMA Active and Life members who are CMAs (AAMA) holding current status are eligible to serve as officers and trustees. Any AAMA Active or Life member may serve as a Delegate or Committee Chair. Privileges on a Society and Chapter level will be determined by those entities respectively.

Suggested Wording

SECTION 3. Privileges:

AAMA Active and Life members who are CMAs (AAMA) holding current status are eligible to serve as national officers, trustees, and committee chairs. Any AAMA Active or Life member may serve as a Delegate, Alternate Delegate, or committee member. Privileges on a State Society and Chapter level will be determined by those entities respectively.

Rationale

This is to clarify that these privileges are for the national level only. Only CMA (AAMA) members are eligible to be candidates for the AAMA Officers, Trustees, and committee chairs.
Proposed Bylaws Amendment 23-06

Article XIII—Boards and Councils, Sections 1–2

Current Wording

SECTION 1. Certifying Board.

C. An annual report shall be submitted at least 90 days prior to the annual House of Delegates meeting.

SECTION 2. Continuing Education Board.

C. The Continuing Education Board shall be under the authority of the Board of Trustees. An annual report shall be submitted at least 90 days prior to the annual House of Delegates meeting.

Proposed Wording

SECTION 1. Certifying Board.

C. An annual report shall be submitted on a date specified by the Speaker of the House.

SECTION 2. Continuing Education Board.

C. The Continuing Education Board shall be under the authority of the Board of Trustees. An annual report shall be submitted on a date specified by the Speaker of the House.

Rationale

This is a less restrictive deadline for report submission allowing the report to contain current information regarding the Certifying Board’s and Continuing Education Board’s activities.
Article XVII—Publication

Current Wording

SECTION 1. There shall be an official publication published bimonthly in the format of a professional journal.

Suggested Wording

SECTION 1. There shall be an official publication that is published regularly according to the format and frequency determined by the AAMA Board of Trustees.

Rationale

A journal is a peer reviewed scientific publication. This does not define our publication. The proposed Bylaws amendment allows for flexibility of publication schedule and format.
APPENDIX
## 2023 Delegates and Alternates

[Current as of August 8, 2023—Subject to Later Revision]

<table>
<thead>
<tr>
<th>State</th>
<th>Delegates</th>
<th>Alternates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alabama</strong></td>
<td>Crystal Gersh, CMA (AAMA)</td>
<td>Ashley Faulkner, CMA (AAMA)</td>
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<tr>
<td></td>
<td>Brandy Owen, CMA (AAMA)</td>
<td>Marquitta Breeding, CMA (AAMA)</td>
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<td></td>
<td>Melanie Strain, CMA (AAMA)</td>
<td>Virginia Owen, CMA (AAMA)</td>
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<td><strong>Alaska</strong></td>
<td>Lisa Nash, CMA (AAMA)</td>
<td>Rebecca Priole, CMA (AAMA)</td>
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<td>Tracy Meyer, CMA (AAMA)</td>
<td>Amy Samuel, CMA (AAMA)</td>
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<td>Jessica Jensky, CMA (AAMA)</td>
<td>Robin Wahto, CMA (AAMA)</td>
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<td><strong>Arkansas</strong></td>
<td>Melinda Rhynes, CMA (AAMA)</td>
<td>Misty Ross, CMA (AAMA)</td>
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<td>Traci Noblett, CMA (AAMA)</td>
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<td>Joyce Nakano, CMA-A (AAMA)</td>
<td>Amanda McDonald, CMA (AAMA)</td>
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<td>Virginia Marquette, CMA (AAMA)</td>
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<td>Ashlyn James, CMA (AAMA)</td>
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<td><strong>Colorado</strong></td>
<td>Christine Hollander, CMA (AAMA)</td>
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<td><strong>Connecticut</strong></td>
<td>Rebecca Parry, CMA (AAMA)</td>
<td>Amanda McDonald, CMA (AAMA)</td>
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<td></td>
<td>Tabitha Opie, CMA (AAMA)</td>
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<td>Jeanette Tyler, CMA (AAMA)</td>
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<td></td>
<td>Mary Lou Allison, CMA-C (AAMA)</td>
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<td>Marsha Benedict, CMA-A (AAMA)</td>
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<td>Christina Sears, CMA (AAMA)</td>
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<tr>
<td><strong>Georgia</strong></td>
<td>Leesa “Kay” Morris, CMA (AAMA)</td>
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<td>Christina Mccree, CMA (AAMA)</td>
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<td><strong>Idaho</strong></td>
<td>Rebecca Van Orden, CMA (AAMA)</td>
<td>Shaeli Christiansen, CMA (AAMA)</td>
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<td>Colleen Conklin, CMA (AAMA)</td>
<td>Chanel Quirk, CMA (AAMA)</td>
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<td>Nina Koeppe1, CMA (AAMA)</td>
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<td><strong>Illinois</strong></td>
<td>Kelly Charland, CMA (AAMA)</td>
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<td>Katherine Schoonhoven, CMA (AAMA)</td>
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<tr>
<td>Indiana</td>
<td>Dianne Mowrer, CMA (AAMA)</td>
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<td>Sharon Strutzenberg, CMA (AAMA)</td>
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<td>Teresa Duncan, CMA (AAMA)</td>
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<td>Julie Benson, CMA-AC (AAMA)</td>
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<td>Billie Acree, CMA (AAMA)</td>
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PROXY VOTE

Oregon
Alexandria Holcomb, CMA (AAMA)
Christina Oldenstadt, CMA (AAMA)
Paula Purdy, CMA (AAMA)
Andrea Erickson, CMA (AAMA)

Pennsylvania
Theresa Eckelmann, CMA (AAMA)
Jennifer Gonzalez, CMA (AAMA)
Janet Mills, CMA (AAMA)
Mary Lou Ninehauer, CMA (AAMA)

South Carolina
Twana Triplett, CMA (AAMA)
Crissy Taylor, CMA (AAMA)
Jacquelin Harris, CMA (AAMA)
Denise Kirby, CMA (AAMA)

South Dakota
Susan Hookie, CMA (AAMA)
Amanda Schroeder, CMA (AAMA)
Chelsea Wagaman, CMA (AAMA)

Tennessee
Dawn Alter, CMA (AAMA)
Tonya Milam, CMA (AAMA)
Sandra Laws, CMA (AAMA)

Texas
Lisa Connelley, CMA (AAMA)
Dina Harrett, CMA (AAMA)
Donna Gibbins, CMA (AAMA)

Utah
Angela Belnap, CMA (AAMA)
Suzette Johnson, CMA (AAMA)
Heather Mendy, CMA (AAMA)

Virginia
Nina Beaman, CMA (AAMA)
Mary Schuknecht, CMA (AAMA)
Debby Houston, CMA (AAMA)

Washington
Brandy Rohaly, CMA (AAMA)
Frannie Mooney, CMA (AAMA)
Carolyn Sherwin, CMA (AAMA)

Wisconsin
Marcia Rene Puetz, CMA (AAMA)
Kelly Emmons, CMA (AAMA)
Kimberly Cooper, CMA (AAMA)
Michelle Van Handel, CMA (AAMA)
Barbara Cumberland, CMA (AAMA)
Julie Flaatten, CMA (AAMA)
Danielle Bodoh, CMA (AAMA)
INFORMATIONAL ONLY
As the AAMA is MAERB’s primary sponsoring organization, MAERB would like to provide the
House of Delegates with this summary of MAERB’s activities over the past year. MAERB is
very appreciative of its productive and engaging relationship with AAMA, and we look forward
to continuing it.

Program Reviews

November 2022 Webinar
- 0 Initial Accreditation Survey
- 0 Continuing Accreditation Survey
- 8 Progress Reports
- 0 Requests for Reconsideration: Site Visit/Progress Report/Personnel Issues
- 0 Requests for Reconsideration: Annual Report Form
- 0 Annual Report Forms/Expanded Action Plans
- 2 Four Month Final Initial Accreditation Reviews
- 1 Twelve Month Initial Accreditation Review
- 0 Personnel Changes/Miscellaneous Issues

January 2023 Meeting—Two-Day Meeting in Tampa, FL
- 2 Initial Accreditation Survey
- 14 Continuing Accreditation Survey
- 12 Progress Reports
- 0 Requests for Reconsideration: Site Visit/Progress Report/Personnel Issues
- 0 Requests for Reconsideration: Annual Report Form
- 2 Annual Report Forms/Expanded Action Plans
- 1 Four Month Final Initial Accreditation Reviews
- 4 Twelve Month Initial Accreditation Review
- 0 Personnel Changes/Miscellaneous Issues
April 2023 Meeting Webinar

- 0 Initial Accreditation Survey
- 0 Continuing Accreditation Survey
- 5 Progress Reports
- 0 Requests for Reconsideration: Site Visit/Progress Report/Personnel Issues
- 0 Requests for Reconsideration: Annual Report Form
- 1 Annual Report Forms/Expanded Action Plans
- 0 Four Month Final Initial Accreditation Reviews
- 1 Twelve Month Initial Accreditation Review
- 2 Personnel Changes/Miscellaneous Issues

July 2023 Meeting—Two-Day Meeting in Chicago, IL

- 1 Initial Accreditation Survey
- 21 Continuing Accreditation Survey
- 6 Progress Reports
- 1 Requests for Reconsideration: Site Visit/Progress Report/Personnel Issues
- 0 Requests for Reconsideration: Annual Report Form
- 10 Annual Report Forms/Expanded Action Plan
- 1 Four Month Final Initial Accreditation Reviews
- 3 Twelve Month Initial Accreditation Review
- 0 Personnel Changes/Miscellaneous Issues

2022–2023 MAERB meetings were held:

- Nov. 11, 2022, Webinar
- Jan. 27–28, 2023, Tampa, FL
- April 28, 2023, Webinar
- July 28–29, 2023, Chicago, IL

MAERB representatives attended the following CAAHEP meetings:

- Chair Karon Walton and Executive Director Sarah Marino attended the CAAHEP
Symposium, Jan. 20–21, 2023, in Tampa, FL.

- Chair Walton and Executive Director Marino attended the Committee on Accreditation (CoA) Summer Workshop and CAAHEP’s Accreditation Workshop July 19–22, Minneapolis, MN.

Accreditation Workshops

- Self-Study Workshop, Oct. 21, 2022, AAMA Conference, Myrtle Beach, SC
- Virtual Program Director Boot Camp, Sept. 23, 2022
- Webinar: Self-Study Template, Jan. 18, 2023
- Virtual Program Director Boot Camp, April 14, 2023
- Virtual Self-Study Workshop, April 20–21, 2023, (connected ½ day sessions)

Surveyor Workshops and Training Webinars

- Surveyor Training, Oct. 24, 2022, AAMA Conference, Myrtle Beach, SC
- Virtual Surveyor Debrief, Nov. 15, 2022
- Virtual Surveyor Debrief, Dec. 1, 2022
- Virtual Surveyor Site Visit Training, Dec. 7, 2022 (two webinars)
- Virtual Surveyor Training: 4 asynchronous sessions, February–June 2023
- Virtual Surveyor Training: MAERB Core Curriculum, February/March 2023 (four webinars)
- Virtual Surveyor Training: Writing Rationales, April/May 2023 (three webinars)

Program Director Information and Training Webinars

- ARF Tracking tool, Sept. 15, 2022
- MAERB Forum, Oct. 23, 2022
- Virtual MAERB Forum, Oct. 27, 2022
- Webinar: Curriculum Map, Dec. 8, 2022
- Webinar: Affective Competencies, March 9, 2023
- Site Visit Training, December 2022 and January 2023 (2 webinars)
- ARF Tracking Tool, April 27, 2023
Respectfully Submitted,

Karon G. Walton, MEd, CMA (AAMA), Chair
Rebecca Dail, AAS, CMA (AAMA), Co Vice Chair
Nancy Szywydek, MPH, RN, RHIA, RMA(AMT), CRAT, CMAC, Co Vice Chair
Linette Birky, RN
Jill Ferrari, MA, MT, RMA(AMT), MLT(ASCP)
Connie M. Morgan, MEd, RN, CMA (AAMA)
Jo Penning, BS, CMA (AAMA)
Firdous Remita, MD, CPT, RMA(AMT)
Amber Schappaugh, DM-HCML, CMA (AAMA), AHI, MA, RMA(AMT)
Jennifer Stephenson, BSN, MPH, RMA(AMT)
Marianne Van Deursen, EdD, CMA (AAMA)
Sarah R. Marino, PhD, Executive Director
James Hardman, Program Manager and Assistant Director of MAERB
Bethany Hardman, Program Manager
The charge of the Maxine Williams Scholarship (MWS) Committee is to review applications and qualifications submitted to the AAMA. The following were the activities of this committee.

The application was reviewed for accuracy, updating, and enhancements. Any changes or suggestions made to the application were reviewed and agreed by Director of Certification Katie Gottwaldt and checked for legality by CEO and Legal Counsel Donald Balasa, JD, MBA.

The heading on the application “The American Association of Medical Assistants Endowment,” needed to be corrected since this is no longer part of the endowment. The language was updated and reads as follows:

The American Association of Medical Assistants®

Maxine Williams Scholarship Application

The application area “send the following documents” was updated as a check-off list. The committee wanted more recognition for the Maxine Williams Scholarship fund and advertising of the winners. Also included were two new added areas which were a color headshot to be used for publicity and applicant information (type or print clearly). A disclaimer was added: Submitted materials are subject to future use as marketing materials and the like by the AAMA. Such materials may include photos and quotes. By submitting an application to the AAMA, you agree to permit the AAMA to use these materials at the AAMA’s discretion. This is the disclaimer used on all AAMA Excel Awards entry forms.

The new application was uploaded to the AAMA website and a copy of the application was sent to CAAHEP program directors. The deadline for submissions was April 15, 2023.

This Chair received a total of forty-three applications, and all were uploaded to the AAMA Board of Trustees Teams Maxine Williams Scholarship Committees Folder. Two applications were ineligible (due to an incomplete application, missing documentation, student status, etc.).

This Chair sent the committee members their assigned applications to review, a copy of the blank 2023 application for reference, and a copy of the scoring rubric form with instructions. Each committee member scored the applications and sent the scoring sheets to this Chair.

This Chair took the top scores from each committee member and the top eight applications were then reviewed again by each member. The committee members then picked their top five applicants. The committee met virtually, completed the final review, and selected the winning applicants. The following are the recipients and the amount awarded to each.

1. Darrylinn Tafoya from Santa Fe Community College in New Mexico—Scholarship

   Amount Awarded: $3,500.00
2. Michaela Reed from SUNY Erie Community College in New York—Scholarship
   Amount Awarded: $3,500.00
3. Terreva Zipp from Ivy Tech Community College in Indiana—Scholarship Amount
   Awarded: $2,500.00
4. Millaray Lopez Salazar from Bates Technical College in Washington—Scholarship
   Amount Awarded: $2,500.00

All names were submitted to Customer Services Manager Erika Mercado for processing.
Notification was sent to the scholarship recipients indicating they will be featured in a future
issue of the *CMA Today* magazine and future marketing materials. Along with the scholarship,
they will receive a free membership to the AAMA.

A memo was sent to the non-winners thanking them for their interest in the scholarship program
and encouraging them to continue to pursue a medical assisting career.

This Chair would like to thank the committee members for their collaboration and completion of
assignments. This Chair would also like to thank Director Gottwaldt and Manager Mercado,
MWS Committee staff liaisons, for their help and assistance through this process.

Monica Case, CMA (AAMA), *Chair*

**Members:**

Natasha Geno, CMA (AAMA)
Pam Neu, CMA (AAMA)

**Staff Liaisons:**

Katie Gottwaldt
Erika Mercado
AAMA
FINANCIAL
REPORTS
1. The American Association of Medical Assistants (AAMA) is a non-profit corporation exempt under Section 501(c)(6) of the Internal Revenue Code. It consists of the General Fund and the Certification Fund.

   General Fund revenues include:
   • Membership dues
   • Purchases of AAMA continuing education products
   • Independent provider fees
   • CMA Today subscriptions and advertising
   • Annual Conference
   • Interest

   Certification Fund revenues include:
   • Exam fees
   • Recertification by continuing education
   • Practice exam fees
   • Reactivation fees
   • Interest

2. The AAMA fiscal year begins July 1 and ends June 30.

3. At its July 2023 meeting, the AAMA Board of Trustees reviewed the audit report for the AAMA Corporation for the fiscal year ending June 30, 2022. Total revenue for this fiscal year was $7,361,786. Total expense was 6,391,365. Revenue exceeded expense by 970,421. The net assets at the end of this fiscal year were 10,415,025. The audited balance sheet/statement of financial position and income statement/statement of activities for FY 2022 are included in this Delegates Packet. The following is an explanation of these statements.

Financial Accounting Tutorial

The fundamental accounting identity is:

\[
\text{Assets} \equiv \text{Liabilities} + \text{Net assets/Net worth/Equity}
\]

Assets may be defined as the resources available to an association.

Liabilities may be defined as the claims on resources by third parties, such as vendors to
whom the association owes payment.

*Net assets/net worth/equity* may be defined as the claims on resources by the association itself.

**Therefore, net assets/net worth/equity reflects the financial position of an association.**

**Explanatory Narrative**

As indicated above, the net worth of the AAMA Corporation as of June 30, 2022, was $10,415,025. As indicated on the balance sheet, there are no donor restrictions on the net assets.

*Cash and cash equivalents* include highly liquid assets such as bank accounts, money market accounts, and certificates of deposits. These instruments are essentially free of risk.

On the income statement, “Exam Fees” as well as “Membership Dues” are included because this statement is for the entire AAMA Corporation, which includes the Certification Fund as well as the General Fund.

The revenue from the sale of tangible continuing education products is divided between “CE Revenue” and “Shipping Fees.” This is the preferred way of reflecting revenue from the sale of products that are shipped to the purchaser.

The “Conference” line-item captures revenue received at the 2021 AAMA Annual Conference in Houston, Texas. This was the first AAMA Annual Conference after the COVID-19 pandemic began. Attendance, consequently, was low compared to previous and subsequent AAMA Annual Conferences.

Expenses are assigned to three categories:

- Programs
- General and administrative
- Fundraising

The “Programs” category includes expenses for providing services to members and CMA (AAMA) Exam candidates. “General and administrative” encompasses infrastructure expenses, such as rent; utilities; and salaries, payroll taxes, and benefits for staff who provide services for the AAMA as a whole and not for a particular program or benefit. Examples would be the accounting staff, costs of the outsourced mailroom, and switchboard. “Fundraising” refers to expenses related to marketing, advertising, promotions, and the like.

As indicated above, for the fiscal year ending June 30, 2022, AAMA revenues exceeded expenses by $970,421.

4. The Board of Trustees reviewed the total revenue and expense for eleven of the twelve months of the fiscal year beginning July 1, 2022, and ending June 30, 2023. As of May 31, 2023, revenue exceeded expenses by 1,409,409. Revenue is expected to exceed expenses by this amount for the fiscal year ending June 30, 2023.
5. The Board of Trustees adopted a General Fund budget for fiscal year 2024 (July 1, 2023, through June 30, 2024). Projected revenue is 3,924,855. Projected expense is 2,981,460. Projected revenue over expense is 943,395.

6. Total member numbers decreased from calendar year 2022 to 2023 by approximately 12.5%. The membership revenue is projected to decrease from 1,823,852 in fiscal year 2023 to 1,500,000 in fiscal year 2024.

Membership is not decreasing in all states; however, there is a general membership decline throughout the United States. Although there are several reasons for this decrease, a primary cause is the decrease in the number of medical assisting programs accredited by CAAHEP and ABHES, and the decrease in the number of students graduating from these programs. Fewer graduates results in fewer candidates for the CMA (AAMA) Certification Exam. Fewer new CMAs (AAMA) results in fewer members of the AAMA.

7. The decrease in revenue from membership dues is being offset by the increase in revenue from updated and new continuing education offerings from the AAMA Continuing Education Board (CEB). The CEB has an obligation to keep its offerings current and accurate. Therefore, some of its products must be withdrawn and updated when necessary. New products developed by the CEB provide additional revenue for the AAMA General Fund when products must be withdrawn from sale for updating.

8. Similarly, because of the decrease in the number of graduates from CAAHEP- or ABHES-accredited medical assisting programs, there are fewer candidates for the CMA (AAMA) Certification Exam. There has been a small increase in the number of candidates who have graduated from medical assisting programs equivalent to CAAHEP- or ABHES-accredited medical assisting programs. This increase is less than the decrease in the number of candidates from CAAHEP- or ABHES-accredited medical assisting programs.

9. As indicated above, the Board of Trustees adopted a General Fund budget for Fiscal Year 2024 with projected revenue exceeding expense by 943,395. The Certifying Board adopted a Certification Fund budget for Fiscal Year 2024 with projected revenue exceeding projected expense by 29,446. The projected surplus for the AAMA Corporation for FY 2024 is therefore **$972,841**.
American Association of Medical Assistants®
Audit Report

Costabile & Steffens P.C.
Certified Public Accountants

American Association of Medical Assistants, Inc.
STATEMENT OF FINANCIAL POSITION
June 30, 2022

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<td>CURRENT LIABILITIES</td>
<td></td>
</tr>
<tr>
<td>Accounts Payable and Accrued Expenses</td>
<td>1,404,467</td>
</tr>
<tr>
<td>Deferred Revenue</td>
<td>952,341</td>
</tr>
<tr>
<td>Due to Other Organizations</td>
<td>19,220</td>
</tr>
<tr>
<td>Total Current Liabilities</td>
<td>2,376,028</td>
</tr>
<tr>
<td>NET ASSETS</td>
<td></td>
</tr>
<tr>
<td>Without Donor Restrictions</td>
<td>10,415,025</td>
</tr>
<tr>
<td>Total Liabilities and Net Assets</td>
<td>$12,791,053</td>
</tr>
</tbody>
</table>

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, 2022*

<table>
<thead>
<tr>
<th>Without Donor Restrictions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REVENUE AND OTHER SUPPORT</strong></td>
</tr>
<tr>
<td>Membership Dues</td>
</tr>
<tr>
<td>Exam Fees</td>
</tr>
<tr>
<td>ABR - OE Courses</td>
</tr>
<tr>
<td>ABC - G Revenue</td>
</tr>
<tr>
<td>Other CE Revenue</td>
</tr>
<tr>
<td>CMA Today</td>
</tr>
<tr>
<td>Shipping Fees</td>
</tr>
<tr>
<td>Conferences</td>
</tr>
<tr>
<td>Miscellaneous Income</td>
</tr>
<tr>
<td>Interest Income</td>
</tr>
<tr>
<td><strong>Total Revenue and Other Support</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>EXPENSES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Programs</td>
</tr>
<tr>
<td>General and administrative</td>
</tr>
<tr>
<td>Fundraising</td>
</tr>
<tr>
<td><strong>Total Functional Expenses</strong></td>
</tr>
</tbody>
</table>

Increase in Net Assets 970,421

Net Assets - Beginning of the Year 9,444,604

Net Assets - End of Year $10,415,025

The accompanying notes are an integral part of this statement.
ADDITIONAL INFORMATION
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-Treasurer
- 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.
### Initialisms and Acronyms

<table>
<thead>
<tr>
<th>Initialisms and Acronyms</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Initials</strong></td>
</tr>
<tr>
<td>AAFP</td>
</tr>
<tr>
<td>AAMA</td>
</tr>
<tr>
<td>AAMAE</td>
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<tr>
<td>AAPC</td>
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<td>ABHES</td>
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<td>ACS</td>
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<td>ACCSC</td>
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<td>ACICS</td>
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<tr>
<td>ADAA</td>
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<tr>
<td>AFC</td>
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<td>AHDI</td>
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<td>AHIMA</td>
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<tr>
<td>AMT</td>
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<tr>
<td>ASAE</td>
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<tr>
<td>ASMT</td>
</tr>
<tr>
<td>BOT</td>
</tr>
<tr>
<td>CAAHEP</td>
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<td>CCETF</td>
</tr>
<tr>
<td>CEB</td>
</tr>
<tr>
<td>CEU</td>
</tr>
<tr>
<td>CMA (AAMA)</td>
</tr>
<tr>
<td>CMA-A (AAMA)</td>
</tr>
<tr>
<td>CMA-C (AAMA)</td>
</tr>
<tr>
<td>CMA-P (AAMA)</td>
</tr>
<tr>
<td>CPC</td>
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<tr>
<td>DOE</td>
</tr>
<tr>
<td>FSMB</td>
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<tr>
<td>HOSA</td>
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<tr>
<td>HPN</td>
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<tr>
<td>I.C.E.</td>
</tr>
<tr>
<td>LEAP</td>
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<tr>
<td>MAERB</td>
</tr>
<tr>
<td>MARWeek</td>
</tr>
<tr>
<td>MSC</td>
</tr>
<tr>
<td>MWSC</td>
</tr>
<tr>
<td>NACCLS</td>
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<td>NCSBN</td>
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<td>5088</td>
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<tr>
<td>5089</td>
</tr>
<tr>
<td>5090</td>
</tr>
</tbody>
</table>
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.
RESOURCES FROM KEYNOTE ADDRESS
Pricing of AAMA CEUs by Independent Sponsors—Limitations on AAMA Actions Because of Accreditation of the CMA (AAMA) Certification Program

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

2021 NCCA Standards

Standard 3: Education, Training, and Certification

Appropriate separation must exist between certification and any education [including continuing education] or training functions to avoid conflicts of interest and to protect the integrity of the certification program.

Commentary 2—Appropriate firewalls [between certification and education] should be in place to avoid an appearance of conflict of interest.

Standard 7: Program Policies

Commentary

4. Policies and procedures restricting access to certification, which may include requiring membership in an association, excluding nonmembers, requiring purchases of other products or services, offering differential pricing for members [unofficial guideline—non-members may be charged no more than twice the price for members], and engaging in other potentially anticompetitive conduct, should be carefully reviewed for justification and reasonableness.

To avoid violating the NCCA Standards, the Certifying Board cannot establish recertification-by-continuing-education requirements for the purpose of increasing General Fund revenue from AAMA continuing education products or events.

ISO 17024

5.2 Structure of the certification body in relation to training

5.2.1 Completion of training may be a specified requirement of a certification scheme. The
recognition/approval of training [initial or continuing] by the certification body shall not compromise impartiality or reduce the assessment and certification requirements.

5.2.3 Offering training and certification for persons within the same legal entity constitutes a threat to impartiality. A certification body that is part of a legal entity offering training shall:

d) not require the candidates to complete the certification body's own education or training as an exclusive prerequisite when alternative education or training with an equivalent outcome exists;

Dual roles of CEB—The Continuing Education Board is both a provider of, and an approver of, continuing education. In its role as a provider, it offers continuing education sessions at the AAMA Annual Conference and self-study courses. In its role as an approver of continuing education activities for CEUs, the CEB (through the Continuing Education Department) evaluates and determines which continuing education events offered by AAMA state societies and local chapters, and independent sponsors, meet the standards of quality and relevance established by the CEB (using the International Accreditors of Continuing Education and Training (IACET) Standards as guidelines).

The CEB must not limit the number of AAMA CEUs offered by independent sponsors, and state societies and local chapters, so more purchases will be made of CEU products sold by the AAMA. Doing so could violate the NCCA prohibition of “requiring purchases of other products or services” and could be considered “anticompetitive conduct” and jeopardize the accreditation of the CMA (AAMA) program.

Relevant lawsuit

On September 13, 2022, the (1) Association of Surgical Assistants (ASA), a national provider of continuing education for surgical assistants, sued the (2) National Board of Surgical Technology and Surgical Assisting (NBSTSA), a national board that certifies surgical technologists and surgical assistants, in federal district court alleging that the NBSTSA violated the federal and Colorado antitrust laws that prohibit unreasonable restraint of trade and monopolizing.

The NBSTSA awards its Certified Surgical First Assistant (CSFA) credential to surgical assistants who meet its eligibility requirements and pass its CSFA examination. Certified Surgical First Assistants must recertify periodically by either retesting or continuing education. The (3) Association of Surgical Technologists (AST) is an approver and provider of continuing education for surgical assistants. NBSTSA policy states that all continuing education for recertifying the CSFA certification “must be earned through AST-approved sources.”

The ASA petitioned the NBSTSA to recognize its continuing education courses as usable by
CSFAs for recertification by continuing education. NBSTSA essentially told the ASA that it had to have its continuing education approved by AST to have it count toward recertification by CSFAs. ASA contended that AST’s requirements for continuing education approval were unduly burdensome and unnecessary.

ASA alleges that “NBSTSA’s actions have caused an unreasonable restraint on trade in the market space for continuing education credits for…surgical assistants by ensuring AST is the sole provider and processor of these credits in the nation...By refusing to allow ASA to apply for accreditation [of its surgical assisting continuing education], [NBSTSA leaders] and NBSTSA have created a monopoly in favor of AST by ensuring AST retains one hundred percent of the market share for providing and processing continuing education credits for…surgical assistants nationwide.”
Why the Certifying Board of the AAMA and the Medical Assisting Education Review Board Are Accountable to Third Parties

By Donald A. Balasa, JD, MBA

I often receive questions about why the American Association of Medical Assistants® (AAMA) Board of Trustees (BOT) does not have the authority to override decisions of the Certifying Board (CB) of the AAMA and the Medical Assisting Education Review Board (MAERB). The short answer is that the CB and MAERB must have autonomy in policy decision-making to remain accredited and recognized by third parties.

CMA (AAMA) Certification Program

NCCA Accreditation

The CMA (AAMA) Certification Program is accredited by the National Commission for Certifying Agencies (NCCA) under the NCCA 2021 Standards for the Accreditation of Certification Programs (Standards).¹ To become and remain accredited by the NCCA, a certification program must demonstrate compliance with the following provisions of the Standards:

Standard 2: Governance and Autonomy

The certification program must be structured and governed in ways … that ensure autonomy in decision-making over all essential certification activities.

…

A. … The process for selection and removal of certification board members [protects] against any undue influence that could compromise the integrity of the certification process.

…

2: Essential certification decisions refer to the core aspects of a certification program, such as eligibility standards; standards for initial certification and maintaining certification [i.e., recertification]; disciplinary determinations; the development, administration, and scoring of examinations; and the selection of subject-matter experts.

…

5: … Examples of undue influence can include … pressure from a parent organization or outside entity to adjust certification standards. [Emphases added.]¹

As the parent organization of the CMA (AAMA) Certification Program, the AAMA—through its BOT—is forbidden by the NCCA Standards from (for example) creating the Content Outline for the CMA (AAMA) Exam², determining the eligibility pathways, or establishing the minimum passing score for the CMA (AAMA) Certification Exam. These are considered essential certification activities and core aspects of a certification program and must be determined by the
CB of the AAMA without undue influence by the AAMA BOT (or any other body). If the BOT were to veto or override decisions by the CB on these core aspects of the CMA (AAMA) Certification Program, the result would be a loss of NCCA accreditation.

The Importance of NCCA Accreditation

Some state laws only recognize medical assisting certifications accredited by the NCCA. One example is present in Washington law:

WAC 46-827-0200 Medical assistant-certified—Training and examination. An applicant for a medical assistant-certified credential must meet the following requirements:

(2) Pass a medical assistant certification examination, approved by the secretary, within five years of submitting an initial application. A medical assistant certification examination approved by the secretary means an examination that:

(a) Is offered by a medical assistant program that is accredited by the National Commission for Certifying Agencies (NCCA); and

(b) Covers the clinical and administrative duties under RCW 18.360.050 (1).³

Another example can be found in California law:


(a) An organization that certifies medical assistants may apply to the Board for approval. This application shall include the following information:

(1) Name and address of the applicant;

(2) Applicant’s federal employee identification number (FEIN);

(3) Name, address, and telephone number of a contact person for the applicant;

(4) Documentation establishing that the applicant is accredited by the National Commission for Certifying Agencies (NCCA);⁴

Accreditation Under ISO 17024

The CB of the AAMA is also accredited by the International Accreditation Service (IAS) under International Standard ISO/IEC 17024:2012(E), “Conformity assessment—General requirements for bodies operating certification of persons” (also known as ISO 17024). The requirements of ISO 17024 are similar to those of the NCCA Standards. The CMA (AAMA) Certification Program and the CB of the AAMA are the only medical assisting certification program and certifying body accredited under both the NCCA Standards and ISO 17024.

Medical Assisting Education Review Board (MAERB)
Programmatic Accreditation of Medical Assisting Programs

The Commission on Accreditation of Allied Health Education Programs (CAAHEP) and the Accrediting Bureau of Health Education Schools (ABHES) are the only bodies authorized to programmatically accredit medical assisting programs. CAAHEP is recognized by the Council for Higher Education Accreditation (CHEA); ABHES is recognized by the United States Department of Education. A programmatic accrediting body accredits academic programs in a particular discipline. An institutional accrediting body accredits academic institutions as a whole.

MAERB’s Relationship to CAAHEP

MAERB is a committee on accreditation (CoA) of CAAHEP. A CoA is a board or committee that—in conjunction with CAAHEP—establishes accreditation Standards for academic programs for an allied health profession; conducts site visits of programs seeking initial or continuing accreditation; determines compliance of programs with the Standards; and makes accreditation recommendations to the CAAHEP Board of Directors. CAAHEP is the legal entity that accredits allied health education programs.

CAAHEP has policies that CoAs, such as MAERB, must abide by to remain CoAs of CAAHEP.

CAAHEP’s Accountability to CHEA

Because CAAHEP is recognized by CHEA, it must comply with the CHEA Standards and Procedures for Recognition. The following requirements apply to CAAHEP and other accrediting bodies seeking recognition by CHEA:

STANDARD 3. ACCREDITATION STRUCTURE AND ORGANIZATION

A recognized accrediting organization demonstrates that it:

... 3.H. maintains independence from any sponsoring and/or parent organization with respect to all accreditation activities, reviews, actions, and decisions;

... 3.H. EXAMPLES OF SUGGESTED EVIDENCE:

• Description of how the accrediting organization’s accreditation activities are separate and independent from those of its parent.

• Memorandum of Understanding that confirms the separation.

• Formal (legal) documents ascertaining independence from sponsoring and/or parenting organization.

• Documents demonstrating legal authorization to operate as an accrediting organization.5

CAAHEP would lose its recognition by CHEA if it and its committees on accreditation did not
abide by the CHEA Standards, including maintaining “independence from any sponsoring and/or parent organization with respect to all accreditation activities, reviews, actions, and decisions.”

Sponsoring Organizations

The AAMA is a sponsoring organization of MAERB. A sponsoring organization is defined by the CAAHEP Policies & Procedures as follows:

502 Sponsoring Organizations. Sponsoring organization members are organizations or agencies that establish or support one or more Committees on Accreditation and support the CAAHEP accreditation system.

Summary

The AAMA CB is accredited by the NCCA and IAS. These accrediting bodies require that the CB be autonomous in decision-making over core aspects of a certification program. The AAMA BOT is not permitted to exercise undue influence over policy decisions that the CB must make.

MAERB is a CoA of the CAAHEP. MAERB must abide by the policies of CAAHEP. CAAHEP is recognized by CHEA. CHEA requires CAAHEP and its CoAs to be separate and independent from parent organizations in formulating and executing accreditation policies and procedures.

References


