

**AMERICAN ASSOCIATION OF MEDICAL ASSISTANTS
MEDICAL ASSISTANT CODE OF ETHICS**

The Code of Ethics of AAMA shall set forth principles of ethical and moral conduct as they relate to the medical profession and the particular practice of medical assisting.

Members of AAMA dedicated to the conscientious pursuit of their profession, and thus desiring to merit the high regard of the entire medical profession and the respect of the general public which they serve, do pledge themselves to strive always to:

- A. Render service with full respect for the dignity of humanity;
- B. Respect confidential information obtained through employment unless legally authorized or required by responsible performance of duty to divulge such information;
- C. Uphold the honor and high principles of the profession and accept its disciplines;
- D. Seek to continually improve the knowledge and skills of medical assistants for the benefit of patients and professional colleagues;
- E. Participate in additional service activities aimed toward improving the health and wellbeing of the community.

**AMERICAN ASSOCIATION OF MEDICAL ASSISTANTS
MEDICAL ASSISTANT CREED**

I believe in the principles and purpose 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.

NSMA General Assembly Reference Guide

You, as a current member of the Nebraska Society of Medical Assistants (NSMA), are now a part of the voting body of the General Assembly. This is a serious responsibility which requires preparation and commitment. Important functions of the voting body are issues brought before the General Assembly, including elections of Officers, Election of Delegates and Alternate Delegates to the AAMA Annual Conference and Bylaws changes.

Attendees should send in their completed registration form for the NSMA Annual Conference as soon as possible. Be sure to print the General Assembly packet from the NSMA Website and bring it with you to the Conference or have it downloaded on an electronic device.

Attendees will need to present their AAMA membership card to the Credentials Committee to be allowed into the General Assembly and be wearing their Conference name tag.

Attendees are expected to be thoroughly familiar with the material in this packet prior to their arrival at the Conference. This packet includes a preliminary agenda for the General Assembly, Officer and Standing Committee year end reports, proposed bylaws changes and financial reports. Items in the packet should be discussed with other members. Be prepared to offer input and express your views but remember that parliamentary authority dictates the majority will rule.

It is the duty of every member to listen, think objectively, and consider all issues for the good of the entire membership. Your position requires that you base your decisions on the deliberations of the General Assembly, not on personal opinion or the interest of a special group. When voting use your knowledge to lead you. Your vote should support what is considered to be in the best interest of the entire NSMA membership. The voting power of the General Assembly is placed in the hands of all the members who are empowered with one vote each.

You should be familiar with the NSMA Bylaws and the information in this reference guide. Direct all questions to the Speaker or any NSMA Board member.

The General Assembly is the business meeting held during the Annual NSMA Conference. Here we have the Power to:

1. Amend Bylaws
2. Determine administrative policies and act upon such business that may be presented.
3. Conduct the election of NSMA Officers and Delegates to the AAMA House of Delegates.

All members must check in with the Credentials Committee fifteen(15) minutes before the General Assembly convenes and be seated five (5) minutes prior to opening. The credentials table will be located inside, near the entrance. If a member is not properly checked in on time by the Credentials Committee, the member will not be allowed to be seated without special permission of the General Assembly. Present your current AAMA membership card for admission and proceed to be seated. None will be admitted to the General Assembly without a current conference name tag. A head table will be provided for the NSMA Officers and the AAMA Representative (if present).

The Credentials Chair will tally the voting body and be asked to announce a quorum (one-third of the voting members registered in the General Assembly) and what number constitutes a majority (one over one half of the voting members) and a two-thirds vote to the General Assembly.

A member may not leave and re-enter the General Assembly once it is in session, but may exit if the General Assembly is adjourned, in recess or with special permission from the Speaker. If at any time you leave, you must check out with the credentials table and pick up your membership card. You will then recheck in at the credentials table when returning to the General Assembly.

When addressing the General Assembly, the individual speaking should first be recognized by the Speaker. Stand and properly identify yourself by stating your name and credentials. The Speaker will acknowledge the request to address the General Assembly. It is out of order to stand when another member has the floor.

Deliberations of the General Assembly are governed by the **Robert's Rules of Order Newly Revised** (current edition). However, the NSMA Bylaws may modify these rules. This blend of authority is established by tradition and interpreted for the General Assembly by the Speaker and the acting parliamentary advisor (NSMA Bylaws Chair). In determining what it wants to do, the majority opinion of the General Assembly remains the goal.

Members need to have basic knowledge of parliamentary procedure and know how to present a motion properly. When offering a motion, stand, address the Chair with proper identification (name and credential) and present the motion by clearly stating. " I move that ___". The Chair will call for the second, repeat the motion exactly as stated and debate or voting will follow. The Chair or Secretary will request that you submit a written copy of the motion for accurate documentation and this form is in the back of the General Assembly Packet.

Every member is limited to two (2) minutes of debate on each question brought up at the General Assembly. Additional time may be obtained at the discretion of the Speaker. A member has the right to speak twice on the same question.

The NSMA BOD annual reports are included in the General Assembly packet. These reports provide a year end synopsis of what the NSMA BOD have accomplished during their term. These are important and informative documents that should be part of the overall review during the General Assembly. Any questions, suggestions, or debate should be brought up at the General Assembly. The Speaker will conduct an open hearing to encourage participation by all members so the opinions of the members are made known. After discussion, reports may be accepted, amended, or rejected.

A member may vote in favor, against, or abstain from voting if so moved. Voting may be conducted by ballot, show of hands or a standing vote. A member is not required to vote simply because there is only one candidate. A member may request a caucus with other members if the need arises.

The Vice Speaker solicits, screens, and presents a slate of nominees for Officers and Delegates and Alternate Delegates to AAMA HOD in accordance with the NSMA Bylaws. Candidates nominated from the floor during the General Assembly must meet all of the same qualifications and eligibility requirements. Verification of these credentials must be obtained prior to the vote. Eligibility requirements for candidates can be found in the NSMA Bylaws.

Ballots are distributed one by one via Tellers. Ballots will include the names of all candidates with blank lines to enter those nominated from the floor. Do not mark on the ballot except as instructed. After marking the ballot, fold it in half and hold it up in the air so a Teller may pick it up. When all voting is completed, the Tellers will retire to count the votes. The business of the General Assembly will continue until the Chair of the Tellers indicates the report of the Tellers is ready for announcement.

Upon recognition of the Speaker, the Chair of the Tellers will read the Tellers report without declaring the results. The report will include: number of eligible votes cast, number of rejected votes, number required for election and the number received by each candidate.

The Speaker will declare the final election results for each position. A majority of votes cast is necessary for elections of Officers. The Delegates and Alternate Delegates to AAMA HOD are elected by plurality in descending order.

Proposed ByLaw Amendments are typically voted on by a show of hands and require a two-thirds (2/3) vote of the voting members present, for adoption.

If the Speaker calls for a standing vote, stand and remain standing until the Tellers have counted, or count off as directed. If the Speaker calls for a show of hands, keep

Special meetings of the General Assembly may be taken by email, verbally, or in writing. All actions taken will be officially recorded in the minutes of the next scheduled BOD meeting.

2025 NSMA GENERAL ASSEMBLY AGENDA

Call to Order

Recite the Medical Assistant's Creed

Pledge of Allegiance

Introductions of Officers and General Assembly Assistants

Introduce the AAMA Representative

Report from Conference Chair on Registration for Conference

Adoption of the General Assembly Reference Guide

Approval of 2024 General Assembly Minutes

Officer Reports

Treasurer Report

Standing Committee Reports

Vote on NSMA Operating Budget and the 2025 Conference Budget

NSMA Proposed Bylaws

Nominations and Elections

Unfinished Business

New Business

Discussion of Yearly Dues

Announcements

2025 Post Conference Meeting Board Meeting

2026 NSMA Conference in Council Bluffs, Iowa

AAMA 70th Annual Conference, September 19-22, 2025 in Arlington, Va

Adjournment

NSMA General Assembly Minutes 2024

CALL TO ORDER: The 58th annual meeting and 4th annual General Assembly of the Nebraska Society of Medical Assistants was called to order at 1:18 p.m. by Speaker Angie Eytcheson, CMA (AAMA), CPC. The purpose of the meeting was to determine the policies of the Society, review year-end committee reports, and conduct the annual election of officers and NSMA Delegates and Alternates to the AAMA Conference.

INTRODUCTION OF OFFICERS AND GUESTS:

President: Angy McCarter, CMA (AMA), LRT
Vice President: Barb Carter, CMA (AAMA)
Speaker: Angie Eytcheson, CMA (AAMA), CPC
Vice Speaker: Terrie King, CMA (AAMA)
Treasurer: Jen Kocian, CMA (AAMA), CPC
Secretary: Tracy Bednar, CMA (AAMA)
Immediate Past President: Terrie King, CMA (AAMA)
AAMA Representative: Candy Miller, CMA (AAMA)

Andy Stewart, CMA(AAMA) [Lisa Hoffman, CMA(AAMA)] moved to adopt the agenda as printed. All Ayes. Motion carried.

OPENING REFLECTIONS: Speaker Angie Eytcheson, CMA (AAMA) led those present in reciting the Medical Assistant Creed.

PLEDGE OF ALLEGIANCE: The Pledge of Allegiance was recited by those present.

PRESENTATION OF HELPERS:

Credentials Committee: Shannon Kibbee, CMA (AAMA) and Guadalupe Cisneros, CMA (AAMA)
Tellers: Andy Stewart, CMA (AAMA) and Lisa Hoffman, CMA (AAMA)
Timekeeper: Pam Ondracek, CMA (AAMA)
Page: Jennifer Limp, CMA (AAMA) and Megan Luna, CMA (AAMA)
Minute Takers: Allison Stengle, CMA (AAMA) and Steph Richards, CMA (AAMA)

INTRODUCTION OF THE AAMA REPRESENTATIVE: Candy Miller, CMA (AAMA)

REPORT OF CREDENTIALS: Shannon Kibbee, CMA (AAMA) reported that 25 Active Members of the AAMA paid their dues before December 31, 2023, 3 paid after December 31, 2023, 2 are Iowa Members and 3 are Non-members. There were 25 eligible votes, of which 13 were the Majority Vote and 17 were the 2/3rds Vote. Those who cannot vote have their name tags marked with orange.

REPORT OF CONFERENCE REGISTRATION: Angy McCarter, CMA (AAMA), Conference Chair, reported that there were 86 total registrants.

7 Non-Members
1 Student
6 Friday Only
2 Saturday Only
14 First Timers
9 Past Presidents
1 New CMA
16 Recertifying CMAs

NSMA General Assembly Reference Guidelines: Reviewed by those in attendance on pages 2-4 of the General Assembly Packet.

APPROVAL OF THE MINUTES: Per Carol Hipke-Muske, CMA (AAMA) page 2, line 58 says "(AA,MA)" and should not have the comma in AAMA and line 77 is missing the period, which was dropped onto line 78. No other corrections noted by attendees.

Terrie King, CMA(AAMA) [Pam Ondracek, CMA(AAMA)] moved to approve the minutes of the 3rd General Assembly as corrected. All Ayes. Motion carried.

OFFICER AND COMMITTEE REPORTS: President Angy McCarter, CMA (AAMA) stated there are multiple corrections, due to the printer, with missing type at the end of most lines: Page 11, Line 13 add "e", Line 24 add "he", Line 25 add "ht", Line 35 add "r", Line 39 add "n". There were no other corrections given.

TREASURER'S REPORT: Treasurer Jen Kocian, CMA (AAMA) stated she did not print the Year End Income & Expenditures spreadsheet to be handed out at the General Assembly and it is not in the General Assembly Packet, but she did display it on the big screen for attendees and sent it out to the NSMA Board of Directors via Gmail Drive. She also offered to email it to anyone in attendance if they requested it. The report will be placed on file for audit. The year end report was handed out to attendees.

BUDGET AND FINANCE: Chair Andy Stewart, CMA (AAMA) presented both the Proposed Operating Budget for 2024-2025 and the Proposed 2025 NSMA Conference Budget-Kearney Area, of which printed copies were distributed to attendees. She stated that a motion to adopt is required.

Questions from the gallery regarding the Proposed Operating Budget -

Carol Hipke Muske, CMA (AAMA) asked why the amount for Awards was changed from \$500 to \$1000. Answer - Because \$500 is only enough to cover the Student Scholarship, and additional funds are needed for supplies and operation of the chair. Chair Stewart explained the Website amount was increased to \$10,000 to cover the expense to update the website. Carol Hipke Muske, CMA (AAMA) asked if there will be secure {TORNADO WARNING AT 1:47 P.M.} access for members only, so not just anyone can see the business information. Answer - No, per Website Chair Jen Kocian, CMA (AAMA). Carol Hipke Muske, CMA (AAMA) asked if the NSMA Board of Directors had shopped around for website bids, because the current web designer was less costly than other companies 11 years ago. Answer - No, because this quote is from the same web designer as 11 years ago and is still the current provider, per Website Chair Jen Kocian, CMA (AAMA).

Chair Andy Stewart, CMA (AAMA) asked for a motion to approve the Proposed Operating Budget.

Lisa Hoffman, CMA(AAMA) [Carol Hipke Muske, CMA(AAMA)] moved to approve the Proposed Operating Budget 2024-2025. All Ayes. Motion carried.

Questions from the gallery regarding the Proposed Budget for Conference 2025 -

Lisa Hoffman, CMA (AAMA) asked if the \$500 beginning balance will ever be increased due to rising costs. Answer - So far, no, as up-front money hasn't been needed in the past, per Budget & Finance Chair, Andy Stewart, CMA (AAMA).

Speaker Angie Eytcheson, CMA (AAMA), CPC asked for a motion to accept the Proposed Budget for Conference 2025.

Terrie King, CMA(AAMA) [April Morris, CMA(AAMA)] moved to approve the proposed 2025 NSMA Conference Budget in the Kearney Area. All Ayes. Motion carried.

BYLAWS: Chair Terrie King, CMA (AAMA) read the proposed changes that were printed in the General Assembly Packet on pages 92 and 93.

Regarding page 92, Proposed Wording, APPENDIX B, DUTIES OF COMMITTEES, D. BUDGET & FINANCE, 3. ***Shall prepare an Annual Operating Budget and Annual Conference Budget to be proposed at the Fall BOD meeting with final approval by the BOD at the NSMA Pre-Conference Board meeting. The budget, as approved by the BOD, shall be provided to the General Assembly for its information*** Carol Hipke Muske, CMA (AAMA), from the gallery, asked why the schedule is to present the Annual Operating Budget changes at the Fall Board of Directors meeting, approve them at

the Pre-Conference Board of Directors meeting and only be presented, not voted on, at the General Assembly, but yet it's not in the General Assembly Packet. Answer - per Chair Terrie King, CMA (AAMA) the AAMA doesn't have their House of Delegates vote on any finances because the members who don't attend Board of Directors meetings do not know what is going on with funds. The NSMA is trying to align with the AAMA Bylaws so that our General Assembly will not be voting on funds either.

Andy Stewart, CMA (AAMA) [Steph Richards, CMA (AAMA)] moved to approve the Bylaws change as written. All ayes. Motion carried.

Regarding page 93, Proposed wording, APPENDIX A, DUTIES OF OFFICERS, Section 1 - Duties, C. IMMEDIATE PAST PRESIDENT, **add #4. Automatically serve on the Bylaws Committee and in case of a vacancy will assume the duties of the Bylaws Chair** Carol Hipke Muske, CMA (AAMA), from the gallery, asked if the Vice President will still be on this committee. Answer - yes, it's written under the Vice President's section in the Bylaws, but it's not shown here on this proposed change because of the section it's taken from.

Carol Hipke Muske, CMA (AAMA) [Christine Ehmke, CMA (AAMA)] moved to approve the Bylaws change as written. All ayes. Motion carried.
{TORNADO WARNING AT 2:09 P.M.}

NOMINATIONS/ELECTIONS: Vice Speaker Terrie King, CMA (AAMA), read the nominations from the preliminary ballot printed in the General Assembly Packet on page 17 and stated the Curriculum Vitae of nominees were printed on pages 98 to 103.

Vice President: Angela Eytcheson, CMA (AAMA), CPC

Treasurer: None because Jen Kocian, CMA (AAMA), CPC is in the second year of her term

Secretary: Steph Richards, CMA (AAMA)

Vice Speaker: None

Delegates - Jen Kocian, CMA (AAMA), CPC

Terrie King, CMA (AAMA)

Angy McCarter, CMA (AAMA), LRT

Steph Richards, CMA (AAMA)

Melanie Shaw, CMA (AAMA)

Nominations for Secretary were open to the floor: None

Nominations for Vice Speaker were open to the floor: None

Steph Richards, CMA (AAMA) asked from the gallery if a person must have been on a committee for two years to qualify to be nominated. Answer - per Terrie King, CMA (AAMA), a nominee must have served on the Board of Directors for two of the last three years.

Speaker Angie Eytcheson, CMA (AAMA) announced that there must be a nomination for Vice Speaker before the General Assembly closes.

Terrie King opened the floor again for nominations for Vice Speaker. Steph Richards, CMA (AAMA) nominated Tracy Bednar, CMA (AAMA), who declined the nomination.

Nominations for Vice President were open to the floor: None.

Lisa Hoffman, CMA (AAMA) asked from the gallery if a nominee for all officer positions must have served on the Board of Directors for two of the last three years, because if so, it disqualifies a lot of possible nominees from the gallery. Answer - per Terrie King, CMA (AAMA) yes, however a five minute caucus was taken to check the Bylaws.

Five minute caucus from 2:19 to 2:24 P.M., which determined a nominee must be an active member,

and must have served on the Board of Directors for two of the last three years. Also, the President may appoint a Vice Speaker if no one is nominated.

Nominations for Delegates to the AAMA Conference in Grand Rapids, MI on September 20-23, 2024 were open to the floor: None. Melanie Shaw, CMA (AAMA) removed herself from the ballot due to her need to attend as a representative of her employer, which would not allow her to fulfill the duties of a delegate.

FINAL BALLOT:

Vice President - Angela Eytcheson, CMA (AAMA), CPC

Secretary - Steph Richards, CMA (AAMA)

Vice Speaker - No One

Delegates: Terrie King, CMA (AAMA)

Jen Kocian, CMA (AAMA)

Angy McCarter, CMA (AAMA)

Steph Richards, CMA (AAMA)

Ballots were collected by tellers Lisa Hoffman, CMA (AAMA) and Andy Stewart, CMA (AAMA) and tabulated.

{TORNADO WARNING AT 2:15 P.M..}

While the ballots were being counted, Speaker Angie Eytcheson, CMA (AAMA), CPC asked the gallery if there were any questions regarding the Delegate Reports for the 2023 Annual AAMA Conference. Carol Hipke Muske, CMA (AAMA) asked from the gallery why page 83 of the General Assembly Packet is blank--is it a missed report or information. Answer - per Speaker Angie Eytcheson, CMA (AAMA) was no, it was just blank.

A ten minute break was taken from 2:36 to 2:46 P.M.

RESULTS OF THE ELECTION: Teller Andy Stewart, CMA (AAMA) reported the votes and noted that 2/3rds of the vote is now 16.

Vice President - Angela Eytcheson, CMA (AAMA), CPC with 23 of 24 votes.

It was then stated by Speaker Angie Eytcheson, CMA (AAMA), CPC that according to the protocols of the AAMA House of Delegates, it is not necessary or required to report the number of votes for each nominee.

Secretary - Steph Richards, CMA (AAMA)

Delegates/Alternates to the 2024 AAMA Conference:

1st Delegate: Barb Carter, CMA (AAMA) (automatic as President):

2nd Delegate: Angela Eytcheson, CMA (AAMA), CPC (automatic as Vice President):

3rd Delegate: Steph Richards, CMA (AAMA)

1st Alternate Delegate: Angy McCarter, CMA (AAMA), LRT

2nd Alternate Delegate: Terrie King, CMA (AAMA)

3rd Alternate: Jen Kocian, CMA (AAMA)

Speaker Angie Eytcheson, CMA (AAMA) asked for a motion to hold the ballots for 30 days and then destroy them.

Carol Hipke Muske, CMA(AAMA) [Christine Ehmke, CMA(AAMA)] moved that the Vice Speaker hold the ballots for 30 days and then destroy them. All ayes. Motion carried.

UNFINISHED BUSINESS: None.

NEW BUSINESS:

Discussion of yearly dues: State dues are currently at \$13. National dues are set at \$77. This makes

the total for membership dues \$90. The NSMA Board of Directors recommend dues remain the same.

Lisa Hoffman, CMA(AAMA) [Carol Hipke Muske, CMA(AAMA)] moved to keep the NSMA dues for 2024-2025 at \$13, for a total of \$90. All ayes. Motion carried.

ANNOUNCEMENTS:

The 2024 Post-Conference Board Meeting will be Saturday, April 27th, 2024, after the last speaker of the day, in the Barringer room.

The 59th NSMA Conference will be in Grand Island in 2025.

The AAMA 69th Annual Conference will be September 19th-24th, 2024 in Grand Rapids, MI.

For the next NSMA term, Board of Director meetings will have the option to attend via ZOOM. The meetings will be held in Grand Island, NE at CHI St. Francis Hospital. Meeting dates will be posted on the NSMA website.

Speaker Angie Eytcheson announced Andy Stewart, CMA (AAMA) is retiring from the NSMA Board of Directors this year and read a moving summary of the years Andy volunteered in the NSMA. Andy joined the Great Plains Chapter in 1982 with only four members, and was active in her local chapter until the NSMA became a bi-level organization. She was CMA of the Year twice, in 2002 and 2018 and has served as President of the NSMA. She also chaired the NSMA Annual Conference, largely on her own, numerous times, and served on many other committees. The NSMA expressed deep gratitude for her many years of service!

The AAMA Representative, Candy Miller, CMA (AAMA), thanked the NSMA for inviting her to attend the conference and General Assembly. She also announced that anyone who would speak with her throughout the conference will be given a ticket to be entered into a drawing for a prize.

ADJOURNMENT: Adjourned the meeting at 2:54 P.M.

Tracy Bednar, CMA (AAMA)
NSMA Secretary 2023-2024

Angy McCarter, CMA (AAMA), LRT
NSMA President 2023-2024

NSMA President Year End Report

The NSMA President assumed the duties at the close of the General Assembly in Lincoln, Nebraska, on April 27th, 2024. NSMA Board meetings were held at CHI St Francis Center in Grand Island, Nebraska on the following dates with agendas emailed to the NSMA Board members at least 10 days prior to the meetings.

Post Conference: April 27th, 2024

Summer: August 17th, 2024

Fall: November 2nd, 2024

Winter: January 25th, 2025

Spring: March 15th, 2025

Pre Conference: April 25th, 2025

The President served as a Delegate to the AAMA Conference in Grand Rapids, Michigan, September 20-23, 2025.

The President has been in regular communication with the Board of Directors via email to exchange information or answer any questions. The President responded to all correspondence in a timely manner and met all AAMA calendar deadlines for requests of information.

The President shared emails from AAMA with the Board.

Several discussions on the Board were held concerning being able to continue to provide the NSMA Conference as the President has not been able to find a volunteer to Chair the 2027 NSMA Conference and hotel expenses continue to increase. We continue to discuss other options. The Board needs more members to become active to continue to provide Conferences.

Projects completed this year by the Board that are important to note, the archive information has been scanned on a hard drive to reduce the burden of toting around large books, and the NSMA website was updated.

I would like to thank all that served as Elected Officers and Committee Chairs for their hard work and dedication to NSMA and its members.

Barb Carter, CMA (AAMA)
2024-2025 NSMA President

**NSMA VICE PRESIDENT YEAR-END REPORT
2024 - 2025**

I have attended the following meetings:

August 17th, 2024 - Summer Meeting
September 10th, 2024 - Zoom to go over AAMA Delegate Packet
November 2nd, 2024 - Fall Meeting
January 25th, 2025 - Winter Meeting
March 15th, 2025 - Spring Meeting
April 25th, 2025 - Pre-Conference Meeting

I served as a Delegate to the 2024 AAMA 68th Annual Conference in Grand Rapids, Michigan September 20-23rd, 2024. During the AAMA Conference I participated in many discussions regarding membership retention and recruitment, ideas for future CEU sessions and conference ideas from other state leaders.

As Vice President I have spent the year preparing to assume the duties of President by learning from the current NSMA President Barb Carter, CMA (AAMA). I continue to work on securing Committee Chairs, Medical Advisory Board in preparation for 2025-2026.

I have acquired meeting locations and have scheduled the NSMA Board meetings for my Presidential term. Schedules

April 26th, 2025 - Post-Conference, Ramada Midtown Hotel
August 16th, 2025 - Summer - Grand Island Clinic, Conference Room
November 8th, 2025 - Fall - Grand Island Clinic, Conference Room
January 24th, 2026 - Winter - Grand Island Clinic, Conference Room
March 14th, 2026 - Spring - 2026 Conference Location, Ameristar Hotel
April 17th, 2026 - Pre-Conference, Ameristar Hotel

I am looking forward to serving the NSMA members in the upcoming year. I appreciate all that I have learned from the State and National Leaders while representing NSMA since 2015. I also want to thank all of the NSMA members that have volunteered to be on the NSMA Board 2025-2026. Thank you for all your hard work.

Angie Eytcheson, CMA (AAMA), CPC
NSMA Vice President

NSMA Secretary Year-End Report

I was elected to be the Nebraska Society of Medical Assistants Secretary for the 2024-25 term.

During my term I attended all meetings in person, taking minutes. The minutes were then shared with the Board of Directors for review, corrections, and approval. They will be sent to the website chair to upload to the NSMA Website.

All minutes will be uploaded to an external drive printed for the secretary's book before turning over to the newly elected incoming secretary.

I would like to thank the members for voting for me to be the NSMA Secretary for the 2024-25 term. I have learned much about all areas of the Board of Directors. I look forward to continue working with the BOD.

Steph Richards, CMA (AAMA)
NSMA Secretary 2024-25

NSMA Treasurer Year-End Report Year End Report 2024-2025

As the NSMA Treasurer, I was responsible for keeping a detailed account of receipts and disbursements of the organization. I presented a detailed report at each of the Board of Director meetings for review.

The Delegates and Alternates to the AAMA National Conference submitted their expense vouchers along with their receipts. I assisted in an audit that was done on 4 of the members who submitted their information at the Fall board meeting. I also assisted with the remaining 2 member audits which were completed on December 2. The final report was submitted at the Winter board meeting.

As a member of the Budget and Finance Committee, I assisted with an audit of the NSMA general fund account as well as the conference account.

A year-end audit was held on August 17, 2024 of the Treasurer's books performed by Angie Eytcheson, Barb Carter, Lisa Hoffmann, and myself. The conference account was balanced at that time. The general fund account was balanced after further review on January 18, 2025. The audit period was from 07/14/23-08/17/24 for both accounts.

One of the NSMA certificate of deposit was up for renewal this year. I updated the term of CD #9932 to a new rate of 4.00% APR for a 7 month period in person at First Interstate Bank on 11/25/24.

A year-end report will be presented to the NSMA General Assembly at the NSMA Conference in April 2025.

Thank you to our members for allowing me to serve another term as the NSMA Treasurer.

Jennifer Kocian, CMA (AAMA)
NSMA Treasurer 2024-2025

**NSMA SPEAKER Year end Report
2024 - 2025**

The Speaker has attended Post conference Board meeting, August board meeting and January board meeting in person. October meeting via zoom due to personal commitment. I will attend March 15th meeting at the Ramada in Grand Island, Ne also the Pre Conference board meeting at the Ramada on April 25, 2025.

I have been preparing for the general assembly on April 25th, 2025 at the NSMA Conference.

I attended AAMA National Conference in Grand Rapids, Michigan as an alternate delegate. I have submitted my report to the board to be placed in assembly packet.

Thank you for allowing me to hold this chair position. It is a privilege to work with the board to keep society running.

Terrie King, CMA(AAMA)
2024 - 2025 Speaker

NSMA Vice Speaker Year End Report 2024-2025

I have attended most of the NSMA Board meetings in person. Was excused from the August meeting. I plan to attend the March meeting at the Ramada MidTown Hotel in Grand Island, NE on March 15, 2025. I will also be attending the NSMA Conference at the Ramada MidTown Hotel in Grand Island, NE on April 25-26, 2025. I've communicated with the NSMA Board via gmail account throughout this past year.

I accepted nominations for 2025-2026 NSMA Officers and Delegates to the AAMA Conference in Arlington, VA in September 2025. I have signed copies of consent forms for these nominations done and sent to the Speaker. I will complete a Voting form to be used at the General Assembly at the NSMA Conference on April 25, 2025.

Thank you for allowing me to hold this position.

Shannon Kibbee, CMA(AAMA), CRCS
NSMA Vice Speaker 2024-2025

Immediate Past President Year-End Report

I am grateful for the opportunity to serve as the Immediate Past President for the 2024-2025 term. During this time, I have participated in all but one meeting scheduled by the President. Unfortunately, I was unable to attend the winter board meeting. At the time of this report, it is uncertain whether I will be able to attend the spring conference.

Over the past year, I have updated the Past Presidents' birthday list and the NSMA Presidents list, ensuring both are saved on a thumb drive and in Google Drive for accessibility and preservation. I also purchased a bulk package of birthday cards and stamps. Any remaining supplies will be handed over to the next Immediate Past President. Additionally, I have mailed out birthday cards to the Past Presidents using the addresses we have on record.

Over the past few years, I have been responsible for updating the Gmail accounts for each board committee member. This year, I successfully completed the updates and assisted with resolving any issues members experienced in connecting to their accounts. Additionally, I made updates to the Immediate Past President (IPP) fact sheet and worked with the Procedure Manual Chair to ensure the updated version was provided to the Website Chair for posting. Once a final copy is available, it will be printed and placed in the IPP handbook.

I was voted in as an Alternate Delegate to the 2023-2024 American Association of Medical Assistants annual House of Delegates meeting. I attended the AAMA National Conference in Grand Rapids, MI, and fulfilled my responsibilities by submitting the required report, which is filed in the General Assembly packet for reference.

I participate in the NSMA Delegate/Alternate travel audit, ensuring accurate records and compliance with travel guidelines.

I appreciate the board and members for this opportunity.

Angy McCarter, CMA (AAMA), LRT
NSMA Immediate Past President
2024-2025

Preliminary General Assembly Ballot

VICE PRESIDENT

Terrie King, CMA(AAMA)

SECRETARY

Angy McCarter, CMA(AAMA), LRT

VICE SPEAKER

Steph Richards, CMA(AAMA)

TREASURER

Jen Kocian, CMA(AAMA)

DELEGATES TO AAMA CONFERENCE Grand Rapids, Michigan Sept 20-23, 2024

Steph Richards, CMA(AAMA)

Terrie King, CMA(AAMA)

NSMA Annual Conference Year-End Report 2024-2025

Thank you for letting me be the Annual Conference Committee Chair for 2024-25, I have attended all meetings in person.

The NSMA 2025 Annual Conference will be April 25 and 26, 2025 at the Ramada Midtown, 2503 S Locust St, Grand Island, NE 68801. The room rate is \$120.95 for a King or Queen/Queen non-pool side room, this includes breakfast on both days. Parking is free.

Working with the Ramada Midtown has been rather difficult as there have been several staff changes and now an ownership/ management change.

At this time it is planned for 12 CEU hours, there are 6 confirmed speakers, and I am waiting for confirmation from 4 more. The chair has requested information and CVs from all confirmed speakers, time spots have also been offered, but only one has chosen their exact time. At this time only one speaker is going to be via Zoom.

The chair has created several documents to help keep track of speakers, time spots offered, a letter asking for donations, a letter of thanks to be mailed once donations are received, Speaker information for conference packets, and an introduction for the speakers.

Over 50 letters were mailed asking for donations of either product goods or monetary donations.

The cost of Ribbons for conference name badges has been researched, and the chair is currently working with Awards Plus in Grand Island, NE to order more conference name badge ribbons.

The chair has asked the Social Media chair to post updates to the NSMA Facebook page and group. Asked for volunteers to help during registration times before the conference starts both days and for donations for raffles and or vendor booths.

One confirmed vendor and the possibility of another, they are checking on the time offered. At this time, nothing is being planned to be sold.

The committee chair is looking at the cost of offering pens, note pads, or small tote bags to offer members, or for raffle drawings.

Steph Richards, CMA (AAMA)
2024-25 Annual Conference Committee Chair

NSMA Annual Conference Year-End Report 2025-2026

The chair and co-chair attended all NSMA board of directors (hereafter noted as BOD) meetings to date, and intend to attend the Spring and Conference meetings. Six hotels were interviewed prior to presenting pros, cons and costs to the BOD. A detailed chart was made to simplify the information. The chart is on file in the Annual Conference Gmail Drive, should it be needed for reference in the future. After BOD approval, a contract was signed with the Holiday Inn Ameristar in Council Bluffs, IA, due to their lower costs and what appears to be steady and continuous management. They have had the same sales team for over a decade. Costs in the Omaha venues were much higher, and a couple seemed unreliable in their sales pitches. Respectfully submitted,

Tracy Bednar, CMA (AAMA), LRT
NSMA Annual Conference Chair 2026

Terrie King, CMA (AAMA)
NSMA Annual Conference Co-Chair 2026

2024-2025 NSMA Archive Year-End Report

I want to thank President Barb Carter, CMA (AAMA)
for allowing me to serve on this committee.

I have so far attended 3 of the board meetings, I was excused from the Jan. 25, 2025
meeting.

There has been a proposal of getting a copy made of the hard drive to save with all of
our photos. I have been checking into that. Looking at cost and safest way to do it so
the original hard drive is not lost in the process.

Most of my committee work will be done at conference, setting up displays and taking
pictures.

Respectfully,
Lisa Hoffman, CMA(AAMA)

NSMA Awards Year-End Report 2024-2025

Thank you for the opportunity to be the Awards Committee Chair for 2024-25, this year I have done the following:

Updated the NSMA Student Scholarship application, no applications have been submitted at the time of this report.

Accepted several nominations for special recognitions and CMA of the year. CMA of the Year process will begin once the nomination window is closed.

Steph Richards, CMA (AAMA)
Awards Committee Chair 2024-25

NSMA BYLAWS CHAIR YEAR END REPORT 2024-2025

I attended all NSMA Board Meetings. August and January in person, October via zoom due to personal commitment. I plan to attend the NSMA Spring Board Meeting on March 15, 2025, NSMA Pre Conference Board Meeting on April 25th, 2025 at the Ramada in Grand Island, NE. There were no Bylaw changes from the AAMA. There are no bylaw changes for the NSMA this year.

I was an alternate delegate to the AAMA Conference in Grand Rapids, Michigan in September of 2024.. I emailed out my delegate report to the NSMA Board in October.

Thank you for allowing me to hold this chair.
Terrie King, CMA(AAMA)

NSMA Membership Year-End Report 2024-2025

During my term as NSMA Membership Committee Chair 2024-5 I have completed the following tasks.

I emailed the Medical Assisting Program directors of all the benefits of the NSMA and AAMA for them to forward out to current and past students and asked to encourage them to sign up and participate.

Been in contact with Candy Miller, CMA (AAMA) by email a few time in regards to issues of not receiving Marketing Materials that I ordered last year twice for conference, have never gotten a resolution. With the new AAMA website it has not been available to order new materials yet. So I still have very limited Marketing materials to lay out at conference.

Held a contest for new and renewing memberships. 1 new member and 1 renewing member winning contestants received free NSMA attendance to 2025 Conference.

Mailed letters of congratulations to the New Nebraska CMA's from April 2023-Jan 2024, Included information for the 2025 NSMA Conference and how to become members of AAMA. Will Mail out Jan - March letters prior to conference.

Downloaded the 2025 NSMA Membership Rooster and emailed out to the board.

I had the privilege to attend the 68th AAMA Annual Conference September 20th-23rd in Grand Rapids, MI. I attended several Educational Sessions. I volunteered as a Teller during the House of Delegates.

It's been a privilege to serve as the Membership Chair this past year. Thank you

Shannon Kibbee, CMA (AAMA), CRCS
Membership Chair 2024-2025

NSMA Procedure Manual Year-End Report 2024-2025

Thank you for the opportunity to let me be on the board as the procedure manual chair. I have learned many things. I was not able to attend the summer meeting, but I did meet via zoom for the November and January meetings. I plan to meet via zoom for the March meeting as well.

I updated the travel expenses section and the Immediate Past President duties were updated.

This is my last term that I will be able to be the procedure manual. I want to thank everyone for this opportunity. I greatly appreciated the confidence that was given to me.

Thank you

Christine Ehmke, CMA
Procedure Manual
2024-2025

NSMA Public Policy Year-End Report 2024-2025

I am grateful for the opportunity to serve as the Public Policy Chair for the 2024-2025 term. During this time, I have participated in all meetings but one scheduled by the President. Unfortunately, I was unable to attend the winter board meeting. At the time of this report, it is uncertain whether I will be able to attend the spring conference.

There wasn't much activity in this role this year. However, I did have a discussion with Donald A. Balasa, JD, MBA, CEO and Legal Counsel for the AAMA, regarding a member's question about whether a Medical Assistant (MA) can obtain fetal heart tones (FHT). The question arose after a post on the NSMA social media where a member stated that Don did not believe this was a task an MA should perform. Don mentioned that the MA would need to make an "assessment." I countered that an MA can take a pulse and record the data, which is similar to how an MA would handle FHT.

Don's email to me included the following:

"That is helpful, Angy. The fact that a medical assistant is expected to inform the licensed provider if there is some abnormality gives me pause.

In contrast, if a medical assistant takes the temperature of a patient, measures blood pressure, takes the pulse, or records the oximeter percentage, the medical assistant merely reports the readings to the provider. If the numbers are outside of the normal range, the provider determines what should be done (if anything). You could say that the numbers 'speak for themselves.'

From what I have been able to read, listening to fetal heart tones is not the same as taking a pulse. There is some element of judgment that must be exercised when listening to the FHTs. If I am incorrect in this, Angy, I would be happy to revise my opinion."

Over the last year I was able to review and I made updates to the Public Policy Fact sheet to ensure the updated version was provided to the Website Chair for posting. Once a final copy is available, it will be printed and placed in the Public Policy handbook.

Angy McCarter, CMA (AAMA), LRT
Public Policy Committee Chair
2024-2025

NSMA Public Relations Year-End Report 2024-2025

See Printed Handout

NSMA Social Media Year-End Report 2024-2025

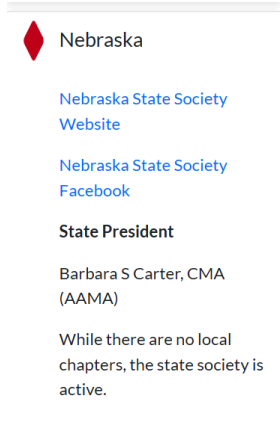
I am grateful for the opportunity to serve as the Social Media Chair for the 2024-2025 term. Throughout the year, I have participated in all meetings but one scheduled by the President. Unfortunately, I was unable to attend the winter board meeting. At the time of this report, it is uncertain whether I will be able to attend the spring conference.

Throughout the year, this committee has been actively engaged in sharing posts related to holidays, remembrance and national days, board member birthdays, AAMA news, and recommendations from fellow board members.

Additionally, the committee has taken responsibility for producing a monthly newsletter, which is released at the beginning of each month via Mailchimp (free version). These newsletters include ICYMI (In Case You Missed It) highlights from AAMA communications, as well as updates from NSMA board meetings and conferences.

This committee also organized a successful free Zoom CEU session titled "Understanding Resiliency, Effective Self-Care Practices, and Building a Supportive Community," presented by Susan Buettner, JD, on Tuesday, October 22, 2024, in honor of MARWeek. The session saw high engagement, with 96 members from across the U.S. signing up, 94 registering in the Zoom event, and 64 attending. Feedback was positive, with attendees expressing appreciation for the event and the quality of the speaker.

This committee did submit a request to the AAMA to have the Facebook Page added to the AAMA Website under State Societies and Chapters, this has been added. This can be found at <https://www.aama-ntl.org/about/state-societies-and-chapters>



I appreciate the board and members for this opportunity.

Thank you,

Angy McCarter, CMA (AAMA), LRT
Social Media Chair
2024-2025

NSMA Website Year-End Report 2024 - 2025

-I worked with Blake from Provident Promotions to update our NSMA website so it has a more updated look. The new NSMA website was launched in October 2024.

-A new account with Stripe.com was set up by me. Stripe is a portal website that was linked on our new website that is used for online payment directly to our account for conference registrations. Currently I am the administrator with Blake Pesek and Derek Petermann from Provident Promotions are listed as developers.

-I provided Blake a copy of our registration form used for past conferences. Provident was able to load that information into our new website to allow members online registration capability for any future conference.

- Photos from our NSMA 2024 Conference from Lincoln and also the National AAMA Conference from Grand Rapids were added to the NSMA website.

-I was able to upload the information for the Zoom webinar that was held in October.

-Updates were made to the names of officers/chairs that are listed on the website. Updates were also made for the current medical providers that are the current liaisons for NSMA.

Jennifer Kocian, CMA(AAMA)
Website Chair

NSMA Delegate- to AAMA Conference 2024-2025

68th Annual AAMA Conference in Grand Rapid, Michigan

September 20th-23rd, 2024

Barbara Carter, CMA (AAMA)

Saturday August 3 rd

Virtual AAMA Meet the Candidates

The AAMA Candidates introduced themselves and talked about their qualifications and experience. It gave Delegates a chance to get to know the candidates prior to the Conference.

Saturday August 17 th

Virtual AAMA Proposed By-Law Review

There were 2 proposed By-Law amendments to be voted on during the House of Delegates (HOD) this year, so a virtual meeting was offered to discuss and answer questions prior to the HOD. I did not attend as we had the NSMA Summer Meeting at the same time. This is nice to have as I believe it gives Delegates and Alternates a chance to evaluate how their state will vote on the By-Laws proposals prior to the HOD.

Saturday September 7 th

Virtual AAMA Meet the Candidates

The Candidates answered questions submitted by AAMA members during this session. I was not able to attend this session, but AAMA offered a recorded version.

Saturday, September 7 th

Virtual House of Delegate/Alternate orientation:

Virtual sessions were available to attend orientation prior to AAMA Conference.

Delegates and Alternates can attend prior to the Conference thus allowing Conference attendees to be able to attend another CEU session at Conference instead of attending the HOD orientation. During the virtual orientation, Speaker of the House, Sherry Bogar, CMA (AAMA) went over the rules for the 2024 HOD. The Delegates and Alternates were encouraged to be familiar with the Delegates Packet before entering the HOD. Rules for the HOD were explained.

557 people were preregistered for AAMA Conference this year, and over 580 people ended up attending. Cvent was used to manage AAMA Conference. Cvent allowed access to a schedule of events taking place, news, and announcements. You could create a personal profile and keep track of your agenda on the app. This allowed AAMA to have digital check in to education sessions and meals allowing better tracking for AAMA.

Friday, September 20th

Board of Trustees Meeting:

9:13 a.m. Call to order by AAMA President, Monica Case, CMA (AAMA).

Roll call was taken and Trustee Sandra Williams, CMA (AAMA) was excused due to health reasons.

Next was Introduction of the Board of Trustees and galley attendees.

Summer minutes were approved.

Monica stated the Board set 3 priorities in 2023; they were

Membership, Leadership, and Marketing.

Don Balasa, JD, MBA, CEO and House Legal Counsel for AAMA developed AAMA podcast called A Legal Look at Medical Assisting. There will be other podcasts developed in the future. He will be speaking at AMGMA Conference on the role of Medical Assistants in telehealth. He reported some states are trying to get Medical Assistants recognized or

licensed. A letter was sent to all State Presidents about Medical Assistants can be delegated to administer injections by Nurse Practitioners. He was interviewed by Washington for how AI would impact Medical Assistants.

The BOT approved a new Logo and color palate, pictures and examples were displayed for the galley.

The AAMA website was revamped and will be released mid-November so Michael Knight from AAMA showed the galley an example of how it will look. The BOT worked very hard on this project and spent lots of hours to get this completed and released in their goal of 10 months. Main high lights are there will not be a password reset, there will be a feedback tab on each page so members can make suggestions of changes or updates they want, search will work quickly, and it has a responsive design meaning that the site will work on any device that you are using. The goal was to make it as user friendly as possible for the members as we all are volunteers, and our time should not be spent searching for what we need on the website.

Next Monica asked for verbal updates on Committee reports.

Deborah Novak, CMA (AAMA), served as the Awards Committee Chair and she stated that there was a great night of surprises planned for the Welcome and Awards night.

Candy Miller, CMA (AAMA), Trustee served as By-Laws Committee Chair. There were 2 proposed by-laws changes to be voted on at the HOD and the By-Laws Committee held 2 different review sessions prior to the Conference for Delegates to attend to discuss the by-laws proposals. About 120 people attended each session.

Natasha Geno, CMA (AAMA), Trustee served as Documents Committee Chair. All volunteer forms on the AAMA website were reviewed and updated this year.

Pam Neu, CMA (AAMA), served as Career Professional Development Committee Chair. A new Assessment-Based Recognition module for Medical Office Basics launched in July with total revenue at \$42,190. A new module called "Insurance Insights & Quality Measures" will

be released October 1, 2025 with 6 CEU's and the cost will be \$95 for members and \$160 for non-members.

Virginia Thomas, CMA (AAMA), was Chair of the Maxine Williams Scholarship Committee and announced the 5 Maxine Williams Scholarship winners, 2 for \$3500 and 3 for \$2500.

The Advisory Task Force Chair, Deborah Novak, CMA (AAMA), achieved the goal of developing AAMA Podcasts. Two podcasts are completed. The first one was completed with MGMA and the second one was to be released during AAMA Conference. Two other podcasts are in development.

Claire Houghton, CMA (AAMA), was Leadership Development Committee Chair and announced that 2 CEU's were awarded for the Leadership meeting during AAMA Conference.

Amy Quinn, CMA (AAMA), served as Social Media Committee Chair. Her committee developed Mini Mics with Medical Assistants, and the goal was to interact with members while showing those on social media what to expect at AAMA Conference. The committee also did Real Talk with Medical Assistants and Questions & Answers for leaders during 2023-2024.

Deborak Novak, CMA (AAMA) reported as Chair of the Partnership Task Force a partnership with SunBus for skin cancer detection. The bus will run from March 2025 to November 2025 in Colorado, Texas, and Phoenix, Arizona and will have physicians, physician assistant, and medical assistant volunteers. Deb also reported AAMA President Case will attend a colorectal conference coming up.

Sherry Bogar, CMA (AAMA), served as chair for the Membership Development Strategy Team. This committee designed AAMA membership pins. She also announced that if

members purchase 2 CEU's from the AAMA magazine then they would get 1 free. The committee developed a letter to send to new CMA's describing the benefits of membership. The new AAMA membership pins were for sale during the Conference for buy 4 get 1 free and were \$7.50 per pin and after the conference will be \$10 per pin to cover shipping cost. Deborah Novak, CMA (AAMA), served as chair for the Nominating Committee and held two virtual meetings prior to conference to meet the candidates listed in the HOD packet. Shirley Sawyer, CMA (AAMA) reported the Editorial Advisory Committee reviewed all articles after MARCOM and all the members completed their reviews of the articles. Pam Neu, CMA (AAMA) served as the Chair to the Educators Collaborative Task Force and worked on creating a face book page for educators to collaborate with each other, much like the leaders face book page. Virginia Thomas, CMA (AAMA), served as Chair on the Marketing Strategy Team. This team developed a AAMA keychain and AAMA portfolio that were sold during conference and developed the MAR Week logo of Bridging the Gap. Deborah Novak, CMA (AAMA), was on the Conference Board and announced that AAMA staff would be in red shirts for the weekend so they would be more recognizable. She reported there were new electronic boards placed near registration that would have run information about conferences and the happenings during the day's events. The Certifying Board had nothing new to report.

Amber Greer, CMA (AAMA) was Continuing Education Board Chair and reported the held 2 additional virtual meetings after the report in the HOD packet and an in-person meeting in September. There will be a Medical Law for 15 CEU's and Medical Ethics for 25 CEU's released.

No unfinished or new business reported.

Time was allowed for questions and comments from the gallery members.

Meeting adjourned at 11:13 a.m.

CEU session: Coding Updates 101

Nina Watson, CMA (AAMA), CPC, CCS, CEMA, discussed the new major coding changes in effect for October 2024.

CEU session: Service Dogs Vs Emotional Support Dogs

Sydney Baxter spoke about Paws for a Cause and the use of emotional support dogs and the training required to provide a dog for a person.

Welcome and Awards Celebration:

The theme was "A night amongst the Stars" and we had an enjoyable time dressing up as Barbie's. I chose Pastry Chef Barbie and enjoyed making my costume for this event. Excel Award winners announced, and Nebraska won Membership Retention in Section B. Tacos were served to enjoy during the announcement of the winners. Announcement was made for the next AAMA The 69 th AAMA National Conference will take place September 19 th to 22 nd at

Hyatt Crystal City at Reagan International Airport, in Arlington Virginia.

Saturday, September 21 st

Presentation of the Colors, National Anthem, and the Pledge of Allegiance were done first.

House of Delegates called to order by Sherry Bogar, CMA (AAMA), Speaker of the House: Opening reflections and introductions of the AAMA Officers, Board of Trustees, Past Presidents, Timekeepers, Pages, Delegate Committees, and AAMA Staff occurred second.

First Session

Credentials Chair Report:

Total voting power 141 with 127 registered and 14 proxy votes with 71 as majority vote and 94 as $\frac{2}{3}$ vote.

Motion for approval of the agenda passed.

Orientation of the Delegates read by Natasha Geno, CMA (AAMA), Vice Speaker of the House. Motion made for adoption of the House rules passed.

Appointment of the Reference Committees and Tellers given. No resolutions this year.

Supplemental report given by AAMA President Monica Case; CMA (AAMA) that referenced the September 20th AAMA BOT meeting highlighted above.

Report of the Nominating Committee given by with a full slate of candidates.

Members running for election:

President: Virginia Thomas, CMA (AAMA) from Virginia

Vice President: Sherry Bogar, CMA (AAMA) from Texas

Secretary: Loxie Kistler, CMA (AAMA) --2-year term from Ohio

Speaker of the House: Jane Seelig, CMA-A, (AAMA) –1 year term from Indiana

Vice Speaker of the House: Claire Houghton, CMA (AAMA) –1 year term from Texas

Trustee: 3-2-year terms

Cameron Smith, CMA (AAMA) from North Carolina

Pam Neu, CMA (AAMA) from Indiana

Candy Miller, CMA (AAMA), from Oregon

No further nominations from the floor.

Nominations for the Nominating Committee:

Patty Licurs, CMA (AAMA)-SC

Paula Cooke, CMA (AAMA)-NC

Christina Sears, CMA (AAMA)-FL

Linda Metcalf, CMA (AAMA)-NC

Paula Schubert, CMA (AAMA)-IN

Debby Houston, CMA (AAMA)-VI

Dawn Jordan-LaBlanc, CMA (AAMA)-MA

Todd Lasher, CMA (AAMA)-NY

Mary Ragis, CMA (AAMA)-OH

Toni Coffman, CMA (AAMA)-NM

Don Balasa, CEO, spoke about the Management Steering Committee and explained it is a subcommittee of the BOT. He gave the history of the Management Steering Committee.

There is no report from the MSC in the HOD packet as the MSC makes recommendations to the BOT and then those recommendations are acted upon or not acted upon by the BOT. If the BOT acted on a recommendation, then those would be listed in the HOD packet. The 2 by-Laws proposals are in regard to the MSC so I believe this helped the delegates have a better understanding of what the purpose of the MSC is.

Recess at 9:56 a.m.

Meet the Candidates:

Each candidate gave a short speech about themselves and then they were sent to different areas/corners in the room where the Delegates and Alternates from each State could ask them questions. A timekeeper kept Delegates and Alternates moving from candidate to candidate, so the Nebraska Delegates were able to speak to Cameron Smith, Pam Neu, Loxie Kistler, and Sherry Bogar. We were not as familiar Camerson, Pam, and Loxie, so it was nice to hear them speak and get to know them each a little better.

At 1 p.m. Reference Committee Reports, Bylaws, and Resolution's Session:

Highlights from some reports are below:

Report of the Board of Trustees: Monica Case, CMA (AAMA)

Approved creating a new task force to evaluate results of the educator survey and recommend appropriate action. The official name is the Educators Collaborative Task Force.

Approved entering an agreement/contract with Kathy Basel Marketing & Events as the conference planner for the 2024 AAMA Annual Conference and continue the search for 2025 AAMA Conference sites.

Approved Senior Director Mokijewski to add teal color to the approved AAMA apparel line and present additional colors for apparel while keeping the integrity of the AAMA logo.

Approved the AAMA website rebuild project.

Approved an AAMA membership benefits flyer for state society and local chapter uses.

Approved a letter from the AAMA President to be sent to new CMAs (AAMA) congratulating them on their certification and providing information about AAMA membership benefits.

Approved the opening of the AAMA Bylaws Committee to volunteers with AAMA active membership status starting with the 2024–2025 Volunteer Leaders Application.

Report of the President: Monica Case, CMA (AAMA)

Attended multiple virtual and in person meetings and many events, including MGMA in Nashville, AAFP in Chicago, AMGMA in Florida, and attended BOT Planning Session/Executive Session in November, February, and June.

Communicated via the Leaders Insider for the months of November, January, March, April, May, June, and July.

Follow-up emails sent to 292 new CMAs (AAMA) nonmembers from the President congratulating them and providing information about the AAMA and membership benefits.

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

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

Participated in regular meetings with Senior Director of MarCom Mokijewski and/or Project Manager Flynn, to review and discuss updates, status of projects and information.

Report of the Vice President: No report as she resigned prior to AAMA Conference.

Report of the Immediate Past President: Deborah Novak, CMA (AAMA)

Attended MGMA Leaders Conference and AAFP FMX (American Academy of Family Physicians) Conferences.

Chair of Annual Conference Committee, Awards Committee, Advisory Task Force, Nominating Committee, Partnership Task Force, and Career Professional Development Committee.

Report of the Secretary-Treasurer: Virginia Thomas, CMA (AAMA)

Served as Marketing Strategy Team and Maxine Williams Scholarship Chair

and was a member of the Documents Committee.

Prepared and sent minutes for multiple Executive Sessions and virtual meetings.

Report of the Speaker: Sherry Bogar, CMA (AAMA)

Met virtually each month with Vice Speaker Natasha Geno to discuss various projects and deadlines for the HOD including timeline, format and all documents.

Hosted Orientation of Delegates virtually on Wednesday August 28, 2024, at 6 p.m. CST and 9 p.m. CST Saturday September 7, 2024, at 10:30 a.m. CST. Chair of the Membership Development Committee and HOD Minutes Committee.

Appointed to serve as a member of the Annual Conference Committee, Career Professional Development Committee, and Strategic Issues Planning Committee.

Report of the Vice Speaker: Natasha Geno, CMA (AAMA)

Chair of Documents Committee.

Served as member of HOD Minutes Committee, Membership Committee, and Partnership Committee.

Collaborated with Speaker Bogar through virtual meetings to discuss the HOD and related responsibilities.

Report of CEO and Legal Counsel: Donald Balasa, JD, MBA

Recorded the inaugural podcast of the Advisory Service.

Serve on the CAAHEP Bylaws Committee, Planning and Development Committee, and Outcomes Task Force after June 30 th , 2024.

Help constituent state societies and component chapters with issues involving bylaws, parliamentary procedure, suspected or actual misappropriation of funds, records retention, obtaining an Employer Identification Number/Taxpayer Identification Number (EIN/TIN), incorporation, advising states and chapters in regard to notices from the Internal Revenue Service, and the ineligibility of states and chapters for state sales tax exemption..

Spoke at MGMA Conference.

Attended American Association of Nurse Practitioners Annual Conference.

Presented at the Council for Higher Education Accreditation.

Helped a few states with new legislation for Medical Assistants.

Attended National Colorectal Cancer Roundtable 2023 Annual Meeting.

Career Professional Development Committee: Pamela Neu, CMA (AAMA) Chair

Finalized the ABR-Medical Office Basics modules. Part 1 was 5 modules and Part 2 was 3 modules for a total of 10 CEU's. Pricing is \$100 for members and \$160 for nonmembers.

Worked on completing the Population Health Badge.

Documents Committee: Natasha Geno, CMA (AAMA) Chair

Worked on the BOT Policy and Procedures Manual, the Volunteer Leaders Position Descriptions (VLPD), State and Chapter Treasurer, and State and Chapter Secretary, documents this current year.

Social Media Committee: Aimee Quinn, CMA (AAMA)

Project #1: Weekly Questions with "Reel" Answer: This first project will be an ongoing project. The Committee will compile a list of questions to ask our volunteers, whether they are BOT members or State or Chapter leaders and have them answer the questions via a reel.

This will then be posted on all the social media outlets. The committee would like

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

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

Project #3: Mini Mics: Continued from last year’s conference, the committee purchased 5 mini mics and interviewed members and leaders during different events at conference.

Strategic Issues Planning Committee: Sandra Williams, CMA (AAMA) Chair

2023-2024 Strategic Issues Plan is:

Goal 1: Rebuild AAMA Website.

Goal 2: Strengthen the market share of the AAMA membership and CMA (AAMA) credential.

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

Goal 4: Enhance engagement and communication.

Goal 5: Educate the decision makers on the value and utilization of credentialed medical assistants.

Goal 6: Expand educational opportunities.

Goal 7: Be the leading resource for medical assisting scope-of-practice information.

Marketing Strategy Team: Virginia Thomas, CMA (AAMA) Chair

Developed the MARWeek theme, Bridging the Gap

Designed an updated medical assistant button and placed it on key chains that were sold at AAMA Conference.

Suggested a padfolio to be sold at AAMA conference.

Membership Development Strategy Team: Sherry Bogar, CMA (AAMA) Chair

Developed Membership Loyalty Lapel Pins

Discontinued the Early Bird membership discount as AAMA did not see an increase in membership with this discount.

Suggested bulk discounts for multi-year memberships or loyalty memberships.

They will try to implement these suggestions after the new website is fully functional.

Developed a letter for non-member CMA’s (AAMA) educating them on benefits.

Developed a letter for mailing to new CMA’s (AAMA) mailed out the month after they obtain their credentials.

Focused on trying to inform members of Beneplace and better utilization.

During the Reference Committee reports a question was posed following the Nomination Committee report asking what would happen if a candidate did not receive majority vote and there was no candidate to fill the Vice Presidency or Presidency. The delegate posing the question used a specific example asking if Monica Case was willing to remain President. Discussion was held during the reference committee reports and during a break, the Judicial Council was consulted. After the Reference Committee reconvened, the Delegates were informed the question was not appropriate and could not

be addressed as it was not a question about the Nominating Committee report.

Proposed By-Laws:

Proposed Bylaws Amendment 24-01

Article XII-Board of Trustees

Section 6 Management Steering Committee

Current Wording:

Section 6. The management steering committee shall consist of the President, Vice President, Immediate Past President, Secretary, and Chief Executive Officer.

Proposed Wording:

Section 6. The management steering committee shall consist of the President, Vice President, Immediate Past President, Secretary, and Chief Executive Officer as an Ex-Officio member, without a vote.

This allows the committee to benefit from the CEO's expertise in organizational operations and strategy without influencing voting outcomes.

Proposed Bylaws Amendment 24-02

Article XII-Board of Trustees

Section 6 Management Steering Committee

As per the current AAMA Bylaws: "The Management Steering Committee shall not assume the

planning, budgeting, or policymaking responsibilities of the Board of Trustees, and shall in all cases be bound by decisions and policies of the Board of Trustees."

Fiscal impact: None

Current Wording:

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

Proposed Wording:

Section 6. Management Steering Committee. The management steering committee shall consist of the President, Vice President, Immediate Past President, Secretary, Speaker of the House, and Chief Executive Officer.

Participation in the MSC can provide valuable experience and skill development for the Speaker of the House. Exposure to executive decision-making and communication at this level

enhances preparedness for advanced leadership rolls, such as Vice President.

It was explained that we would vote on proposal #2 and then proposal #1. Several comments on these by-law proposals were made, including that this was brought up in the prior House of Delegates. One gallery member was upset that the by-laws were not being displayed on the screen for them to see and as members they were entitled to that.

House of Delegates reconvened with call to order at 5:05 p.m.

Credential Chair Report:

Total voting power 141 with 127 registered and 14 proxy votes. Making 71 majority vote and 94 as $\frac{2}{3}$ vote.

Moments of Remembrance and Reflection

Monica Case gave a memorial for Grace Hale, who served the AAMA for over 45 years.

Rebecca Walker gave a memorial for Bonnie Bruntz, CMA (AAMA), who was AAMA President from 2009-2010. I have fond memories of Bonnie Bruntz.

Prior to the Reference Committee Reports, Don Balasa addressed the reason the By-Laws would be voted on with 24-02 first and 24-01 second. The outcome of 24-02 could influence 24-01 and it was more logical to vote on 24-02 first. There was still some discussion from a Delegate and it was noted.

Reference committee reports:

Reports and Resolutions:

Reference committee moved that the reports of the AAMA Officers be accepted and

filed for future reference. AAMA Board of Trustees, Board of Trustees Supplemental Report, President Novak, CMA (AAMA), Vice President, Immediate Past President, Secretary-Treasurer, Speaker of the House, and Vice Speaker of the House, AAMA Chief Executive Officer and Legal Counsel were accepted and filed for future reference. They also moved the reports of the Committees, Strategy Teams, Task Force, and Boards be accepted and filed for future reference. All motions passed.

By-Law's:

The Reference Committee on By-Law's recommended Proposed Bylaw Amendment 24-02 be defeated and Proposed By-Law Amendment 24-01 be adopted.

Electronic voting occurred for the Officers, Trustees, and the Nominating Committee. Voting was completed electronically.

AAMA 2024-2025 Officers and Trustees:

President:, Virginia Thomas, CMA (AAMA)

Vice President: Open

Secretary: Loxie Kistler, CMA (AAMA)

Speaker of the House:, Jane Seeling, CMA (AAMA)

Vice Speaker of the House: Claire Houghton, CMA (AAMA)

Trustees: 2-year term:

Cameron Smith, CMA (AAMA)

Pam Neu, CMA (AAMA)

Candy Miller, CMA (AAMA)

Nominating Committee:

Todd Lasher, CMA (AAMA)

Patty Licurs, CMA (AAMA)

Debby Houston, CMA (AAMA)

Christina Sears, CMA (AAMA)

By-Law 24-02 and 24-01 were defeated.

No Unfinished or New Business

Speaker Sherry Bogar, CMA (AAMA) thanked all the AAMA staff, Parliamentary Advisor and committee members for their assistance.

We joined in reciting the Medical Assistants Creed.

10 minutes were allowed for good and welfare statements.

HOD was adjourned at 7:57 p.m.

Sunday, September 22 nd

CEU session: CMA (AAMA) Knowledge Bowl

Interactive session sponsored by the Certifying Board where volunteers sign up to be selected for a team of CMA's (AAMA). The team competes against another team to answer questions on a vast range of subjects applicable to CMA's (AAMA). This is always a fun CEU to attend

State Leaders Session:

This session was led by Trustee Clair Houghton, CMA (AAMA). She began by introducing the BOT leaders present. Then proceeded to a Q & A session with former members of the BOT, Paula Purdy, CMA (AAMA), Patty Licurs, CMA (AAMA), Debby Houston, CMA (AAMA), and Mary Lou Allison, CMA (AAMA). She asked the following questions of the panel:

1. How do you figure out what learning style a person has to help them best?

Response was to ask them and then ask as you work with them if you need to adjust how you are mentoring them.

2. How do you determine when the mentor/mentee relationship is complete?

Response was you will just know as they feel more comfortable and confident in

their answers and activities.

3. Are there any networking groups to get involved in? Response was AAMA, AAPC, AMGMA, Leadership face book page.

4. What skills and/or education sessions were most helpful in your career? Response included clinical to administrative and professionalism class.

5. As a mentor, how would you guide your mentee? Response was asking mentee additional questions to lead them to their own answers, don't give them the answers but guide them to the information so they can make their own opinion and for their own answers.

6. What are the biggest mistakes you have seen? Response was to speak without thinking, not listening, and not asking questions. And how do you help a mentee avoid them? Response was to read the room, take responsibility for your mistakes, learn from others previous mistakes.

7. What do you struggle with as mentor/mentee? Response was seeing someone work hard and not be successful, struggling with delegating responsibility, and struggling with opening up to each other.

8. How do you show ethical behavior to your team? Response was transparency, being open and honest, setting examples on how you act, and being a one-on-one team.

9. How do you prioritize competing demands to make sure important tasks do not get overlooked? Responses included using calendar reminders and written lists. Trying to make a priority list so you do what is most important first and making tasks attainable. Also be flexible if you must change your calendar.

10. What strategies do you use to maintain work life balance as a mentor? Response included setting boundaries and discussing your goals and priorities with your family.

Then there was a Q & A time from the audience. Questions from the audience were:

1. How do you get others to step up as State leaders? Responses included using the tools available on AAMA website, learn the policies and By-Laws.

2. How do you check yourself, that power doesn't go to your head? Responses were to let someone tell you and learn that it is OK to make mistakes.

3. When you were a mentee, did you seek someone out or did the mentor seek you out? Response included both. The panel recommended complimenting others and encouraging other members if they seem interested in participating more.

4. What can States do to increase membership? Participation? Responses included involving employers, encouraging all credentials, having student days, holding monthly Zoom meetings in your State for CEU's.

5. What strategies can be used to retain active members? One response was to ask members what they wanted to see.

A suggestion came from the gallery that they would like formal Zoom sessions with the BOT and AAMA leaders prior to AAMA Conference and more open communication.

6. How to get schools involved? Response was to recommend to the schools the Educators Collaborative Task Force and the possibility if the Task Force could reach out to the schools. Also, someone suggested a face book page for Educators.

7. How to bring other Medical Assistants to the AAMA? Suggestions were made to reach out to area employers and get involved in State medical or management groups.

8. How to give them value to AAMA? Response was to show them what AAMA can

offer them and the networking opportunities available.

9. What is AAMA doing to bring to colleges? Honest answer was the BOT does not do that, but the Certifying Education Board is responsible for that task.

Lastly, Rebecca Walker, CMA (AAMA) spoke and had a slide show about the Fundamentals of Mentorship and Learning to Grow Future Leaders. She discussed being available to you mentor and using tone and phrase and being honest but not blunt. There are 2 types of mentoring, formal and informal. She discussed distance mentoring, one on one mentoring, and group mentoring. It takes a time commitment to be a mentor, effort, and knowing your role. In closing she gave the following information: A leader does not always equal a mentor, a mentee must be willing to accept advice, the mentor and mentee must commit, and feedback from the mentor/mentee are crucial, avoid blame-instead look at the process, and know your goals and benchmarks for success.

Presidents Banquet:

This has been continued as a formal event to salute State leaders with a Parade of Presidents from each State. As NSMA President, I got to walk the red carpet and received a certificate for serving as President from AAMA President Monica Case, CMA (AAMA). I enjoy seeing everyone dressed up to celebrate Certified Medical Assistants. The outgoing AAMA President Monica Case, CMA (AAMA) was thanked for her service and incoming AAMA President Virginia Thomas, CMA (AAMA) was installed for her Presidency term. Several special awards were presented during the Presidents Banquet, including a special award for Don Balasa, CEO.

This concluded the AAMA Conference. I appreciate all the AAMA volunteers who work tirelessly to support and promote Certified Medical Assistants, and I appreciate the Nebraska Society of Medical Assistant members for giving me the opportunity to attend AAMA Conference and learn so much from my peers.

NSMA Delegate- to AAMA Conference 2024-2025

Saturday, September 7th, 2024:

Virtual AAMA Meet the Candidates Part II

The Officer and Trustee candidates answered questions submitted by AAMA members during the Meet the Candidates Part II. I was unable to attend the first session but I found the recording of part 1 and watched it on youtube after watching the second session.

I downloaded the Cvent App for the AAMA Conference. Cvent allowed me to access the schedule of events, announcements, keep track of my agenda and get notification of any changes to the schedule of events or my personal agenda during the conference. Cvent also allowed the CEU sessions, conference events, and meals to be tracked by AAMA.

Friday, September 20th, 2024:

Board of Trustees Meeting:

9:13 a.m. Call to order by AAMA President, Monica Case, CMA (AAMA).

Roll call was taken by AAMA Secretary, Virginia Thomas, CMA (AAMA), Trustee Sandra Williams, CMA (AAMA) was excused due to health reasons. Introduction of the Board of Trustees and approximately 80 members representing 22 states were in the gallery. June 23-24 Meeting minutes were approved. President, Monica Case, CMA (AAMA) stated the BOT set these 3 priorities in 2023: Membership, Leadership, and Marketing.

Don Balasa, JD, MBA, CEO and House Legal Counsel for AAMA had recorded a podcast called A Legal Look at Medical Assisting. He will be speaking at the MGMA Conference on the role of Medical Assistants in Telehealth Medicine in October. A letter was sent to all State Presidents that Medical Assistants can be delegated to administer injections by Nurse Practitioners.

The BOT approved a new AAMA Logo, pictures and examples were displayed for everyone in attendance.

The AAMA website is getting updated and will be released mid-November during the transition the website will be down for approximately 72 hours. Michael Knight from AAMA IT department showed those in attendance an example of how it will look. The BOT worked very hard on this project and spent lots of hours to get this completed and released in their goal of 10 months. There will be a feedback tab on each page so members can make suggestions of changes or updates they want to see, search will work quickly, and it has a responsive design meaning that the site will work on any device that you are using and automatically resize to fit the screen of the device you are using. The goal was to make it as user friendly as possible for the members.

Officer and Committee updates:

No new updates for the Officers or Trustees.

Awards: Immediate Past President, Deborah Novak, CMA (AAMA), stated that there was a great night of surprises planned for the Welcome and Awards night.

By-Laws: Trustee, Candy Miller, CMA (AAMA), There were 2 proposed by-laws changes to be voted on at the HOD and the By-Laws Committee held 2 different review sessions prior to the Conference for Delegates to attend to discuss the by-laws proposals. About 120 people attended each session.

Documents: Trustee, Natasha Geno, CMA (AAMA), Forms on the AAMA website were reviewed and updated this year.

Career Professional Development: Trustee, Pam Neu, CMA (AAMA), A new Assessment-Based Recognition module for Medical Office Basics launched in July with total revenue at \$42,190. A new module called "Insurance Insights & Quality Measures" will be released October 1, 2025 with 6 CEU's and the cost will be \$95 for members and \$160 for non-members.

Maxine Williams Scholarship: Secretary, Virginia Thomas, CMA (AAMA), announced the 5 Maxine Williams Scholarship winners, 2 for \$3500, 2 for \$2500 and 1 for \$1500.

Advisory Task Force: Immediate Past President, Deborah Novak, CMA (AAMA), achieved the goal of developing AAMA Podcasts. Two podcasts are completed. The first one was completed with MGMA and the second one to be released during the AAMA Conference on Advisory Task Force. Two more are in the works.

Leadership Development: Trustee, Claire Houghton, CMA (AAMA), announced that 2 CEU's were awarded for the Leadership meeting during AAMA Conference.

Social Media: Trustee, Amy Quinn, CMA (AAMA), The committee also did Real Talk with Medical Assistants and Questions & Answers for leaders during 2023-2024. The Social Media Committee will be doing "Mini Mics with Medical Assistants" with members attending the conference to show what to expect at the AAMA Conference and post them on social media.

Partnership Task Force: Immediate Past President, Deborah Novak, CMA (AAMA) reported the partnership with SunBus for skin cancer detection. The bus will run from March 2025 to November 2025 in Colorado, Texas, and Arizona and will have physicians, physician assistant, and medical assistant volunteers and reported that AAMA President Case will attend the National Colorectal Roundtable in November 2024.

Membership Development Strategy Team: Speaker of the House, Sherry Bogar, CMA (AAMA), helped design AAMA membership pins, also announced that if members purchase 2 CEU's from the AAMA magazine then they would get 1 free, developed a letter to send to new

CMA's describing the benefits of membership. The new AAMA membership pins are made in-house to reduce cost. You could buy them at the conference for: \$7.50 each - buy 4 get 1 free then after the conference will be \$10 per pin to cover shipping cost.

Nominating: Immediate Past President, Deborah Novak, CMA (AAMA), held first ever virtual "Meet the Candidates" and held a total of two virtual meetings for "Meet the Candidates" prior to the conference for the slate of nominees listed in the House of Delegate packet.

Editorial Advisory: Trustee, Shirley Sawyer, CMA (AAMA) asked the members "What do you want to see in the Magazine"

Educators Collaborative Task Force: Trustee Pamela Neu, CMA (AAMA) worked on creating a facebook page for educators to collaborate with each other, much like the AAMA Leaders facebook page.

Marketing Strategy Team: Secretary, Virginia Thomas, CMA (AAMA), the team developed an AAMA keychain for \$5 and AAMA padfolio \$20 that will be sold during the conference and developed the MAR Week logo of Bridging the Gap. The committee will be handing out stickers with the new AAMA keychain logo at the Awards and Welcome Celebration.

Conference: Immediate Past President, Deborah Novak, CMA (AAMA), announced that AAMA staff would be in red shirts during the conference so they would be more recognizable. She also reported there were new electronic boards placed near registration that would run with information about the conference and the happenings of each day's events.

Certifying Board: Carolyn Fuller, CMA (AAMA) stated nothing new to report.

Continuing Education Board: Amber Greer, CMA (AAMA) reported that they held 2 additional virtual meetings after the report in the HOD packet and one in-person meeting in September. There will be a Medical Law training for 15 CEU's and Medical Ethics training for 25 CEU's.

No unfinished or new business reported.

Past presidents commented that they take change, cash and credit cards for donations to the Maxine Williams Scholarship fund.

Another member commended the Board on the service they provided this year.

Meeting adjourned at 11:13 a.m.

CEU Session: Coding Updates 101: Nina Watson, CMA (AAMA), CPC, CCS, CEMA, discussed the coding updates that will go into effect October 1, 2024.

CEU Session: Service Dogs Vs Emotional Support Dogs: Sydney Baxter spoke about Paws for a Cause and the use of service dogs to assist patients and the training and cost that is required

to provide a dog for a person, and how the company places the animals to serve the individuals for life. We also learned how the company got its start in Michigan.

Welcome and Awards Celebration: The theme was “A Night Amongst the Stars” We decided to dress up as Barbies as a group. Excel Award winners were announced. Nebraska won for Membership Retention in Section B. Announcement was made for the 69th AAMA National Conference which will take place September 19th to 22nd, 2025 at Hyatt Regency Crystal City at Reagan National Airport in Arlington, Virginia.

Saturday, September 21st, 2024:

House of Delegates:

Presentation of the Colors by Rockford American Legion.

National Anthem sung by Sylvia Kazma.

Pledge of Allegiance by Cameron Smith, CMA(AAMA) and HOD Attendees.

The House of Delegates was called to order by Sherry Bogar, CMA (AAMA), Speaker.

Opening reflections

Introductions of the AAMA Officers, Board of Trustees, Past Presidents, Timekeepers, Pages, Delegate Committees, and AAMA Staff

Credentials Chair Report:

Total Voting Power: 141

Registered to Vote: 127

Proxy Votes: 14

Majority Vote: 72

Two-Thirds Vote: 94

Motion for approval of the agenda passed.

Motion made for adoption of the House rules passed.

Reference Committees and Tellers appointment.

Supplemental report given by AAMA President Monica Case; CMA (AAMA) that referenced the September 20th AAMA BOT meeting.

Report of the 2023-2024 Nominating Committee given with a full slate of candidates listed below:

Candidates for Election:

President: Virginia Thomas, CMA (AAMA) from Virginia

Vice President: Sherry Bogar, CMA (AAMA) from Texas

Secretary (2 Year Term): Loxie Kistler, CMA (AAMA) from Ohio

Speaker of the House (1 Year Term): Jane Seelig, CMA-A, (AAMA) from Indiana

Vice Speaker of the House (1 Year Term): Claire Houghton, CMA (AAMA) from Texas

Trustee (2 Year Term): Cameron Smith, CMA (AAMA) from North Carolina

Trustee (2 Year Term): Pamela Neu, CMA (AAMA) from Indiana

Trustee (2 Year Term): Candy Miller, CMA (AAMA), from Oregon

There were no further nominations from the floor.

Nominations for the 2024-2025 Nominating Committee:

Patty Licurs, CMA (AAMA) from South Carolina

Paula Cooke, CMA (AAMA) from North Carolina

Christina Sears, CMA (AAMA) from Florida

Linda Metcalf, CMA (AAMA) from North Carolina

Paula Schubert, CMA (AAMA) from Indiana

Debby Houston, CMA (AAMA) from Virginia

Dawn Jordan-LaBlanc, CMA (AAMA) from Massachusetts

Todd Lasher, CMA (AAMA) from New York

Mary Ragis, CMA (AAMA) from Ohio

Toni Coffman, CMA (AAMA) from New Mexico

Don Balasa, JD, MBA, CEO and Legal Counsel, spoke about the Management Steering Committee in order to help the delegates have a better understanding of the purpose of the Management Steering Committee as a subcommittee of the BOT and the reasons behind the two By-Law Amendments. The MSC does not write reports for the House of Delegate Packet because the MSC only makes recommendations to the Board of Trustees then those recommendations are acted upon or not acted upon by the BOT. If the BOT acted on a recommendation, then those recommendations would be listed in the reports of the BOT in the HOD packet.

House of Delegates recess: 9.56 am.

Meet the Candidates:

Each candidate gave a short speech about themselves and then they were sent to different areas in the room where the Delegates and Alternates from each State could ask them questions. A timekeeper kept Delegates and Alternates moving from candidate to candidate. Our Delegates and Alternates spoke with Cameron Smith, Pam Neu, Loxie Kistler, and Sherry Bogar.

Reference Committee Reports, Bylaws, and Resolution's Session:

During the Reference Committee reports a question was posed following the Nomination Committee report asking what would happen if a candidate did not receive majority vote and there was no candidate to fill the Vice Presidency or Presidency. The delegate posing the question used a specific example asking if Monica Case was willing to remain President.

Discussion was held during the reference committee reports and during a break, the Judicial Council was consulted. After the Reference Committee reconvened, the Delegates were informed the question was not appropriate and could not be addressed as it was not a question about the Nominating Committee report.

Proposed By-Laws:

Proposed Bylaws Amendment 24-01:

This allows the Management Steering Committee to benefit from the CEO's expertise in organizational operations and strategy without influencing voting outcomes by remaining a neutral party to focus on providing informed advice to the committee members. It was noted that the CEO currently (and throughout his tenure) has not exercised his right to vote.

Proposed Bylaws Amendment 24-02:

Participation in the Management Steering Committee can provide valuable experience and skill development for the Speaker of the House. Exposure to executive decision-making and communication at this level enhances preparedness for advanced leadership rolls, such as Vice President.

It was explained that we would vote on proposal #2 and then proposal #1.

Several comments on these by-law proposals were made, including that this was brought up in the prior House of Delegates.

One Delegate was upset that the by-laws were not being displayed on the screen for the entire HOD Assembly to see during the Reference Committee on By-Laws and as members we were entitled to that. It is not stated in the current Delegate packet but as Delegates and Alternates we should be well versed on the AAMA Bylaws and should print a current copy and add it to the Delegate packet prior to coming to the House of Delegates. I believe that the Nebraska members should also print and read a current copy of the NSMA By-Laws when they print and read the Delegate Packet prior to attending the Nebraska General Assembly.

House of Delegates (Evening Session): reconvened at 5:05 p.m.

Credential Chair Report:

Total Voting Power: 141

Registered to Vote: 127

Proxy Votes: 14

Majority Vote: 71 (This was changed from 72 to 71 per Credentials Chair for AM/PM sessions)

Two-Thirds Vote: 94

Moments of Remembrance and Reflection:

Special Honor for Grace Hale “The voice of AAMA” She was the receptionist for AAMA for 45 years spanning 46 AAMA Presidential terms.

Memorial for Bonnie Bruntz

Prior to the Reference Committee Reports, Don Balasa addressed the reason the Proposed Bylaw Amendments would be voted on with 24-02 first and 24-01 second. The outcome of 24-02 could influence 24-01 and it was more logical to vote on 24-02 first.

There was still some discussion from a Delegate and it was noted.

Reference Committee Reports, Resolutions and Bylaws:

Reference committee moved that the reports of the AAMA Board of Trustees, Board of Trustees Supplemental Report, President, Vice President, Immediate Past President, Secretary, Speaker of the House, Vice Speaker of the House, AAMA Chief Executive Officer and Legal Counsel were accepted and filed for future reference. They also moved the reports of the Committees, Strategy Teams, Task Forces, and Boards be accepted and filed for future reference. All motions passed.

By-Laws:

The Reference Committee on By-Law’s recommended Proposed Bylaw Amendment 24-02 be defeated and Proposed By-Law Amendment 24-01 be adopted.

Electronic voting occurred for the Officers, Trustees, and the Nominating Committee.

AAMA 2024-2025 Officers and Trustees:

President: Virginia Thomas, CMA (AAMA)

Vice President: Open

Secretary: Loxie Kistler, CMA (AAMA)

Speaker of the House: Jane Seeling, CMA (AAMA)

Vice Speaker of the House: Claire Houghton, CMA (AAMA)

Trustees: 2-year term:

Cameron Smith, CMA (AAMA)
Pam Neu, CMA (AAMA)
Candy Miller, CMA (AAMA)

Nominating Committee 2024-2025:

Todd Lasher, CMA (AAMA)
Patty Licurs, CMA (AAMA)
Debby Houston, CMA (AAMA)
Christina Sears, CMA (AAMA)

By-laws:

By-Law 24-02 and 24-01 were defeated.

No Unfinished or New Business

Speaker Sherry Bogar, CMA (AAMA) thanked all the AAMA staff, Parliamentary Advisor and committee members for their assistance.

The Medical Assistant's Creed was recited

10 minutes were allowed for good and welfare statements.

House of Delegates Adjourned: 7:57 p.m.

Sunday, September 22nd, 2024:

CEU session: CMA (AAMA) Knowledge Bowl: An interactive session sponsored by the Certifying Board where volunteers sign up to be selected for teams of 4 CMA(AAMA)'s. The teams compete against each other to answer questions on Clinical, Administrative, and General subjects much like the ones in the CMA (AAMA) certification exam in a fun and engaging game show with very entertaining CMA (AAMA) Cheerleaders from North and South Carolina. Winning team gets \$25 each.

State Leaders Session:

This session was led by Trustee Clair Houghton, CMA (AAMA). She began by introducing the BOT leaders present. Then proceeded to a Q & A session with Past Presidents, Paula Purdy, CMA (AAMA), Patty Licurs, CMA (AAMA), Debby Houston, CMA (AAMA), and Mary Lou Allison, CMA (AAMA).

She asked the panel questions about how to be a Mentor and how to help your mentee without micromanaging, being too critical, or not setting clear goals and benchmarks for success. How to know when a mentor/mentee relationship is complete. Ideas for networking, setting boundaries work/family/volunteering, and taking responsibility for your mistakes and learning from others' mistakes. Mentor/Mentee relationships require active listening, asking questions to

understand or assist the mentor/mentee with the problem/situation without giving the answers. Be transparent and have open and honest discussions and don't speak without thinking about your response. Teamwork and prioritize the daily tasks by making a list, setting reminders in the calendar to do the most important tasks first and attainable and be flexible if you need to change your schedule.

Questions from the audience were:

How do you get others to step up as State leaders?

Use the information on the AAMA website, learn the policies and By-Laws, compliment other members and encourage them if they seem interested in participating more.

What can States do to increase membership? Participation?

Involve employers, encourage all credentials, have student activities, hold monthly Zoom meetings in your State for CEU's.

What strategies can be used to retain active members?

Ask members what they wanted to see and offer Zoom sessions with your State BOD and State leaders prior to the State and National AAMA Conferences and have more open communication.

How to get schools involved?

Offer the Educators Collaborative Task Force and the possibility if the Task Force could reach out to the schools and facebook page for Educators.

How to bring other Medical Assistants to the AAMA?

Suggestions were made to reach out to area clinics and healthcare employers and get involved in state medical or management groups. Show them what benefits the AAMA can offer them and the networking opportunities available.

At the end of the session, Rebecca Walker, CMA (AAMA) had a slideshow about the Fundamentals of Mentorship and Learning to Grow Future Leaders that stated several of the previous ideas mentioned with the Past Presidents Panel.

President's Banquet:

This is a formal event where the outgoing AAMA President is thanked for their service and the incoming AAMA President is installed for their Presidency term. Several special awards were presented during the President's Banquet, including a new award that was given to Don Balasa, JD, MBA, CEO for his many tireless years of service to the AAMA and preserving the CMA (AAMA) credential that our members hold.

I want to thank the NSMA members for allowing me to serve as your Vice President and Delegate to the 68th Annual AAMA National Conference.

AAMA Delegate Vice President,
Angie Eytcheson, CMA (AAMA), CPC

NSMA Delegate- to AAMA Conference 2024-2025

Delegate Report
68th AAMA Annual Conference in Grand Rapids, MI
September 20th-23rd, 2024
Stephani Richards CMA (AAMA)

Friday September 20, 2024

First-Timers Reception

President Monica Case, CMA (AAMA) welcomed all first time attendees and any one who chose to attend with them I attended alone. While attending we were introduced to the AAMA officers and trustees. They provided a welcoming and walk through of what to expect during the inried of the conference.

Board of Trustees and Endowment Meetings

President Monica Case, CMA (AAMA) called the meeting to order at 0913, she shared a brief reflection before roll call was taken all Board Members were accounted for except Aimee Quinn, CMA (AAMA) who was excused due to personal health reasons. The AAMA Board Members were introduced and shared the office or chair they currently hold. The microphone was then passed around the room for all state delegates and alternate delegates to introduce themselves.

Approval of the prior minutes were accepted and approved with no corrections.

Donald Balasa, JD, MBA CEO and Legal Counsel for the AAMA will attend the MGMA Leaders Conference to discuss the topic of Medical Assistants and Telehealth. He has been working with states to address the challenges being faced with the scope of practice for Medical Assistants. He did share that he has made some progress after reaching out to state boards of nursing dealing with Nurse Practitioners (APRN's/NP's) being able to delegate the administration of injections to medical assistants. Further details about Don's efforts over the past year can be found in his report in the 2024 House of Delegate Packet. He is also asking any Medical Assistant interested in sharing their feelings about AI are invited to email him for further information.

Committee Chairs delivered a verbal update on the activities that have occurred after they wrote and submitted their reports for the HOD Delegate Packet. Below is the summary of their verbal reports.

- President Case, CMA (AAMA) reports that her assignments are complete.
- Gina Mokijewski, Marketing Director announced there will be a new logo unveiled.
- President Monica Case, CMA (AAMA) introduced Mike Knight, Website Design/Development. The new website will launch some time in November of 2024. There will be no password reset, the down time will be around 72 hours. The new site is hoping to provide more back office information without needing to call. There will be a feedback feature. Micheal is asking that we all use this for good and bad things. This will help make the website more user friendly and what all CMA's are looking for. The website will also be more mobile friendly with responsive design. There is no app discussion at this time, the current goal is to update and modernize the current website.

He was given 18 months to create and launch the new site, it is a tight timeframe, but they think it will be done.

- Annual Conference Chair and Awards Chair Debarha Novak, CMA (AAMA) announced there will be a costume contest at the Welcome Party, along with walking the red carpet.
- Bylaws and Resolutions Chair Candy Miller, CMA (AAMA) added that they had two more virtual meetings about the two PDA updates. There were about 120 people in attendance.

Career Professional Development Chair Pamela Neu, CMA (AAMA) announced that with the completion of the Medical Office Basic (MOB) modules, the new module of "Insurance Insights and Quality Measure" will be available after October 1, 2024. She is also encouraged to keep completing these offered courses and getting your badges, as HR departments are keen to see all the badges that can be added to your email signature.

- The Maxine Williams Scholarship was excited to announce that a total of five scholarships that were awarded later that day, two \$3,500, two \$2,500, and one \$1,500.
- Advisory Task Force Chair Novak, CMA (AAMA) reports that there are two completed Podcasts, one has been released with MGMA insight with Don Balasa about Evolving Roles. The second was available on 09/20/24 and was about The Legal Landscape of Medical Assistants.
- The State Leader session is awarding 2 CEU's.
- Social Media will be having reel talk with CMA's Q & A and Mini Mic moments throughout the conference.
- Partnership Task Force chair Novak, CMA (AAMA) announced the partnership with Sun Bus, a mobile dermatology clinic for the 24-25 year, there has been some rescheduling needed due to breakdowns. New schedule will also start in March 2025, they will be reaching out for volunteers in the areas of travel. Chair Novak also announced that President Case, CMA (AAMA) will be attending the National Colorectal Roundtable in November 2024.
- Membership Development Chair Sherry Bogar, CMA (AAMA) announced that they have created years of service pins that could be purchased at the conference pop up shop, they were \$7.50 each or buy 4 get 1 free when purchased at conference, they will be \$10 on the website. There is a new partnership with Uniform Advantage, this is the first collaboration of its kind, making this exciting for this organization.
- Nomination Committee Chair Novak, CMA (AAMA) completed the first ever virtual meeting to meet the Candidates, there was also an in-person meeting with the candidates on 09/21/24. Chair Novak also shared there is no new candidates nominated, the list included in the House of Delegates packet is accurate.
- Editorial Advisory Committees Chair Shirely Sawyer, CMA (AAMA) shared that she had one task left to complete after submitting her report for The House of Delegates packet, but that the task was completed at that time.
- Marketing Strategy Teams Chair Virginia Thomas, CMA (AAMA) shared that there will be AAMA branded items available to purchase in the Conference pop-up shop, a new AAMA Portfolio and Keychain, but there is a limited number available. MARweek "Bridging the Gap" posters and magnets will be available for orders soon on the AAMA website. MARweek is October 21-25, 2024.
- Continuing Education Board Chair Amber Greer, CMA (AAMA) updated that the board had two additional vertical meetings since submitting the report for the HOD. There is a new monograph that has been created for Law, offering 25 CEU's, and one for Ethics offering 15 CEU's. These resources will be available soon.

Unfinished Business- none

New Business- none

Meeting adjourned at 1113.

Education Session: "Providing Effective Employee Feedback" presented by K. Minchella Ph.D, CMA (AAMA)

Education Session: "Service Dogs Vs. Emotional Support Dogs" presented by Sydney Baxter, Communications Manager for Paws with a cause (PAWS).

Welcome and Awards Celebrations:

I attended the Welcome and Awards celebration with other NSMA Delegates and Alternate Delegates, and other NSMA Members that were in attendance at the AAMA National Conference. The theme for the Award Celebration was to dress as favorite movie stars or celebrities. The Nebraska group decided to dress as Barbies, I was dressed as the Boho Barbie, others were Wired Barbie, Disco Barbie, and Chief Barbie.

Nebraska won an Excel Award for Membership Retention in Section B.

The next AAMA National Conference will be the 69th Annual Conference, it will be held at the Hyatt Crystal City at Reagan International Airport, located at 2799 Richmond Ave, Arlington, VA.

Saturday, September 21, 2024

The House of Delegates (HOD):

The House of Delegates (HOD) meeting at The 68th Annual AAMA Conference was called to order at 0900 by Speaker of the House Sherry Bogar, CMA (AAMA).

The Presentation of Colors was conducted by the Rockford American Legion, the National Anthem was sung by Sylvia Kazma, and Camerson Smith, CMA (AAMA) recited the Pledge of Allegiance.

Introductions of the Board of Directors were given.

Report of the Credentials Chair was given by Mary Dey CMA (AAMA) of the following:

Received 71 majority

141 voting power

127 present

14 proxy

141 power

71 majority

94 two-thirds vote

Approval of the Agenda was presented to Sherry Bogar, CMA (AAMA), Speaker of the House and was given approval.

Orientation of Delegates, Adoption of Rules of the House were given by Vice Speaker of the House Natasha Geno CMA (AAMA), then voted for approval.

Appointment of Reference Committees and Tellers

The Supplemental Report of Friday, September 20, 2024 was given by President Monica Case, CMA (AAMA), there were 80 persons in attendance at that meeting

The Report of the Nominating Committees was presented by Deborah Novack, CMA (AAMA), there were no changes.

Nominations of members running for Election are:

- Virginia Thomas, CMA (AAMA) for President
- Sherry Bogar, CMA (AAMA) for Vice President
- Loxie Kisler, CMA (AAMA) for Secretary
- Claire Houghton, CMA (AAMA) for Vice Speaker of the House
- Jane Seelig, CMA (AAMA) for Speaker of the House
- Trustees (2 year term)
 - Pamela Neu, CMA (AAMA)
 - Cameron Smith, CMA (AAMA)
 - Candy Miller, CMA (AAMA)

Speaker of the House Bogar CMA (AAMA) asked for nominations from the floor for The Nominating Committee for the 2024-25 term. The following nominations were made:

- Patty Licurs, CMA (AAMA) from South Carolina
- Paula Cooke, CMA (AAMA) from North Carolina
- Christina Sears, CMA (AAMA) from Florida
- Linda Metcalf, CMA (AAMA) from North Carolina
- Paula Schubert, CMA (AAMA) from Indiana
- Debbie Hustan, CMA (AAMA) from Virginia
- Dawn Jordan-LeBlanc, CMA (AAMA) from Massachusetts
- Todd Lasher, CMA (AAMA) from New York
- Mary Reges, CMA (AAMA) from Ohio
- Toni Coffman, CMA (AAMA) from New Mexico

Delegates will elect four candidates from this list.

CEO Don Balasa provided an explanation of the Management Steering Committee (MSC). He provided the clarification that the MSC is a subcommittee of the Board of Directors and doesn't generate a report, due to no actions. They only recommend things to the Board of Trustees if they make any changes, but there is still no report due to confidentiality.

Meeting recessed at 0956.

Attended the Meet the Candidates from 1015 to 1130.

Reference Committee Reports, Bylaws, and Resolutions

Reports:

- Chris Hollander, CMA (AAMA) from Colorado asked about the Report of the Nominating Committee on page 105 in the Delegates Packet, Her question was what would happen if a candidate didn't receive enough vote to fill the position they were running for, and there were no other person running or interested. She used the President as an

example. Asking if current President Case would stay on if Virginia Thomas, CMA (AAMA) did not receive enough votes to fill the spot.

- Following her question there was discussion held, and a break taken to allow the Judicial Counsel to meet and deliberate the response. Returning from break it was concluded that the question posed was not fair or appropriate and could not be addressed.

Bylaws:

- Proposed Bylaw Amendment #2 found on page 146 of the HOD packet, was discussed and had concerns from the gallery. One member brought to light that this had been voted down previously once if not twice already. More questions raised as to why the Speaker of the House needed to be added to the Committee. Several questions were asked and given the best answer that was available at the time.
- Questions were then asked as to why the CEO needed to be listed as an Ex-Officio if the MSC doesn't have voting rights. It was clarified that all areas of the Bylaws that say Chief Executive Officer as an Ex-Officio member, without a vote, are consistently written in the bylaws in a manner that adheres to standard practice.

House of Delegates Reconvenes:

The House of Delegates Reconvened at 1705, Speaker of the House Bogar, CMA (AAMA) called to order.

The Credentials Chair provided an addendum to correct the majority number of votes needed from the morning session. 71 votes are needed, not 72 for majority. The possible voting power was still 141, with 127 registered, and 14 proxy votes. The $\frac{2}{3}$ vote required was 94.

Moments of Remembrance and Reflection President Case, CMA (AAMA) provided a memorial for Grace Hale, a long-time employee of the AAMA. Rebecca Walker, CMA (AAA) provided a memorial for long-time CMA (AAMA) Meber Boni Bruntz. She also encouraged donations to the Maxine Williams Scholarship Fund.

Mary Dyer, CMA (AAMA) invited members to The Gathering meeting scheduled from 1300 to 1530 on Sunday, September 22, 2024.

Don Balasa provided an explanation during the Report of the Reference Committee. He explained the voting order for the Proposed Bylaws Amendments, explained that Proposed Amendment #2 would need to be voted upon before Proposed Amendment #1, he provided a logic to address any other concerns before voting took place.

Electronic Voting of the Officers, Trustees, and Nominating Committee's then took place Reported Results as followed:

- President: Virginia Thomas, CMA (AAMA) from Virginia
- Vice President: None at this time
- Secretary: Loxie Kistler, CMA (AAMA) from Ohio
- Vice Speaker of the House: Claire Houghton, CMA (AAMA) from Texas
- Speaker of the House: Hane Seelig, CMA-A (AAMA)
- Trustees (2 year terms)
 - Cameron Smith CMA (AAMA) from North Carolina
 - Pam Neu, CMA (AAMA) from Indiana
 - Candy Miller, CMA (AAMA) from Oregon

Nominating Committee:

- Patty Licurs, CMA (AAMA) from North Carolina
- Christina Sears, CMA (AAMA) from Florida
- Debbie Hustan, CMA (AAMA) from Virginia
- Todd Lasher, CMA (AAMA) from New York

Reports of the Reference Committee on reports from the 68th Annual Conference were distributed and reviewed, approval of all reports were recommended by the committee.

Reports: All reports in the HOD packet passed.

Bylaws:

- Proposed Bylaw Amendment #2 was defeated.
- Proposed Bylaw Amendment #1 was defeated.

Resolutions: None

Unfinished Business: None

New Business: None

Good and Welfare Statements were held to a 15 minute timeframe.

Announcements:

- The 69th National Conference will be held September 19th to 22nd, 2025 at the Hyatt, Crystal City at the Reagan International Airport, located in Arlington, VA.

Meeting Adjourned (I forgot to write the time down)

Sunday, September 22, 2024

Education Session "CMA (AAMA)" Knowledge Bowl, hosted by North and South Carolina.

State Leaders Meeting:

Four past AAMA Presidents Patty Licurs, Paula Purdy, Debbie Hston, and Mary Lou Allison had a question and answer session, provided insight on being in the leadership role, and even provided ideas on how to help grow membership.

AAMA Past President Rebecca Walker, CMA (AAMA) led a mentorship quiz and effective mentor focusing on three areas: Active Listening, Availability, and Analysis.

Education Session: Veterans and Mental Health, presented by Michael Coonan, Clinical Social Worker.

President's Banquet:

A formal or cocktail style event was attended by members that evening, All who were in attendance from Nebraska sat together for a plated meal and celebrated when Barb Carter, CMA (AAMA) walked in The Parade of State Presidents. The President's pin took place during this event also. Speeches were delivered from outgoing President Case, and incoming

President Thomas. There were also several other awards that were given during this time.

I am thankful for the chance to serve as a Delegate for the NSMA to the 68th AAMA Annual Conference, I learned a lot and can not wait to apply it while working with the NSMA Board of Directors.

Steph Richards, CMA (AAMA)
NSMA Secretary, Awards Chair, 2025 Annual Conference Chair
2024-2025 NSMA Delegate

NSMA Alternate Delegate to AAMA Conference 2024-
Alternate Delegate to AAMA 68th Annual Conference
Grand Rapids, Michigan September 20-23, 2024

I attended the Meet the Candidates and Bylaws Meeting prior to attending the conference.

September 20, 2024

First I attended the Board of Trustees meeting. Roll call was taken and everyone around the room introduced themselves and where they are from. President Monica Case, CMA(AAMA) did a reflection. Minutes were approved from the 2023-2024 Summer Board Meeting. The Committee completed their goals for the year. They worked on membership, including a new website, how to increase membership and education. Leadership with a facebook page for leaders only. Don Balasa, CEO had attended the MGMA Conference 3 weeks ago, stated the scope of practice for Medical Assistants continues to be challenged in some states and he also did an interview about why he chose Medical Assistants to focus on. The Board also approved a new AAMA logo and color. The new website launch will be November 2024 the old will be unavailable for 72 hours. There is a section at the bottom of each page for feedback with any problems you have with the site then it is assigned to someone to fix it. The new design will allow you to easily view from any device without zooming in and out. Committee updates include awards, Debra Novak, CMA(AAMA) there's a surprise for all at the awards ceremony later that day, there is a costume contest with a red carpet for participants to walk down and show off their costume and for voting on the best. Bylaws, Candy Miller, CMA(AAMA) held two meetings in which 120 people attended each session. Career, Pamela Neu, CMA(AAMA) stated there's a new Dentist Module that was available in July for CEU's, New one on Insurance and Quality Measures will be out, it will be \$95 for AAMA Members and \$160 for nonmembers. Maxine Williams Scholarship, Virginia Thomas, CMA(AAMA) the winners will be announced on Sunday at the President Banquet. The application updates have been approved for next year. Advisor Task Force, Debra Novak, CMA(AAMA) they have been working on two podcasts, one being ready to listen to today on increasing Medical Assistant Recognition for members and employers. Claire Houghton, CMA(AAMA) she received approval for State Leaders meeting for CEU credit. Social Media, Aimee Quinn, CMA(AAMA), will be working on real talk with Medical Assistants who are at the conference letting everyone know what's happening. AAMA Partnerships, Debra Novak, CMA(AAMA) stated to continue with Fetal Alcohol Syndrome, 23 Medical Assistants attended Train the Trainer sessions to offer CEU's at local conferences. Sunbus has coupled with a few states like Denver, Colorado, Dallas, TX and Phoenix, Arizona. There is a grant program to determine Melanoma through sun exposure. Continued partnership with colorectal, they will have a meeting in November where Monica Case, CMA(AAMA) will represent the AAMA. Membership, Sherry Bogar, CMA(AAMA) AAMA now has pens with the number of years of AAMA members, they are at a discounted price during the conference. There is also a membership special in October Medical Assistant Today Buy 1 CEU get a second free. Nominating, Debra Novak, CMA(AAMA) stated there will be virtual sessions for attendees following recess of House of Delegates. Education, Pamela Neu, CMA(AAMA) stated there will be an Educator facebook page soon. Marketing, Virginia Thomas, CMA(AAMA) told everyone about the shop opened by registration to buy AAMA logo products throughout the conference. Annual Conference, Debra Novak, CMA(AAMA) if any questions find staff with a red shirt with Staff written on the back. Meeting Adjourned at 11:15 AM.

1st CEU session I attended was Providing Effective Employer Feedback by Karen Manchella. A

very interactive presentation. We discussed challenges of reviews taking time to complete, forced choices, uncomfortable identifying improvement areas and is used as a written record. Always remember to document your time and things that happen that can hold up in court. Discussed the different types of reviews and their importance. Reviews are good to use as stepping stones, start, thinking, analyzing, planning, trying new ideas, keep going and be a successful employee.

2nd Ceu session Service Dogs by representatives from Paws for a Cause. It has improved the life of the disabled, started in 1979 and offered 3300 dogs in 33 states. September 20th is National Service Dog Day. There are four types of dogs they use, they receive two to two and a half years of training. There are twenty states with teams working on preparing dogs for their assignments. Dogs have an average ten years of work with lifetime support for those who receive the dogs. First started with Dogs for the Deaf. There are four types of assistance dogs, hearing dogs, service dogs, dogs for children with autism and seizure response dogs. Alternative jobs for dogs who don't successfully pass training is a facility dog for young children at hospitals and schools, police in which they smell for drugs in sd cards, computers, laptops or cell phones.

September 21, 2024

House of Delegates

At 9:00 AM, Sherry Bogar, CMA(AAMA) was Speaker of the House and Natasha Geno, CMA(AAMA) Vice Speaker of the House. The morning voting power possible 141, registered 127, proxy 14, totaling 141, Majority is 71 and $\frac{2}{3}$ is 94. Monica Case, CMA(AAMA) did a report from the Board of Trustees meeting in which 22 states were represented. Nominations were taken from the floor for the nominating committee for 2024-2025 year. Patty Licurs, CMA(AAMA), SC, Paula Cooke, CMA(AAMA), NC, Christina Sears, CMA(AAMA), FL, Linda Metcalf, CMA(AAMA), NC, Paula Schubert, CMA(AAMA), IN, Debby Houston, CMA(AAMA), VA, Dawn Jordan Leblanc, CMA(AAMA), MA, Todd Lasher, CMA(AAMA), NY, Mary Regis, CMA(AAMA), OH, and Toni Coffman, CMA(AAMA), NM, voting at 5 PM select 4. Don Balasa spoke about steering committee article 12 section 6 in regards to subcommittees and that all reports are due 61 days before the HOD, they still meet and that's why there are updates. Meeting adjourned at 9:56 AM.

Next was to meet the candidates for President, Vice President, Speaker of the House, Vice Speaker, Secretary and Trustees. They were each given several minutes to tell everyone about their accomplishments and ideas for the future AAMA.

This was followed up by meet the candidates where members are allowed to go to individuals to ask questions to be more prepared to vote in the second session of the house.

The Reference Committee was following, everyone was asked if they had any questions as we went through each report. Next Bylaws time for questions and understanding of the proposed Bylaws. There were no resolutions to discuss this year.

At 5:05 PM, the second half of the House of Delegates started. Credentials desk report Possible votes 141, registered 127, proxy 14, total 141. Majority 71 and $\frac{2}{3}$ 94. The Reference committee and Bylaws committee gave their reports. Voting was done then later reported results. Reflections were given Grace Hale, AAMA receptionist for 45 years, she answered calls and greeted visitors. She worked under 46 presidents. Boni Bruntz who was president in 2009-2010 and is a life member.

September 22, 2024

I attended the CMA Knowledge Bowl which is a game where we compete to win games by answering test questions. Always a fun time, always a great review of all things included in a Certified Medical Assistant.

Leadership session was next, we discussed being a mentor and what it means for mentor and mentee. It's always good to learn the mentee's learning style. How do they learn the best? How to know when mentoring is completed? Beliefs are always evolving, could be when a person seems confident and they move forward with their skills. How to get more people involved is to be more enthusiastic, showing how to get involved and learn Bylaws and policies. Networking groups to be involved in Join AAMA and look for other Medical Assistant State Societies. Skills successful in a Medical Assistant Career are to learn something new once a week, share your knowledge and talk to people at conferences. When mentoring, mentors can answer some questions but should allow mentee time to answer first, just listening. Some struggles with being a mentor are fear of public speaking, sitting and listening at first then you grow to ask the questions. Ethical behavior in leadership team is transparency being honest, showing your best side

and offer one on one time with everyone. Prioritize tasks by completing demands, make a checklist for what and when to be completed, continue with a list daily until all are complete. How to make life for leadership and family, you just have to set aside a time for each and follow the timeline, setting boundaries, talking with family before agreeing to a position. How to increase membership is to involve employers, add all credentials in your state, zoom meetings monthly and interact with members. To retain active members with new members ask what they want in their membership. How to welcome new members as leaders telling what's new like new websites, send postcards and follow up, just having constant contact with them. Explain the values of being an AAMA member - we are not better, the AAMA offers a voice to all medical assistants, explain what you get out of being involved in the society, African Proverb If you want to go fast, go alone. If you want to go far, do it together. President Truman once said It is amazing what you can accomplish if you do not care who gets credit. What does it take to be in leadership? Commitment, time, effort, follow up and knowing your role. The word fail - first attempt in learning. Epic failure is an embarrassing public incident. Mentors are good listeners, flexible, honest, non judgemental, eager to learn and understand networking and connections. There are several types of mentors, advisors, coach, challenger and connector.

Next session was on Veterans and Mental. The speaker is a clinical social worker who works with the veterans and is a veteran with PTSD. He talked about programs out there for veterans and their caretakers. He told many stories. He discussed PTSD once called shell shock and soldiers' hearts. They have trouble sleeping, very interrupted with nightmares. He discussed that when you become judgemental you lose contacts, lose friends and don't want help.

I attended the President Banquet. Each state's President was recognized. The outgoing AAMA President, Monica Case, CMA(AAMA) gave a speech and handed over the gavel to the New incoming president, Virginia Thomas, CMA(AAMA). She also gave a speech. Don Balasa was given a new award that will hang on the wall at AAMA headquarters, to be added to as needed. Scholarship winners were announced and thanked the AAMA.

Thank you for allowing me the opportunity to represent the Nebraska Society of Medical Assistants as an alternate delegate.

Terrie King, CMA(AAMA)
2024-2025 Alternate Delegate to AAMA Conference

NSMA Alternate Delegate Report

68th AAMA Annual Conference in Grand Rapids, MI
Sept 20th-23rd, 2024
Angy McCarter, CMA (AAMA), LRT

Saturday September 7th, 2024

Attended the Virtual AAMA meeting: Meet the Candidates - Part II.

Thursday September 10th, 2024

Attended an NSMA virtual meeting to discuss the AAMA bylaw changes and candidates for AAMA office and trustees.

Friday September 20th, 2024

Board of Trustees Endowment Meeting:

President Monica Case, CMA (AAMA) called the meeting to order just after 9:00 a.m. and shared a reflection. Roll call was taken. Introductions of the AAMA board members, others in attendance along with the state leaders in the gallery were made. Approval of the prior minutes were accepted and approved with no corrections.

Chief Executive Officer Donald A. Balasa, JD, MBA, will attend the MGMA Leaders Conference in a few weeks, where he plans to discuss key issues surrounding Medical Assistants and telehealth. He has been actively collaborating with states to address challenges related to scope of practice. Notably, he has seen some progress after reaching out to state boards of nursing about permitting Nurse Practitioners (APRN/NPs) to delegate the administration of injections to medical assistants. Detailed information on these efforts is included in his report, available in the 2024 House of Delegates (HOD) packet. He also invited any Medical Assistants interested in sharing their insights on AI and its potential impact on the future of the profession to email him directly for an interview.

Each committee chair delivered a verbal update on activities that occurred after the submission of their initial reports for the HOD packet. Below is a summary of these updates.

- President Case, CMA (AAMA), reported that all her assigned items have been completed.
- Marketing Director Gina Mokijewski announced that the AAMA will be unveiling a new logo.
- President Case, CMA (AAMA), reported on the AAMA website rebuild progress and that they have been diligently working on the development of its new website, with plans to officially launch the site in November. IT Consultant and Website Rebuild Project Manager Michael Knight shared the new website with the members present. Key notes he shared included:
 - Launch Timeline: The new site will soon be ready to go live. Michael requested that members allow 72 hours (over a weekend) before reporting any issues with the site to ensure a smooth transition.
 - No Password Resets Required: There will be no need for users to reset their passwords, simplifying the login process.
 - Simplified Design: The website features a cleaner and less busy design, making it easier for users to find information and navigate.
 - Brand Consistency: The site has been built to mimic the new AAMA logo, reinforcing brand identity and cohesiveness.
 - Feedback Button: A dedicated Feedback button will be prominently featured on the site. Michael encouraged all members to utilize this tool, as it will help AAMA create content that meets the needs and interests of its members. The

Feedback button is designed to be responsive, adapting based on the device being used.

- Annual Conference Chair and Awards Chair Novak, CMA (AAMA), announced that attendees can expect many exciting surprises throughout the conference. One highlight will be a costume contest during the Welcome Party!
- Bylaws and Resolutions Chair Candy Miller, CMA (AAMA), announced the Bylaws and Resolutions Committee had conducted two virtual meetings with delegates and alternates to discuss the proposed amendments to the bylaws prior to the House of Delegates (HOD) meeting. There were 120 members present for these virtual meetings. These discussions were aimed at ensuring that all members had the opportunity to provide input and feedback on the proposed changes.
- Career Professional Development Committee Chair Neu, CMA (AAMA), announced that with the successful completion of the Medical Office Basics (MOB) modules, the newest module, "Insurance Insights and Quality Measures," is set to be available after October 1st, 2024.
- The Maxine Williams Scholarship Chair, Thomas, CMA (AAMA), was excited to announce that the winners of this year's scholarships will be revealed later today. A total of five scholarships will be awarded: two at \$3,500, two at \$2,500, and one at \$1,500.
- Advisory Task Force Chair Novak, CMA (AAMA), announced that the episode of the podcast MGMA Insights: Don Balasa on the Evolving Role and Legal Landscape of Medical Assistants should be available to the public today.
- Social Media Chair Quinn, CMA (AAMA), recently shared a slideshow highlighting recent posts. She announced that there will be an interviewer conducting mini mic interviews at the conference and encouraged everyone to participate. The interviews will be shared on AAMA's social media platforms.
- Partnership Task Force Chair Novak from the AAMA announced a collaboration with the Sun Bus, a mobile dermatology clinic. This initiative offers free skin cancer screenings, sun safety education, and samples of EltaMD sunscreen and Heliocare at Sun Bus events. Novak encouraged individuals in the area to volunteer with the Sun Bus to support this important health initiative. In addition, Novak announced that President Case, CMA (AAMA), will be attending the National Colorectal Roundtable in November 2024.
- Membership Development Chair Bogar, CMA (AAMA), introduced membership pins, which will be available for purchase at a discounted rate (buy 4, get 1 free) during the conference at the pop-up shop. The conference price is \$7.50 per pin, while the price will increase to \$10 per pin after the conference. Bogar also announced a partnership with Uniform Advantage, marking the first collaboration of its kind, which is an exciting development for the organization.
- Nominating Chair Novak, CMA (AAMA), announced that they hosted the first-ever virtual meeting to meet the candidates. Novak also confirmed that there are no new candidates nominated and that the list included in the House of Delegates (HOD) packets is accurate.
- Education Advisory Chair Sawyer, CMA (AAMA), announced that she had one task left after submitting her report for the HOD packet, which she completed.
- Marketing Strategy Team Chair Thomas, CMA (AAMA), announced that a pop-up store will open at 10 AM tomorrow, featuring previous MARWeek promotional items. Additionally, attendees can purchase a newly designed keychain and folio, both showcasing the new AAMA logo.
- Annual Conference Chair Novak, CMA (AAMA), announced that attendees can identify

AAMA staff by their specific red shirts. She encouraged attendees to approach staff in these shirts for any assistance or questions they may have.

- Continuing Education Board Chair Greer, Novak, CMA (AAMA), announced that the committee has held two virtual meetings since the submission of the HOD packet report. A new monograph has been created for Law, offering 25 CEUs, and for Ethics, offering 15 CEUs. This resource will be available soon.

Unfinished or New Business: None

Meeting was adjourned at 11:14 a.m.

Education session "Providing Effective Employee Feedback," presented by K. Minchella, PhD, CMA (AAMA).

Education session "Service Dogs vs. Emotional Support Dogs," presented by Sydney Baxter, Communications Manager for Paws with a Cause (PAWS).

Welcome and Awards Celebration:

I attended the Welcome and Awards Celebration with the NSMA Delegation and members, where the theme was to dress as favorite movie stars or celebrities. The Nebraska group dressed as a set of Barbies, and you chose to dress as Weird Barbie.

Nebraska received an Excel Award for Membership Retention in Section B.

Next year's 69th National Conference will take place from September 19th to 22nd at the Hyatt Crystal City at Reagan International Airport, located at 2799 Richmond Ave, Arlington, VA.

Saturday September 21th, 2024

The House of Delegates (HOD):

The House of Delegates (HOD) meeting was officially called to order at 9 a.m. by Sherry Bogar, CMA (AAMA), who served as the Speaker of the House.

The Presentation of Colors was conducted by the Rockford American Legion, the National Anthem was sung by Sylvia Kazma, and Cameron Smith, CMA (AAMA), recited the Pledge of Allegiance.

The introduction of the Board of Directors (BOD) was given.

The Credentials Chair, Mary Day, CMA (AAMA), reported the following:

Total registered: 127

Proxy votes: 14

Total voting power: 141

Majority: 72

2/3 vote: 94

The Agenda of the House was presented by Speaker Sherry Bogar, CMA (AAMA), then voted on and approved.

Adoption of the House Rules was presented by Vice Speaker Natasha Geno, CMA (AAMA), then voted on and approved.

President Monica Case, CMA (AAMA), delivered a supplemental report to the delegate body, highlighting the meeting held on Friday, September 20th, 2024, which was attended by 80 people.

The report of the Nominating Committee presented by Deborah Novack, CMA (AAMA), indicated that there were no changes to the current nominations.

Speaker Sherry Bogar, CMA (AAMA), requested nominations for the Nominating Committee for the 2024-2025 term. The following nominations were made from the floor:

- Patty Licurs, CMA (AAMA) from South Carolina
- Paula Cooke, CMA (AAMA) from North Carolina
- Christina Sears, CMA (AAMA) from Florida
- Debbie Hustan, CMA (AAMA) from Virginia
- Dawn Jordan-LeBlanc, CMA (AAMA) from Massachusetts

- Todd Lasher, CMA (AAMA) from New York
- Mary Regis, CMA (AAMA) from Ohio
- Toni Coffman, CMA (AAMA) from New Mexico

Delegates will elect four candidates from this list.

Chief Executive Officer Donald A. Balasa, JD, MBA, provided an explanation of the Management Steering Committee (MSC). He clarified that the MSC is a subcommittee of the Board of Directors (BOD) and does not generate reports. Instead, its role is to make recommendations to the Board of Trustees (BOT), and any recommendations made will be included in the BOT's report.

Rebecca Walker, CMA (AAMA), encouraged donations to the Maxine Williams Scholarship Fund. Additionally, Mary Dyer, CMA (AAMA), made announcements inviting members to The Gathering meeting scheduled for Sunday from 1:00 to 3:30 p.m.

Meeting recess at 9:56 a.m.

Reference Committees: Reports, Bylaws, and Resolution's session:

The Reference Committees reviewed all reports, bylaws, and resolutions during this session.

Reports:

- Chris Hollander, CMA (AAMA), from Colorado, inquired about the Nominating Committee Report on page 105 of the HOD packet, specifically asking what would happen if a candidate did not receive a majority vote. She used the Presidency as an example and asked if the outgoing president and immediate past president would be willing to fill that role.
 - Following her question, there was some discussion, and a break was taken to allow the Judicial Counsel to meet and deliberate. After the break, it was concluded that the question posed was not fair or appropriate and could not be addressed.

Bylaws:

- During the discussion on Proposed Bylaws Amendment #2, found on page 146 of the HOD packet, comments and questions were raised from the gallery. One individual noted that this amendment had been previously presented to the delegation and voted down. Additionally, there was a suggestion to remove the secretary from the Management Steering Committee (MSC), with a past president commenting that the MSC does not have voting rights.
- During the discussion of Proposed Bylaws Amendment #1, found on page 145 of the HOD packet, a question was raised about why the wording includes "Chief Executive Officer as an Ex-Officio member, without a vote," if the MSC does not vote. It was

clarified that in all sections of the bylaws, the phrase "Chief Executive Officer as an Ex-Officio member, without a vote" is consistently written in this manner, adhering to

standard practice.

- A larger concern emerged regarding the future of the Chief Executive Officer role. Members expressed trust and respect for Don Balasa, feeling that he understands and supports the AAMA. There is apprehension that once Don is no longer the Chief Executive Officer as an Ex-Officio, his successor may not share the same values or views.

HOUSE OF DELEGATES RECONVENES

The House of Delegates (HOD) reconvened at 5:05 p.m. and was called to order by the Speaker of the House, Sherry Bogar, CMA (AAMA).

The Credentials Chair report provided an addendum to correct the majority number from the

morning session, stating that it should have been noted as 71. In the current session, the possible voting power was 141, with 127 registered voters and 14 proxy votes, resulting in a total voting power of 141. The majority was 71, and the 2/3 vote required was 94.

During the Moments of Remembrance and Reflections, President Monica Case, CMA (AAMA), delivered an in memoriam for Grace Hale, a dedicated staff member who served the AAMA for over 45 years. Additionally, Rebecca Walker, CMA (AAMA), gave an in memoriam for Boni Bruntz, CMA (AAMA), who was the AAMA President during the 2009-2010 term.

During the report of the Reference Committee, Don Balasa explained the reasoning behind the voting order for the bylaw amendments. He clarified that the delegation would vote on Proposed Bylaws Amendment #2 before Amendment #1 because the outcome of Amendment #2 could influence the first amendment. Therefore, it was logical to address Amendment #2 before voting on Amendment #1.

Electronic voting of the Officers, Trustees, and Nominating Committee's commenced.

Election results were as reported:

- President: Virginia Thomas, CMA (AAMA) - Virginia
- Vice President: None
- Secretary: Loxie Kistler, CMA (AAMA) - Ohio
- Vice Speaker of the House: Claire Houghton, CMA (AAMA) - Texas
- Speaker of the House: Jane Seelig, CMA-A (AAMA) - Indiana
- Trustees (2-year terms):
 - Cameron Smith, CMA (AAMA) - North Carolina
 - Pam Neu, CMA (AAMA) - Indiana
 - Candy Miller, CMA (AAMA) - Oregon

Nominating Committee:

- Patty Licurs, CMA (AAMA) from South Carolina
- Christina Sears, CMA (AAMA) from Florida
- Debbie Hustan, CMA (AAMA) from Virginia
- Todd Lasher, CMA (AAMA) from New York

Report of the Reference Committee was distributed and reviewed. The committee recommended that all reports be approved.

Reports: All Reports in the HOD packet were passed.

Bylaws:

- Proposed Bylaws Amendment #2, Article XII - Board of Trustees, Section 6, regarding the Management Steering Committee, was reviewed. The Reference Committees recommended that the amendment be defeated, and ultimately, the amendment was defeated.
- Proposed Bylaws Amendment #1, Article XII - Board of Trustees, Section 6, regarding the Management Steering Committee, was reviewed. Although the Reference Committees recommended that the amendment be adopted, it was ultimately defeated.

Resolutions: None.

Unfinished Business: None.

New Business: None.

Medical Assistance Creed recited.

Announcements:

- The 69th National Conference will take place from September 19th to 22nd at the Hyatt Crystal City at Reagan International Airport, located at 2799 Richmond Ave, Arlington, VA.

Good and Welfare Statements were shared.

Meeting adjourned.

Sunday September 22nd, 2024

Education session “CMA (AAMA) Knowledge Bowl”.

- During the Education Session, the CMA (AAMA) Knowledge Bowl was hosted by the North and South Carolina state chapters. This game-show-style quiz bowl featured four randomly drawn teams competing against each other by answering administrative and clinical medical assisting test questions.

State Leaders Meeting:

- During the State Leaders Meeting, AAMA Past Presidents Patty Licurs, Paula Purdy, Debbie Huston, and Mary Lou Allison shared insights on leadership roles and skills by answering various questions from the attendees. Examples of the questions included:

- Are there any networking groups you would highly suggest?

- They provided recommendations for volunteering at the national level within the AAMA, attending MGM (Medical Group Management) or PACHOM (Professional Association of Clinical Office Managers) events, joining the AAMA itself and becoming involved in its activities, and engaging with peers on the AAMA State Leaders Facebook page.

- What skills or education sessions have you found to be helpful in your career?

- They encouraged taking professionalism classes and Bootcamp 101.

Debbie Huston stated “Knowledge is no good if you have it and don’t share it”.

- What are the biggest mistakes you have seen and how would you help your mentee avoid them?

- Think before speaking: Encourage mentees to be thoughtful in their responses and avoid speaking impulsively.

- Ask "why": Understand the reasoning behind situations before reacting or making decisions.

- Listen and ask questions: Teach the importance of pausing, actively listening, and seeking clarification when needed.

- Learn to read the room: Develop the ability to observe and understand group dynamics before engaging in conversation or decision-making.

The first half of this session provided practical advice for current and aspiring leaders within the AAMA. After a Q&A session, attendees engaged in a discussion about what they would like to see in the organization and received suggestions from AAMA leadership. Key recommendations included using Constant Contact for state/chapter newsletters and holding regular Zoom meetings with leaders from other states to exchange ideas and address challenges. When asked about involving schools, leadership advised starting with educators and shared that a task force is currently working on this. A takeaway from the discussion was that while other associations exist, the AAMA is the only one that accepts and supports “all” medical assistants.

In the second half of the session, past AAMA president Rebecca Walker, CMA (AAMA), led a mentorship quiz. She discussed key steps to being an effective mentor, focusing on three areas: active listening, availability, and analysis.

- Active listening involves not interrupting, avoiding conflicting body language, and not making assumptions.

- Availability means being present without being overbearing, knowing when to step back, and recognizing that mentees have different needs.

- Analysis emphasizes giving constructive feedback with careful tone and phrasing, being honest but not overly blunt.

Rebecca Walker shared several quotes and additional mentoring tips during the session. She emphasized the importance of commitment, effort, and understanding your role as a mentor. She also cautioned against trying to be a "fixer" and redefined "fail" as First Attempt In Learning. Rebecca concluded by sharing her business card, which featured a quote by Steve Washington: "Mentoring is a two-way street. You get out what you put in."

President's Banquet:

The President's Banquet was a formal or cocktail-style event, with attendees dressing up for an evening out. The night began with a cocktail hour followed by dinner. The Parade of State Presidents and the passing of the AAMA President's pin took place during the banquet. Speeches were delivered by outgoing president Monica Case, CMA (AAMA), and incoming president Virginia Thomas, CMA (AAMA) delivered speeches. Additionally, several special awards were presented throughout the night.

Monday September 23rd, 2024

Education Session "Pulmonary Fibrosis" presented by Brandon J. Hoos, DO, a pulmonologist based in Wyoming, Michigan, affiliated with the University of Michigan Health-West.

I am thankful for the chance to serve as an Alternate Delegate for the NSMA and learned a lot from the annual AAMA Conference.

Angy McCarter, CMA (AAMA), LRT
NSMA Immediate Past President
2024-2025 NSMA Delegate

**Alternate Delegate Report
68th AAMA Annual Conference in Grand Rapids, MI
September 20-23rd, 2024**

Saturday August 3rd-I attended the first virtual meeting of “Meet the Candidates” offered by the AAMA. Each candidate that was running for office presented. In each of their presentations, the candidates listed all of their offices or what committees they had served at their local state levels as well as the national level. They also explained what ideas they wanted to bring to the AAMA.

Thursday, September 10th-I attended the NSMA virtual meeting run by our President Barb Carter. Discussion was made about the potential bylaw changes at the AAMA level and how it would impact CMA's. We also talked about the candidates running for the open AAMA offices and Trustees. Each report in the delegate packet was reviewed and discussion was held.

Friday, September 20th-As an Alternate Delegate, one of the mandatory meetings I attended during the conference was the Board of Trustees and Endowment meeting.

Those at the head table included the following:

Amber Grier Sue Hawes Aimee Quinn Claire Houghton Natasha Geno Sherry Bogar Virginia Thomas Deb Novak Don Balasa Candi Miller Shirley Sawyer Shannon Thomas Pam Neu Carolyn Fuller Sharon Flynn Monica Case

President Monica Case called the meeting to order shortly after the scheduled 9am start time, and then adjourned 11:15. Then each of the officers and trustees introduced themselves. In the audience were all the Delegates and Alternates in attendance for the conference as well as some of the other staff of the AAMA. Everyone from the gallery then introduced themselves, where they were from, what positions they have served in the state they are from, and if they were a delegate or alternate.

It was also stated that if there are any additional updates, questions will be answered prior to the House of Delegates.

CEO Don Balasa presented next stating he had done a podcast. He would be attending an MGMA leaders conference that would be focusing on the telehealth topic. He noted that scope of practice for CMA's had been challenged in several states. He sent a letter to all state nursing boards regarding the delegation of injections.

A new logo was approved by the AAMA for this coming year. It will have black instead of red, the diamond was removed, and it will be easier to see with a larger font.

Michael Knight stated that the current AAMA website has been in the process of updating. He said it will go live in mid-November. It has been an 18 month project. The website will be down for about 72 hours while it updates from the current to the new site. Members will be able to use their current logon information. The goal is to make the site cleaner, and easier to navigate where you want to look. It will give members the ability to give website feedback for any errors or issues. Everything refills based on the screen size (computer vs.

phone).

The following have been updated since July:

- Awards-costume contest
- Bylaws-virtual meetings with 120 people total
- Documents-what is expected of positions/committees
- Career Professional Development-provided Medical Office Basics and Insurance Insights & Quality Measures
- Maxine Williams-selected winners for the yearly scholarship award to include 5 total
- Advisory Task Force-get involved with the 2 podcasts that are currently listed on social media. There are also 2 in process.
- Social Media-"Reel talk with Medical Assistants. Mini mics with Medical Assistants
- Community Partnership Task Force-Fetal Alcohol Syndrome provided training, and it will be shared with state chapters. Sunbus had to reschedule some dates in Denver, Dallas, and Phoenix for 2024 to March through November 2025. There may be some chance for it to come to our area for screening and education for preventative skin care (to include providers and CMA's). There will be a colorectal round table in November that President Case will be attending to represent the AAMA.
- Leadership Development Strategy Team-provided membership pins in the pop-up shop \$7.50 at Conference BOGO . After Conference, they will be \$10. Every new member will get a letter from them.
- Nominating Committee-Completed the 1st virtual "meet the candidates". It was held in-person following the first session of HOD. There were no further candidates nominated for the vacated offices/positions.
- Educator Task Force-working on a facebook page
- Marketing Strategy Team-the pop-up store opens 09/21 that will have phone wallets, luggage tags, pins, totes, masks, padfolios, and keychains. Marweek info to include posters, magnets, articles are currently at the printer.
- Annual Conference-gave information about the monitors throughout areas of the hotel.
- Certifying Board-no updates
- Continuing Education Board-had 2 virtual meetings, created now monographs. Topic of Ethics and another subject will be available print and e-format soon

Education sessions attended:

1. Providing Effective Employee Feedback
2. Service Dogs Vs. Emotional Support Dogs

There was a welcome and Awards Celebration that I attended that had the theme of dressing as your favorite celebrity or movie star. Our Nebraska group dressed up as Barbies, with myself dressed up as Veterinarian Barbie. Nebraska received an Excel Award for membership retention in section B. At the end of the celebration, it was announced that the 69th national conference will be held September 19th-22nd in Arlington, VA.

Saturday, September 21st

House of Delegates-The meeting officially started at 9am by Speaker Bogar. All of the Board of Directors were introduced.

-The agenda was presented, voted on, and approved.

-Adoption of the House rules was presented, voted on, and approved.

-President Case shared the Board of Trustees and Endowment meeting had 80 total attendees.

-The choices for candidates for positions in the AAMA were made, but I didn't get them written down.

-Don Balasa stated the Management Steering Committee makes recommendations to the BOT.

-A question was raised if a candidate didn't receive a majority vote how that vacancy would be filled. There was a heated discussion with a break to allow for the Judicial Council to discuss privately. After the break, it was noted the question could not be addressed.

-Bylaws were discussed in more detail with the focus on the specific wording of the CEO having a vote.

Discussion was then made about the future role of the CEO with the implication of what that person would bring to the AAMA once Don Balasa is no longer in that position.

House of Delegates then reconvened later in the afternoon, with a reading of the official numbers regarding voting by the Credentials Chair.

-Memoriams were made for 2 prior members of the AAMA.

Voting started with the election results as follows:

Officers

1. President Virginia Thomas from Virginia
2. Vice-President none
3. Secretary Loxie Kistler from Ohio
4. Speaker Jane Selig from Indiana
5. Vice-Speaker Claire Houghton from Texas

Trustees

- a. Cameron Smith from North Carolina
- b. Pam Neu from Indiana
- c. Candi Miller from Oregon

Nominating Committee

- d. Patty Licurs from South Carolina
- e. Christina Sears from Florida
- f. Debbie Houston from Virginia
- g. Todd Lasher from New York

-Reports in the HOD packet were mentioned one by one without any discussion.

-The 2 bylaws that were presented were both voted on and defeated

Sunday, September 22nd

Education sessions attended:

1. CMA(AAMA) Knowledge Bowl-Several members from the audience were put into 2 separate teams. Then the teams competed against each other for a prize. The questions asked were pulled from current and past AAMA exams. Once each group of teams cycled through, the teams with the most correct answers competed and the winner was chosen.
2. State Leaders session-a panel consisting of past Presidents Patty Licures, Paula Purdy, Debbie Houston, and Mary Allison answered questions from the audience including but not limited to:
 - a. How do you determine what learning style you have?
Find tools that work the best for you
 - b. How do you determine when a mentor/mentee relation is complete?
Not definite, still use as a resource
Empower mentee and make yourself available
When you start to see more confidence
 - c. How do you get a member to step up?
Use tools and the bylaws as a guide
Mingle with those in attendance at local and state meetings
 - d. Are there any networking groups you suggest?
Join AAMA and volunteer
Find one that fits and feeds what you need
Leaders on Facebook page
 - e. What skills/educational sessions have you found most helpful in your career?
professionalism class
Boot camp 101 and 102 on the SC site
getting out and talking to people
 - f. As a mentor, how would you guide the mentee towards an answer?
don't give answer, but ask how would you answer
listen and pause
 - g. What are the biggest mistakes you have seen?
speak without thinking
not listening, asking questions, or assuming
take responsibility, "own it"
 - h. What did you struggle with and a mentor/mentee?
afraid to talk in front of a lot of people
learn how to listen
delegating
learn how to take criticism
look at things globally across the country
 - i. How do you ensure ethical behavior/integrity?
be transparent
be open and honest
one on one
set an example by how you act
 - j. How do you prioritize and make sure important tasks are not overlooked?
make a list
keep a calendar

what needs to be done first/timelines, can't get all done, then go to
next day

- k. What is your strategy for work/life balance?
 - setting boundaries
 - family first
 - set certain days for certain activities
- l. As a mentor/mentee do you seek others?
 - encourage them for the work they have done
- m. What are you doing to increase your state membership and keep them?
 - get employers involved
 - encourage all credentials
 - find out what members like or want
 - zoom meetings
- n. How can current state boards welcome new members?
 - use the template provided coming out on new AAMA website for state presidents follow up with them, and give them some time
 - offer continuing education opportunities
- o. What can the AAMA do to get schools or instructors involved?
 - send info to employers and medical management groups

The second half of the session was led by Rebecca Walker that explained the fundamentals of being a mentor. She stated it takes commitment, effort and knowledge of your role.

1. Active listening-paying attention and interpreting body language
2. Availability-balance-casual or structured
 - when to back off realize not everyone has the same needs analysis
 - give constructive feedback, be honest not blunt
 - watch your tone of voice and how you phrase something

Presidents Banquet-it was a formal event with attendees dressing in cocktail attire. There was a presentation of all state presidents that were in attendance during the event. President Monica Case pinned the incoming President Virginia Thomas.

Monday, September 23rd

Education sessions attended:
-Caregiving and Work-Life Balance

Thank you for voting for me to serve as an Alternate Delegate to the AAMA National Conference this year.

Jennifer Kocian, CMA(AAMA), CPC
NSMA Alternate Delegate 2024
Treasurer, Website Chair

Stephani Richards, CMA(AAMA)

3707 Central Ave

Kearney, NE, 68847

Education Herzing University, Omaha and Madison Campus

Associate of Science in Medical Assisting Services CMA Exam- Passed

Work Experience

CHI Health Clinic- Kearney

Choice Family Health Care

Dr Sharron Bond Dermatology

Family Practice Associates P.C.

Choice Family Health Care

Professional Affiliations

American Association of Medical Assistants

Nebraska Society of Medical Assistant

NSMA Secretary

NSMA Awards, Committee Chair

NSMA Annual Conference 2025, Committee Chair

NSMA Social Media, Committee Chair

NSMA Archive, Committee Chair

2024 AAMA National Conference Delegate in Grand Rapids, MI.

Angy Mccarter CMA (AAMA), LRT

Lincoln, NE | amccarter76@gmail.com

1997 - Graduated from the Medical Assisting Program - Lincoln School of Commerce

2000 - AAMA Certification Exam - Passed

2005 - Recertified with AAMA

2006 - Limited Radiographer License Issued. Renewed every 2 years and is current.

2010 - Recertified with AAMA

2015 - Recertified with AAMA

2020 - Recertified with AAMA

2023 - Recertified with AAMA

Lincoln Chapter of Medical Assistants {LCMA}

2000 - Started with the LCMA

2003 - 2004 - Vice President, Delegate to NSMA Conference

2004 - 2005 - President, Delegate to NSMA Conference

2016 - 2017 - Delegate to NSMA Conference

2017 - 2018 - President

2017 -2018 - Delegate to NSMA Conference

2018 - 2019 - President, 2020 NSMA Conference Chair

2020 - 2021 - 2020 NSMA Conference Chair

2020 - 2021 - Chapter Dissolved

Nebraska Society of Medical Assistants (NSMA)

2002 - 2003 Delegate to National AAMA Convention in Oregon

2003 - 2004 Liaison Committee Chairman

2004 - 2005 Historian/Archive Committee Chairman

2004 - 2005 NSMA Vice President

2005 - 2006 NSMA President Elect, Delegate to National AAMA Convention in Colorado

2006 - 2007 NSMA President, Delegate to National AAMA Convention in Milwaukee

2007 - 2008 Immediate Past President

2007 - 2008 Historian/Archive Committee Chairman

2017 - 2018 Certification Committee Chairman

2018- 2019 Secretary, Certification Committee, and 2020 Annual Conference Chair

2019- 2020 Secretary, 2020 Annual Conference Chair. NSMA alternate delegate, National AAMA Conference.

2020 - 2021 Secretary, Social Media Chair, NSMA alternate delegate/delegate to National AAMA Conference (canceled due to COVID pandemic).

2021 - 2022 NSMA Secretary, NSMA Social Media committee member, NSMA alternate delegate to National AAMA Conference in Houston, TX.

2022 - 2023 NSMA Vice President, NSMA Social Media committee member, NSMA delegate to National AAMA Conference in Myrtle Beach, SC.

2023 - 2024 NSMA President, NSMA Social Media committee member, NSMA Annual Conference Chair for Lincoln, NE. Started the NSMA Monthly Newsletter. NSMA delegate to National AAMA Conference in Orlando, FL.

2024 - 2025 NSMA Immediate Past President, Public Policy and Social Media Chair. NSMA
Monthly

Newsletter composer. NSMA alternate delegate to National AAMA Conference in Grand Rapids,
Michigan.

American Association of Medical Assistants (AAMA)

2021-2022 AAMA Social Media committee member.

OTHER

- Member of the American Association of Medical Assistants from 1997 to present.
- In the past, sat on the Education Board for the Medical Assistant program at Southeast Community College in Lincoln, NE. Help with providing education/internship for Medical Assistants in past and current offices._

Terrie King, CMA(AAMA)

2704 E Kaneshville Blvd Apt 27 , Council Bluffs, Ia

I currently work as a Certified Medical Assistant at Children's Physicians office since Feb 14th of 2022. I am on Clinic Council at Children's started January 2023. Children's Hospital since September 2015 in Pulmonology-Allergy-Sleep Medicine clinic. 2018 until 2020 was on Medical Assistant committee at Children's. In 2021 on a task force for Medical Assistants, here at Children's working on what we can do in clinic settings.

I worked at Methodist Physicians Clinic in Pediatrics from 2001 to 2015. I worked at

Creighton Family Practice from 1997 to 2001 in Family Practice.

Certified Medical Assistant since 2002.

Omaha chapter of Medical Assistants

2019-2020 Immediate Past President

2018-2019 President

2017-2018 Vice President

2015-2016 Immediate Past President

2014-2015 President

2013 -2014 Vice President

2012-2013 Immediate Past President

2011-2012 President

2010-2011 Vice President

2008-2020 Communication Chair

2003 - 2020 Education Chair

Nebraska Society of Medical Assistants

2023-2025	Bylaws
2024-2025	Speaker
2023-2024	Vice Speaker
2023-2024	Immediate Past President
2022-2023	President
2021-2022	Vice President
2020-2021	Media Member, Website Member
2019-2020	Marketing Chair
2018-2019	Membership Chair
2017-2018	Immediate Past President
2016-2017	President
2015 -2016	Vice President
2012-2015	Secretary
2010-2012	Certification

American Association of Medical Assistants

2024-2025 Alternate Delegate to AAMA Conference in Grand Rapids, MI

2023 -2024 Delegate to AAMA Conference in Lake Buena Vista, FL

2022-2023 Delegate to AAMA Conference in Myrtle Beach, SC

2021 -2022 Delegate to Conference in Houston, Tx

2017 -2018 Alternate Delegate to Conference in Cincinnati, OH

2016 - 2017 Delegate to Conference in Reston, VA

2015 - 2016 Delegate to Conference in Portland, OR

2014 - 2015 Delegate to Conference in St Louis, MO

2012 - 2013 Alternate Delegate to Conference in Scottsdale, AZ

Jennifer Kocian CMA (AAMA)CPC

1601 Torreys Drive

CERTIFICATIONS

11/10/18-CPC	02/14/18-CMA (AAMA)
11/01/13-CMA (AAMA)	01/01/07-CMA (AAMA)
01/26/01-CMA (AAMA)	01/23/22-CPC
03/17 /23-CMA (AAMA)	

NEBRASKA STATE POSITIONS

Website Chair 2022-2025	Speaker 2021-2022
Vice-Speaker 2020-2021	Treasurer 2015-2016, 2023-2025
Archive Chair 2013-2014	Delegate National Conference 2014, 2024
Conference Co-Chair 2015, 2024	Conference Treasurer 2010, 2015, 2024

LINCOLN CHAPTER POSITIONS

President 2012-2013	Vice-President 2011-2012
Treasurer 2009-2011	

MEMBERSHIPS

AAMA November 2000-Present	AAPC November 2018-Present
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PROPOSED MOTION FORM

Clearly write down the motion:
I move-

Motion made by:

Seconded by:

PASSED

FAILED

(After the motion has been moved and seconded, this form must be sent to the Speaker via Page please)

PROPOSED MOTION FORM

Clearly write down the motion:

I move-

Motion made by:

Seconded by:

PASSED

FAILED

(After the motion has been moved and seconded, this form must be sent to the Speaker via Page please)