67th Annual AAMA Conference

Lake Buena Vista, Florida

September 22-25, 2023

Third Delegate Report

At the 2023 CSMA annual meeting, this delegate was nominated to be the fourth delegate to represent our State Society at the 2023 AAMA Annual Conference, to be held at the Hilton Orlando Lake Buena Vista-Disney Springs Area in Florida. As there was no vice-president to be the second delegate, the remaining delegates each moved up one position.

This delegate was fortunate to be able to spend a few days prior to our meeting on vacation at a resort about half an hour away from our conference site. We were able to host delegate Virginia Marquette, CMA (AAMA) for a day before the conference. We had some lovely weather and some wet weather while there. There was lightning and heavy rain while going to the airport to pick up Virginia that the windshield wipers had difficulty keeping up with. Once we made it to the airport, we had to wait an hour or so for her luggage as outside handlers aren’t allowed outside to unload or load a plane if lightning is within three miles of the airport. That was the first we had ever heard of that but it’s nice to know that they don’t put workers in harm’s way.

I was able to room with our 4th delegate Ashlyn James, CMA (AAMA) and get to know her a bit better. COVID and social distancing has taken a toll on us with the lack of socializing. It’s hard for many of us and the state societies to get back to in person meetings and interaction with others. I hope we all work on it to strengthen our profession and enhance our own mental health.

My job of representing CSMA started Friday morning, the 22nd, with attending the Board of Trustees (BOT) meeting. It was announced that 658 had registered for the conference thus far. Don Belasa, JD, MBA, CEO and Legal Counsel made several announcements: 1) Board policies would be addressed at the House of Delegates (HOD); 2) Medical Assistant (MA) licensing is a state-by-state process so allowed duties may differ; 3) The Association of Nurse Practitioners (NPs) is in favor of delegating special tasks to certified MAs whom have received specific training to perform those tasks. It was also announced that the BOT had approved the lease and move of the AAMA office headquarters to the 37th floor of the Civic Opera Building saving AAMA $50,000.

Also, a new assessment-based recognition in medical office basics (a training module) consisting of approximately 14-16 units is being developed, it was mentioned that it would be a good refresher of entry level information. The cost for this module would be $90.00 for members and $125.00 for non-members.

Marketing encouraged us to download the materials for MARWeek from the AAMA website. The MARWeek theme is “Medical Assistants Shine Bright”. PAHCOM was sponsoring a scavenger hunt with items for MARWeek as prizes. Marketing is also working on resume tips and how to promote ourselves. They had also sent delegate packet contents out to employers for outreach.

Membership sent out 34,000 emails to non-members and received 7.5% or 2,561 responses back, they’ll address the top three issues mentioned by those that responded.

The Nominating Committee announced there would be five trustee vacancies instead of four, as Shelley Gingrich, CMA (AAMA) has resigned due to medical reasons.

Our CMA Today magazine is getting a new facelift with the new name/title of Medical Assisting Today. It was mentioned we would be able to download a copy of the magazine to add our individual photo to the front page. We were told it takes 330 employee hours to complete each issue. The AAMA website is also looking at some changes coming up in the future.

Friday evening the Welcome and Awards Celebration took place with attendees encouraged to dress in 80’s themed attire. There was a very good and interesting turnout. Don Balasa won the prize for best costume, looking very much like Don Johnson who played Sonny Crocket on the 1980’s television show Miami Vice. There were too many Excel Award Winners to list them all in this report, but this delegate would like to mention a few. Awards of Distinction: Leadership and Mentoring- Donna Gibbins, CMA (AAMA); Golden Apple- Sandra Alexander, MPA, CMA (AAMA); and Medical Assistant of the Year- Rebecca Eldridge, CMA (AAMA). AAMA Rising Star Awards went to Norma Gonzalez, CMA (AAMA); Alyssa Shackelford, CMA (AAMA); and Cameron Smith, CMA (AAMA), PBT(ASCP). This delegate would also like to give a shout out to the Iowa State Society for the hard work and dedication that it would have taken for the recognition in excelling in membership retention, membership recruitment, student membership recruitment, and CMA (AAMA) Certification.

The HOD was called to order Saturday morning at 9:07am. Don Belasa, JD, MBA, CEO and Legal Counsel did the Keynote Speaker Presentation; The VFW Post 4287 Honor Guard of Orlando presented the Colors; 2022-2023 President Deborah Novak, CMA (AAMA) led all in the Pledge of Allegiance; and the Orlando Gay Chorus did a beautiful job leading us in singing our National Anthem. The Board of Trustees (BOT), officers, Past Presidents, and AAMA staff were all introduced.

It was announced that the voting power for the morning session was 151 with 143 registered and 0 proxies. A quorum was present with the majority being 73 and two-thirds being 95. Motions were made and passed to accept the agenda of the house and to accept the rules of the house. Nine nominations were made by the nominating committee. A eulogy was presented for 2011-2012 Past President Ann Naegle who passed away on July 23, 2023. She was only 79 years old and was a life member. The meeting then recessed at 9:58am.

This delegate also attended Meet the Candidates. The Candidates went from table to table to answer any questions we had or tell us why they were running and what they wanted to accomplish if voted into the position they were running for. Before conference, this delegate received mail or email correspondence from some of those running for an office. This provided some preliminary information to consider and help formulate questions that our delegates could ask the candidates. To be honest, not much of what I heard from the candidates that came by our table impressed me. Pride, passion, perseverance, recruitment, retention, and recognition were mentioned as goals. Some discussion, at times a bit heated, of proposed bylaws that were going to come up for vote in the HOD took place.

This delegate then attended Reference Committees: Reports, Bylaws, and Resolutions. The Reference Committee on Reports recommended all reports be accepted and filed for future reference (some editorial revisions would be made as noted). The Reference Committee on Bylaws recommended that all seven proposed bylaw amendments that are being presented be adopted. There was much discussion on proposed bylaw amendments 23-04 and 23-05 having to do with membership qualifications and privileges. Membership declined about 12.5% from 2022-2023. Many states are having difficulty in membership numbers as well as members taking an active part within their societies. Many are seeking to include associate members as possible choices for delegate and alternate delegate for their society as they pay dues but don’t get the opportunity to represent their state. Many other members are concerned that this is mainly an avenue for seeking more revenue for the AAMA, which after all is a business, and for the states that would welcome this change. Others feel these two proposed bylaw amendments would just be opening the door in the future for these members numbering about 1,346 versus 24,000 CMA (AAMAs) to serve on the BOT, become committee chairs, and AAMA officers representing the CMA (AAMA) without holding the credential. This delegate felt this was catering to a low number of members in relation to the larger number of CMA (AAMA) members, thus not a large revenue source and that these two proposed bylaw amendments don’t help uphold the level of our credential.

The HOD reconvened Saturday evening for elections. The Credentials Chair report was given. Voting power was 151, registered was 143, proxies was 8. Majority vote was 77 and two-thirds vote was 101. Voting for Officers, Trustees, Nominating Committee and Proposed Bylaw Amendments took place. Proposed Bylaw Amendment 23-01 was regarding Article Vlll-Qualifications of Officers and Trustees, Section 1 and Section 4B. This mainly was to remove the word Treasurer from the Secretary -Treasurer position as this officer doesn’t require the handling of money (Passed with yes 138, no 10, abstain 2). Proposed Bylaw Amendment 23-02 regarding Article Vlll-Qualifications of Officers and Trustees Section 4. This explains that the Medical Assisting Education Review Board (MAERB) sought and achieved its own legal incorporation. Therefore, the MAERB Board Chair doesn’t attend the BOT meetings providing the needed exposure to issue discussions to qualify for officer candidacy (Passed with yes 144, no 6, abstain 0). Proposed Bylaw Amendment 23-03 regarding Article Vlll-Qualifications of Officers and Trustees, Section 4A basically removes chairs of the Certifying Board and Continuing Education Board as a qualification for running as an officer or for the BOT (Passed with yes 126, no 22, abstain1). Proposed Bylaw Amendment 23-04 regarding Article Vl- Membership, Section 2A was a contentious proposal, with much argument taking place. This would allow any credentialed medical assistant holding current status through a National Commission for Health Certifying Agencies (NCCA)-accredited certification program and whose credential hasn’t been revoked as provided by the respective credentialing body to become an active member. The rationale was AAMA is proud to be the only organization solely representing all medical assistants and as multiple state societies allow associate members who hold other credentials to serve as officers, this will give those credentialed medical assistants the opportunity to contribute to the AAMA as an active member (Passed with yes 129, no 17, abstain 4). Proposed Bylaw Amendment 23-05 regarding Article Vl-Membership, Section 3 received much discussion and disagreement between many members. The rationale was to clarify only CMA (AAMA) members are eligible to be candidates for AAMA Officers, Trustees, and committee chairs but allowing any AAMA Active or Life member to serve as a Delegate, Alternate Delegate, or committee member. Many felt this was opening a future door for the non- CMA (AAMA) to be a candidate for AAMA Officers, Trustees, and committee chairs in the near future (Failed with yes 99, not 49, abstain 2). Proposed Bylaw Amendment 23-06 regarding Article Xlll-Boards and Councils, Sections 1-2 basically changes the deadlines for the annual reports of the Certifying Board and Continuing Education Board with the rationale of making the deadlines less restrictive (Passed with yes 138, no 12, abstain 0). Proposed Bylaw Amendment 23-07 regarding Article XVll-Publication is to allow for flexibility of publication schedule and format. The current wording states that the official publication published bimonthly be in the format of a professional journal. Rationale states a journal is a peer reviewed scientific journal which doesn’t define our publication. Many expressed concern that we wouldn’t receive as many CMA Today magazines as we do presently (Passed with yes 119, no 30, abstain 1). The 1st Delegate report has each bylaw proposal written out verbatim if you would like to read each in its entirety. We heard the Reference Committee Reports and ended the session with Good and Welfare Statements before the meeting was adjourned.

This delegate was able to attend the President’s Banquet on Sunday evening. Delegate Virginia Marquette, CMA (AAMA) walked for President Joyce Nakano, CMA-A (AAMA), BA. Don Belasa, JD, MBA, CEO and Legal Counsel gave clarification on the privileges of current CMA (AAMA)s as officers and trustees and the other four credentials as a committee member or delegate only. Rebecca Walker, CMA (AAMA) announced the total donation for the Maxine Williams Scholarship Fund at the conference was $2611.01 and four scholarships (two for $2,500 and two for $3,500) were awarded. When it came time to announce the recipient of the 2023 Life membership award, Rebecca was called back to the podium for this great honor. This is the only time I’ve ever seen her speechless in the twenty years I’ve attended these conferences! It was acknowledged that she knows when to lead and when to step back, that she has a positive attitude and is a great storyteller. She’s always been a highlight at our annual conferences.

A bon voyage tribute was given to Deborah Novak, CMA (AAMA) featuring bling crowns and sweet tea as she leaves the Presidency. Monica Case, CMA (AAMA), the incoming 2023-2024 President, thanked the many that encouraged her years ago to run for the BOT, which got her to this place in the AAMA organization. She mentioned that you need to think of the why, how, and where when you consider anything. She stated the 2023-2024 Board must be proactive, and not reactive. It’s not about her or the BOT but about the medical assistant members, it takes all of us together.

This delegate was fortunate to be able to attend a few CEU sessions this year. There was a very informative, but a bit frightening, session titled “Human Trafficking Recognition and Trauma-Informed Care”. Many of us don’t realize that trafficking happens where we live and not just in large cities or foreign countries. A trafficker can make a lot more money trafficking a child or adult by reselling them than they would by stealing or some other crime. We were told that those of us in healthcare could be the only ones that might rescue someone from such a situation. “Workplace Empathy” provided some good information and resources to help us make our workplace a better place to work. “The Knowledge Bowl” was a hit as always, entertaining, informative, and humbling all at the same time. We don’t realize how things slip from our mind if not used somewhat regularly. I was looking forward to attending “De-escalating Patient Agitation” as there’s been a few instances at work when patients were worked up and we had to call security. It was a good source of information and I hope a way to stop a situation from escalating in the future. The keynote CE Session, “The Other End of the Stethoscope” speaker was Marcus Engel, MS, CPXP, CSP. His message showed how important it can be to a to a patient to just let them know you’re there and present when needed. It gave us perspective from the patient’s side.

The CEB Practice Managers Task Force- featured speaker Preethi Fernando was offering a free copy of her book, “Emotional Intelligence in Business”, in electronic format to all attendees via the Cvent app. You just have to tap Fernando’s name on the “Speakers” tab and scroll to “Attachments” to find the e-book.

There are three free AAMA CEUS available in the AAMA e-Learning Center: “Introduction to Fetal Alcohol Spectrum Disorders: The Medical Assistant’s Role” (1.5 CEUs); “Promoting Substance-Free Pregnancy: What Medical Assistants Need for Effective Practice” (1 CEU); and “Cannabis Phenomenology, Therapeutics, Misuse- An evolving Landscape” (1 CEU).

It was announced that members, excluding students, will get an $8 discount and a complimentary online CE class as an Early-Bird special if you sign up online for the 2024 Membership Term before midnight October 31,2023.

This delegate in closing would like to thank our CSMA President Joyce Nakano, CMA-A (AAMA), BA for her guidance, training, service, and patience. This delegate would like to thank our CSMA members for having confidence in her to take the action needed that’s in the best interest for our society.

This delegate strongly and whole-heartedly encourages each of our California members to take an interest in our society and become more involved. We need more hands-on help, ideas, and interaction with those who we hope one day will become our future officers and strong supporters of our chosen profession. If anyone has any questions, please feel free to go to our website to get in touch with someone, <https://www.csma-medassist.org>. We are here for you.

Nancy Lizon, CMA (AAMA)

CSMA Treasurer

Third Delegate