

Med-A-Scoop

A Publication by the Indiana Society of Medical Assistants, Inc.
www.insocmedasst.org



(C) Kimberly Mattia

INDIANA FALL

October/November 2025



INDIANA | Society of
Medical Assistants



AN AFFILIATE OF THE
AMERICAN ASSOCIATION OF MEDICAL ASSISTANTS.

Indiana Society of Medical Assistants

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Medical Assistant Creed:

I believe in the principles and purposes of the profession of medical assisting.

I endeavor to be more effective.

I aspire to render greater service.

I protect the confidence entrusted to me.

I am dedicated to the care and well-being of all people.

I am loyal to my employer.

I am true to the ethics of my profession.

I am strengthened by compassion, courage, and faith.

ISMA Mission Statement:

The Indiana Society of Medical Assistants, in affiliation with the American Association of Medical Assistants, strives to:

- Promote professional growth of and identify its membership through education and credentialing
- Inspire members to provide honest, loyal, and efficient service to the public they serve and the proficient:
- Stimulate a feeling of fellowship and cooperation with the medical profession in improving public relations
- Encourage and assist medical assistants in forming component chapters.

Indiana State Medical Assistants Code of Ethics

E is for Endeavor in our duties

T is for Truthfulness in all we do

H is for Helpfulness to others

I is for Integrity in our work

C is for courteous treatment to all

S is for sincerity in our purpose

Put them all together they spell **ETHICS**,

A WORD WE MUST UPHOLD TO ATTAIN OUR GOAL

J. Marie Theobald Wilhite

Indiana Society of Medical Assistants

Dates to Remember

ALL State Board Meetings will be held at
IU Hospital North
11700 N. Meridian St. Entrance B
Carmel, IN 46032

Workshop 12 noon, Meeting Registration 3:15 p.m.
Virtual: WebEx

2025—2026 ISMA State Board Meetings and Workshops

Meeting

November 8, 2025

February 14, 2026

April 17-19, 2026

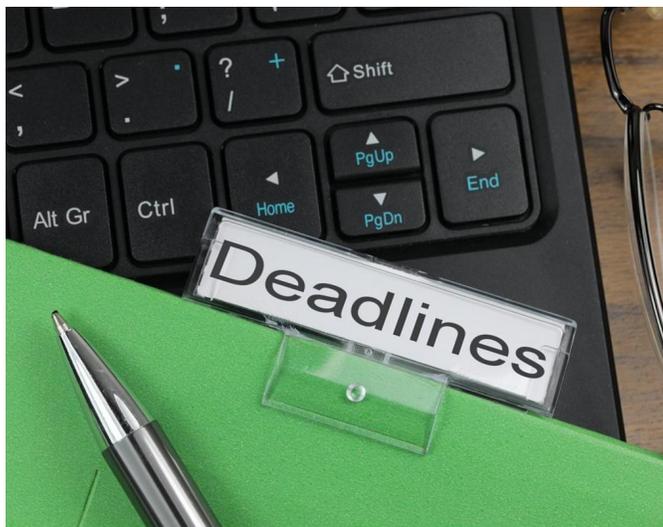
Med-A-Scoop Deadline

September 27, 2025

January 3, 2026

March 5, 2026

Email all district news, **Microsoft Word file only**,
for Med-A-Scoop publication directly to:
Pam Neu, CMA(AAMA), MBA
msneu@yahoo.com



ISMA PHYSICIAN ADVISORS

2025-2026

PHYSICIAN	YEAR(S) TO SERVE	LOCATION	TERM
Jeff Stidam, MD	3 years	Southeast District	2025-2028
Kristi Peck, MD	2 years	First District	2024-2027
William Pond, MD	1 year	Twelfth District	2023-2026

HONORARY MEMBERS

1980	Herbert Dixon*
1997	Bruce Johnson and Hubert Irwin*
2008	Earl Williams*
2013	Jack Begley and Kathy Heck
2023	James Ginder

ISMA LIFE MEMBERS

YEAR	MEMBER
1992	Bonnie Reidenbach, CMA-AC*
1994	Patricia Kennington, RN, CMA*
2005	Eva Irwin, CMA*
2011	Eulah Dearing, CMA(AAMA)*
2012	June Brown, RMA
2015	Tammy Daily, CMA(AAMA)
2018	Marjorie Mikesell, CMA(AAMA)
2024	Rita Michel, CMA (AAMA)

LEON LEVI AWARD RECIPIENTS

1988	Patricia Kennington, RN, CMA* Pauline Pinnick, CMA* Jane Seelig, CMA-A (AAMA)
1990	Bonnie Reidenbach, CMA-AC*
1991	Bettye Yard, CMA-C*
1998	Norma Harmon, CMA
2001	Eva Irwin, CMA*
2002	Eulah Dearing, CMA (AAMA)*
2010	Marjorie Mikesell, CMA (AAMA)
2013	Tammy Daily, CMA (AAMA)
2014	Sandra Johnson, MS, CMA (AAMA), CPC
2016	Rita Michel, CMA (AAMA)
2019	Pam Neu, CMA (AAMA), MBA

GOLDEN APPLE AWARDS

2000	Eva Irwin, CMA *
2003	Sandra Johnson, MS, CMA (AAMA), CPC
2004	Nancy Measell, CMA
2005	Cindy Abel, CMA
2006	Pam Neu, CMA (AAMA), MBA
2009	Jennifer Weathers, CMA (AAMA)
2010	Rita Michel, MCA (AAMA)
2012	Nina Thierer, CMA (AAMA)
2019	Sherry Braye, CMA (AAMA), BS

INDIANA SOCIETY OF MEDICAL ASSISTANTS BOARD OF DIRECTORS

OFFICE	NAME	EMAIL
President	Paula Schubert, CMA (AAMA)	Schubertpaula63@hotmail.com
Vice President	Heidi Sisson, CMA (AAMA)	banguigirl@gmail.com
Recording Secretary	Kit Stine, CMA (AAMA)	Katjalee@live.com
Immediate Past President	Dianne Wimsett, CMA (AAMA)	d.m.wimsett@hotmail.com
Treasurer	Brandi Gaumer, CMA (AAMA)	Blauderback86@gmail.com
Med-A-Scoop Manager and Website	Pam Neu, CMA (AAMA), MBA	msneu@yahoo.com

DISTRICT DIRECTORS

DISTRICT	NAME	EMAIL
East Central District	Katie Maccoux, CMA (AAMA)	kchristiema@gmail.com
First District	June Brown, RMA	jmbrown400@icloud.com
Southeast District	Joyce Edds, CMA (AAMA),	mnedds@aol.com
St. Joseph District	Karen Pershing, CMA (AAMA)	klpershing1@gmail.com
Twelfth District	Rita Michel, CMA (AAMA)	Remichel49@gmail.com

Dear ISMA Members,

Hello Fall!

Yard work, sports, and all the outdoor activities we get to enjoy this time of year. Remember to use your core muscle group while raking the leaves, use sunscreen and stay hydrated.

We welcome all Medical Assistants no matter what your credential is, and if you are not a member of the AAMA, we can help you with that. Anyone renewing their dues after September 1 receives 2025 bonus months plus all of 2026. Remember, to avoid sitting again for the AAMA certification exam, you may attend the education offered by ISMA, your own or any other chapter offering workshops to obtain CEU's. You only need twelve units every year to complete your recertification, as we need 60 (sixty) CEU's every five years. Our next ISMA meeting will be Saturday November 8, 2025, at IU North 11700 N. Meridian St. Entrance B, Carmel IN 46032. Lunch starts at 11:00 AM, 3 CEU's are available for the education; which starts at Noon, and the business meeting begins 15 minutes after the education ends. Please, plan to be with us for all parts of the day. Your participation is needed to guide the future of ISMA. Please "Pay It Forward" by expressing your opinions and let us know what your goals and aspirations are.

ISMA will have a raffle basket extravaganza on Saturday November 8, 2025, "Souper Saturday". The baskets will be featured on the Indiana Society website at insocmedasst.org also on our Facebook page Indiana Society of Medical Assistants and in this issue. There will be a photo of each basket, a list of what the basket contains and the donor's charity choice with a description of the charity. The basket with the most tickets sold will be the winner with half of the raffle profits being donated to the sponsor's charity, so be prepared to spend to help pick the winner.

Always "Pay It Forward" as a Medical Assistant. This is your organization, so get involved at the local, state, or national level. Dream big, watch how big the dream can become, and where the dream can lead you.

Paula Schubert, CMA (AAMA)
2024-2026 ISMA President



ISMA Board of Directors Meeting
Saturday November 8, 2025
15 minutes following workshops

Call to Order	Paula Schubert, CMA (AAMA), President
Invocation	LaTrees Woodley, CMA (AAMA) – Chaplain
Medical Assistant Creed	Heidi Sisson, CMA (AAMA), Vice President
Credentials Report	June Brown, RMA/Karen Pershing, CMA (AAMA)
_____ Registered _____ Voting Power _____ Quorum _____ Majority _____ 2/3	
Secretary’s Report	Kit Stine, CMA (AAMA)
Treasurer’s Report	Brandi Gaumer, CMA (AAMA)
Presentation of Bills	Paula Schubert, CMA (AAMA), President
Correspondence	Jane Seelig, CMA-A (AAMA), Corresponding Secretary
Officers’ Reports	
President	Paula Schubert, CMA (AAMA)
Vice-President	Heidi Sisson, CMA (AAMA)
Recording Secretary	Kit Stine, CMA (AAMA)
Treasurer	Brandi Gaumer, CMA (AAMA)
Med-A-Scoop/	
Website Development	Pam Neu, CMA (AAMA), MBA
AAMA BOT	Pam Neu, CMA (AAMA), MBA, Trustee, Jane Seelig, CMA-A (AAMA), Speaker of the House
Committee Reports	
Budget & Finance	Brandi Gaumer, CMA (AAMA)
Bylaws &	
Standing Rules	Jane Seelig, CMA-A (AAMA)
Certification	Katherine Maccoux, CMA (AAMA)
Conference Guide	Karen Pershing, CMA (AAMA)
Continuing Education	Heidi Sisson, CMA (AAMA)
Council of Past Presidents	Dianne Wimsett, CMA (AAMA)
Eva I Irwin CMA (AAMA) Medical Assistant Support Fund	Sandra Johnson, CMA (AAMA), MS, CPC
Historian	Joyce Edds, CMA (AAMA), CPT (ASPT)
ISMA Liaison/Public Policy/Affairs	Tammy Daily, CMA (AAMA)
Membership	Dianne Wimsett, CMA (AAMA)
Mentoring	Pam Neu, CMA (AAMA), MBA
Nominating	Karen Pershing, CMA (AAMA)
Procedure Manual	Jane Seelig, CMA-A (AAMA)

Social Media Tabitha Terry, CMA (AAMA)
Ways & Means Sandra Johnson, CMA (AAMA), MS, CPC
ISMA 2026 State Conference Co-Chairs
Tammy Daily, CMA (AAMA), June Brown, RMA

Director Reports

East Central District – Katherine Maccoux, CMA (AAMA),
AHA CPR Instructor
First District – June Brown, RMA
St. Joseph District – Karen Pershing, CMA (AAMA)
Southeast District – Joyce Edds, CMA (AAMA), CPT (ASPT)
Twelfth District – Rita Michel, CMA (AAMA)
West Central District–Jackie Raber, CMA (AAMA), BSHCA,
EMT

Unfinished Business

Printer Purchase—Jane Seelig, CMA-A (AAMA)
AAMA House of Delegates Report
Resolution & Bylaws
Election Results
Delegate Reports
HOSA Meeting

New Business

2026 Budget Recommendations

Deadlines:

Membership December 31, 2025
Medical Assistant of the Year Jan. 1, 2026
Leon Levi Award February 1, 2026
Golden Apple Award February 1, 2026

Announcements

Med-A-Scoop Deadline – January 3, 2026

Next Meeting

February 14, 2026 (**Virtual**)

Other announcements?

Adjournment

Paula Schubert, CMA (AAMA), President

BOT REPORT
ISMA BOARD MEETING
Saturday, November 8, 2025

The BOT met at the Hyatt Regency Crystal City at Reagan National Airport September 18 through 22, 2025, during the AAMA National Conference. We were very busy during the conference practicing our dance for the Welcome and Awards evening opening show, answering questions and describing our duties as BOT members. We were very pleased that Indiana won an Excel award for membership, and special achievement awards for the Website and Med-A-Scoop. The House of Delegates was informative, and association business was conducted without conflict. The opening of the House was very special this year as our Veteran attendees stood before the body, saluted the Flag and led us in the Pledge of Allegiance.

The Board of Trustees are

Immediate Past President	Monica Case 2025-2026
President	Virginia Thomas 2025-2026
Vice President	Sherry Bogar 2025-2026
Secretary	Shirley Sawyer 2025-2026
Speaker of the House	Jane Seelig 2025-2027
Vice Speaker of the House	Aimee Quinn 2025-2027
Trustee	Candy Miller 2025-2026
	Pam Neu 2025-2026
	Cameron Smith 2025-2026
	Christa Smith 2025-2027
	Janette Tyler 2025-2027
	Sandra Williams 2025-2027

The Resolution was approved as amended and is posted on the AAMA website, HOD tab.

WHEREAS: The American Association of Medical Assistants (AAMA) is the only professional membership organization solely dedicated to the profession of medical assisting; and

WHEREAS: The AAMA has begun to develop a number of collaborative activities with various nonprofit organizations, such as the National COLORECTAL Cancer Round Table (NCCRT) and the Center for the Application of Substance Abuse Technologies (CASAT), that address specific medical conditions, illnesses, diseases and comorbidities;

WHEREAS: The AAMA provides professional development for medical assistants through certification and continuing education; and

WHEREAS: The AAMA aligns with health care employers to emphasize the value of employing credentialed medical assistants in today's medical setting; and

WHEREAS: The credentialed medical assistant is trained to handle both clinical and administrative tasks, excel at patient communication, lessen the risk of

allegations of negligence, improve quality outcomes through patient education and customer service, and demonstrate a strong foundation of knowledge and skills; and

WHEREAS: The role of the credentialed medical assistant, according to evidence-based practice, is vital to the interdisciplinary team model best suited to treat today's patient's illnesses, diseases, and co-morbidities; therefore, be it

RESOLVED, That the AAMA, where appropriate and advantageous, enter into partnerships with professional organizations addressing common medical conditions, illnesses, diseases, and co-morbidities; and be it further

RESOLVED, That the AAMA encourage all credentialed medical assistants to play a role in said partnerships through volunteering for events, undertaking continuing education on the specific medical conditions being addressed and help improve the quality of care offered by themselves and their practices through appropriate screening of patient and sharing resources for care, where appropriate and as delegated by the practice's licensed independent provider.

The following proposed bylaw amendments were approved. The updated AAMA Bylaws are now posted on the AAMA website.

Article VIII: Qualification of Officers and Trustees

Section 4: Additional qualifications for specific offices shall be:

A. A candidate for President or Vice President shall:

1. have served as an AAMA elected officer for a minimum of one AAMA year (an AAMA year is from annual meeting to annual meeting of the House of Delegates)
 2. have been a elected member of the Board of Trustees for two complete AAMA years
- have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

Article IX: Nominations and Elections

If any candidate among a slate of candidates for an open position does not receive a majority vote after two ballots by the House of Delegates, on all subsequent ballots the candidate receiving the lowest number of votes will be eliminated.

Article VIII: Qualifications of Officers and Trustees

Section 4: Additional qualifications for specific offices shall be:

E. A candidate for Trustee shall:

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

The requests to host the 2027 AAMA conference are being reviewed to see how well they meet the conference requirements and costs associated with hosting the event. There is an issue with the costs of hotel rooms and food for all submitted sites. Indiana’s request was received.

Due to an oversight the ad for Jane’s candidacy was not included in the conference book. As compensation we were refunded our payment, given a reserved table at the banquet, the ad was printed and put into the remaining registrant’s books, put on the table with the daily newsletter for the conference and displayed as a banner on the Cvent conference app. We were recognized for our contribution to the Awards event. A special note of appreciation to the members who helped staff the Marketing Strategy Team table.

Thank you for your support of our participation on the AAMA Board of Trustees. We are looking forward to an exciting year of progress with the 2025-2026 BOT.

Pam Neu, CMA (AAMA) MBA
Trustee
Jane Seelig, CMA-A (AAMA)
Speaker of the House

Thank you to all the ISMA members for their support and encouragement for me to continue as AAMA Speaker of the House. Serving on the AAMA Board of Trustees has been an enlightening experience which has added meaningful quality to my life. Also a very special “thank you” to the ISMA members at the conference who helped at the Marketing Table. Many commented on how much of a difference you made in encouraging and assisting in the ease of purchasing the items for sale.

During my two-year journey as a BOT officer, I promise to focus my efforts on finding ways to encourage membership growth and finding a solid future for AAMA. Please contact me if you have any questions or need assistance with any AAMA related issue.

Jane Seelig, CMA-A (AAMA)
AAMA Speaker of the House 2024-2027



November 8, 2025
ISMA

Workshop Highlights—
Mark your Calendar!

Program: TBD

Sponsor: Indiana Society of Medical Assistants

CEUs: 3 Category:

**Please bring your favorite soup, side,
drinks, or dessert to share for lunch.**



INDIANA STATE MEDICAL ASSOCIATION 2025

Tammy Daily, Paula Schubert, and Jane Seelig represented the Indiana Society of Medical Assistants at the 176th meeting of the physicians. The physicians received the representatives well. The common question for our ladies was “Where can I find good, well-trained medical assistants?” Their table was visited by many physicians.

Well done ladies!

Have you seen the new Medical Assistants Recognition material? It is available at the AAMA office. Order yours to hand out today or download it and print!



ISMA Board of Directors Meeting Minutes

**IU North Hospital
1170 N Meridian St
Carmel IN 46032
August 23, 2025**

- Call to Order** The meeting was called to order by President Schubert at 2:57pm
- Invocation** The Invocation was given by Chaplain Woodley
- Medical Assistant Creed** Vice President Sisson led the reciting of the Creed
- Credentials Report** Karen Pershing, CMA (AAMA), Chair reported
20 Registered _13_ Voting Power _7_ Quorum __7_ Majority _9_ 2/3
- Secretary's Report** Kit Stine, CMA (AAMA) -Approved as published in the Med-A-Scoop by voice vote.
- Treasurer's Report** Brandi Gaumer, CMA (AAMA) -Approved as distributed, will be filed for audit
- Presentation of Bills** Paula Schubert, CMA (AAMA), President- no bills presented
- Correspondence** Jane Seelig, CMA-A (AAMA), Corresponding Secretary- Letter from Indiana History Museum requesting donation. Wounded Warriors requesting donation
AAMA Conference committee sent out a flyer. They are collecting items for the Virginia Department of Health. Requested items are youth coats, cleaning supplies, personal care items, or gift cards. Jane Seelig, CMA-A (AAMA) and Pam Neu CMA (AAMA) MBA can transport items to the conference as they are driving.

Officers' Reports

President – Paula Schubert, CMA (AAMA)- Since the last meeting of Indiana Society of Medical Assistants on June 15, 202, this officer has done the following: Responded to a request from Jazmin Feuerstein, CMA (AAMA), recent AAMA Leadership Strategy Team member and Chair of the IU Health Advisory Council to meet to discuss collaboration of education of IU medical assistants with our organization. A dinner meeting was set-up for Monday August 18, 2025, at Yard House 15 W. Maryland St. Indianapolis. This officer along with Katja Stine, CMA (AAMA), and Jane Seelig, CMA-A (AAMA) met with Patty Nannenga, Director Clinical Foundation Medical Assistant Education Program IMR and Christina Chadwell, Administrator-Medical Assistant Externships-CNO Admin IMR. There was open discussion, we each introduced our selves with years of being in the field, our experience, background

and where we worked. The three representatives from ISMA discussed the leadership positions we currently held with AAMA, ISMA, and ECDCMA. We hope to have further meetings; Kit is sending them the state district map with the meeting schedule for ISMA and ECDCMA. We encouraged them to attend the meeting this Saturday August 23 at IU North, they seemed interested.

Vice-President – Heidi Sisson, CMA (AAMA) - no report

Recording Secretary – Kit Stine, CMA (AAMA) - no report

Treasurer – Brandi Gaumer, CMA (AAMA)- no report

Med-A-Scoop/Website Development – Pam Neu, CMA (AAMA), MBA- The August/September issue of MAS was published and posted on the website on schedule. Thank you to everyone who contributed to editing this issue. I have been notified that Microsoft Publisher will be discontinued in October 2026, which is the program I have been using to develop MAS. Beginning in 2026, I will transition the Med-A-Scoop to Microsoft Word—new year, new challenges! As always, your suggestions and input are welcome. The ISMA website is up to date. I will need headshots of Katie Maccoux and Karen Pershing for the Directors section. If you notice any issues on the site, please let me know so I can share them with Jake for resolution.

BOT—Pam Neu, CMA (AAMA), MBA and Jane Seelig, CMA-A (AAMA) Speaker of the House AAMA- The BOT has held multiple virtual meetings since our last report. Committees are moving forward diligently to reach their objectives before the year concludes at the conference next month. Results of focus group meetings are being reviewed with actions taken to respond to the needs and desires of our membership. Cameron Smith was appointed Bylaws Committee Chair after the resignation of Loxie Kistler. The Marketing Team will be displaying Kuhls new product line with new colors and selling conference t-shirts, items from last year plus AAMA bling pins and an iron on patch. Let us or your delegates know if you want anything at a discounted price before it is sold in the AAMA store (no shipping charges). The Delegates Packet, AAMA Bylaws and Reference Guide for Delegates and Alternates were distributed by email. There is a new tab on the AAMA website for easy access to the House of Delegates information. The first virtual session for the proposed bylaws amendments was held last Saturday. More virtual sessions are scheduled for bylaws, House of Delegates orientation, Reference Committee orientation, and House Committee orientation. A charity collection drive for the Virginia Department of Human Services will be conducted on site at the conference. Requested items are Youth coats – sizes small, medium, and large (new or gently used), Household cleaning supplies – all-purpose cleaners, dish soap, sponges, etc., Laundry Detergent, Shampoo & Conditioner and Target or Walmart Gift Cards. We are driving to conference so we can transport your donations. Contact one of us if you have donations to deliver. As Jane is not active on Facebook and is running for the only contested position, we are requesting that ISMA support her candidacy on social media on her behalf. Serving AAMA as a member of the Board of Trustees has had many challenging and rewarding moments. It is always a growing experience

with value to explore new opportunities. Thank you for your support in our participation in the AAMA Board of Trustees. We encourage all members to expand their horizons by becoming active members of their chapter and ISMA.

Committee Reports

Budget & Finance -Brandi Gaumer, CMA (AAMA)- no report

Bylaws & Standing Rules – Jane Seelig, CMA-A (AAMA)- no report

Certification – Katherine Maccoux, CMA (AAMA)- no report

Conference Guide – Karen Pershing, CMA (AAMA)- no report

Continuing Education – Heidi Sisson, CMA (AAMA)- The program today was “Adult Scam and Public Health System” was presented by James R. Ginder, MS, NREMT, PI, CHES ®, NCEE, PAI, CCHW. The program today was approved for 3 CEUs AG. We had 15 virtually and 24 in person attending. Income from registration was \$350. Certificates of Attendance are available upon request to all attendees as well as a copy of the speaker’s power point presentation upon request.

Council of Past Presidents – Dianne Wimsett, CMA (AAMA) - no report

Eva I Irwin CMA (AAMA) Medical Assistant Support Fund - Sandra Johnson, CMA (AAMA), MS, CPC - no report

Historian - Joyce Edds, CMA (AAMA), CPT (ASPT) - no report

ISMA Liaison/Public Policy/Affairs – Tammy Daily, CMA (AAMA) - The Indiana State Medical Association’s 176th Annual Convention will be held on September 26-28, 2025. It will be held at the Embassy Suites, 13700 Conference Center Drive-South, Noblesville, IN. Those attending from our Society will be Jane Seelig, CMA-A (AAMA), Paula Schubert, CMA (AAMA), Katja (Kit) Stine, CMA (AAMA), and Tammy Daily, CMA (AAMA). The Indiana Society has chosen the “Gold Level” Sponsorship again this year. This cost is \$2000.00. I have been in contact with Nick Peetz at the ISMA office and all our information has been received. If there is anything else required on my part, he will let me know. We are all getting excited to attend. In the June and July ISMA Reports this information was reported: The ISMA reported they had joined 45 state medical associations in sending a letter to Senate Leaders opposing suggested Medicaid cuts. This letter from the Coalition of State Medical Associations warns that the planned cuts will seriously harm access to health care for all Americans. The ISMA also joined state and national organizations in support of terminated Advisory Committee on Immunizations Practices (ACIP), within the Centers for Disease Control and Prevention (CDC). This letter strongly urges them to immediately reinstate the terminated

members of ACIP and honor their commitments to serve through the end of their appointed terms. Physicians across the state and the country are in support of evidence-based immunizations to help prevent severe diseases and protect public health. Thank you again for allowing me to be your Liaison and helping us keep updated with the information from the Indiana State Medical Association.

Membership - Dianne Wimsett, CMA (AAMA)-- Indiana Society of Medical Assistants has 1,176 members. That is an increase of 81 members from the June meeting. We had 1,095 members in June 2025. We have 76 new CMAs since June 2025.

Mentoring – Pam Neu, CMA (AAMA), MBA- no report

Nominating –Karen Pershing, CMA (AAMA)- The nominating committee has qualified members for each of the following offices. President, Vice President, and Secretary. We are still looking for a qualified Treasurer. If anyone has a suggestion, please let me know. Each member will need to have paid the dues by the end of this year. This will be verified in January, and our final report will be ready for our February 2026 meeting.

Procedure Manual – Jane Seelig, CMA-A (AAMA)-- no report

Social media—Tabitha Terry, CMA (AAMA) - 38 members on Facebook page

Ways & Means - Sandra Johnson, CMA (AAMA), MS, CPC- \$142 collected today, and Tammy Daily was the basket winner.

ISMA 2026 State Conference – Co-Chairs Tammy Daily, CMA (AAMA), June Brown, RMA- The First District Chapter 2026 Conference Committee met on July 22, 2025, at the Prime-Time Restaurant-North at 6:00pm. The committee consists of 8 Chapter members. In attendance on July 22, 2025, were Sherry Braye, Jennifer Julian, Clara Poirot, June Brown, and Tammy Daily. This was our first sit-down meeting, and we went through a lot of information, discussed a lot of ideas and we were able to confirm a few items that needed to be completed. Those that were confirmed at this meeting were: 1. Three Speakers & Topic and waiting to hear from one more 2. The Menu - Meals have been chosen 3. Registration Fees were set. We are still working on the agenda and will have the Registration Form and the rest of the itinerary ready for the ISMA November 8, 2025, meeting. Our next 2026 Conference Committee meeting will be decided at our Chapter meeting on September 9, 2025. Please keep this date and information on your Calendars.... FRIDAY, APRIL 17, 2026, thru SUNDAY, APRIL 19, 2026 -- ISMA ANNUAL CONFERENCE NEW HARMONY INN RESORT AND CONFERENCE CENTER NEW HARMONY, INDIANA This area is a lovely place to visit, and we are trying our “BEST” to have a Great Conference for ALL!

Director Reports

East Central District – Katie Maccoux, CMA (AAMA) - We met on August 9, 2025, for education provided by Honorary member, James Ginder on Avian

Influenza and Workplace Mental Health. We had 32 people in attendance in person and virtually. The last of the Kroger gift cards for students were given to Katie Maccoux for distribution to Lincoln Tech Medical Assisting Students. It was decided to donate a total of \$500 to Lincoln Tech in recognition of MAR Week; \$200 to the school, and \$300 to the Medical Assisting Program for a student essay competition. Updates to the Procedure Manual were approved. The AAMA Proposed Bylaw Amendments were discussed. LaTress Woodley was recognized for her contributions to the chapter with a grant to support her attendance at the AAMA Annual Conference. The chapter will proceed with the purchase of a computer for the secretary. We had chapter logo shirts and bags for sale and pre-order. We have 314 members in our chapter.

First District – June Brown, RMA- We do not meet in July and August. Our next meeting will be September 9 at Ivy Tech Evansville. The meeting starts at 6:00 with speaker at 6:30

The 2026 Conference Committee met on July 22, 2025. Our theme is “Spring Training for the Medical Assistant.” We have our registration form and itinerary ready for the November meeting. First District has 245 members.

St. Joseph District – Karen Pershing, CMA (AAMA)- Working on 3-hour workshop for October. Once finalized it will be posted on our Facebook page. St. Joseph district has 213 members.

Southeast District – Joyce Edds, CMA (AAMA), CPT (ASPT)- We have not met over the summer. Sandy and I have talked and are looking into a virtual workshop for the fall. More info to come later. Sandy, our treasurer, got our check from AAMA for \$555 dollars. We have 108 active members, 2 associates, and 2 students for a total of 112.

Twelfth District – Rita Michel, CMA (AAMA) - Twelfth District has not met this summer. Membership total is 203.

West Central District – Jackie Raber, CMA (AAMA), BSHCA, EMT - West Central district met on 8/12/25. The President (Jackie Raber) and VP (Tereasa Hallmen) were the only attendees. The discussion was to get speakers for the following meetings for the remainder of the year lined up. Attendance from current roster (153 members) How we were currently reaching out (Facebook, email, personal text) Email sent out with possible dissolving the chapter in December if no attendance until then.

Discussed getting a map showing the members where they would have to go to attend meetings if WCD was not an active chapter. Currently offering FREE CEU via zoom for members off the roster. Our next meeting will be 9/9/25 future meeting: 10/15/25, 11/11/25, 12/10/25

Unfinished Business

Ad Hoc Committee—Kit Stine, CMA (AAMA)- The due date for the basket

information to be sent to Pam Neu for the website and Kit Stine for e-mailing to the members is September 24, 2025. The basket value should be \$35-\$40. Each Chapter will choose a charity to sponsor. The proceeds will be divided in half with half going to the ISMA and the other half going to the charity of the basket that earns the most entries. We look forward to seeing how this will work out at our “Souper” Saturday in November.

Surety Bond Update—Pam Neu, CMA (AAMA) MBA—Pam has completed the paperwork for this. Documents have been received and will be filed with the treasurer.

New Business

Delegates Packets PBA and Resolution—President Schubert read each proposed by-law and resolution change. Discussion was made with the membership in attendance after each amendment/resolution and a vote was taken on how the delegates should vote at conference.

RESOLUTION 25-01

INTRODUCED BY: 2024-2025 American Association of Medical Assistants Bylaws and Resolutions Committee

SUBJECT: Increased Awareness and Utilization of Credentialed Medical Assistants Through Community Health and Safety Partnerships

WHEREAS: The American Association of Medical Assistants (AAMA) is the only professional membership organization solely dedicated to the profession of medical assisting; and

WHEREAS: The AAMA has begun to develop a number of collaborative activities with various nonprofit organizations, such as the National COLORECTAL Cancer Round Table (NCCRT) and the Center for the Application of Substance Abuse Technologies (CASAT), that address specific medical conditions, illnesses, diseases, and comorbidities;

WHEREAS: The AAMA provides professional development for medical assistants through certification and continuing education; and

WHEREAS: The AAMA aligns with health care employers to emphasize the value of employing credentialed medical assistants in today’s outpatient medical office setting; and

WHEREAS: The credentialed medical assistant is trained to handle both clinical and administrative tasks, excel at patient communication, lessen the risk of allegations of negligence, improve quality outcomes through patient education and customer service, and demonstrate a strong foundation of knowledge and skills; and

WHEREAS: The role of the credentialed medical assistant, according to evidence-based practice, is vital to the interdisciplinary team model best suited to treat today’s patient’s illnesses, diseases, and co-morbidities; therefore, be it

RESOLVED, That the AAMA, where appropriate and advantageous, enter into partnerships with professional organizations addressing common medical conditions, illnesses, diseases, and co-morbidities; and be it further

RESOLVED, That the AAMA encourage all credentialed medical assistants to play a role in said partnerships through volunteering for events, undertaking continuing education on the specific medical conditions being addressed and help improve the quality of care offered by themselves and their practices through appropriate screening of patient and sharing resources for care, where appropriate and as delegated by the practice's licensed independent provider.

The ISMA membership in attendance voted to **pass** this resolution.

Proposed Bylaws Amendment 25-01

Article VIII: Qualification of Officers and Trustees

Section 4: Additional qualifications for specific offices shall be:

As per the current AAMA Bylaws, the officers of the AAMA shall be a President, a Vice President, a Secretary, a Speaker of the House, a Vice Speaker of the House, and an Immediate Past President.

Fiscal impact: None

Current Wording:

Section 4: Additional qualifications for specific offices shall be: A. A candidate for Vice President shall: 1. have served as an AAMA elected officer. 2. have been an elected member of the Board of Trustees for two complete AAMA years (an AAMA year is from annual meeting to annual meeting of the House of Delegates) 3. have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

Proposed Wording: Section 4: Additional qualifications for specific offices shall be: A. A candidate for President or Vice President shall: 1. have served as an AAMA elected officer for a minimum of one AAMA year (an AAMA year is from annual meeting to annual meeting of the House of Delegates) 2. have been an elected member of the Board of Trustees for two complete AAMA years 3. have served as one of the following: President, Vice President, President-Elect, Speaker, or Vice Speaker of a Constituent Society.

Rationale: Clarification of qualification for officers: As the Vice President moves into the office of President, the qualifications for the office of President are implied in the Bylaws. Adding the word President to Section 4 clarifies that qualifications for both offices are the same. The qualifications for the office of President are now listed and not inferred.

The ISMA membership in attendance voted to **pass** this amendment

Proposed Bylaws Amendment 25-02

Article IX: Nominations and Elections

Section 2: Elections D.

Fiscal impact: None

Current Wording: If any candidate does not receive a majority vote after two ballots by the House of Delegates, on all subsequent ballots the candidate receiving the lowest number of votes will be eliminated.

Proposed Wording: If any candidate among a slate of candidates for an open position does not receive a majority vote after two ballots by the House of Delegates, on all subsequent ballots the candidate receiving the lowest number of votes will be eliminated.

Rationale: The addition of the proposed wording clarifies that the open office is opposed, and more than one candidate is running for the open position. The candidate with the lowest number of votes in the third vote and all subsequent votes will be eliminated. This narrows down the field of candidates to decrease the number of revotes required.

The ISMA membership in attendance voted to **pass** this amendment

Proposed Bylaws Amendment 25-03

Article IX: Nominations and Elections

Section 2: Elections

Fiscal impact: None

Current Wording: None.

Proposed Wording: E. An unopposed officer or trustee candidate not receiving a majority ballot for an open position is considered defeated after two votes. The candidate has the right to decline a second vote.

Rationale: The addition of the proposed wording clarifies that an unopposed candidate not receiving a majority vote is considered defeated after a second vote. On the first ballot, a delegate may not vote for a candidate to express general dissatisfaction or opposition. However, some delegates may vote in favor of the sole candidate on the second ballot because they may conclude that it is more important to have a leader in the office rather than allow that office to remain vacant. This eliminates the possibility of multiple votes in an unopposed election for the same position to obtain different results. The proposed wording clarifies that voting for an unopposed position may occur twice if needed and the results are final.

The ISMA membership in attendance voted **against** this amendment

Texas State Society

Proposed Bylaws Amendment 25-01

Article VIII: Qualifications of Officers and Trustees

Section 4: Additional qualifications for specific offices shall be:

Fiscal impact: None

Current Wording: E.A candidate for Trustee shall: 1. have attended at least two

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

Proposed Wording: E. A candidate for Trustee shall: 1. have attended at least two previous AAMA meetings as a Delegate or served as Chair of the Certifying Board or Continuing Education Board; 02. have served as one of the following: President, Vice President, President-Elect, Secretary, Treasurer, Speaker or Vice Speaker of a Constituent Society; 3. have actively served for one full year on: (1) a national committee; (2) a national board i.e., the Certifying Board or Continuing Education Board) or one of its committees, task forces or strategy teams; or (3) a national task force or strategy team whose medical assistant members are appointed or approved by the Board of Trustees.

Rationale: Adding Secretary and Treasurer as a means of meeting one requirement for serving as an AAMA Trustee is recommended as they too are elected officers of the Constituent societies and support the same mission as the other officers do of their state society and the AAMA. This will also open the leadership ladder of the AAMA to all those serving the membership who may wish to serve on the AAMA Board of Trustees but are not provided every opportunity at their state level. **If this is approved, it should be carried forward to all BOT positions.**

The ISMA membership in attendance voted to **pass** this amendment

Texas State Society

Proposed Bylaws Amendment 25-02

Article X: Officers and Trustees: Term of Office, Vacancy in Office Failure to Perform Duties

Section 1: Term of Office

Fiscal impact: None

Current Wording: A. The term of office for the President, Vice President, and Immediate Past President shall be one year or until successors are elected. The elected Officer shall not serve more than one consecutive term in the same office (except for the 2020-2021 AAMA year).

Proposed Wording: A. The term of office for the President, Vice President, and Immediate Past President shall be one year or until successors are elected. If there are no successors to one or more of the offices of President, Vice President, or Immediate Past President, the House

of Delegates may authorize the current President, Vice President, or Immediate Past President for whom there is no successor to serve one additional AAMA year.

Rationale: This by-law could be perceived as contradicting as the first sentence states that the position is a one-year term or until successor is elected; however, the second sentence states that they cannot serve more than one consecutive term. One consecutive term can be read as one year versus one term with an additional term, which is what the intent is. By removing the second sentence, removing one consecutive term, and simplifying the term definition of the President, IPP and Vice President term it will lead to less confusion about the length of the term of these positions.

The ISMA membership in attendance voted **against** this amendment

SWOT (Membership)—Pam Neu, CMA (AAMA), MBA- Pam explained that SWOT stands for: Strengths, Weakness, Opportunities and Threats. It is a business practice to do a yearly analysis of how you are doing. She was going to do a presentation however, due to time constraints, she will be putting the information on our website to work through.

BIPPUS Bank Report—Rita Michel, CMA (AAMA)- The six-month Certificate of Deposit (Account No. XX794) that was reinvested on 2/24/2025 is now maturing on August 24, 2025. I spoke to Jana Gass at the Bippus State Bank regarding the process to renew the CD. They are again offering a 6-month CD special with a 4.00% APY. The regular rate is 1.40%. I have requested her to begin the paperwork to rollover the CD which she said would be on Monday, August 25, 2025. The maturity date should then be February 25, 2026.

Members attending the National Conference-

Sandra Johnson CMA (AAMA), LaTress Woodley, CMA (AAMA) and Janet Boyer CMA (AAMA) will be attending.

HOSA-

Conference is Oct 24, 2025, in Indianapolis at JW Marriott. In the past few years ISMA has set up a table to get the word out about the AAMA. Jane Seelig CMA-A (AAMA), Katie Maccoux, CMA (AAMA) and Lisa Owens CMA (AAMA). This is not currently in our budget. The cost of the table is \$200 plus cost of parking and lunch for those who are attending.

MOTION: Kit Stine CMA (AAMA) moved to increase the public relations budget to allow for this conference and any that may come up in the future. Motion was passed unanimously.

Honorarium—James Ginder in the past has not accepted an honorarium for the numerous presentations he has done for us over the years. He is now willing to accept an honorarium. Jane Seelig, CMA-A (AAMA) recommended that we give more than the \$150 honorarium that would normally be given for today’s presentation.

MOTION: Pam Neu CMA (AAMA) moved that the money earned from registration for today’s meeting of \$350 be donated to James’ charity of choice. The motion passed unanimously.

Printer for Recording Secretary- It was proposed in the Executive board meeting this morning that a printer might be useful if there is a need for copies at the last minute. Jane Seelig CMA-A (AAMA) will investigate pricing for this, and this will be discussed at [our](#) next meeting.

Announcements

Med-A-Scoop Deadline September 27, 2025

Next Meeting November 8, 2025

Adjournment The meeting was adjourned by President Schubert at 5:29pm

Kit Stine CMA (AAMA)

Recording Secretary





Rita's Rules... as Parliamentary Advisor

QUESTIONS YOU MAY HAVE...*When you are in a meeting, do you wonder about Robert's Rules of Order and how they work? Here are a few answers to questions that you may have.*

Do bylaws supersede Robert's rules of order?

It is important to note that Robert's Rules do not supersede the organization's bylaws. The organization's bylaws can include a provision specifying the edition of Robert's Rules that will be its parliamentary authority, but this authority must comply with the bylaws. While there isn't a single sentence in RONR stating "bylaws supersede Robert's Rules," the entire concept is based on the understanding that the rules an assembly adopts for its own conduct take precedence over the general rules of parliamentary law.

Is it true that the President can vote only to break a tie?

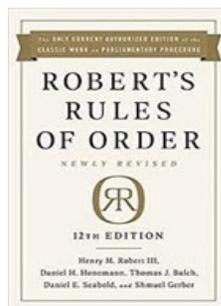
No, it is not true that the president can vote only to break a tie. If the president is a member of the voting body, she/he has exactly the same rights and privileges as all other members have. [RONR (12th ed.) 44:12-13]

Can votes be taken in an executive session?

Yes, votes can be taken in executive session. Executive sessions happen behind closed doors, but they are not restricted through other means. [RONR (12th ed.) 9:24-27]

In determining the result of a vote, what constitutes a majority?

The word "majority" in this context means, simply, *more than half*. The use of any other definition, such as 50 percent plus one, is apt to cause problems. For example, in voting on a motion 17 votes are cast, 9 in favor and 8 opposed. Fifty percent of the votes cast is 8½ so that 50 percent plus one would be 9½. Under such an erroneous definition of a majority, one might say that the motion was not adopted because it did not receive 50 percent plus one of the votes cast, although it was, quite clearly, passed by a majority vote. [RONR (12th ed.) 44:1]



ISMA Coding Corner

Toxic Shock Syndrome – What Is It?

Toxic Shock Syndrome is most commonly associated with Staphylococcus aureus or Streptococcus pyogenes infections. Usually this results from tampon use, skin wounds, or surgical incisions. Symptoms are usually high fever, rash, low blood pressure, and multi-organ involvement. It typically appears suddenly, usually after a surgical procedure, or within 3-5 days for those using tampons or menstrual cups. Swimming in dirty water can absorb through the string of a tampon and cause a staph infection which can lead to toxic shock syndrome. Delaying medical due to these severe complications and possibly death. As women, we are all aware of this condition and the serious results that it can bring.

A more detailed breakdown:

- *Rapid Onset: TSS symptoms, such as high fever, low blood pressure, vomiting, diarrhea, and a rash similar to a sunburn appear suddenly and escalate quickly.
 - *Menstrual-Related TSS: For those using tampons or menstrual cups, symptoms can develop within 3-5 days.
 - *Surgical related TSS can manifest as quickly as 12 hours post-procedure.
 - * Importance of prompt treatment: Due to the rapid progression of TSS, prompt diagnosis and treatment is crucial. Without treatment, this can lead to severe complications, including organ failure and death within a short period, sometimes within 48 hours.
- *Primary codes to bill: A48.3 – Toxic Shock Syndrome with a diagnosis of TSS by either staph or streptococcal bacteria.
- *Additional codes (if applicable): B95.6 for Strep or Staph as secondary codes.
- *Symptom Codes: Relevant symptom codes: R50.9 for fever; R21 for rash only when they are not integral to the condition or necessary for medical necessity.
- *Outpatient Follow-up codes: E/M codes – 99214, 99215 for office complications.

Sandra Johnson, MS, CPC, CMA-AAMA, Southeast District

BC Advantage; September/October Issue 20 www.billing-coding.com

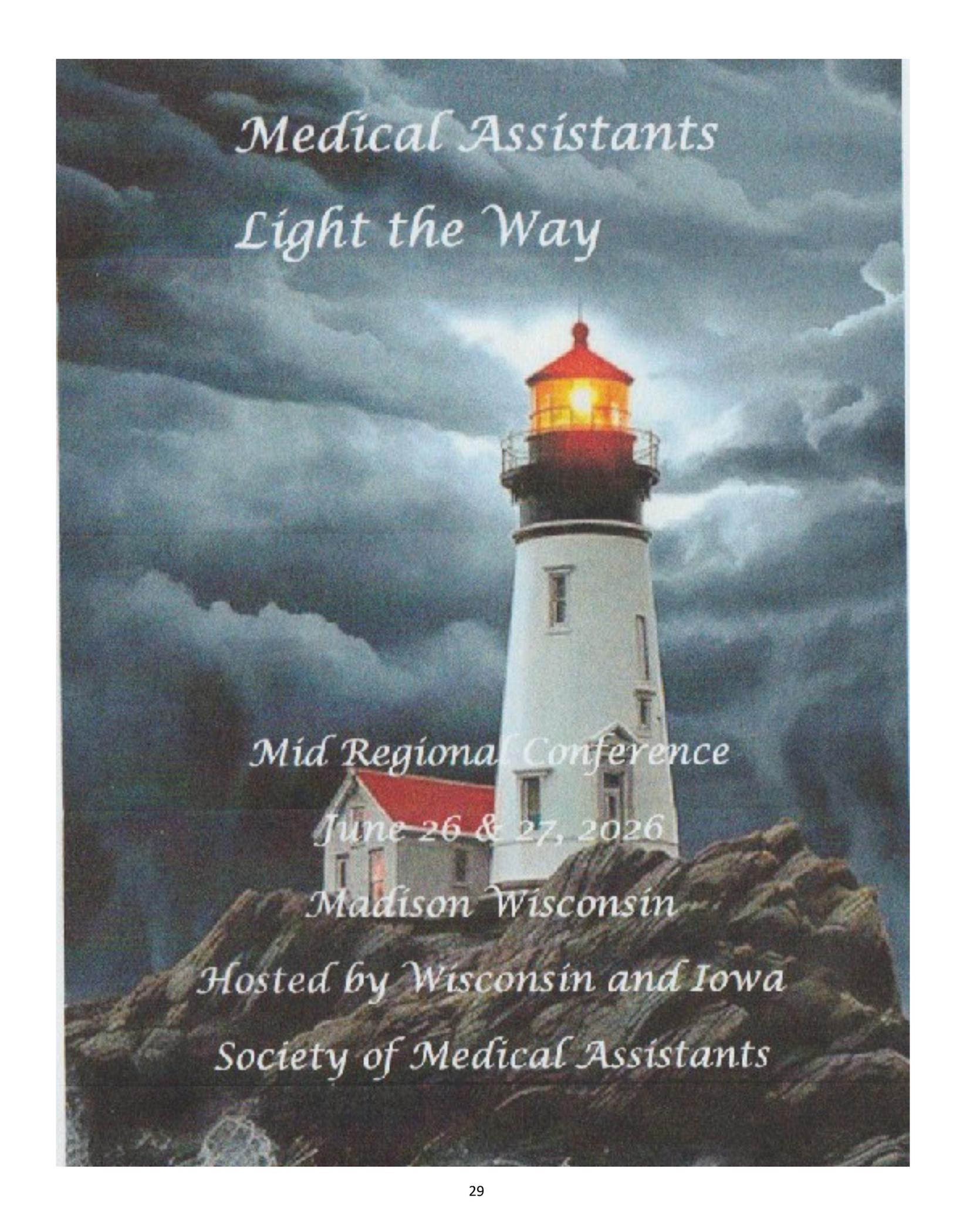


Toxic Shock Syndrome |

WebMD

YouTube · WebMD

57.7K views · May 1, 2017

A lighthouse with a white body and a red lantern room sits on a rocky island. The sky is dark and stormy, with a bright light breaking through the clouds behind the lighthouse. A small white building with a red roof is visible at the base of the lighthouse.

*Medical Assistants
Light the Way*

Mid Regional Conference

June 26 & 27, 2026

Madison Wisconsin

Hosted by Wisconsin and Iowa

Society of Medical Assistants

Mid Regional Conference

June 26 & 27, 2026

Doubletree by Hilton Madison East

4402 East Washington Ave, Madison WI 53704

P 608 244 4703

Room Rates \$139/night

(Thursday, Friday, Saturday)

Registration Fees:

Member \$200/Both Days

Iowa Contact:

Shelly Sears

Email: shelly.sears@gmail.com

Website-lowasma.org

Wisconsin Contact:

Kim Copper

Email: kimberly.coop84@gmail.com

More information to come!

ISMA BASKET RAFFLE ANNOUNCEMENT

Join Us for a Chance to Win and Support a Charity

The ISMA Basket Raffle - November 8, 2025

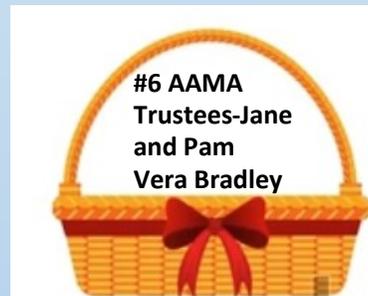
How to Participate

If you are unable to attend the meeting in person, or if you plan to join virtually, you can still participate in the raffle. Tickets for the baskets are available for purchase now, so everyone has a chance to join in the fun and support our charities.

View the Baskets

All raffle baskets are displayed on the ISMA website, as well as featured in the latest edition of *Med-A-Scoop*. Each basket comes with a detailed flyer that lists the contents and highlights the specific charity that will benefit from your participation if it is the winner of the most sold tickets.

We look forward to your participation!



Tickets are \$1 per ticket or 6 for \$5-how can you lose!

HOW TO ENTER: Submit payment **prior** to Nov. 8 and make sure you tell us which basket you are wanting. Tickets will be tracked for each basket. Bid on more than one basket!!

Checks are made out to:

ISMA or use Venmo: @Kit-Stine
Mail to Kit Stine
1408 Evergreen Dr.
Greenfield, IN 46140



#1 Basket East Central District



#2 Basket First District

First District's raffle basket contains a large Sea Star Scentsy burner and three packages of scented wax, Pacific Mist, Petals and Peaches and Cozy Cardigan. Our charity is Chemo Buddies. Chemo Buddies are volunteers founded in Evansville, IN in 2011, by two sisters who sat together for seven hours in a treatment room. They noticed that many patients had no one with them. They founded Chemo Buddies to offer friendship, companionship and the healing power of hope to the patients. Chemo Buddies not only sit with patients during treatment they provide blankets, snacks and drinks. They offer free rides to treatment centers and free wigs for those with hair loss caused by Cancer. They work with the nurses in the treatment room serving



First District Basket continued:



3 Basket

St. Joseph District Chapter

- 1 Gnome Tied Blanket other side is green with red birds 48" x 60"
- 2 Gnomes 16oz metal cups with lid and straws and small brush to clean straw
- 2 Gnomes coasters

(Hand Wash Cups and Coasters)

- 1 Gnome light up block 5 x 5 with battery operated fairy lights
- 1 Christmas Pillow 12 x 12



Cups & Coasters



Light up block



Pillow

Charity: **Mishawaka Troop Town**

Tiny homes and transitional support for homeless veterans in Mishawaka. Private living spaces alongside a common area and resources for financial literacy, employment, and medical assistance.

The goal is to help these veterans get back on their feet and return to a productive and meaningful life.

Mission: Mishawaka Troop Town will strive to do what is right for our residents' best interest. Understanding that Veterans are unique, we will recognize the extraordinary sacrifice they made in service to our nation and that they are most deserving of our very best efforts to meet their needs. We will also respect and preserve the dignity of each resident. MTT will continue to educate veterans with a skill set to live healthier lives, being involved in the community while providing spiritual, mental, and physical support.



#4 Basket
SOUTHEAST DISTRICT
NOVEMBER RAFFLE BASKET



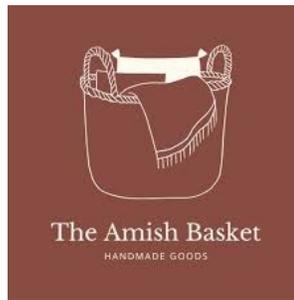
FALL/CHRISTMAS BASKET

Items – Christmas Blanket, 2 fall dish towels, 8 Christmas gift bags, 2 fall people, 2 fall oven mittens, 2 Joy Christmas decorations, and 1 Christmas ~~snomes~~.

Charity - Wounded Warriors

5 Basket Twelfth District





Items for Basket from Twelfth District

Country Harvest Cookbook

Mrs. Millers Old Fashioned Noodles

Chicken Broth

Grabill Country Boneless Chicken

6-pack Holiday Kitchen Towel Set

Dutch Country Honey

Farm Dust Seasoning

Amish Country Cheddar Cheese Microwave Popcorn

Yoder's Homestyle Apple Butter

Yoder's Homestyle Strawberry Jam

Donations to:

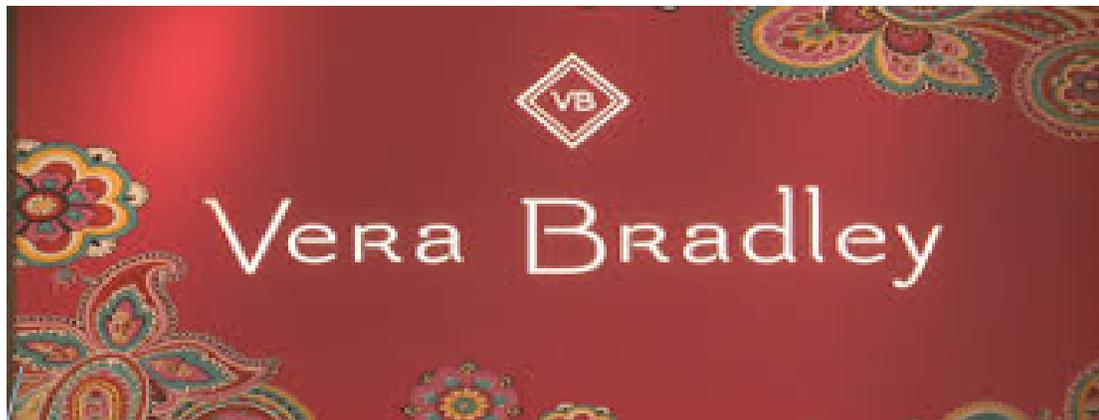
Riley Children's Foundation

500 N Meridian, Suite 100

Indianapolis, IN 46204

Jane Seelig, CMA-A (AAMA) and Pam Neu, CMA (AAMA, MBA)
AAMA Board of Trustees
#6 Basket





*Items for basket from BOT,
Jane Seelig, CMA-A (AAMA) and
Pam Neu, CMA (AAMA), MBA*

- Gray Vera Bradley Backpack bag (\$115 value)
- 3-Piece Vera Bradley Cosmetic Set
- Vera Bradley Travel Pill Case
- Wrist Blood Pressure Cuff
- Instant Hand Sanitizing Wipes
- Emergency Thermal Blanket
- Two Salon Nail Boards
- Silver Organizer Bag
- Toothbrush
- Toothbrush Holder
- Toothpaste
- Dental Floss

Donations to:
Riley Children's Foundation
500 N Meridian, Suite 100
Indianapolis, IN 46204

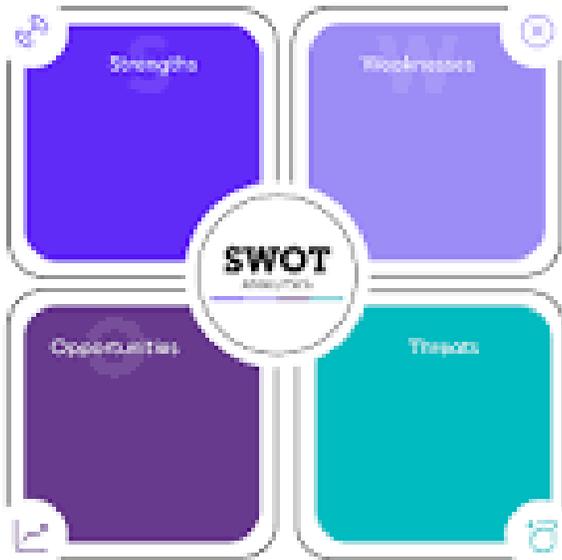


SWOT ANALYSIS

Pepperdine Graziadio Business School

<https://bschool.pepperdine.edu> › personal growth › article

Jul 10, 2024 — In this guide, you'll find **SWOT analysis best practices** that sharply focus your strategic planning, ensuring no detail is overlooked.



A SWOT analysis helps individuals and organizations assess internal Strengths and Weaknesses and external Opportunities and Threats to improve decision-making and strategic planning. To perform one, gather a diverse team to brainstorm internal and external factors using a 2x2 grid, and then develop actionable strategies to leverage strengths, address weaknesses, capitalize on opportunities, and mitigate threats. It is important because it provides clarity, builds common understanding, identifies areas for growth and improvement, and helps anticipate risks.

Why You Should Do a SWOT Analysis

Identifies opportunities for growth:

A SWOT analysis helps uncover avenues for expansion and improvement, acting as a starting point for strategic initiatives.

- **Highlights areas needing improvement:**

By identifying weaknesses and threats, organizations can learn from mistakes and develop concrete plans to streamline operations and improve performance.

Builds common understanding and alignment:

The collaborative process of conducting a SWOT analysis ensures leadership teams share a unified view of the company's position, leading to more cohesive strategies.

Supports strategic planning:

It serves as a fundamental framework for developing effective business strategies by providing a clear snapshot of the current competitive landscape.

Manages risks:

The analysis helps identify potential risks before they become major concerns, allowing for proactive measures to be put in place.

How to Do a SWOT Analysis

1. Define the Objective:

Clearly state the goal or scope of the SWOT analysis.

2. Gather a Diverse Team:

Involve individuals from various departments and levels to ensure a broad range of insights.

3. Brainstorm and List Factors:

Internal (Strengths & Weaknesses): What does your organization do well (strengths)? What are its limitations (weaknesses)? Consider internal factors like brand, skills, and technology.

External (Opportunities & Threats): What external factors can help your organization (opportunities)? What factors could negatively impact it (threats)? Consider market trends, competition, and economic factors.

4. Use a SWOT Grid:

Organize the brainstormed points into a 2x2 grid with headings for Strengths, Weaknesses, Opportunities, and Threats.

5. Analyze and Prioritize:

Assess the significance and interconnections of the factors identified. How can strengths mitigate threats? How can opportunities be leveraged?

6. Develop an Action Plan:

Create concrete strategies to capitalize on strengths, overcome weaknesses, seize opportunities, and plan for threats.

7. Implement and Monitor:

Put the action plan into effect and regularly review and update the SWOT analysis to track progress and adapt to new information.

SWOT Analysis - Printable Worksheet

Strengths	Weaknesses
<hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/>
Opportunities	Threats
<hr/> <hr/> <hr/> <hr/>	<hr/> <hr/> <hr/> <hr/>

How To Write an Action Plan (With Template and Example)

Written by Jennifer Herrity

Updated March 25, 2025



An action plan outlines the actionable steps you can take to achieve a business goal. A strong action plan will also establish a start and end date for every step in the process. In this article, we discuss how to create an action plan that can help you reach your goals. **Key takeaways:**

- An action plan helps you define goals, break them into actionable tasks, and follow a timeline to stay organized and on track.

Effective action plans include SMART goals, clear steps, timelines, assigned resources, and a way to monitor progress.

Action plans are useful in both personal and professional settings, from improving work habits to managing large-scale projects.

How to write an action plan in 5 easy steps

While action plans may differ in terms of tasks and timelines, they generally conform to the following steps:

1. Set SMART goals

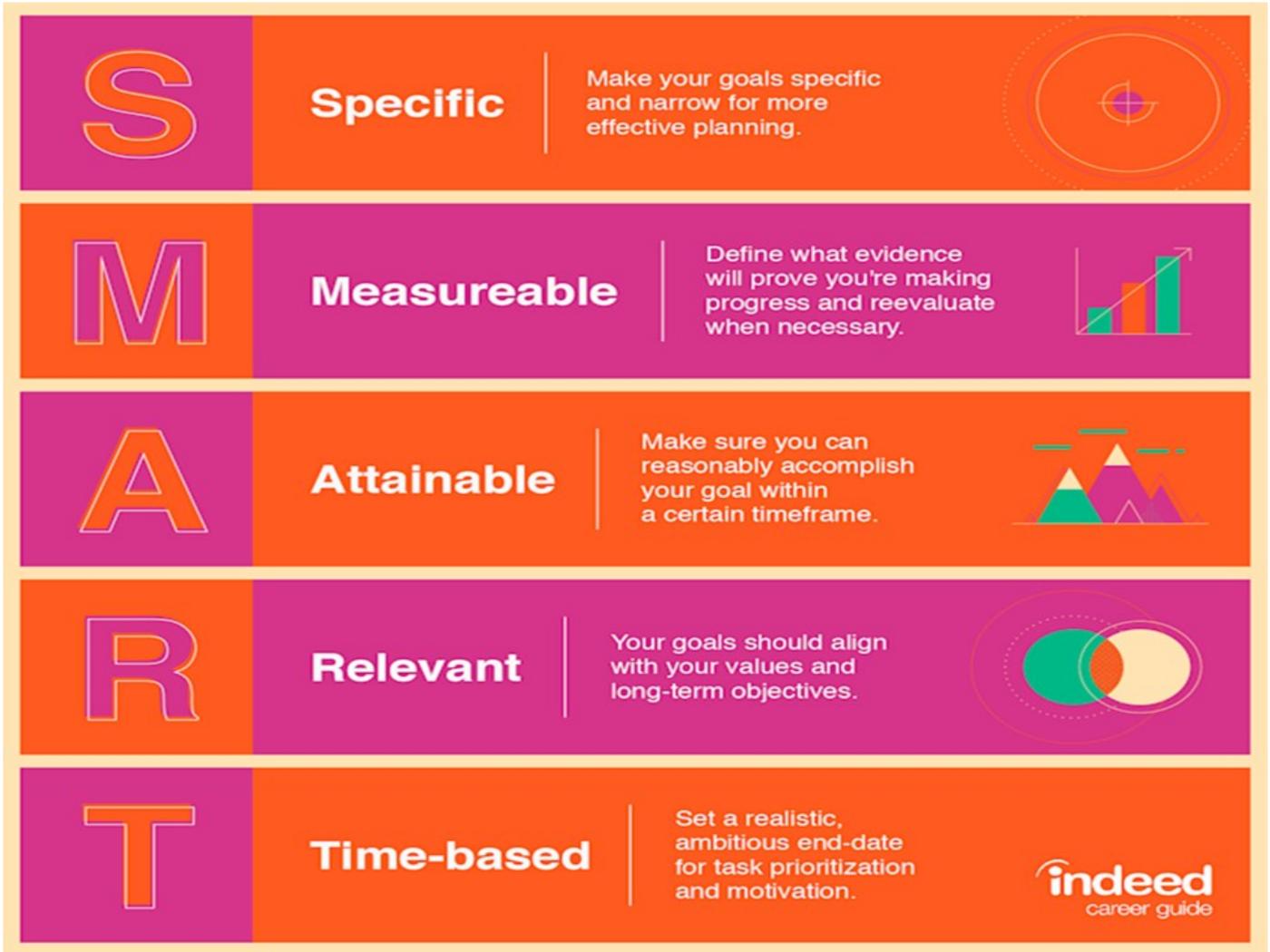


Image description

Before you start writing your action plan, consider using the SMART method. Your goal should be:

- **Specific:** For instance, instead of saying that you want to increase sales, you could set a certain threshold you want to reach, such as increasing sales by 20%.
- **Measurable:** For instance, if your goal is to generate more sales, try to create weekly or monthly sales reports to track your progress.
- **Attainable:** For instance, project tasks should be assigned to team members who have the skills and bandwidth to complete them.

- **Relevant:** For instance, if you want to increase advertising revenue by 25%, setting a goal to initiate a new workplace safety program may not be relevant.

Time-based: For instance, you should set a specific deadline for reaching your goal, such as increasing your income by 10% within the next 12 months.

2. Create a list of actions

Next, create a list of tasks you need to complete to reach your goal. This process entails dividing your main goal into smaller objectives. By doing so, you can make the final goal seem less overwhelming and you can move forward in an organized manner. If necessary, you may need to break down some complex objectives into multiple tasks. For example, if you want to get a promotion, you may have to perform a number of tasks to achieve your goal, such as reaching a performance benchmark or learning a new skill. Learning a new skill is one task that will likely need to be broken up into smaller, well-defined steps. Clearly describe each task to create a plan that will lead you to your ultimate goal.

3. Set a timeline

Besides setting a deadline for your main goal, you should also establish a timeframe for completing each task. It's essential to create a timeline you can reasonably follow so you can maintain consistent progress toward your goal. Assess the requirements and consider the amount of time you need to complete each item on your list. For example, say you want to increase traffic to your website by 100% in one year through social media and improved SEO strategies. Set a timeframe for achieving your desired results for each of the tasks, such as increasing your social media posts by 30% in two months and hiring an SEO specialist right away to guide your new strategy.

Designate resources

If you are managing a large project, you will likely be assigning tasks to a number of people. Assess the skills and abilities of your team to determine which of them are best qualified to perform each task. Then, write down the resources needed to complete each task, such as money, equipment and personnel. For example, if you're managing a marketing campaign, you will need to find out which of your staff members are strongest in planning, content production, social media marketing and SEO. You should also have the applications and tools for content production, [graphic design](#) and marketing analytics.

5. Monitor your progress

Finally, describe how you will ensure each task in your action plan is completed on time, such as using internal reporting or holding regular meetings. By doing so, you will have a better idea of the progress you are making toward your goal. Specify the measures you will be using to monitor the plan's progress, which can be milestones like the number of tasks completed, or quantitative measures, such as sales or market share. For example, you want your [customer service](#) department to be able to handle 1,000 inquiries a day by the end of the year. However, you need to have at least 10 customer representatives to achieve your goal. You can easily figure out how close you are to your final goal by assessing how many inquiries you can handle and how many customer service representatives you have at the half-year mark.

Action plan template

You can save time by using a template to create your action plan. Here is an effective template for a wide range of goal-setting situations:

Problem:

Goal:

Action Plan:

- Actions (steps you plan to take to achieve your goals)
- Persons in charge (staff members who will be handling each step)
- Timeline (deadline for each step)
- Resources (assets you need to allocate for each step)
- Potential barriers (factors that can potentially hinder the completion of each step)

Outcomes (desired result for each step)

Evidence of Success:

Tracking and Evaluation Process:

<https://www.indeed.com/career-advice/career-development/how-to-write-an-action-plan>



SWOT ANALYSIS EXAMPLE:

ISMA:

Objective-To increase our membership by 20% at the end of 2026

Strengths- Members who are willing to work and make ideas happen
Great advisors willing to help

Weaknesses- Declining membership
Not all members are willing to participate

Opportunities - Many physicians or health professionals willing to help
Many healthcare facilities need good medical assistants

Threats-Other credentialed medical assistants in the area
Other credentialed medical assistant organizations

ACTION PLAN: This is a sample only! I filled in names off the top of my head because I didn't have a diverse team in my home office to brainstorm

SMART GOALS:

Specific: To increase our membership by 20% at the end of 2026

Measurable: Look at monthly membership numbers from national to check our progress

Attainable: Create 2-3 committees of current members willing to send out letters by email.

To nonrenewing members

To new CMAs

To clinics that hire medical assistants

Relevant: Create goals for the committees that everyone agrees to and has the most significant impact on the success of obtaining new members.

Our Goals could be – We will send specific letters relating to the nonrenewing members, to the new CMAs, and to clinics, hospitals, or physicians that hire medical assistants.

Timed: Create a sense of urgency, motivating everyone to act promptly and ensuring that tasks are completed on schedule. Have deadlines, give everyone a chance to give feedback and adjust when necessary.

Our Time could be that our letters go out by the 5th, 15th, and 30th. Each committee will create a letter to send out to the nonrenewing members, new CMAs, and the third committee can be given a letter to clinics/hospitals/offices that hire medical assistants.

Actions:

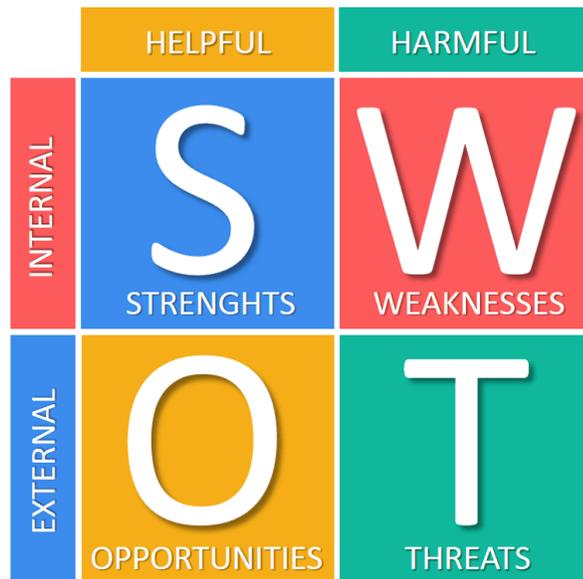
We can create 3 teams to write letters for the nonrenewing members, new CMAs, clinics, hospitals, offices that hire medical assistants.

Rita’s team (Heidi, Paula, Joyce) can create a letter for the nonrenewing members, Rita will make sure her team sends the letters by email on the 5th of every month

Jane’s team (Dianne, Sandy, Tammy) can create a letter for the new CMAs, Jane will make sure her team sends the letters by email on the 15th of every month

Kit’s team (Brandi, June, Karen) can create a letter for the clinics, hospitals, and offices that hire medical assistants. Kit will make sure her team sends the letters by email on the 30th of each month.

Outcome: Tabitha will check the numbers on the AAMA website to determine the difference in membership and record the percentage of increase or decrease of membership.



ADDITIONAL DEADLINES

Membership Dues	<u>December 31, 2025</u> , to be eligible to vote at ISMA Annual Conference
Medical Assistant of the Year	Nominations by Chapters to President by <u>January 1, 2026</u> , and forwarded to Physician Advisors (3) by <u>February 1, 2026</u> , for judging. Award to be presented at Annual State Conference Banquet.
Leon Levi Award	Nominations to President by <u>February 1, 2026</u> , for judging. Award to be presented at Annual State Conference Banquet.
Golden Apple Award	Nominations to President by <u>February 1, 2026</u> . Award to be presented at Annual State Conference Banquet.
Nominating Slate (Officers)	Slate of Officers to be presented at the <u>February 15, 2026</u> , State Board Meeting.
Bylaws, Standing Rules, Resolutions	Any proposed changes to Bylaws, Standing Rules, Etc. must be provided to the membership 60 days prior to Annual State Conference (February 3, 2026)



DOWNLOAD THE ISMA WEBSITE LINK!

Instructions for Android and iPhone:

Android Phones: Open Chrome and type in the website address: Insocmedasst.org—hit enter and let the website appear. Tap the menu icon (3 dots in upper right-hand corner) and tap Add to home screen. **Every time you go into the Web link, make sure you refresh the page!**

iPhone: Using Safari type in the website address: Insocmedasst.org and hit enter. At the bottom of your screen you will see a box with an arrow going up-touch that and scroll over until you see the prompt “add to home screen” tap the words and touch “add” at the top of the screen and watch your Web link appear. **Don’t forget to refresh the page each time when you go into the web link!**

**Official Newsletter of the
Indiana Society of Medical Assistants, Inc.
An Affiliate of the American Association of Medical Assistants**

NOTICE- If you have a name or address change
PLEASE NOTIFY the National AAMA office at
1-800-ACT-AAMA
(1-800-228-2262) OR WWW.AAMA-NTL.ORG