



# **Program Planners Guide**

**How to plan a continuing  
education program  
for adult learners**

## **Program Planners Guide**

Published by  
American Association of Medical Assistants  
20 N. Wacker Dr., Ste. 1575  
Chicago, IL 60606

Phone: 312/899-1500  
Fax: 312/899-1259  
E-mail: [continuingeducation@aama-ntl.org](mailto:continuingeducation@aama-ntl.org) (questions)  
[pplanners@aama-ntl.org](mailto:pplanners@aama-ntl.org) (approvals)  
Website: [www.aama-ntl.org](http://www.aama-ntl.org)

© Copyright 1991, 1996, 1999, 2003, 2006, 2008 by the American Association of Medical Assistants

Sixth edition 2008

Revised by 1998–1999, 2002–2003, 2005–2006, 2007–2008 Continuing Education Board

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, including electronic, mechanical, photographic, or magnetic without prior written permission of the publisher.

---

# INTRODUCTION

---

**Goal**

The goal of the Continuing Education Board of the AAMA is to improve the quality of continuing education for medical assistants through the combined efforts of the program planner and the Continuing Education Board.

---

**Guideline**

The Program Planners Guide is designed by the Continuing Education Board to provide guidelines for planning and organizing continuing education programs for adult learners.

---

*On behalf of the Continuing Education Board and the American Association of Medical Assistants, we extend our best wishes for the success of your continuing education programming and thank you for the part you are playing in the professional growth and development of medical assistants.*

# TABLE OF CONTENTS

TIME LINE/FLOW CHART.....	6
---------------------------	---

## Section I. UNDERSTANDING THE BASICS

Continuing Education.....	7
Goals of Continuing Education .....	7
Recertification through Continuing Education .....	7
AAMA CEU Approval .....	8
AAMA Transcript Registry.....	8
Eligibility .....	8
Multi-sessions .....	9
Program Approval Process.....	9
Approval Request Form .....	9
Review.....	9
Notification .....	10
AAPC CEU Approval .....	10
Provider Level CPR Approval .....	10

## Section II. DESIGNING THE PROGRAM

Needs Assessment.....	11
Surveys .....	11
Needs Assessment—Sample Form .....	12–13
Methods .....	14
Oral Assessments.....	14
Written Assessments .....	14
Distribution .....	14
Choosing the Topic .....	15
Ineligible Topics .....	15
Identifying Participants.....	15
Developing the Program.....	16
Planning Content Outline.....	16
Writing Learning Objectives .....	17
Instructor-Student Ratio.....	17
Instructional Methods .....	17
Program Length .....	18
Determining CEU Value .....	18
Ineligible Activities .....	19
Calculating CEU Values.....	19
Alternatives .....	19
Non-AAMA Education Sponsorship .....	20
Designing the Program—Checklist .....	21

## Section III. BUDGET AND FINANCE

Budget Factors .....	22
Cost-saving Ideas .....	22
Speaker Expenses.....	23
Determining the Budget—Worksheet .....	24

**Section IV. SPEAKERS/INSTRUCTORS**

Identifying/Finding Speakers .....25  
 Initial Contact .....26  
 Written Confirmation.....27  
 Telephone Confirmation .....27  
 Hospitality for Speakers .....27  
 Substitute Speakers .....28  
 On the Day of the Program.....28  
 Introducing the Speaker .....28  
 Following the Presentation .....28  
 After the Program .....28  
 Tips for Introducing the Speaker .....29  
 Speaker Information Form .....30  
 Speakers/Instructors—Checklist .....31

**Section V. LOCATION AND LOGISTICS**

Choosing the Location .....32  
 Making the Arrangements .....32  
 Contact with Facility .....33  
 Written Confirmation.....33  
 Telephone Confirmation .....33  
 Program Date Change.....34  
 Other Advance/Alternative Arrangements .....34  
 On the Day of the Program.....34  
 AAMA CEU .....34  
 Completing the Attendance Record Form.....34  
 Following the Program .....35  
 Submission of Attendance Record Form .....35  
 Location and Logistics—Checklist .....36

**Section VI. PUBLICITY AND MARKETING**

Promotional Materials.....37  
 Information .....37  
 Format.....37  
 Distribution .....38  
 Other Methods of Publicity .....38  
 Sample Press Release.....40  
 Sample Public Service Announcement.....41

**Section VII. PROGRAM EVALUATION**

Evaluation by the Participant .....42  
 Evaluation by the Program Planner .....42  
 Sample Evaluation Forms .....42  
 Program Evaluation—Sample Form #1 .....43  
 Program Evaluation—Sample Form #2.....44  
 Sample Point Distribution Chart.....45  
 Credit Conversion Chart .....45

# TIME LINE/FLOW CHART

## Suggested Steps in Program Progress

	Days
• Select topic	
• Secure funds	
• Set time	
• Choose site	
• Locate speaker	
• Send written confirmation	
• Arrange hospitality	
• Announce/publicize	
• Registration forms	
• Apply for AAMA CEU approval	30+
• Verify accommodations	14-21
• Confirm speaker	14-21
• Confirm equipment and material	14-21
• Gather equipment and materials	1-3
• Check facility	1-3
• Program	0
• Complete Attendance Record Forms	0
• Collect AAMA nonmember transcript fee(s)	0
• Evaluate program	1-7
• Pay facility/speaker/other expenses	1-7
• Submit Attendance Record Forms	within 30
• Send formal thank you letters	within 30

# Section I. UNDERSTANDING THE BASICS

---

- Continuing Education
  - Goals of Continuing Education
  - Recertification through Continuing Education
  - AAMA CEU Approval
  - AAMA Transcript Registry
  - Eligibility
  - Program Approval Process
  - Approval Request Form
  - Review
  - Notification
- 

**Continuing Education**

AAMA continuing education includes any formal learning activities that relate to the practice of medical assisting. Continuing education programs sponsored by AAMA provide an effective means of keeping the CMA credential current.

---

**Goals of Continuing Education**

The basic goal of any AAMA continuing education program is to promote the professional performance of the medical assistant.

A second goal is to provide a method of maintaining the professional credential of AAMA, the Certified Medical Assistant (CMA), through the continuing education method of recertification.

---

**Recertification through Continuing Education**

The CMA credential may be recertified through the continuing education method by accumulating 60 recertification points within a period of five years. A minimum of 10 recertification points must be earned in each of the three categories, 30 of which must be AAMA approved credit. The remaining 30 recertification points can be obtained in any combination within the three categories.

- 10 General
  - 10 Administrative Procedures
  - 10 Clinical Procedures
  - 30 combination of above three
  - 60 recertification points
-

---

### **AAMA CEU Approval**

AAMA has selected the International Association for Continuing Education and Training (IACET) CEU (Continuing Education Unit) as the basic unit for awarding credit for continuing education programs.

*AAMA awards 1 CEU for one hour of continuing education activity.*

---

### **AAMA Transcript Registry**

A record of all participant activity for AAMA CEU activities is maintained by AAMA. Transcripts are available online to AAMA members who have registered AAMA CEU credit during that quarter.

If you do not have online access, you may request a full transcript of AAMA CEU activity, by telephone, fax or mail. In your request, include your name, current mailing address, member ID number, and signature. Nonmember transcripts are available only on request for the fee of \$20 per transcript. Send requests to:

Continuing Education Department  
American Association of Medical Assistants  
20 N. Wacker Dr., Ste. 1575  
Chicago, IL 60606

Phone: 800/228-2262

Fax: 312/899-8391

E-mail: [continuingeducation@aama-ntl.org](mailto:continuingeducation@aama-ntl.org)

---

### **Eligibility**

AAMA affiliates (local chapters and state societies) and medical assisting directors of schools with CAAHEP-accredited medical assisting programs are eligible to submit continuing education programs to be reviewed for AAMA CEU approval.

*Programs submitted for AAMA CEU approval must adhere to criteria established by the Continuing Education Board.*

---

**Multi-sessions** If you have programs occurring on either the same date or several concurrent dates, they *must* be submitted together.

---

**Program Approval Process** In order to have a program reviewed for AAMA CEU approval, the program planner (not the speaker) must submit a completed Approval Request Form to the Continuing Education Department of the AAMA. A separate form must be submitted for each program to be reviewed.

---

**Approval Request Form** The Approval Request Form must be completed and postmarked or faxed at least thirty (30) days before the date of your program. This allows time to resolve any problems that would delay or prevent program approval. **Should the form be postmarked or faxed after this deadline, the request form may not qualify for review.** Therefore, submit your request as soon as you have necessary information to complete the sponsor, program and instructor information sections of the Approval Request Form. If you are having problems obtaining this information, contact the Continuing Education Department well before the deadline for advice.

To obtain a copy of the Approval Request Form, please contact:

Continuing Education Department  
American Association of Medical Assistants  
20 N. Wacker Dr., Ste. 1575  
Chicago, IL 60606

Phone: 800/228-2262  
Fax: 312/899-8391  
E-mail: [continuingeducation@aama-ntl.org](mailto:continuingeducation@aama-ntl.org)  
Website: [www.aama-ntl.org](http://www.aama-ntl.org)

---

**Review** Programs are reviewed on the basis of topic, content, focus (ie, whether or not the program is designed specifically or primarily for medical assistants), length and instructor qualifications.

All program applications are reviewed on a case-by-case basis. A program that addresses a topic listed as not eligible for credit (see “Ineligible Topics” under “Designing the Program”) may be accepted if the program planner can document that the program is applicable to the field of medical assisting. If you have questions about a topic you are considering, consult with the Continuing Education Department Director before submitting the application.

---

**Notification** If the program is approved, notification will be faxed or e-mailed to the program planner.

All decisions regarding program approval may be appealed to the Continuing Education Board. Requests must be in writing and contain a full explanation or rationale for the appeal and submitted within 30 days of the denial. The Board will consider the appeals at their next full meeting (semi-annual meetings in winter and summer).

---

**AAPC CEU Approval**

Are you planning programs that are coding related? The American Academy of Professional Coders (AAPC) has agreed to grant full-credit approval for coding related seminars and educational materials of the AAMA, which includes its state societies, local chapters, and postsecondary medical assisting education programs accredited by the Commission on Accreditation of Allied Health Education Programs (CAAHEP).

So if you are preparing a coding related workshop and you want the program added to the list of AAPC approved courses, be sure to submit your Approval Request Form to both the AAMA and the AAPC. You must apply for CEU credit approval at least 30 days prior to the presentation. Once approved, the AAPC will add you to its list of CEU courses, which is sent to AAPC members. Submissions to AAPC should be mailed or faxed to: AAPC; 309 West 700 South; Salt Lake City, UT 84101. Fax: 801/236-2258.

For additional information, contact AAPC at 800/626-2633 or visit <http://www.aapc.com/education/CEUs/ceus.html>.

---

**CPR Approval**

Effective immediately the AAMA Continuing Education Board will recognize provider level CPR certification from an entity whose provider level CPR certification course meets or exceeds the provider level course offered by the American Red Cross or the American Heart Association. Provider level CPR is designed to meet the needs of health care professionals who respond to cardiac and respiratory emergencies. The content of the course must include adult and pediatric CPR, foreign-body airway obstruction, and two-rescuer CPR. The course must contain information on barrier devices, stroke, and automated external defibrillation, including a new algorithm for use of automated external defibrillators.

To receive AAMA credit, submit a copy of the CPR certification or recertification card and documentation of the length of the program to the AAMA Continuing Education Department.

---

## Section II. DESIGNING THE PROGRAM

---

Needs Assessment  
Surveys  
Needs Assessment—Sample Form  
Methods  
Oral Assessments  
Written Assessments  
Distribution  
Choosing the Topic  
Ineligible Topics  
Identifying Participants  
Developing the Program  
Planning Program Outline  
Writing Learning Objectives  
Instructor-Student Ratio  
Instructional Methods  
Program Length  
Determining CEU Values  
Ineligible Activities  
Calculating CEU Values  
Other Planning Options  
Active Participation  
Repeating Program Notification  
Checklist: Designing the Program

---

### **Needs Assessment**

Needs assessment identifies the needs and interests of the program participants. Identified needs and interests should be developed from data sources (surveys, questionnaires, etc.) rather than the program planner's own opinions of needs and interests.

Needs assessment should ideally be scheduled on a regular basis for any chapter, society, or institution producing continuing education programs, since the educational needs of medical assistants are constantly changing. At a minimum, this assessment should be conducted on an annual or biannual basis.

---

### **Surveys**

The survey usually includes questions on:

- participants' preferences on time, date, and location of program
  - topics/speakers of most interest to participants
  - educational level/CMA status of participants
  - participants' preferences on length of program and financial limitations
  - reasons which might keep a participant from attending (lack of child care, transportation problems, etc.)
-

# NEEDS ASSESSMENT—SAMPLE FORM

NAME: \_\_\_\_\_  
(optional)

E-MAIL: \_\_\_\_\_  
(optional)

By completing this questionnaire, you will help plan programs that will benefit the greatest number of medical assistants in the area.

## Regular Meetings (usually held once a month)

1. Please indicate the day and time that is the most convenient for you.

1st choice: DAY \_\_\_\_\_ TIME \_\_\_\_\_

2nd choice: DAY \_\_\_\_\_ TIME \_\_\_\_\_

3rd choice: DAY \_\_\_\_\_ TIME \_\_\_\_\_

2. Topics that you would like scheduled for the regular meetings:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. The learning format that I prefer is:

- |   |   |
|---|---|
| <input type="checkbox"/> Lecture          | <input type="checkbox"/> Demonstration    |
| <input type="checkbox"/> Workshop         | <input type="checkbox"/> Teleconference   |
| <input type="checkbox"/> Panel discussion | <input type="checkbox"/> Audio conference |
| <input type="checkbox"/> Seminar          | <input type="checkbox"/> _____            |

4. Do you know of anyone who would be a good speaker for a meeting or seminar?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Do you know a commercial firm that might have a presentation suitable for a meeting or seminar?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Long Term Courses (a series of classes offered over a period of weeks/months)

1. I would be interested in a course on (indicate 1st, 2nd, and 3rd choices):

- Anatomy and Physiology
- Clinical Procedures
- Medical Terminology
- Laboratory Procedures
- Human Relations
- Certification Review
- Bookkeeping
- Written Communication
- Medical Law and Ethics
- Computer Usage
- Other:
- Not interested in long term courses

2. I prefer that the classes be held:

- Twice a week for \_\_\_\_\_ (number of weeks)
- Once a week for \_\_\_\_\_ (number of weeks)
- Semi-monthly for \_\_\_\_\_ (number of months)

3. I can attend classes that meet on (check all that are possible and indicate 1st and 2nd choices):

- |  |   |
|--|---|
| <input type="checkbox"/> Monday evening    | <input type="checkbox"/> Friday evening     |
| <input type="checkbox"/> Tuesday evening   | <input type="checkbox"/> Saturday morning   |
| <input type="checkbox"/> Wednesday evening | <input type="checkbox"/> Saturday afternoon |
| <input type="checkbox"/> Thursday evening  | <input type="checkbox"/> Sunday afternoon   |

4. Evening hours that are most convenient for me begin at:

- 5:30    6:00    6:30    7:00 pm    7:30

5. I prefer to meet for sessions of:

Continued

- 1 hr.
- 2 hrs.
- 3 hrs.

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**General Information**

1. Are you a Certified Medical Assistant?  Yes  No

2. If not, are you interested in becoming a CMA?  Yes  No

3. If not, why not? \_\_\_\_\_

\_\_\_\_\_

4. Are you a member of the AAMA?  Yes  No

5. If not, are you interested in becoming a member?  Yes  No

6. If not, why not? \_\_\_\_\_

\_\_\_\_\_

7. What percentage of your time in the office is spent in doing:

\_\_\_\_\_ % Administrative Procedures

\_\_\_\_\_ % Clinical Procedures

\_\_\_\_\_ % Managerial Functions

8. Did you receive your training as a medical assistant in a formal medical assisting program or were you trained on the job?

- formal training
- on-the-job training

9. How many years have you worked as a medical assistant? \_\_\_\_\_

Thank you for taking the time to complete this form. Your answers to these questions will help the program planner construct programs to meet your needs. Return this form postmarked by \_\_\_\_\_ to:

\_\_\_\_\_, Program Chairman

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

---

<b>Methods</b>	A formal needs assessment may be either oral or written. In either case, permanent records should be made of the responses for future planning needs.
<b>Oral Assessments</b>	Oral assessment has the advantage of allowing the respondent to express opinions spontaneously. It has a disadvantage as well, in that participants whose identities are known will sometimes respond as they believe they should rather than as they truly feel.  An oral needs assessment may be done by telephone survey, by surveying participants at regular continuing education programs, or by forming small group sessions during a larger convention or meeting.  It is essential that the leaders conducting oral surveys be trained to: <ul data-bbox="428 722 1390 823" style="list-style-type: none"><li>• frame standardized questions, so that all answers can be compared</li><li>• phrase questions impartially and unemotionally, so as not to affect the answers</li><li>• consistently record the responses of the participants</li></ul>
<b>Written Assessments</b>	Written assessments provide the best method for doing needs assessment by making it possible to keep the identity of the participant anonymous. Many times people are more willing to share their true feelings when they know that their identities will not be revealed, particularly when they have criticisms or negative comments.  A written questionnaire also has the advantage of being easier to compile than an oral survey and has the potential for distribution to a wider audience.
<b>Distribution</b>	Written surveys may be distributed directly to participants at continuing education programs on both the state and local level or by mail, to: <ul data-bbox="474 1335 1422 1545" style="list-style-type: none"><li>• local AAMA members</li><li>• nonmember participants of your continuing education programs</li><li>• local physicians' offices or other health care settings where medical assistants are employed</li><li>• health care settings where medical assistants are employed</li><li>• students enrolled in medical assisting programs</li></ul> Distributing the surveys as widely as possible will enable the program planner to target those medical assistants in the area who rarely attend programs or have never attended a program. Determining their needs and planning programming to meet those needs could result in a significant increase in attendance at continuing education programs.

---

**Choosing the Topic**

**Current Issues:** Whenever changes occur that may affect the medical assistant, these should be targeted as topics for continuing education activities.

**Needs Assessment:** The use of surveys and questionnaires can provide a list of topics for continuing education programming.

**Injections:** If your program involves content regarding injections, contact the AAMA legal department before you submit the topic for approval.

---

**Ineligible Topics**

The following topics (including, but not limited to) do not qualify for CEU credit:

- Health care programs that include religious or spiritual topics that are *not* non-denominational
  - Personal appearance or grooming, such as wardrobe selection, color analysis, and make-up
  - Personal self-defense (defense lectures about dealing with difficult patients will be considered)
  - Personal financial planning
  - Missionary trips
  - Employee benefits
  - How to certify, recertify, or become a member of a professional association
  - Preparing a resumé or job searching skills
  - Product endorsements or sales
  - Community service topics aimed at the general populace (a program specifically designed for medical assistants is more likely to be acceptable)
  - Association-oriented leadership training programs (A program specifically designed to impart leadership skills to the medical assistant who is a medical office manager is more likely to be acceptable.)
- 

**Identifying Participants**

Program planners need to be aware of the educational background and accumulated knowledge of their target audience. Programs should be planned to meet the varying educational needs and levels of the participants. The *Occupational Analysis of the CMA (AAMA)*, *Advanced Practice of Medical Assisting*, and *Content Outline for the AAMA Certification/Recertification Exam* provide guidelines that will help program planners determine topics relevant to the practice of medical assisting.

---

- Basic:** Introductory material for those who have no previous knowledge of the topic.
- Intermediate:** For those who possess some experience and basic knowledge in the topic being addressed. These sessions are designed to build upon a foundation of existing skills and experience. A basic-level course may be a prerequisite for an intermediate-level session.
- Advanced:** For experienced, knowledgeable practitioners of the topic being addressed. These courses may involve a great deal of peer interaction and are designed to promote a high level of professionalism and expertise.  
  
An intermediate-level course may be a prerequisite for an advanced-level session. Note the placement of the asterisks within the Role Delineation Chart.
- All Levels:** Information for all levels of education, training and experience. Material presented will include basic, intermediate and some advanced information.
- Certification Status:** Participants who are recertifying their CMA credential through the continuing education method will need a variety of programs in the three required subject categories: General, Administrative Procedures, and Clinical Procedures.

**Developing the Program**

It is important to provide programs from each of the above categories to meet all participants' needs.

**Planning Content Outline**

Once the topic has been chosen and the audience identified, the program needs to be developed. It is important to keep in mind the final program to be presented and to be clear about what information will be presented to participants.

Decide what specific information is to be presented and develop an outline that fits the time frame. Is the topic one that includes many areas of interest? If so, perhaps it will be necessary to zero in on one or two areas.

Include such items as:

- demonstrations
- visual aid presentations
- question and answer time
- program evaluation

Develop the content outline in discussion with the speaker(s), to ensure that the speaker(s) can prepare the proper material for presentation. A final outline can be used in marketing the workshop.

**Writing  
Learning  
Objectives**

After the outline is developed, specific learning objectives must be identified. Develop the objectives in discussion with the speaker(s), to ensure that the speaker(s) can organize the material to meet the objectives.

Learning objectives must state what the participant will gain from attending the session. Performance objectives should be used if hands-on participation will occur. The following are examples of both learning and performance objectives:

“Upon completion of this program, the participant will (be able to):

**LEARNING OBJECTIVES**

- recognize the need for...”
- have an understanding of...”
- be made aware of...”
- define and describe the...”
- distinguish the different types of...”
- explain the medical assistant’s role and responsibility...”
- discuss methods to...”

**PERFORMANCE OBJECTIVES**

- accurately complete...”
- demonstrate...”
- list and define...”

These objectives should be made available to the intended audience as a way for potential participants to select courses based on their needs and interests.

**Instructor-  
Student  
Ratio**

If the program is to be a lecture presentation, then attendance need only be limited to space available.

However, if demonstration or active participation is planned, such as a lab workshop, attendance must be limited. For this type of workshop, the *maximum* instructor-student ratio should be 1:24.

An alternative to limiting enrollment would be to increase the number of instructors. A primary instructor would present the lecture portion and any instructions for participation. Assistants would help with demonstration or monitoring practice sessions. Naturally, it is important that any assistant have appropriate expertise in the applicable area.

**Instructional Methods**

A wide variety of instructional methods are available, including:

- lecture
- group discussion
- panel discussion
- case studies
- role-playing
- online  
(Internet/intranet)
- audio conference
- teleconference
- demonstration
- audiocassettes/videocassettes
- overheads/slides

The instructor may indicate a preference for specific educational methods. (Audiovisual methods of instruction may be used **by** an instructor—not **in place of** an instructor.)

The method used should be appropriate for the material being presented. For example, workshops in areas of office or lab procedures should have some active participation by attendees. Small group discussions should have assigned monitors for guidance. Roundtable discussion should be somewhat structured and should have a qualified facilitator.

An effort should be made to vary the educational methods; do not rely too heavily on the use of lectures. Methods requiring learner involvement have been shown to provide more effective learning experiences.

The appropriate use of audio/visual media can enhance the learning process when integrated with other teaching methods, but care should be taken not to rely solely on these as instructional methods.

For online programs, submit an approval form and include the URL (ie, website address); a post test (passing rate is 70% or greater); and screen shots.

For programs involving audio conference, teleconference or extensive use of video, submit a post test (passing rate is 70% or greater) with the approval form.

**Program Length**

The minimum length of any educational offering is one hour. However, most educational topics need at least two hours to be of any value to the participant. Extensive topics or workshops that involve active participation by attendees might need much longer to be covered adequately. Make sure that the time allowed is appropriate for the amount of information being presented and the type of instructional methods being used.

**Determining CEU Value**

The 60-minute contact hour is the basis of the AAMA Continuing Education Unit.

Programs submitted for AAMA CEU approval must be a minimum of one hour in length, on a *single* topic. (For example, a program that is 1/2 hour on OSHA Regulations and 1/2 hour on recognizing child abuse would not be eligible.)

The CEU value that is awarded to the program is based on the amount of actual instructional time.

Instructional time may include the following activities:

- lectures
- approved independent study activities
- field trips/facility tours (minus travel time):  
2 experiential hours = 1 hour of classroom time
- slide presentations
- film screenings (with qualified instructor present)
- question and answer periods
- discussion periods
- testing
- program evaluation

### Ineligible Activities

Activities that are ineligible (including but not limited to):

- refreshment breaks, lunches, receptions, dinners
- business or committee activities
- welcoming speeches, announcements, or organizational reports
- meeting registration

### Calculating CEU Values

CEU values are calculated as follows:

A program that is:

1 hour to 1 hour and 29 minutes	= 1.0 CEU
1 hour and 30 minutes to 1 hour and 49 minutes	= 1.5 CEUs
1 hour and 50 minutes	= 2.0 CEUs
A program with 5 3/4 hours of instructional time, 1 hour lunch break, and 3/4 hour committee report	= 5.5 CEUs
A two-day program that includes 7 1/2 hours of instructional time, 3 meal breaks, 2 coffee breaks, and a formal banquet of 2 1/2 hours	= 7.5 CEUs
A 1 hour program that includes 1/2 hour of instruction, followed by a 1/2 hour business meeting	= 0.0 CEU
A program that includes 1 hour of instructional time, followed by a 1/2 hour business meeting	= 1.0 CEU
A visit to a laboratory that includes 2 1/2 hours of instructional time, plus 20 minutes travel time	= 2.5 CEUs

### Alternatives

Other planning options are available for AAMA CEU credit.

**Non-AAMA  
Education  
Providers of  
AAMA CEU  
Credit**

The *Non-AAMA Education Provider* category is designed for programs conducted by organizations and institutions other than the local chapters or state societies of the American Association of Medical Assistants (AAMA) or medical assisting programs accredited by the Commission on Accreditation of Allied Health Education Programs (CAAHEP). This category includes commercial firms, colleges, medical centers, private consultants and other associations or organizations.

As a Non-AAMA Education Provider, you must:

1. Ensure the content of the program is relevant to the practice of medical assisting, so that it is eligible for CEU approval.
2. Complete the **Non-AAMA Education Sponsor Approval Request Form**.
3. Provide program content information in the format specified on the approval request form.
4. Provide the nonrefundable submission fee of \$70 per CEU.
5. Mail the completed approval request form, with the fee and program content description 30 days prior to the event. (Once the program has been reviewed, the AAMA send notification via fax or e-mail of the approved/denied status, and CEU credit awarded.)
6. Provide the AAMA with a copy of all brochures or promotional materials that indicate or advertise approved programs. Any reference to the AAMA or the AAMA Continuing Education Board must state the following:

This program has been granted prior approval by the American Association of Medical Assistants (AAMA) for [insert number and category approved for CEUs (e.g., 1 administrative)] continuing education unit(s). Granting approval in no way constitutes endorsement by the AAMA of the program content or the program's sponsor.

7. Ensure the program is conducted as outlined in the approval request form and in compliance with any additional requirements necessary for AAMA approval.
8. Download the **Attendance Record** from the AAMA website, below, and circulate it at the program.
9. Submit the completed Attendance Record to the AAMA. The AAMA cannot grant CEUs to program attendees without this record.
10. Maintain a copy of the Attendance Record for proof of attendance.

Want to market your program to AAMA members? Visit the AAMA website at [www.aama-ntl.org](http://www.aama-ntl.org) or call 800/228-2262 ext. 774 for the following information:

Advertising in *CMA Today*, the official bimonthly publication of the AAMA that goes to member CMAs, medical assisting educators and students.

Purchase mailing labels to direct-mail market to CMAs in your area.

Medical Marketing Service, Inc.

Contact 800/MED-LIST

800/633-5478 ext. 3314

### DESIGNING THE PROGRAM—CHECKLIST

(All steps should be completed as soon as possible after the program date has been set.)

- Choose the Topic
- Identify the Participants
- Plan the Content Outline
- Write the Learning Objectives
- Develop the Program Description
- Determine Instructor-Student Ratio
- Determine Instructional Methods
- Determine Program Length

## Section III. BUDGET AND FINANCE

---

Budget Factors  
Cost-saving Ideas  
Speaker Expenses  
Checklist: Determining the Budget

---

**Budget Factors** Presenting continuing education programs will almost always involve expenses of varying degrees. Whether the expenses are large or minimal, they should always be considered when planning a program. Information about the financial cost of a program is vital when registration fees are to be charged, but it is also helpful when budgeting for programs in which no fees will be recovered.

- When fees are charged, they should be large enough to cover the costs incurred, but small enough to be marketable to your target audience.
- Look at the costs of other programs in your area and set registration fees accordingly.
- As appropriate, set a differential between fees for members and nonmembers. This gives a benefit to members and provides an incentive for nonmember participants to become members of AAMA.

Other possible expenses to be considered include marketing, speaker expenses, meeting room expenses, meal expenses and educational materials.

---

### **Cost-saving Ideas**

There are many resources that can be drawn upon to assist in the cost of education programs.

Many institutions and companies are specifically geared to assist in educational programs and may be able to provide assistance in the areas of speakers, meeting rooms, printing, postage, supplies for hands-on activities and other assistance.

Potential sources include:

- physicians' offices/clinics
- hospitals
- medical societies
- medical supply companies
- pharmaceutical companies
- health insurance carriers
- federal, state and local agencies
- colleges and universities
- local merchants
- interested individuals

If assistance is provided, be sure to give the company or individual appropriate recognition.

---

Schools and colleges are usually very cooperative in offering classroom space at a nominal charge or at no charge. Hotels/motels may choose not to charge for a meeting room if there is a meal function included in the program.

Also, combining resources to cosponsor an educational program with another organization or institution is another method of reducing program costs.

---

**Speaker  
Expenses**

Speakers' requirements for honorariums or other reimbursements vary widely. As a rule of thumb, the larger the audience and the more urban the area, the more likely the speaker is to request an honorarium. Some speakers may ask only that their travel expenses be reimbursed; for others a small token of appreciation may be appropriate.

The decision to budget for honorariums should be made before contacting the speaker.

---

# DETERMINING THE BUDGET—WORKSHEET

INCOME (if applicable):

Registration Fees \$ \_\_\_\_\_

Other Resources \$ \_\_\_\_\_

TOTAL INCOME \$ \_\_\_\_\_

EXPENSES

Marketing

Printing/Photocopying \$ \_\_\_\_\_

Postage \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

Subtotal: \$ \_\_\_\_\_

Speaker Expense

Honorarium \$ \_\_\_\_\_

Travel \$ \_\_\_\_\_

Lodging \$ \_\_\_\_\_

Meals \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

Subtotal: \$ \_\_\_\_\_

Meeting Room Expense

Room Rental \$ \_\_\_\_\_

Audio/Visual Aids \$ \_\_\_\_\_

Podium/Microphone Rental \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

Subtotal: \$ \_\_\_\_\_

Meal/Refreshment Expenses

Meals \$ \_\_\_\_\_

Refreshment Breaks \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

Subtotal: \$ \_\_\_\_\_

Educational Materials

Texts, Handouts, etc. \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

Subtotal: \$ \_\_\_\_\_

Miscellaneous

\_\_\_\_\_ \$ \_\_\_\_\_

Subtotal: \$ \_\_\_\_\_

TOTAL EXPENSES \$ \_\_\_\_\_

PROFIT/LOSS \$ \_\_\_\_\_

## Section IV. SPEAKERS/INSTRUCTORS

---

Identifying/Finding Speakers  
Initial Contact  
Written Confirmation  
Telephone Confirmation  
Hospitality for Speakers  
Substitute Speakers  
On the Day of the Program  
Introducing the Speaker  
Following the Presentation  
After the Program  
Tips for Introducing the Speaker  
Speaker Information Form  
Speakers/Instructors—Checklist

---

### **Identifying/ Finding Speakers**

The basic criteria in selecting a speaker are:

- knowledge of the subject matter by education and/or experience
- ability to communicate this knowledge to others
- for clinical topics, the speaker or moderator *must* have clinical background

The field of medical assisting has expanded so rapidly and grown to cover such a wide variety of duties and responsibilities that there is almost an unlimited source of instructors or speakers appropriate for medical assisting programs.

Physicians have always provided a willing pool of speakers and are most glad to share their knowledge and expertise with medical assistants.

Experienced CMAs, as well as medical assisting educators, make excellent speakers because they can directly address areas of concern to medical assistants.

Other professionals who may be called upon as speakers are attorneys, accountants, management consultants, and physicians or other health care professionals.

State and local medical societies, as well as hospitals, may have rosters of speakers who are willing to conduct sessions on specific topics. Some of these may already have in-service training programs that can easily be adapted for medical assistants.

Faculty members of local colleges and universities may also be an excellent source of instructors.

Trade schools and adult education programs can provide speakers. The business community can provide a variety of experts in such areas as telephone communication, insurance billing, collections, management, and personnel issues.

Community programs such as those providing home health care or support for elderly, disabled and terminal patients are other speaker sources.

Other allied health associations may have information on speakers they have used and can recommend, or they may have members who are experienced in presenting programs in their particular field.

---

**Initial Contact** When contacting a potential speaker, a brief introduction to the AAMA and medical assisting may be appropriate, particularly if the speaker is unfamiliar with either. Consider sending the speaker copies of the *Occupational Analysis of the CMA (AAMA)*, *Advanced Practice* document, *Content Outline*, and refer them to our website at [www.aama-ntl.org](http://www.aama-ntl.org).

A summary of the program should be discussed with your potential speaker, the target audience should be described, and the level of the program should be specified.

If the speaker agrees to be the instructor, details of the program can be finalized. (If the speaker is not available to present the program, thank him for his time and inquire if he might be available for any future programs.)

Confirm the date, time, and location with the speaker.

Discuss and develop the specific content outline, learning objectives, and instructional methods of the program with the speaker. The final presentation should be clearly defined and understood by both parties.

Obtain sufficient information regarding the speaker's qualifications on the topic.

Length of session, teaching aids, and logistics of the program should be clearly understood by the speaker. Clarify whether the speaker will provide handouts or audio/visual aids or if these are to be provided by the program planner.

Include a clear discussion of any financial arrangements, as well as any travel arrangements that might be necessary.

Manufacturers or retailers of supplies to medical offices, such as pharmaceuticals and medical equipment as well as electronics and communication equipment, are not eligible to present programs on their products.

Asking if there are any questions or suggestions for the program should conclude the initial contact with the speaker. Let the speaker know that you will be confirming the arrangements in writing.

---

### **Written Confirmation**

Immediately following the initial contact with the speaker, a written confirmation should be sent. In this confirmation the topic, date, time and location should be specified. In addition, the general outline of the program and specific details that were previously agreed upon should be confirmed.

If an honorarium was agreed upon, or other financial arrangements made, these should also be confirmed. If meals, rooms, or transportation will be provided, this should be made clear.

Request a written confirmation and a curriculum vitae or résumé and thank him/her for accepting the invitation to speak at the program.

---

### **Telephone Confirmation**

Two to three weeks before the program, make a telephone call to the speaker to confirm that all arrangements are in order. Reconfirm details such as provision for audio/visual equipment, handouts, or anything else that will be necessary for the speaker. Repeat the confirmation two to three days prior to the program.

---

### **Hospitality for Speakers**

The speaker is the most valuable part of the program and should be made to feel relaxed and welcome.

It is customary to invite the speaker to attend any meal function connected with the program as a guest of the association. The program planner should make arrangements for complimentary meal tickets and give them to the speaker, particularly if the tickets will be collected when the meal is served.

If transportation is necessary, inform the speaker of the types of transportation available to the meeting site and whether transportation expenses will be reimbursed. Usually, speakers are requested to make their own transportation arrangements.

If the speaker must stay overnight at the meeting site, let him know of any accommodations reserved for the group. Also let him know whether you will be paying for such expenses.

---

**Substitute Speakers**

Although it doesn't happen often, speakers sometimes must cancel. A couple of options address this problem: the program date is moved to another day or a substitute speaker is obtained. In either case, contact the Continuing Education Department *immediately* regarding the date change.

When a substitute speaker is used, you must obtain the speaker's qualifications (as you did for the original speaker) and provide them as soon as possible by telephone, fax, mail or e-mail, since the new speaker's qualifications must be reviewed and approved by the Continuing Education Department. If you are notified prior to or at the meeting that there will be a speaker substitution and you contact the Continuing Education Department as soon as possible, you may be able to obtain approval of the speaker before the meeting and can inform the audience that the program is approved for AAMA CEUs. Consideration of approval will also be given following the meeting, if the speaker canceled at the meeting.

---

**On the Day of the Program**

Make sure that someone is assigned to meet the speaker upon arrival and act as host. The host should arrange for someone to remain with the speaker at all times and make sure he is introduced to the association officers and other speakers.

It is a good idea for the host to become familiar with the background of the speaker, since this will be helpful in making the speaker feel at ease and welcome.

---

**Introducing the Speaker**

Identify several outstanding achievements, particularly those related to the program topic, from the speaker's curriculum vitae or résumé. Mention the qualifications and achievements of the speaker in a one to two minute introduction. The title of the presentation should be included and the statement, "It is my pleasure to present \_\_\_\_\_." Never (even when the speaker is well-known to the audience) preface the introduction with the words, "This speaker needs no introduction."

---

**Following the Presentation**

At the conclusion of the speaker's presentation, either the program planner or the chairman of the program should thank the speaker, who will either return to the speaker's table or leave the podium.

Whether the speaker leaves the meeting immediately or at the end of the program, the program planner should personally thank the speaker.

---

**After the Program**

A thank you letter should be sent to the speaker.

---

## Tips for Introducing the Speaker

### **Ask for a biography rather than résumé**

A biography says what this person would like you to say. Get permission to make minor changes.

### **Interview the speaker**

The best introductions given on our behalf have been by someone who called to interview us.

### **Answer, “Why this speaker?”**

Don’t fill the audience’s brains with credentials. They want to know why this particular speaker is standing in front of them. What expertise in the field? Why uniquely qualified?

### **Be upbeat!**

Sound as though you can’t wait to hear the talk.

### **Share something of the person**

Your speaker needs to build instant rapport with the audience. Help by showing the speaker as a living, breathing, compassionate, and even vulnerable person. But be careful not to embarrass or offend the speaker.

### **Don’t steal the speaker’s thunder**

You introduce the speaker, not the topic.

### **“Our speaker needs no introduction.”**

If this is really true, then sit down.

### **Say the speaker’s name first**

After stating the speaker’s name loudly and distinctly, the rest of the introduction seems to flow naturally and effortlessly.

# SPEAKER INFORMATION FORM

Thank you for agreeing to be a speaker.

In order to apply for AAMA Continuing Education Credit, we will need to receive the following information \_\_\_\_\_ days prior to your scheduled program. This form will assist me in the completion of the Approval Request Form. (Sections 1 and 2 are required information.)

Date \_\_\_\_\_ Time \_\_\_\_\_ Length of Session \_\_\_\_\_

Location \_\_\_\_\_

1. Name \_\_\_\_\_ Credentials \_\_\_\_\_  
Job Title and Place of Employment \_\_\_\_\_  
Daytime telephone \_\_\_\_\_  
E-mail \_\_\_\_\_  
College(s) attended \_\_\_\_\_ Degree(s) \_\_\_\_\_  
Brief employment history \_\_\_\_\_  
\_\_\_\_\_

2. Program information/Descriptive program title (actual topic/content)  
\_\_\_\_\_  
\_\_\_\_\_

Describe what you expect the participant to be able to do at the end of the presentation.

“As a result of this program, the participant will be able to...” \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Personal background information that may be used when introducing speaker at meeting.  
(All responses are optional.)  
  
Family \_\_\_\_\_  
Hometown \_\_\_\_\_  
Unusual or interesting travel experiences, hobbies, or activities \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Other \_\_\_\_\_

Thank you for your cooperation!

Return to:

## SPEAKERS/INSTRUCTORS—CHECKLIST

- Identify sources for speakers (as soon as topic is chosen)
- Determine budget for program (as soon as topic is chosen)
- Make initial contact (immediately after identifying speakers)
- Send written confirmation (one to two days following initial contact)
- Arrange hospitality (as soon as speaker is chosen)
- Confirm audio/visual or other equipment/supplies  
(as soon as speaker is chosen and again on day of program)
- Confirm by telephone (two to three weeks before the program)
- Make final confirmation (two to three days before the program)
- Introduce speaker (on day of program)
- Thank the speaker (following the program)
- Send formal thank you letter (two to three days following program)

## Section V. LOCATION AND LOGISTICS

---

Choosing the Location  
Making the Arrangements  
Contact with Facility  
Written Confirmation  
Telephone Confirmation  
Program Date Change  
Other Advance/Alternative Arrangements  
On the Day of the Program  
AAMA CEU  
Completing the Attendance Record Form  
Following the Program  
Submitting the Attendance Record Form  
Location and Logistics—Checklist

---

### **Choosing the Location**

The site for the program should be selected after consideration of the location of the facility and the suitability of the amenities offered.

There are usually many choices of facilities for meetings available in a community, including:

- schools or colleges
- hospitals
- medical society offices
- clinics or physicians' offices
- hotels/motels
- convention centers
- community centers
- restaurants with meeting facilities

Criteria for selection should include:

- a professional setting
- a meeting room that is easily located
- available parking
- close public transportation (if applicable)
- clean, safe environment
- adequate restroom facilities

---

### **Making the Arrangements**

All program arrangements should be done in person. It is important to meet only with someone who has the authority to speak for the facility and see that your requirements are fulfilled. Allow adequate time to discuss the arrangements in full.

---

### **Contact with Facility**

At the first meeting with the facility representative, explain the type of function and give a brief program description.

Be sure to personally inspect the meeting room to ensure that it meets your requirements.

The size of the room needs to match the size of the expected audience. Both speaker and participants will be uncomfortable in a large room only half full. Conversely, it is difficult to concentrate in a crowded room, where the speaker may not be adequately heard or seen. Try to arrange for an alternate meeting room should the actual size of the audience be significantly larger or smaller than planned.

Inform the representative of the seating arrangements that will be required. Generally, a classroom setting with tables and chairs will be appropriate for lectures or panel discussions. If a laboratory or hands-on setting is required, make sure that the room logistics will provide both safety and ease of activity.

Make sure that the lighting and acoustics are suitable.

Arrange for an area to be set up for registration of program participants. If a desk or table and chairs are going to be needed for registration activity, determine who is going to provide it.

Audio-visual equipment needed by the speakers should be discussed. Be clear whether this will be provided by the facility or will need to be obtained elsewhere. If blackboards, screens, podiums, or other equipment will be required, this should be clarified at this time.

Any arrangements for meals or refreshments should be made at the initial meeting. The number of participants should be estimated and the price per person should be agreed upon with the facility representative.

Determine when the facility will need to know the final attendance and whether provision can be made to accommodate unexpected or late arrivals.

---

### **Written Confirmation**

Within a few days after the initial discussion with the facility representative, send a written confirmation which outlines all arrangements.

Be specific about financial agreements and also about any meals and breaks that the facility will provide. Request a written confirmation from the facility in return.

---

### **Telephone Confirmation**

Make telephone or e-mail contact to clarify arrangements. Make a final telephone or e-mail confirmation two or three days before the program to allow time for last minute changes.

---

**Program  
Date Change**

You must contact the Continuing Education Department if you are changing the date of the program for inclement weather, speaker cancellation, or for any other reason.

---

**Other  
Advance/  
Alternative  
Arrangements**

The program planner should appoint members to serve at the registration desk on the day of the program. Registration should be an easy process for the participant, and as much as possible should be prepared in advance. The people at the registration desk should be familiar with the logistics of the program so they can answer any questions that participants may have.

If the facility is not providing the meals or refreshments, be sure to make alternate arrangements well in advance of the program.

If audio-visual or other equipment needs to be rented from outside the facility, this will also need to be done in advance. Assign someone to be responsible for pick-up or delivery.

---

**On the Day  
of the Program**

Make a final check to ensure the meeting room is set up correctly and the registration desk is prepared. Handouts and other course materials may be distributed at the time of registration.

If nonmembers are expected to attend, information about AAMA and membership applications should be available at the the registration desk.

Name tags are essential and may either be prepared in advance or at the time of registration.

Following the final check, the major responsibility of the program planner on the day of the program is to serve as host for the speakers and participants and to enjoy the meeting.

---

**AAMA CEU**

If the program has been approved for AAMA CEUs, provide Attendance Record Forms for participants to complete.

---

**Completing  
the Attendance  
Record Form**

Announcing simple instructions allows for efficient registration of CEUs by AAMA Staff. It is important to write or print legibly and to spell out city names.

Alert registrants to update information by providing name and/or address changes since the last CEU activity.

---

**Following  
the Program**

Along with the association treasurer, the program planner will need to meet with the facility representative and take care of the expenses connected with the meeting. Be sure to thank the representative for any special arrangements made for the meeting. If the facility arrangements did not meet expectations, this should be brought to the attention of the representative at this time.

---

**Submission of  
Attendance  
Record Form**

For timely processing of CEU credit, submit the Attendance Record Form(s) within 15 days after completion of the program. Maintain photocopies for your records. Attendees may be referred to you for confirmation of attendance.

Allow 6-8 weeks for credits to be entered.

If you'd like an e-mail confirmation that your attendance was received; please complete a confirmation sheet found at [www.aama-ntl.org](http://www.aama-ntl.org).

---

## LOCATION AND LOGISTICS—CHECKLIST

- Select the site (as soon as topic is chosen)
  
- Contact the facility (immediately after selecting site)
  
- Make other advance/alternative arrangements (after initial contact with facility)
  
- Send written confirmation to facility (two to three days after initial contact with facility)
  
- Make final check of facility (on day of program)
  
- Pay for meeting facility (after the program)
  
- Submit Attendance Record and registration fees (within 30 days)

## Section VI. PUBLICITY AND MARKETING

---

Promotional Materials  
Information  
Format  
Distribution  
Other Methods of Publicity  
Sample Press Release  
Sample Public Service Announcement

---

### **Promotional Materials**

A brochure or flyer is one of the most useful promotional materials for marketing the program. All brochures and printed materials must contain the following disclaimer: This program(s) has been granted prior approval by the American Association of Medical Assistants (AAMA) for continuing education units. Granting approval in no way constitutes endorsement by the AAMA of the program content nor the program's sponsor. All brochures and printed material must be approved by the Continuing Education Department.

---

### **Information**

Informing your target audience about the program is vital for a successful program. Care should be taken to accurately describe the program and to ensure all pertinent information is available for potential participants.

Basic information to be covered in promotional materials should include:

- course title
  - description of course content
  - learning objectives
  - instructional methods
  - instructor's name and qualifications
  - level of instruction
  - prerequisite skill or knowledge (if applicable)
  - date, time and location
  - cost and registration information
  - refund and cancellation policy
  - name, address and phone number of contact person
  - note if program is approved or pending approval of AAMA CEUs
  - information about meals, parking, or directions to facility
  - registration information if overnight stay is necessary
  - the AAMA logo may not be used
- 

### **Format**

When planning the brochure, there are several ways to make it more effective:

- Be selective. When everything is emphasized, nothing is emphasized.
- Print using two or three colors.
- Be large in scale. Larger formats outperform smaller ones.
- Provide a simple and convenient response option by phone, fax, or mail (eg, Mary Brown, Program Chair).

- Send out a first and a second mailing. The second mailing can go out on the day one-half of the expected registrations are received.
- Mail in first class envelopes. Third class suggests "junk" mailers. Also, envelopes allow for additional related inserts.

---

**Distribution**

Maintaining a mailing list for potential program participants is essential. Active members of the association will constitute the core of the list; however, former members, CMAs and medical assistants who are not yet members, and participants in former programs are also excellent sources. Medical societies and health insurance carriers will often provide mailing lists.

Also, brochures and flyers can be distributed at meetings or directly to office personnel.

---

**Other  
Methods of  
Publicity**

In addition to mailing of brochures, several other methods of publicity are available.

**Fax and e-mail** distribution has become increasingly popular.

**Posters** distributed within the medical community can be effective. It is important that these include both an accurate description of the program, as well as registration information.

**Announcements on community billboards/bulletin boards** can be useful. Depending on the community, it is sometimes helpful to advertise programs on the hosting hotel or convention center billboard. Occasionally banks, colleges, or other institutions will do this as a public service.

**Notices** can be placed in association publications, medical society bulletins, or newsletters of other allied health professions.

**Press releases** to the local newspapers are valuable in informing potential participants about future events, as well as gaining publicity for the association.

When writing press releases, be succinct. Include the most important information (who, what, where, when and why—if applicable) in one or two short paragraphs. Editors do not want anything but the bare bones of the information to be presented; if they have to edit, inaccurate information might be the result.

Conclude the press release with "END," "###," or "-30-" to let the editor know the press release is complete.

**Public Service Announcements (PSAs)** on radio or television are another useful marketing tool. PSAs must fit into a 15 or 30 second time slot, so include only the *essential* information. Most radio and television stations need at least a two week lead time for PSAs. Some might have specific format or typing requirements. Check with the local stations to find out their preferences.

---

# SAMPLE PRESS RELEASE

[State society name]

[Date]

FOR IMMEDIATE RELEASE

RE: Meeting Location Change

CONTACT: [Contact person's name and phone number]

-----

Due to temporary use of the Medical Arts Building by Law and Justice offices, the [chapter name] of the [state society name] has changed its meeting locations for January and February. Meetings will be held in the offices of [name and address of office].

The meeting on [date] will feature [speaker's name and title], with the presentation [presentation title] starting at [time]. The regular chapter business meeting will be held at [time].

For further information contact [contact person], chapter president, at [contact person's phone number].

###

# SAMPLE PUBLIC SERVICE ANNOUNCEMENT

[State society name]

[Date]

## PUBLIC SERVICE ANNOUNCEMENT

Thirty seconds

RE: Meeting Location Change

CONTACT: [Contact person's name and phone number]

-----

The [chapter name] of the [state society name] has changed its meeting locations for January and February to the offices of [name and address of office].

Featured [date], will be [speaker's name and title], with the presentation [presentation title] starting at [time]. The regular chapter business meeting will be held at [time].

For further information contact [contact person], chapter president, at [contact person's phone number].

###

## Section VII. PROGRAM EVALUATION

---

Evaluation by the Participant  
Evaluation by the Program Planner  
Sample Evaluation Forms  
Program Evaluation—Sample Form #1  
Program Evaluation—Sample Form #2

---

### **Evaluation by the Participant**

Program evaluation involves getting feedback from program participants as to how the program met their needs and expectations. This should be done immediately following the program and should request participants to complete an evaluation form.

Areas covered in the evaluation form usually include program content, instructor effectiveness, facilities, handouts, and audio/visual materials. Other questions that the program planner considers appropriate to the planning process may also be included.

The evaluation form should be short and easy to complete. The format should allow the participant to answer specific questions and to make comments or suggestions.

Keep the evaluation forms on file to help with future program planning. Recommendations or suggestions for future programs will make it easier for program planners to build on the strengths and eliminate problem areas discovered in the current program.

---

### **Evaluation by the Program Planner**

At the end of every program, make a brief summary of the successes and weaknesses of the presentation.

All of the factors that go into planning a program should be evaluated, such as the appropriateness of the topic, effectiveness of the speaker(s), financial success of the program (if a profit was anticipated), attendance level, and the response of the participants to the program.

An effective program evaluation will help you, as the current program planner, and future planners to present the highest quality continuing education programs possible.

---

### **Sample Evaluation Forms**

Included are sample program evaluation forms. These are just examples that can be used as they are or revised as necessary to provide a useful evaluation tool.

---

# PROGRAM EVALUATION—SAMPLE FORM #1

Please complete this evaluation and return it to the workshop coordinator upon leaving.

WORKSHOP TITLE: \_\_\_\_\_

PRESENTER: \_\_\_\_\_ DATE: \_\_\_\_\_

1. Was the information presented what you expected?  Yes  No

If not, what were your expectations? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Would you encourage others to attend similar workshops?  Yes  No

3. On a scale of 1-5 (with 5 representing excellent), rate the workshop presenter in the following areas:

a. Professionalism	1	2	3	4	5
b. Presentation (speech pattern)	1	2	3	4	5
c. Knowledge of subject	1	2	3	4	5
d. Held interest	1	2	3	4	5
e. Use of audio/visual aids	1	2	3	4	5
f. Ability to explain information	1	2	3	4	5
g. Encouraged and answered questions	1	2	3	4	5

Comments: \_\_\_\_\_

\_\_\_\_\_

4. How did you learn about this program? \_\_\_\_\_

\_\_\_\_\_

5. Would you be willing to attend any future workshops?  Yes  No

6. Do you have any suggestions for topics or speakers for future programs?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## PROGRAM EVALUATION—SAMPLE FORM #2

Name of Program \_\_\_\_\_

Date \_\_\_\_\_

1. How well did the program meet your overall expectations?

Very well                       Somewhat                       Not at all

Comments: \_\_\_\_\_

\_\_\_\_\_

2. Do you feel the course content was relevant to medical assisting?

Very relevant                       Somewhat relevant                       Not relevant

Comments: \_\_\_\_\_

\_\_\_\_\_

3. How well did the instructor share his/her knowledge and expertise with you?

Very well                       Somewhat                       Not very well

Comments: \_\_\_\_\_

\_\_\_\_\_

4. Were the physical setting and facilities appropriate for the topic?

Yes                       Somewhat                       No

Comments: \_\_\_\_\_

\_\_\_\_\_

5. Were the educational aids (slides, overheads, etc.) and course handouts helpful?

Yes                       Somewhat                       No

Comments: \_\_\_\_\_

\_\_\_\_\_

## Sample Point Distribution Chart

The following is only an example of how points *may* be distributed to meet the recertification requirements.

Type of Credit	Credit	Hours	Recert. Points*
General—AAMA CEUs**	5 CEUs	5	5
General—Other	5 CMEs	5	5
Administrative—AAMA CEUs**	5 CEUs	5	5
Administrative—Other	5 Contact Hours	5	5
Clinical—AAMA CEUs**	—	—	—
Clinical—Other	1 College Credit	—	15
Gen or Adm or Clin—AAMA CEUs**	5 CEUs	5	5
Gen or Adm or Clin—Other	5 CEUs	5	5
<b>TOTAL required recertification points</b>			<b>60</b>

\* A minimum of 10 recertification points (10 CEUs) is required in each of the general, administrative and clinical content areas.

\*\* At least 30 recertification points (30 CEUs) must be accumulated from AAMA approved CEUs.

## Credit Conversion Chart

Recertification points may be accumulated from many different types of continuing education sources and activities. The chart below details different types of credit units and how to convert them to recertification points. (See Sample Continuing Education Verification Form for an example of how to document various types of credit.)

Type of Credit	Hours of Activity	Recertification Points
1 CEU*	1	1
1.5 CEUs	1.5	1.5
10 CEUs	10	10
1 CME**	1	1
1 Contact Hour	1	1
1 College Credit	—	15

\* CEU is a continuing education unit.

\*\*CME is a continuing medical education credit.



**AMERICAN ASSOCIATION  
OF MEDICAL ASSISTANTS**

20 N. WACKER DR., STE. 1575  
CHICAGO, ILLINOIS 60606

---

PHONE: 800/228-2262

• FAX: 312/899-1259

• WEBSITE: [WWW.AAMA-NTL.ORG](http://WWW.AAMA-NTL.ORG)

E-MAIL: [CONTINUINGEDUCATION@AAMA-NTL.ORG](mailto:CONTINUINGEDUCATION@AAMA-NTL.ORG) (QUESTIONS)

• [PPLANNERS@AAMA-NTL.ORG](mailto:PPLANNERS@AAMA-NTL.ORG) (APPROVALS)