

Report of the Department of Affiliate Relations
Bruce A. Wolf, DO, Chair
July 17, 2019

This report highlights activities of the Department of Affiliate Relations from August 1, 2018 to June 1, 2019.

Bureau of International Osteopathic Medicine

- The BIOM planned and delivered a well received Continuing Medical Education program at the October 2018 OMED and is working on a program for the upcoming OMED in Baltimore.
- The BIOM meeting serves as an opportunity for informational exchange on the activities of AOA and others in the osteopathic family (e.g., COMs, affiliated organizations) on international activities to advance the US model of osteopathic practice internationally.

Committee on Basic Documents and Operations of Affiliate Organizations

- The Committee has met by telephone conference on multiple occasions since July in order to review proposed changes to the governing documents of affiliated organizations. This past year, the Committee reviewed documents from 15 state, specialty and philanthropic affiliates.
- The Committee also provided comment and suggestions regarding the development of an update for the Healthy and Viable Affiliate Organizations program.

Report of the Department of Business Affairs
Ira P. Monka, DO, Chair
July 17, 2019

This report highlights activities of the Department of Business Affairs from August 1, 2018 to June 1, 2019.

Bureau of OMED

- The bureau was pleased to report that DO attendance at OMED18 was up 6% over the previous year, including 652 first-time DO attendees. 90% of OMED18 attendees rated OMED18 excellent or good (up 3% from 2017), and 95% would recommend OMED to colleagues.
- OMED18 exceeded budgeted net revenue due, in part, to the bureau's leadership and the commitment of participating specialty colleges to collaborate with one another to provide high-quality continuing CME programming. In a show of appreciation, the AOA Board of Trustees agreed to provide each participating specialty college an additional share of net revenue beyond the \$375 per member attendee, the equivalent of an additional \$25 per-member attendee plus a \$5,000 OMED 2018 participation bonus.
- Based on direction from the House of Delegates and specialty affiliates, the bureau designated one full day of programming at OMED19 on wellness. The joint specialty program on wellness will be held from 9 am to 5 pm on Monday, Oct. 28, 2019.
- Per direction from the OMED Task Force, the bureau participated in the selection of OMED18 and OMED19 general session speakers.

Committee on Administrative Personnel

- Provided oversight for activities of AOA CEO Search Committee in its successful project to identify and recruit a new CEO for the AOA.
- Identified metrics for performance evaluation of outgoing CEO; identified metrics for performance evaluation of new AOA CEO.
- Worked with outgoing CEO and new CEO on key staffing and personnel reorganization issues.

Committee on AOA Governance and Organizational Structures

- Studied experience from three-year pilot of three emerging leader advisor positions to the AOA Board of Trustees
- Evaluated and updated the charge for the AOA's Committee on Undergraduate Medical Education
- Evaluated and recommended changes to the Strategic Planning Committee to provide for greater participation of and input from AOA state and specialty affiliates
- Studied the allocation of responsibility for policy making in continuing medical education and recommended creation of a CME Steering Committee to provide assurance of consistency in AOA CME policy

Constitution and Bylaws Subcommittee

- Reviewed current bylaw description of the voting and election procedures and proposed amendments to AOA bylaws (Article V and Article VI) to eliminate procedures that have not been used in more than 20 years
- Reviewed all proposed Constitution and Bylaw amendments pending before the 2019 House of Delegates

Finance Committee

- The annual audit of the FY 2019 AOA financial statements resulted in the best opinion achievable.
- The net operating surplus was reported at \$2.8 million for FY 2019.
- The reserve balance of \$37 million at May 31, 2019 reflected a reserve percentage of 84.5% of total operating expenses two years earlier as compared to a 75% reserve requirement.

Report of the Department of Business Affairs
Ira P. Monka, DO, Chair
July 17, 2019

Strategic Planning Committee

- Studied the changing environment of medicine, including the economy, demographics, medical practice, political issues and legislative issues.
- Established five strategic themes to incorporate into the next strategic plan.
- Reviewed the current strategic plan, concluded that it remains relevant, and recommended it be extended one year.

COMMISSION ON OSTEOPATHIC COLLEGE ACCREDITATION
Janice A. Knebl, DO, MBA, FACOI, Chair
July 17, 2019

This report is for the period from June 1, 2018 through June 30, 2019. During this period the AOA Commission on Osteopathic College Accreditation (COCA) met four times: August 24-26, 2018; November 30 - December 2, 2018; April 25-28, 2019; and June 25, 2019.

Petition for Renewal of Recognition of the COCA by the U.S. Department of Education

The U.S. Department of Education notified the COCA Secretary that the COCA's petition for renewal to be listed as a nationally recognized accrediting agency must be submitted no later than February 1, 2020. The petition is tentatively scheduled to be reviewed at the Summer 2021 meeting of the National Advisory Committee on Institutional Quality and Integrity (NACIQI) subject to concurrence of the Chairperson of the committee.

COCA Meeting August 24-26, 2018

The COCA met on August 24-26, 2018 at the Hyatt Rosemont (Rosemont, IL) under the direction of the Chair. The COCA considered progress reports, comprehensive site visit reports, focused site visit reports, a mid-cycle report and substantive change request reports.

The COCA also considered various policy issues regarding accreditation standards and working with both the COSGP and SOMA.

COCA Meeting November 30 - December 2, 2018

The COCA met on November 30 - December 2, 2018 at the Hilton Rosemont Hotel (Rosemont, IL) under the direction of the Chair. The COCA considered progress reports, a comprehensive site visit report, a substantive change request report, an application for Pre-Accreditation status, and changes to the accreditation standards.

Presentations on OMM/OPP leadership qualifications, as required under Element 7.5, were given by Duane G. Koehler DO, FACOFP *dist.*, President, American College of Osteopathic Family Physicians (ACOFP), Kendi L. Hensel, DO, PhD, FAAO, Chair, AACOM's Education Council on Osteopathic Principles (ECOP), Catherine M. Kimball, DO, President-Elect, American Academy of Osteopathy (AAO), and J. Michael Wieting, DO, MEd, Chair, AOA Bureau of Osteopathic Specialists (BOS).

Representatives from the Council of Osteopathic Student Government Presidents (COSGP) and the Student Osteopathic Medical Association (SOMA) provided testimony on several policy issues.

COCA Meeting April 25-28, 2019

The COCA met on April 25-28, 2019 at AOA Headquarters in Chicago, IL under the direction of the Chair. The COCA considered progress reports, comprehensive site visit reports, focused site visit reports, substantive change requests, and an application for Candidate status.

The COCA also considered various policy issues regarding the accreditation standards.

Representatives from the Council of Osteopathic Student Government Presidents (COSGP) and the Student Osteopathic Medical Association (SOMA) provided testimony on several policy issues.

COMMISSION ON OSTEOPATHIC COLLEGE ACCREDITATION
Janice A. Knebl, DO, MBA, FACOI, Chair
July 17, 2019

COCA Meeting June 25, 2019

The COCA met by conference call on June 25, 2019 to approve the final set of proposed standards changes by the Standards Review Committee.

The **COCA Executive Committee** met monthly to review COM site visits, progress by new and developing COMs, student complaints, COM issues, and administrative matters.

The COCA Standards Review Committee met 11 times during the last year addressing revisions needed within the 2017 Standards and their corresponding evidentiary submissions. The Standards Taskforce was named at the August 2019 COCA meeting and began meeting in the fall of 2018, culminating their work on November 1, 2018. The Standards Review Committee received and revised the standards over the course of ten meetings, the last being on April 15, 2019. Revised standards were published on July 1, 2019.

COCA Data and Reports Committee (previously the Annual Report Committee) met three times during the last year addressing needed revisions in the Supplemental Annual Report, the evaluation of data collected from the Annual Reports, and the COCA student survey.

COCA Committee on College Accreditation Training met four times during the last year addressing the removal of site evaluators from the evaluator pool, the site evaluator nomination process, CME for site evaluators, and management of the site visit pool.

Report of the Department of Educational Affairs
Robert G.G. Piccinini, DO, Chair, C. Michael Ogle, DO, Vice-Chair
July 17, 2019

This report highlights activities of the Department of Educational Affairs from August 1, 2018 to June 1, 2019.

Bureau of Osteopathic Education

- The Chair of the Bureau represented the AOA at an AMA Council on Medical Education's March 2019 meeting. The meeting included a discussion of Bureau activities as well as an offer from the AMA Council to work on a policy topic collaboratively.
- The Bureau received reports on the progress of the transition to the single GME accreditation system. A significant event in this activity was the AMA's vote to recognize COMLEX-USA as equivalent to USMLE for the purposes of residency training.
- The Bureau reviewed 15 policies for the policy sunset process.
- The Bureau heard and acted on resolutions from COPT, PTRC, and COCME on proposed accreditation standards changes. The Bureau referred back the CME Accreditation Manual to the Council on Osteopathic Continuing Medical Education for additional work.

Bureau of Osteopathic Specialists

- The Bureau submitted a revised **CME Guide** which was approved by the AOA Board of Trustees in December 2018, with additional changes in May 2019.
- The Bureau acknowledges that the learning model is changing to recognize the value of continuous learning and assessment. Efforts are underway across applicable boards to transition away from the current format of Component 3 and transition to a longitudinal assessment.
- The Bureau continues to focus on identified key priorities in their realignment efforts. This includes opportunities to enhance test quality, improve test convenience, and ensure transparency and adequate communications to candidates, diplomates, and all stakeholders.
- The Bureau continues to identify opportunities to standardize operationally-based policies across all active boards. Recognizing the benefit of risk reduction, consistent output, and improving clarity and quality while decreasing ambiguity, sets the stage for the Bureau and CBS staff to focus on innovation and strategy. Examples of opportunities to standardize include exam registration cutoff dates, number of attempts, exam refunds, score disputes, and several others.

Commission on Osteopathic College Accreditation

- The Commission approved a number of changes to the College Accreditation standards. Of note, the Commission maintained standards for Colleges of Osteopathic Medicine to be involved in graduate medical education.
- For the 2018-19 academic year, the COCA accredits 38 colleges of osteopathic medicine (COMs) operating in 59 sites.

Council on Osteopathic Continuing Medical Education

- Proposed revisions to the Council on Osteopathic Continuing Medical Education Handbook
- Proposed revisions to the Accreditation Manual for Category 1 CME Sponsors
- The Council reviewed and approved 23 AOA Category 1 CME Sponsors for re-accreditation. There are 162 AOA Category 1 CME Sponsors.

Council on Osteopathic GME Development

- The Council developed a new plan for encouraging training programs to seek osteopathic recognition.
- The Council continues to monitor the progress of the single GME accreditation system.

Report of the Department of Educational Affairs
Robert G.G. Piccinini, DO, Chair, C. Michael Ogle, DO, Vice-Chair
July 17, 2019

Council on Osteopathic Postdoctoral Training Institutions

- The Council continued to consider policy waivers by OPTIs.
- The Council discussed the role of OPTIs beyond June 30, 2020.

Council on Osteopathic Undergraduate Medical Education

- The Council reviewed more than 150 pages of material containing proposed changes by the Commission on Osteopathic College Accreditation. The Council submitted a report to the Commission offering suggested changes to the proposed new documents.

Council on Postdoctoral Training

- Proposed revisions to the Basic Documents for Postdoctoral Training in preparation of the post 2020 limited postdoctoral accreditation authority.
- Proposed revisions to the PTRC Handbook.

Program and Trainee Review Committee

- Continued to oversee the accreditation of AOA postdoctoral training programs and the approval of training for osteopathic physicians to sit for the AOA certifying board examinations.
- Successfully completed the last AOA Match. Moving to a single Match will reduce the registration costs to students
-

Standards Review Coalition

- The Coalition reviewed the comments of the Council on Undergraduate Medical Education and the American Association of Colleges of Osteopathic Medicine to more than 150 pages of material containing proposed changes by the Commission on Osteopathic College Accreditation. The Coalition submitted a report to the Commission representing the joint perspectives of the AOA, American Association of Colleges of Osteopathic Medicine and its Assembly of Osteopathic Graduate Educators.

Report of the Department of Government Affairs
Ernest R. Gelb, DO, Chair
July 17, 2019

This report highlights the activities of the Department of Public Policy from August 1, 2018 to June 1, 2019.

Bureau on Federal Health Programs

- The Bureau received reports from National Institutes of Health staff on research funding opportunities for osteopathic physicians and institutions in states designated for additional support for institutional development.
- The Bureau provided input and guidance to AOA staff on plans for DO Day and physician engagement. Bureau input helped support a lobby day that had a year-to-year increase in physician participation, and 382 Congressional meetings covering 42 states.
- Bureau members met with members of Congress and senior Congressional staff to learn about the range of perspectives and proposals in Congress on major health policy issues, including efforts to expand access to health insurance coverage and address rising health care costs.
- The Bureau developed and submitted four new resolutions for consideration and approval by the Board of Trustees and House of Delegates at the 99th Annual Business Meeting. The resolutions focus on the following issues:
 - Surprise Medical Billing
 - Regulation of Pharmacy Benefit Managers (submitted with the BSGA)
 - Hospital Consolidation
 - Background Checks and Firearms Safety Training as a Condition of Firearms Purchase
- The Bureau reviewed and approved 21 sunset resolutions, including 9 with amendments.

Bureau of Socioeconomic Affairs

- 2019 Medicare Physician Fee Schedule - The Bureau provide leadership in guiding recommendations to CMS on proposed and final policy and payment changes for office and other outpatient Evaluation and Management (E/M) visits. Bureau members played a vital role in the development of national clinical documentation guidelines for E/M visits that will be used by physicians and non-physician health care providers across all medical specialties for years to come. Thanks to the BSA's leadership, the AOA's recommendations were supported by the AMA and successfully adopted by CMS for calendar year 2020 and beyond.
- CMS/ONC Interoperability and Information Blocking Proposed Rules - During the rulemaking process, the BSA actively engaged in developing comprehensive recommendations on behalf of the AOA for consideration by CMS and the ONC. The AOA's recommendations are intended to ensure that DOs are not adversely impacted by potential misuse of sensitive health care information, increased administrative burden, imposition of additional physician contracting requirements, and downstream costs associated with the policy changes.
- Policy Development and Engagement
- The BSA drafted several new policies for consideration and approval by the Board of Trustees and House of Delegates at the 99th Annual Business Meeting to support AOA regulatory and payment advocacy efforts on the following issues:
 - Communication Technology-based and remote evaluation services
 - Incident to Billing for physician assistants (PAs) and advanced practice registered nurses (APRNs)
 - Clinical data registries and qualified clinical data registries
 - Patient matching of electronic health record data

Report of the Department of Government Affairs
Ernest R. Gelb, DO, Chair
July 17, 2019

Bureau of State Government Affairs

- The Bureau drafted two white papers and related policy recommendations.
- The Bureau reviewed and revised three 2018 Referred policies with recent data.
- A significant step forward in AOA advocacy efforts this year was the result of leadership from the BSGA's State Grassroots Advocacy Taskforce and the implementation of Task Force recommendations. Under the leadership of the Bureau, the AOA partnered with affiliates on six grassroots campaigns in four different states, resulting in more than 350 physicians and students sending nearly 500 letters and social media messages to 198 state lawmakers this year.

Public Policy Tri-Bureau

- The Public Policy Tri-Bureau received presentations in September 2018 from CVS as well as a consumer-oriented anti-trust lawyer on the potential implications of the CVS-Aetna merger.
- The Tri-Bureau also received a report from the Executive Director of the National Association of Medicaid Directors on the impact of Medicaid Expansion and various waivers on state Medicaid programs.
- The Tri-Bureau also discussed the need and reach a consensus on AOA the need for further policy development
- Under the Tri-Bureau's leadership, the AOA public policy department submitted secured important legislative and regulatory wins on behalf of the osteopathic profession this past year. These public policy accomplishments were the cumulative result of dozens of legislative and regulatory comment letters, hundreds of meetings with lawmakers, and thousands of grassroots e-mails from DOs and osteopathic medical students across the country.

Report of the Department of Professional Affairs
Mark S. Cantieri, DO, Chair
July 17, 2019

This report highlights activities of the Department of Professional Affairs from August 1, 2018 to June 1, 2019.

Bureau of Emerging Leaders

- More actively engaged with its constituents through six strategic task forces (Communications, Engaging Early Career Physicians, OMED Scholarship Program, Resolutions, Structured Mentoring, and Terminology)
- Continued its OMED Scholarship Program for a second year with a new class of 10 recipients for OMED 19
- Created a pilot program to provide more continuity and mentoring to students, postdoctoral trainees and new physicians in practice appointed to AOA B/C/Cs

Bureau of Membership

- Achieved membership goal for FY19 membership revenue and total membership with a total of 42,855 members.
- Deployed and executed the membership recruitment campaign which resulted in 3,553 new members.
- Achieved FY19 membership revenue budget and currently at 84% of total membership revenue goal for FY20.

Ethics Subcommittee

- The Ethics Subcommittee reviewed and evaluated three complaints regarding alleged misconduct on the part of AOA members. (The Subcommittee's deliberations are confidential.)
- The Subcommittee also reviewed and submitted comments regarding a draft document on Social Media and Electronic Communication being developed by the Federation of State Medical Boards (FSMB) Ethics and Professionalism Committee

Committee on Awards

- Received four nominations for the 2019 award cycle
- Anticipate announcing recipients the week of August 5th

Department of Research and Development
Teresa A. Hubka, DO, Chair
July 17, 2019

This report covers the activities of the Department from July 2018 to June 2019.

AT Still Foundation and Research Institute

- The AT Still Foundation funded 4 research grants, approved by the Bureau of Osteopathic Clinical Education and Research, including one Physician in Training Grant and one Student Grant. Since 2016, the AT Still Foundation has provided funding for a total of 12 research grants.

Bureau of Osteopathic Clinical Education and Research

- The Bureau awarded 12 research grants, 7 in the research focus areas of OMM/OMT, Musculoskeletal Injuries, Pain Management, Chronic Disease, and Osteopathic Philosophy. Five grants in the “pipeline” program were awarded to students, physicians in training and new investigators. The total amount awarded was just under \$1.1 million.
- The Bureau held a Research Forum with 42 research experts to generate additional research topics around the focus areas. This information will form the basis for new Request for Applications over the next four years.
- The Bureau reviewed 12 sunset policies for the 2019 House of Delegates meeting and made recommendations to the HOD, including development of a policy paper addressing Osteopathic Manipulative Treatment (OMT) of the Cervical Spine.

Bureau of Scientific Affairs and Public Health

- The Bureau provided grant-related CME programs that include stipends for the affiliate and education to their constituents during their respective annual meetings (e.g., CORE*REMS- 30 programs scheduled in 2019.)
- The Bureau partnered with 8 affiliates at OMED to integrate the Public Health Seminar and Research Speakers into their sessions. AOA funded travel costs to support these speakers.
- The Bureau reviewed 36 sunset policies for the 2019 House of Delegates meeting and made recommendations to the HOD. The Bureau also wrote several policy papers related to HOD policies referred at the 2018 HOD meeting, including Human Cloning, Airbags in Automobiles, and Juvenile Solitary Confinement.