

2023 HOD FINAL ACTIONS CHART

Updated 5-16-2023

Color Key:

Adopted/Consent Adopted

Withdrawn

Rejected/Consent Rejected

Referred

No Action Taken

** Status: C=Completed: U=Underway: O=Ongoing

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<u>01-23 BOT - Budget FY23-24</u> RESOLVED, that the operating budget for fiscal year 2023-2024 be approved. The recommended budget includes: Revenue \$20,919,107 Expense \$20,894,784 Net Surplus \$24,323	Adopted 62-1-0	Majority	N/A	N/A	
<u>02-23 BOT – Dues</u> RESOLVED, that the dues for US Active Members shall be \$817.	Adopted 62-1-0	Majority	N/A	N/A	
<u>03-23 COGA - Bylaws Amendment - Article VIII – Councils, A. Name – Name Change</u> RESOLVED, that the AAO <i>Bylaws</i> Article VIII – Councils, A. Name, be amended as follows: <p style="text-align: center;">ARTICLE VIII — COUNCILS</p> A. NAME: The councils of this Association shall be:	Consent Adopt	2/3	Lisa Chandler to update policy	N/A	

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<ol style="list-style-type: none"> 1. Council on Communications 2. Council on Governmental Affairs <u>Government Advocacy</u> 3. Council on Membership, Ethics and Judicial Concerns 4. Council on Orthodontic Education 5. Council on Orthodontic Benefits 6. Council on Orthodontic Practice 7. Council on Scientific Affairs 8. Council on New and Younger Members <p style="text-align: right;">Underline - Addition Strikethrough - Deletion</p>					
<u>04-23 COGA - Amendment to Policies - Council on Governmental Affairs Name Change</u> RESOLVED, that the name of the Council on Governmental Affairs (COGA) be changed to the Council on Government Advocacy (COGA).	Consent Adopt	Majority	Lisa Chandler to update policy	N/A	
<u>05-23 COMEJC Bylaws Amendment - Article III. - Membership - B. Eligibility, c. ADA Membership</u>	No action taken. See 05-23 COMEJC (S1-PCSO) (S2-BOT)	2/3	N/A	N/A	
<u>05-23 COMEJC (S1-PCSO) Substitute for Bylaws Amendment - Article III. - Membership - B. Eligibility, c. ADA Membership</u>	No action taken. See 05-23 COMEJC (S1-PCSO) (S2-BOT)	2/3	N/A	N/A	
<u>05-23 COMEJC (S1-PCSO) (S2-BOT) Substitute for Bylaws Amendment - Article III. - Membership - B. Eligibility, c. ADA Membership</u> RESOLVED, that the AAO Bylaws Article III. - Membership - B. Eligibility, c. ADA Membership be amended as follows:	Adopted 62-2-0	2/3	Lisa Chandler to update policy		

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>ARTICLE III – MEMBERSHIP</p> <p>B.ELIGIBILITY:</p> <p>1. Active Members: To be an active member of this Association, a dentist shall meet the following requisites:</p> <p style="padding-left: 40px;">a. Education: Successful completion of the full curriculum of an accredited orthodontic program*, successfully passing The National Dental Specialty Examination (NDSE) administered by The Royal College of Dentists of Canada, or successful completion of the educational requirements established by this Association and in effect at the time of completion of education at least one (1) year prior to the date of application for active membership.</p> <p style="padding-left: 40px;">In all cases, the education of the applicant must satisfy this Association.</p> <p style="padding-left: 40px;">b. Pledge: Sign a pledge to adhere to the Principles of Ethics and Code of Professional Conduct (Principles) of this Association.</p> <p style="padding-left: 40px;">c. American Dental Association Membership: Membership in the ADA is strongly encouraged. Be a member in good standing of the ADA on the date of application for membership if practice or residence is in the United States or one of its possessions, unless the dentist is an AAO member within another membership category, and except those active academic applicants involved only in teaching or research, who are unable to obtain ADA membership because they are not engaged in the practice of dentistry in the United States and do not possess a license to practice dentistry in their respective states, are exempt from this requirement. (An active member who was a member of this Association on May 4, 1983, but not a member of the ADA on that date, is exempt from this ADA membership requirement.) Be a member in good standing of the ADA on the date of <u>initial</u> application for membership if practice or residence is in the</p>					

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<p>United States or one of its possessions, unless the dentist is an AAO member within another membership category, and except those active academic applicants involved only in teaching or research, who are unable to obtain ADA membership because they are not engaged in the practice of dentistry in the United States and do not possess a license to practice dentistry in their respective states, are exempt from this requirement. (An active member who was a member of this Association on May 4, 1983, but not a member of the ADA on that date, is exempt from this ADA membership requirement.) Continued membership in the ADA is strongly encouraged.</p> <p>d. Academic Membership Status: Active members who are employed full-time in an orthodontic program or dental school, in both cases accredited by the Commission on Dental Accreditation of the American Dental Association or the Commission on Dental Accreditation of Canada shall be designated active academic members and shall have the same privileges as active members. "Full time" means at least four days per week of teaching and/or research. The duration of such employment must be verified annually by the chair of the orthodontic department (or, in the case of the chair, by the dean) where the applicant is employed. In order to be active academic members they must be designated as either senior faculty (associate professor rank or higher), or junior faculty (assistant professor or lower) by the employing institution.</p> <p>2. Life Active Members: To be a life active member of this Association, a member shall meet the following requisites:</p> <p>a. Eligibility: Be an active member who has attained the age of sixty-five (65) years and been a member in good standing of this Association for at least thirty (30) cumulative years (excluding student membership).</p>					

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<p>b. Reclassification: AAO staff shall reclassify such members upon verification of their eligibility. Reclassification shall be effective on June 1 of the calendar year in which eligibility is met.</p> <p>c. Member Privileges: Shall have the same privileges as active members, except as otherwise provided in these Bylaws.</p> <p><u>d. American Dental Association Membership: Membership in the ADA is strongly encouraged.</u></p> <p>3. Academic Members (non-United States/Canada graduates): To be an academic member (non-United States/Canada graduates) of this Association, a dentist shall meet the following requisites:</p> <p>a. Education: Successful completion of the full curriculum of a specialty (graduate) orthodontic program outside the United States and Canada.</p> <p>b. Pledge: Sign a pledge to adhere to the Principles of this Association.</p> <p>c. Employment Requirement: Be employed full-time (at least four days per week teaching or research) in an orthodontic program or dental school, in both cases accredited by the Commission on Dental Accreditation of the American Dental Association or the Commission on Dental Accreditation of Canada. Employment must be certified annually by the dean of the dental school where the applicant is employed.</p> <p>d. Term of Status: Academic membership (non-United States/Canada graduates) status shall automatically terminate upon the earlier of the following:</p> <p>(1) Election to active or other applicable membership category in this Association; or</p> <p>(2) Termination of full-time employment in an orthodontic program accredited by the Commission on Dental</p>					

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<p>Accreditation of the American Dental Association or the Commission on Dental Accreditation of Canada.</p> <p><u>e. American Dental Association Membership: Membership in the ADA is strongly encouraged.</u></p> <p>4. Student Members: To be a student member of this Association, a dentist shall meet the following requisites:</p> <p>a. Education/Fellowships:</p> <p>(1) Be accepted and/or enrolled as a full-time student in an accredited orthodontic program*, or</p> <p>(2) Have completed the full curriculum of an accredited orthodontic program*, and be accepted and/or enrolled as a full-time student in an advanced educational program at an accredited educational institution, or be engaged full-time in formal fellowship training (i.e., cleft/craniofacial/special needs programs and/or research programs).</p> <p>(3) Have completed a graduate orthodontic program at a certified institution recognized by a national affiliate organization of the World Federation of Orthodontists and be accepted and/or enrolled as a full-time student in an advanced educational program at an accredited educational institution, or be engaged full-time in formal fellowship training (i.e., cleft/craniofacial/special needs programs and/or research programs).</p> <p>b. Pledge: Sign a pledge to adhere to the Principles of this Association.</p> <p>c. American Dental Association Membership: Membership in the ADA is strongly encouraged. Be a member in good standing of the ADA on the date of application for membership if permanent residence is in the United States or one of its possessions, unless the dentist is an AAO member within another membership</p>					

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<p>category. Be a member in good standing of the ADA on the date of <u>initial</u> application for membership if permanent residence is in the United States or one of its possessions, unless the dentist is an AAO member within another membership category. Continued membership in the ADA is strongly encouraged.</p> <p>d. Term of Status: Student membership status shall automatically terminate upon the earlier of the following:</p> <p style="padding-left: 40px;">(1) Election to active or other applicable membership category in this Association; or</p> <p style="padding-left: 40px;">(2) On May 31 of the year immediately following successful completion of an accredited orthodontic program; or</p> <p style="padding-left: 40px;">(3) Upon termination of status as a student in an accredited orthodontic program without satisfactory completion.</p> <p>5. Service Members: To be a service member of this Association, a dentist shall meet the following requisites:</p> <p style="padding-left: 40px;">a. Education: Successful completion of the full curriculum of an accredited orthodontic program* or successful satisfaction of the educational requirements established by this Association and in effect at the time of completion of education.</p> <p style="padding-left: 40px;">b. Pledge: Sign a pledge to adhere to the Principles of this Association.</p> <p style="padding-left: 40px;">c. American Dental Association Membership: Membership in the ADA is strongly encouraged. Be a member in good standing of the ADA on the date of application for membership, if practice or residence is in the United States or one of its possessions, unless the dentist is an AAO member within another membership category. (A service member who was a member of this Association on May 4, 1983, but not a member of the ADA on that date, is exempt from this ADA membership requirement.) Be a</p>					

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<p>member in good standing of the ADA on the date of <u>initial</u> application for membership, if practice or residence is in the United States or one of its possessions, unless the dentist is an AAO member within another membership category. (A service member who was a member of this Association on May 4, 1983, but not a member of the ADA on that date, is exempt from this ADA membership requirement.) Continued membership in the ADA is strongly encouraged.</p> <p>d. Service: Be a military Service Member or civilian employee of the United States or Canadian government who is a practicing orthodontist or Commander.</p> <p>*“Accredited orthodontic program,” as used in these <i>Bylaws</i>, shall mean those advanced specialty education programs in orthodontics that are accredited by the Commission on Dental Accreditation of the American Dental Association or the Commission on Dental Accreditation of Canada.</p> <p style="text-align: center;">Underline – COMEJC Addition Strikethrough – COMEJC Deletion Bold – PCSO Addition Double Strikethrough – PCSO Deletion Double Underline – BOT Addition</p>					
<p><u>06-23 COMEJC Bylaws Amendment - Article III. - Membership, B. Eligibility, 6. Retired Members a. Status</u></p> <p>RESOLVED, that the AAO <i>Bylaws</i> Article III. – Membership, B. Eligibility, 6. Retired Members, a. Status be amended as follows:</p> <p>ARTICLE III – MEMBERSHIP</p> <p>B. ELIGIBILITY:</p> <p>6. Retired Members: To be a retired member of this Association, a member shall meet the following requisites:</p> <p>a. Status: Have retired from the active practice of orthodontics, <u>teaching and research, except for</u></p>	<p>All 06-23's considered together. See 06-23 COMEJC (S3-MASO) (S4-PCSO) for House Action.</p>	<p>2/3</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>

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<p><u>orthodontists who are teaching in an accredited orthodontic program* or providing locum tenens coverage up to 400 hours per year.</u></p> <p>b. Eligibility: Have been an active, service or international member of this Association for fifteen (15) cumulative years prior to retirement, a member in good standing at the time of retirement and shall have requested reclassification by this Association.</p> <p>c. Reclassification: AAO staff shall reclassify such members upon verification of their eligibility and approval by their constituent organizations.</p> <p>d. Life Membership Status: Those members who have been designated life-active members shall be designated life-retired members upon retirement.</p> <p>*“Accredited orthodontic program,” as used in these <i>Bylaws</i>, shall mean those advanced specialty education programs in orthodontics that are accredited by the Commission on Dental Accreditation of the American Dental Association or the Commission on Dental Accreditation of Canada.</p> <p style="text-align: right;">Underline – COMEJC Addition Strikethrough – COMEJC Deletion</p>					
<p><u>06-23 COMEJC (S1-BOT) Substitute for Bylaws Amendment - Article III. - Membership, B. Eligibility, 6. Retired Members a. Status</u></p> <p>RESOLVED, that the AAO <i>Bylaws</i> Article III. – Membership, B. Eligibility, 6. Retired Members, a. Status be amended as follows:</p> <p>B. ELIGIBILITY:</p> <p>6. Retired Members: To be a retired member of this Association, a member shall meet the following requisites:</p>	<p>All 06-23's considered together. See 06-23 COMEJC (S3-MASO) (S4-PCSO) for House Action.</p>	<p>2/3</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>

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<p>a. Status: Have retired from the active practice of orthodontics, <u>teaching and research, except for orthodontists who are teaching in an accredited orthodontic program* or providing locum tenens coverage up to 400 416 hours per year.</u></p> <p>b. Eligibility: Have been an active, service or international member of this Association for fifteen (15) cumulative years prior to retirement, a member in good standing at the time of retirement and shall have requested reclassification by this Association.</p> <p>c. Reclassification: AAO staff shall reclassify such members upon verification of their eligibility and approval by their constituent organizations.</p> <p>d. Life Membership Status: Those members who have been designated life-active members shall be designated life-retired members upon retirement.</p> <p>*“Accredited orthodontic program,” as used in these <i>Bylaws</i>, shall mean those advanced specialty education programs in orthodontics that are accredited by the Commission on Dental Accreditation of the American Dental Association or the Commission on Dental Accreditation of Canada.</p> <p style="text-align: center;">Underline - COMEJC Addition Strikethrough - COMEJC Deletion Double Underline - BOT Addition</p>					
<p><u>06-23 COMEJC (S1-BOT) (S2-NESO) Substitute for Bylaws Amendment - Article III. - Membership, B. Eligibility, 6. Retired Members a. Status</u></p> <p>RESOLVED, that the AAO <i>Bylaws</i> Article III. – Membership, B. Eligibility, 6. Retired Members, a. Status be amended as follows:</p> <p>ARTICLE III – MEMBERSHIP</p> <p>B. ELIGIBILITY:</p>	<p>All 06-23’s considered together. See 06-23 COMEJC (S3-MASO) (S4-PCSO) for House Action.</p>	<p>2/3</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>

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<p>6. Retired Members: To be a retired member of this Association, a member shall meet the following requisites:</p> <p>a. Status: Have retired from the active practice of orthodontics, <u>teaching and research, except for orthodontists who are teaching in an accredited orthodontic or dental school program* accredited by the Commission on Dental Accreditation (CODA) or the Commission on Dental Accreditation of Canada (CDAC) or providing locum tenens coverage up to 400 <u>416</u> hours per year.</u></p> <p>b. Eligibility: Have been an active, service or international member of this Association for fifteen (15) cumulative years prior to retirement, a member in good standing at the time of retirement and shall have requested reclassification by this Association.</p> <p>c. Reclassification: AAO staff shall reclassify such members upon verification of their eligibility and approval by their constituent organizations.</p> <p>d. Life Membership Status: Those members who have been designated life-active members shall be designated life-retired members upon retirement.</p> <p>*“Accredited orthodontic program,” as used in these <i>Bylaws</i>, shall mean those advanced specialty education programs in orthodontics that are accredited by the Commission on Dental Accreditation of the American Dental Association or the Commission on Dental Accreditation of Canada.</p> <p style="text-align: center;">Underline – COMEJC Addition Strikethrough – COMEJC Deletion Double Underline – BOT Addition Bold Underline – NESO Addition</p>					

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<p><u>06-23 COMEJC (S3-MASO) Substitute for Bylaws Amendment - Article III. - Membership, B. Eligibility, 6. Retired Members a. Status</u></p> <p>RESOLVED, that the AAO <i>Bylaws</i> Article III. – Membership, B. Eligibility, 6. Retired Members, a. Status, be amended as follows:</p> <p>ARTICLE III – MEMBERSHIP</p> <p>B. ELIGIBILITY:</p> <p>6. Retired Members: To be a retired member of this Association, a member shall meet the following requisites:</p> <p>a. Status: Have retired from the active <u>full-time</u> practice of orthodontics, <u>teaching, and research</u>, except for orthodontists who are teaching in an accredited orthodontic program* or providing locum tenens coverage up to 400 hours per year.</p> <p>b. Eligibility: Have been an active, service, or international member of this Association for fifteen (15) cumulative years prior to retirement, a member in good standing at the time of retirement, and shall have requested reclassification by this Association.</p> <p>c. Reclassification: AAO staff shall reclassify such members upon verification of their eligibility and approval by their constituent organizations.</p> <p>d. Life Membership Status: Those members who have been designated life-active members shall be designated life-retired members upon retirement.</p> <p>e. <u>Approved exceptions: Members who volunteer or work part-time at any CODA accredited dental school or orthodontic residency program*. Members who provide locum tenens coverage up to 416 hours per year.</u></p>	<p>All 06-23's considered together. See 06-23 COMEJC (S3-MASO) (S4-PCSO) for House Action.</p>	<p>2/3</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>

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<p>*“Accredited orthodontic program,” as used in these <i>Bylaws</i>, shall mean those advanced specialty education programs in orthodontics that are accredited by the Commission on Dental Accreditation of the American Dental Association or the Commission on Dental Accreditation of Canada.</p> <p style="text-align: center;">Underline – COMEJC Addition Double Underline – MASO Addition Strikethrough – MASO Deletion</p>					
<p><u>06-23 COMEJC (S3-MASO) (S4-MASO) Substitute for Bylaws Amendment - Article III. - Membership, B. Eligibility, 6. Retired Members a. Status</u></p> <p>RESOLVED, that the AAO <i>Bylaws</i> Article III. – Membership, B. Eligibility, 6. Retired Members, a. Status, be amended as follows:</p> <p>ARTICLE III – MEMBERSHIP</p> <p>B. ELIGIBILITY:</p> <p>6. Retired Members: To be a retired member of this Association, a member shall meet the following requisites:</p> <p style="padding-left: 40px;">a. Status: Have retired from the active full-time practice of orthodontics, <u>teaching, and research</u>, except for orthodontists who are teaching in an accredited orthodontic program* or providing locum tenens coverage up to 400 hours per year.</p> <p style="padding-left: 40px;">b. Eligibility: Have been an active, service, or international member of this Association for fifteen (15) cumulative years prior to retirement, a member in good standing at the time of retirement, and shall have requested reclassification by this Association.</p> <p style="padding-left: 40px;">c. Reclassification: AAO staff shall reclassify such members upon verification of their eligibility and approval by their constituent organizations.</p>	<p>All 06-23's Referred back to COMEJC for further review.</p> <p>Adopted</p> <p>64-0-0</p>	<p>Majority to Refer</p>	<p>COMEJC, BOT Liaison Dr. Ryan Frost & Staff Liaison Brandon Hackworth to review with council members.</p>	<p>February 15, 2024</p>	

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<p>d. Life Membership Status: Those members who have been designated life-active members shall be designated life-retired members upon retirement.</p> <p>e. <u>Approved exceptions: Members who volunteer or work part-time at any CODA accredited dental*, school or orthodontic, dental hygiene, or dental assisting program and/or residency program*. Members who provide locum tenens coverage for up to a cumulative total of 416 hours per year.</u></p> <p>*“Accredited orthodontic program,” as used in these <i>Bylaws</i>, shall mean those advanced specialty education programs in orthodontics that are accredited by the Commission on Dental Accreditation of the American Dental Association or the Commission on Dental Accreditation of Canada.</p> <p>Underline – COMEJC Addition Double Underline – MASO Addition Strikethrough – MASO Deletion Bold Underline – PCSO Addition Bold Strikethrough – PCSO Deletion</p>					
<p><u>07-23 COMEJC Bylaws Amendment - Article XVII - Disciplinary and Membership Proceedings</u></p> <p>RESOLVED, that Article XVII Disciplinary and Membership Proceedings, of the AAO <i>Bylaws</i> be amended as follows:</p> <p>ARTICLE XVII — DISCIPLINARY AND MEMBERSHIP PROCEEDINGS</p> <p><u>As described in article XVI, all members of this Association are governed by the Principles of Ethics and Code of Professional Conduct. Our members also must adhere to the disciplinary and membership proceedings as also described in detail in the AAO Principles of Ethics, Code of Professional Conduct and Advisory Opinions document.</u></p>	Consent Adopt	2/3	Lisa Chandler to update policy.	N/A	

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<p>A. GROUNDS FOR ACTION:</p> <p>This Association, on its own volition or upon receipt of a written complaint from any other person, reserves the right to discipline any of its members (except honorary) for cause. Non-disciplinary action may include a non-reportable Letter of Concern sent to a member in the event that actions of the member demonstrate behavior of concern to the Council on Membership, Ethics and Judicial Concerns COMEJC but which fail to demonstrate clear and undeniable evidence of violation of these Principles of Ethics or Code of Professional Conduct. Disciplinary action may include a letter of concern, reprimand, suspension or expulsion from membership in the AAO. Violation of the AAO's Bylaws or Principles, Code and Opinions, or any state or provincial lawful rule of practice or any other conduct prejudicial to the interests of this Association, shall constitute sufficient cause for disciplinary action hereunder. This Association, on its own volition or upon appeal from an applicant for membership who has been denied membership by this Association, further reserves the right to terminate the membership of any member and affirm the denial of membership to such applicant.</p> <p>Each Member and each Applicant hereby expressly waives the right to hold this Association, its delegates, trustees, officers, members and employees, or any of its constituent or component organizations responsible for any damage, pecuniary or otherwise, as a result of disciplinary or membership proceedings against or involving any member and or applicant.</p> <p>This Association may, at its discretion, require complainants to provide a waiver of medical privacy rights they may have under any and all applicable laws and regulations, including, but not limited to, the Health Insurance Portability and Accountability Act of 1996 ("HIPAA").</p> <p>B. DISCIPLINARY PROCEEDINGS:</p> <p>1. Jurisdiction: This Association has jurisdiction to bring disciplinary proceedings against, and to conduct membership proceeding as to, a member, which shall be conducted by the Council on Membership, Ethics and Judicial Concerns ("COMEJC").</p>					

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<p>2. The AAO administrative staff will receive and review formally submitted complaints signed by an AAO member or non-member individual or individuals relating to alleged violations of parameters set forth in these Principles of Ethics, Code of Professional Conduct and Advisory Opinions. Such complaints should encompass all pertinent and available information related to the facts of the asserted violation including, but not necessarily limited to, a description of facts related to events or activities, copies of pertinent documents, communications, and when applicable, patient records (e.g., photographs, radiographs, etc.) if available. Such materials shall become the property of the AAO and held in confidence (with exceptions identified below) by the AAO and those designated by the AAO including the COMEJC to examine and process for potential evaluation and subsequent non-disciplinary or disciplinary proceedings or action.</p> <p>a. Preliminary Rejection: Upon receipt and examination of complaints, the Association's executive staff following consultation with the Chair of the COMEJC may reject complaints that it deems to be clearly without merit, patently retaliatory, or fail to include evidence sufficient for a valid complaint.</p> <p>3. Investigation: For those complaints which are not preliminarily rejected, the investigation of disciplinary or membership complaints and/or appeals of membership denials shall occur as follows:</p> <p>a. The Chair of COMEJC shall select three of its members to comprise an "Investigating Committee" to investigate any disciplinary or membership complaints and/or appeals of membership denials. Committee members selected must be unbiased and without conflicts. At a minimum, they must not represent the Association's constituent organization, nor shall they be from the same general geographic area, as the member they are charged with investigating.</p>					

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<p>b. The Investigating Committee may conclude, in its sole discretion and based upon a preliminary review of any complaint or record of membership decision, that the complaint or record contains insufficient information on which to base an investigation, or is patently frivolous or inconsequential. In such case, the matter may be disposed of by written notice to the complainant and his or her respective constituency organization (in the case of active and retired members), as the case may be.</p> <p>c. If the Investigating Committee concludes that a complaint or record constitutes a valid and actionable inquiry, the Investigating Committee shall conduct a confidential investigation in order to determine whether disciplinary or membership action is warranted. Such an investigation in the case of disciplinary proceedings shall include contacting the accused member and providing a copy of the complaint to the member as well as the complainant, if necessary to gather all relevant facts. The investigation of whether any non-disciplinary or disciplinary response, including membership in this Association is warranted shall include contacting the applicant or existing member as the case may be, as well as the member's constituent organization (in the case of active and retired members), and obtaining all relevant facts. Any "whistle blower" complaint, however, submitted by a party who could potentially be subject to retaliation may be considered for further investigation while holding the complainant's identity in confidence by means of redaction of said name and any other identifying materials from the complaint only if preliminary evaluation by the Investigating Committee determines that a non-reportable letter of concern is, or may be likely as the appropriate disposition of said complaint. Should the Investigating Committee, as it moves through its disciplinary process, later determine that a reportable disciplinary action is instead likely, the subject member of the complaint shall be entitled to know the identity of the complainant to enable the accused member to respond specifically with knowledge of the origin of the complaint. AAO staff, in communication with the complainant, would determine if a willingness to reveal the whistle blower's identity is acceptable to permit any disciplinary process to proceed in such cases. If not, the complaint would be rejected. If the accused member refuses to cooperate or provide information, the Investigating Committee may not allow such refusal to influence its judgment concerning the merits of the</p>					

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<p>complaint. Members of the Investigating Committee shall not, at any time, have any personal or “off the record” communications with the accused member, or anyone advocating for the accused. All communications with the accused member concerning the investigation shall be in writing, and shall only be transmitted through AAO executive staff and shall, when possible, be transmitted in such a way as to prove the sufficiency of the communication (e.g., receipted delivery). The Investigating Committee may, at its discretion, suspend its proceedings if it becomes aware that the accused member is involved in litigation or other official proceedings, such as a state dental board or provincial regulatory body investigation, on the same or substantially similar complaint.</p> <p>d. Subject to Disciplinary Proceedings B.3.f, below, the Investigating Committee shall file its report and non-binding recommendations as to a proposed penalty with the Chairman of COMEJC within a reasonable time after notification of the complaint or membership issue.</p> <p>e. If the Investigating Committee determines that no disciplinary action is warranted or that membership should be maintained or granted, it shall notify the member, as the case may be, the member’s constituent organization (in the case of active and retired members), the chairman of COMEJC, and Secretary-Treasurer of this Association. The notice to such member shall be in writing and sent via certified mail return receipt requested.</p> <p>f. Public Statement Assurance: In the case of the first disciplinary complaint against a member involving public statements, announcements of services and promotional activities where the Investigating Committee has determined that the complaint constitutes a valid and actionable inquiry, the Investigating Committee may, in its sole and absolute discretion, elect to advise the member of its finding and obtain a written agreement from the member to cease the unethical activity and to waive any further right of appeal from, or challenge to, such finding and agreement. If the member enters into and complies with such an agreement, the Investigating Committee shall file its report as to such matter with the Chairman of COMEJC, and no disciplinary action shall be warranted in relation to the Public Statement, announcement of services or promotional activity that is the subject of such agreement.</p>					

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>Notwithstanding the foregoing, in the event of a subsequent complaint against the same member involving any Public Statements, announcements of services and promotional activities where the Investigating Committee determines that the complaint constitutes a valid and actionable inquiry, this section (Disciplinary Proceedings B.3.f) shall be inapplicable, and the provisions Disciplinary Proceedings B.2.d and all other related provision of these Disciplinary Proceedings shall apply.</p> <p>4. If the Investigating Committee determines that disciplinary action is warranted or that membership should be terminated or denied, COMEJC shall follow the procedures set forth below:</p> <p>a. Notice: The member shall be notified in writing of the charges including a statement containing all of the actions about which have been complained, including corresponding provisions of this Code that are alleged to have been violated, and his/her right to a hearing before three members of the COMEJC selected by the chairman thereof who shall not be members of the Investigating Committee (the "Hearing Committee") and who have no bias or conflicts in the matter as previously defined. The accused member shall be given the names, states/provinces of members of the Hearing Committee, and shall have the right to challenge any member on the basis of bias or conflicts. In the event of such a challenge, the Chair of COMEJC, in consultation with AAO executive staff, may determine if a conflict does, in fact, exist. Such notification shall be sent by certified mail, with receipted delivery, to the member's address of record. In the event that a conflict or that a COMEJC member is ineligible to serve on the Investigating or Hearing Committees, the Chair shall appoint an alternative COMEJC representative to serve in his/her place. In the event two alternate Council appointees are ineligible to serve, The Chair shall serve on the designated Committee. If the Chair is unable to serve, the AAO President shall appoint the Trustee Liaison to COMEJC or another AAO Trustee to serve on the Investigating Committee or Hearing Committee if the Trustee Liaison is ineligible. Such notification shall be sent by certified mail, with return receipt requested, to the member's address of record. The member shall be notified that he/she may request a hearing before the Hearing Committee in order to appear and may present evidence, and that he/she may be represented by legal counsel, if desired, at his or her expense.</p>					

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>The Hearing Committee may, at its discretion, suspend its proceedings if it becomes aware that the accused member is involved in litigation or other official proceedings, such as a state dental board or provincial governing body investigation, on the same or substantially similar complaint.</p> <p>b. Hearing: Upon timely written request from the member, which must be given within thirty (30) days of the notice to the member of the right to a hearing, the member or applicant shall be entitled to a private hearing before the Hearing Committee at which time he/she shall be given the opportunity to present his/her response. The hearing shall be conducted in accordance with the procedures adopted by this Association at a place and time selected by the Hearing Committee in its sole discretion, and the member shall be given reasonable advance notice of the date, time and place of the hearing. The members of the Hearing Committee shall elect from their number a Hearing Officer, who shall preside at the hearing and issue any appropriate procedural or evidentiary rulings, and summarize the results of the investigation and non-binding penalty recommendation at the hearing for the other members. Formal rules of evidence or civil procedure shall not be required. The Hearing Committee may consider any relevant material.</p> <p>At the Association's discretion, hearings may be offered to be held via videoconference or teleconference.</p> <p>Hearings should be limited to the facts in dispute, which have been entered into the "record" of the case by the accused and complainant.</p> <p>c. In the event no timely written request for a hearing is received from the member, or if a hearing is requested but the respondent does not appear, and no extenuating circumstances have influenced such delay, the Hearing Committee shall render its decision without regard to said failure to appear influencing its judgment concerning the merits of the complaint.</p> <p>d. Decision: Every disciplinary and membership decision of the Hearing Committee shall be in writing. Each decision shall specify the charges made against the member, the facts which substantiate any or all of the charges and if the member has been deemed exonerated or found in</p>					

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<p>violation. If in violation, the decision shall also include the facts which substantiate any or all of the charges, the decision rendered by the Hearing Committee, any penalty imposed in the case of disciplinary proceedings, and in the event of penalty, the specific sections of the Principles of Ethics, Code of Professional Conduct and Advisory Opinions found to be in violation, the fact that the member has a right of appeal and the time for filing a notice of appeal. The Hearing Committee may, in its sole and absolute discretion, give consideration as to whether the case involves a second complaint against the same member concerning public statements, announcements of services and promotional activities if such member entered into a written agreement with the Association pursuant to B.3.f. Disciplinary Proceedings Section 3.f above, in relation to the penalty assessed. Within ten (10) days of the date on which the decision is rendered, a copy thereof shall be sent by certified mail, with return receipt requested, to the Association's last known address of each of the following parties: the member or applicant, the secretary of the constituent organization of which he/she is a member (in the case of active and retired members), the chair of the Council on Membership, Ethics and Judicial Concerns of this Association and the Secretary-Treasurer of this Association.</p> <p>C. APPEALS:</p> <p>The decision of the Hearing Committee as to applicants for AAO membership shall be final with no right of appeal. An existing AAO member receiving an adverse decision from the Hearing Committee shall have the right to appeal from such a decision by filing a notice of appeal with the Secretary-Treasurer of this Association.</p> <p>The notice of appeal must be in writing and filed with the Secretary-Treasurer of this Association within thirty (30) days of receipt of the notice of the adverse decision.</p> <p>Each party to an appeal shall be entitled to submit a brief in support of his/her or its position. The member and the Hearing Committee shall submit his/her or its brief to the Secretary-Treasurer of this Association via certified mail, return receipt requested, within ninety (90) days of filing an appeal.</p>					

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<p>No decision shall become final while an appeal therefrom is pending or until the thirty (30) day period for filing notice of appeal has elapsed. Within thirty (30) days of the receipt of a notice of appeal, the President of this Association will name and determine their willingness to serve, three members to an Ad Hoc Appeals Panel and three alternates, no one of whom shall have been a member of the COMEJC from the time since the original complaint was received and disciplinary proceedings begun. The members of the Ad Hoc Appeals Panel shall be without bias or conflict, and their names, cities and states/provinces shall be made available to the accused member, who may challenge members of the panel on the basis of bias or conflict. In the event of such a challenge, the President of the Association, in consultation with the Association's executive staff, must determine if a conflict or bias exists. The Secretary Treasurer of this Association will notify the member of the names of the three principals via certified mail, return receipt requested. If the member shows good cause why any named principal is unacceptable, an alternate(s) will be selected by the President of the Association. This selection shall be final. The Panel shall notify the COMEJC and the member of the time and place of the hearing, such notice to be sent by certified mail, with return receipt requested, to the last known address of the parties to the appeal and mailed not less than thirty (30) days prior to the date set for the hearing.</p> <p>The Panel shall meet, either in person or via telephone conference, within a reasonable time from the date the appeal was filed. The member may have one representative appear, at his or her expense, before the Panel to make oral or written presentations and to respond to questions from the Panel. The Hearing Officer shall designate a representative to appear before the Panel to support the decision of the Hearing Committee and to respond to questions of the Panel. Either party may be represented by counsel; however, the proceedings shall be conducted on an informal basis.</p> <p>The Panel shall be required to review the decision on appeal and determine whether the charges involving the member support the decision and/or warrant the penalty imposed and shall be based on any evidence about which the Hearing Committee grossly erred with regard to the facts of the case or the law. This Appeal Process shall not be "from scratch" or</p>					

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<p>de novo. The Panel shall not be required to consider additional evidence unless there is a clear and convincing showing that either party to the appeal will be unreasonably harmed by failure to consider the additional evidence.</p> <p>Every decision on appeal shall be reduced to writing and shall clearly state the conclusion of the Panel and reasons for reaching the conclusion. The Panel shall have the discretion to:</p> <ol style="list-style-type: none"> 1. Uphold the decision of the Hearing Committee; 2. Reverse all or any part of the decision of the Hearing Committee and thereby exonerate the member; 3. Deny an appeal because it fails to satisfy the requirements of these <i>Bylaws</i>, Principles of Ethic, Code of Professional Conduct, Advisory Opinions and associated disciplinary procedures; 4. Refer the case back to the Hearing Committee for a new proceeding, if the rights of the member under all applicable <i>Bylaws</i> were not accorded him/her; or 5. Accept the findings of the Hearing Committee, but impose a different penalty or decision. <p>Within a reasonable time from the date a decision on an appeal is rendered, a copy thereof shall be sent by certified mail, with return receipt requested, to the Association's last known address of each of the following parties: the member, the secretary of the constituent organization of which he/she is a member (in the case of active and retired members), the Chair of the COMEJC of this Association and the Secretary-Treasurer of this Association.</p> <p>D. RESIGNATION:</p> <p>If a member who is the subject of a complaint or other disciplinary or membership action by this Association resigns at any time during the</p>					

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<p>proceeding, the matter shall be dismissed and the member may not thereafter reapply for any class of membership.</p> <p>E. REPORTING REQUIREMENT:</p> <p>This Association shall report any information to such agency or agencies as may be required or permitted by the Health Care Quality Improvement Act of 1986, in such form, manner and frequency as may from time to time be required or permitted by the Act.</p> <p style="text-align: right;">Underline – COMEJC Addition Strikethrough – COMEJC Deletion</p>					
<p><u>08-23 HPRC - Bylaws Amendment - Article V - House of Delegates, E. Committees, 3.</u></p> <p>RESOLVED, that the AAO Bylaws Article V – House of Delegates, E. Committees, 1. Committee on Credentials, 2. Committee on Credentials and 4. Reference Committees, be amended as follows:</p> <p style="text-align: center;">ARTICLE V — HOUSE OF DELEGATES</p> <p>E. COMMITTEES:</p> <p>The committees of the House of Delegates shall be the Committee on Credentials, Committee on Rules and Order, Committee on Bylaws, Reference Committees and Special Committees.</p> <p>1. Committee on Credentials: This Committee shall consist of three (3) officially certified delegates or alternate delegates appointed annually by the <u>Speaker of the House</u> President at least forty-five (45) days prior to each annual session.</p> <p>Duties: The Committee on Credentials shall:</p> <p>a. Conduct a hearing, as prescribed in the Manual of the House of Delegates, on any contested credentials of a delegate or alternate delegate, and report its findings and recommendations to the House of Delegates for final action; and</p>	Consent Adopt	2/3	Lisa Chandler to update policy.	N/A	

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>b. Perform such other duties as may be provided in these Bylaws or in the Manual of the House of Delegates.</p> <p>2. Committee on Rules and Order: This Committee shall consist of three (3) officially certified delegates or alternate delegates appointed annually by the <u>Speaker of the House</u> President at least forty-five (45) days prior to each annual session.</p> <p>Duties: The Committee on Rules and Order shall:</p> <p>a. Prepare a report, in consultation with the Speaker and Secretary of the House of Delegates, on matters relating to the order of business and to special rules of order for the House of Delegates; and</p> <p>b. Perform such other duties as may be provided in these Bylaws or in the Manual of the House of Delegates.</p> <p>4. Reference Committees: The required number of Reference Committees shall be established by the Speaker of the House of Delegates. Each Committee shall consist of five (5) officially certified delegates <u>and/or</u> alternate delegates who shall be appointed annually by the <u>Speaker of the House</u> President at least forty-five (45) days prior to each annual session.</p> <p>Each Reference Committee shall consider reports referred to it, conduct open hearings, and report its recommendations to the House of Delegates.</p> <p style="text-align: right;">Underline – HPRC Addition Strikethrough – HPRC Deletion</p>					
<p><u>09-23 NESO - Bylaws Amendment – Article V – House of Delegates, D. Officers, 1. Speaker of the House with conforming amendment to the Standing Rules & Orders Manual</u></p>	<p>No action taken. See 09-23 RC</p>	<p>2/3</p>	<p>N/A</p>	<p>N/A</p>	

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<u>09-23 NESO (S1-BOT) - Substitute for Bylaws Amendment – Article V – House of Delegates, D. Officers, 1. Speaker of the House with conforming amendment to the Standing Rules & Orders Manual</u>	No action taken. See 09-23 RC	2/3	N/A	N/A	
<u>09-23 NESO (S1-BOT) (S2-PCSO) - Substitute for Bylaws Amendment – Article V – House of Delegates, D. Officers, 1. Speaker of the House with conforming amendment to the Standing Rules & Orders Manual</u>	No action taken. See 09-23 RC	2/3	N/A	N/A	
<u>09-23 NESO (S1-BOT) (S3-SWSO) - Substitute for Bylaws Amendment – Article V – House of Delegates, D. Officers, 1. Speaker of the House with conforming amendment to the Standing Rules & Orders Manual</u>	No action taken. See 09-23 RC	2/3	N/A	N/A	
<u>09-23 RC - Bylaws Amendment – Article V – House of Delegates, D. Officers, 1. Speaker of the House with conforming amendment to the Standing Rules & Orders Manual</u> RESOLVED, that the AAO Bylaws Article V – House of Delegates, D. Officers, 1. Speaker of the House, be amended as follows: ARTICLE V — HOUSE OF DELEGATES D. OFFICERS: 1. Speaker of the House of Delegates: The Speaker shall be elected every three (3) years by the House of Delegates for a term of three years and can serve a maximum of two (2) <u>non-consecutive</u> three-year terms. In the temporary absence of the Speaker, the President shall appoint a Speaker <i>pro tem</i> . The Speaker may retain an external parliamentarian to assist with parliamentary issues. With the following conforming amendment: RESOLVED, that the AAO Bylaws Article VII – Officers, D. Term of Office, be amended as follows: ARTICLE VII — OFFICERS D. TERM OF OFFICE:	Adopted as editorially amended by SWSO. 64-0-0	2/3	Lisa Chandler to update policy	N/A	

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>Unless specified otherwise elsewhere in these Bylaws, the officers shall serve for a term of one year or until their successors are elected.</p> <p>With the following conforming amendment:</p> <p>Resolved, that the AAO Bylaws Article VII – Officers, C. Nomination and Election, 1. Nominating Committee be amended as follows:</p> <p>ARTICLE VII — OFFICERS</p> <p>C. NOMINATION AND ELECTION:</p> <p>1. Nominating Committee: There shall be a Nominating Committee composed of the voting members of the Board of Trustees. This Committee shall present nominations for the office of Secretary-Treasurer. There shall also be a Committee for the office of Speaker of the House composed of one delegate selected by each constituent organization, with the chair of the committee selected by the current Secretary-Treasurer who will serve in an advisory role and as a non-voting member.</p> <p>These Nominating Committees shall present nominations for the offices of Secretary-Treasurer and Speaker of the House to the membership in a pre-annual session Association publication and shall be presented at the first meeting of the House of Delegates during the ensuing annual session. Other nominations for these offices may be made from the floor of the House of Delegates.</p> <p>With the following conforming amendment to the AAO Standing Rules & Orders Manual:</p> <p>RESOLVED, that the selection of the Speaker be amended from a constituent-based rotation to one that is attribute-based and fully open to the entire membership, based on selection criteria. The Speaker shall be nominated by a Nominating Committee composed of one delegate selected by each constituent organization, with the chair of the committee selected by the current Secretary-Treasurer who will serve in an advisory role and as a non-voting member, and be it further</p>					

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>RESOLVED, that the Speaker shall be elected every three (3) years by the House of Delegates for a term of three years and can serve a maximum of two (2) <u>non-consecutive</u> three-year terms. This selection process will be implemented for the Speaker for FY 24-25, and be it further</p> <p>RESOLVED, that the proposed amendment to Article V and the proposed amendment to Article VII, Section D of the Bylaws shall take effect immediately upon adoption of this resolution, and that the proposed amendment to Article VII, Section C of the Bylaws shall take effect upon the close the 2023 annual session of the American Association of Orthodontists.</p> <p style="text-align: right;">Bold Underline – SWSO Addition</p>					
<u>10-23 BOT - Amendment to Policy - Speaker Selection Standing Rules & Order</u>	Withdrawn	N/A	N/A	N/A	N/A
<u>11-23 RMSO - Bylaws Amendment – Article V-House of Delegates. E. Committees - Delegate Chair Committee</u>	Withdrawn	N/A	N/A	N/A	N/A
<u>12-23 RC – Clinical Practice Guidelines</u>	Rejected 30-34-0	Majority	N/A	N/A	N/A
<u>12-23 BOT – Clinical Practice Guidelines</u> RESOLVED, that the HOD approve the revised Clinical Practice Guidelines for Orthodontics and Dentofacial Orthopedics attached to this recommendation with the inclusion of the change shown below. MSO Revision to page 8, line 31 of the Clinical Practice Guidelines as presented in 12-23 BOT Pretreatment unaltered diagnostic records for orthodontic treatment may <u>must</u> include the following: 1. Extraoral and intraoral still photographic or video images (may include digital or film-based images) to supplement the clinical findings.	Adopted as amended by MSO 55-8-0	Majority	Lisa Chandler to update policy.	N/A	

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>2. Plaster, <u>resin</u> or digital dental models, <u>or calibrated one-to-one imaging of some form</u> to assess the inter-arch and intra-arch <u>relationships</u> of the teeth, to help determine arch length and width requirements, to assess arch symmetry and to coordinate with other dental professionals concerning anticipated dental procedures.</p> <p>3. Radiographic imaging (<u>which may include</u> intraoral radiographs, panoramic radiographs, cephalometrics, CBCT, etc.) with interpretation to assess the condition and developmental status of the teeth, hard tissue supporting structures, to identify any dental anomalies or pathology and make to enable a <u>limited</u> screening assessment of the patient's upper airway.</p> <p style="text-align: right;">Double Underline – MSO Addition</p>					
<p><u>13-23 COMEJC – Amendment to Part 1, Article I. Dues, B. Annual Dues, 4. Service Members (Financial Policy)</u></p> <p>RESOLVED, that Part 1, Article I. Dues, B. Annual Dues, 4. Service Members (Financial Policy) be amended as follows:</p> <p>I. DUES</p> <p>A. All dues shall be due and payable on June 1 of each year.</p> <p>1. All dues and application fees shall be payable in US currency. 2. Canadian members shall pay eighty percent (80%) of the dues of their applicable category.</p> <p>B. Annual dues are</p> <p>1. Active members: 100% of dues. a. Life-active members, less than 50 cumulative years of membership: 60% of dues. b. Life-active members, more than 50 cumulative years of membership: Exempt c. Active members in first year of membership: 10% of dues. d. Active members in second year of membership: 25% of dues.</p>	Consent Adopt	Majority	Lisa Chandler to update policy.		

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>e. Active members in third year of membership: 50% of dues. f. Active members in fourth year of membership: 75% of dues.</p> <p>2. Active Academic members: 100% of dues, but Senior Faculty may annually apply for reduction to 50% of dues, and Junior Faculty may annually apply for a reduction to 25% of dues.</p> <p>a. Active Academic members in first year of membership: 10% of dues. b. Active Academic members in second year of membership: 25% of dues. c. Active Academic members in third year of membership: 50% of dues but Junior Faculty may apply for a reduction to 25% of dues. d. Active Academic members in fourth year of membership: 75% of dues but Senior Faculty may apply for a reduction to 50% of dues and Junior Faculty may apply for a reduction to 25% of dues.</p> <p>3. Academic (Non-United States/Canada graduates):100% of dues, but Senior Faculty may annually apply for a reduction to 50% of dues, and Junior Faculty may annually apply for a reduction to 25% of dues.</p> <p>a. Academic (Non-United States/Canada graduates) in first three years of membership: 100% of dues, but Senior Faculty may apply for a reduction to 50% of dues, and Junior Faculty may apply for a reduction to 25% of dues.</p> <p>4. Service members: \$300.00 a. Service members in first three years of membership: \$300.00.</p> <p>5. Student members: \$30.00. a. Students who have been accepted into, but not yet started, an accredited orthodontic residency program: Exempt for the period of December 1 through May 31 immediately following acceptance into an orthodontic residency program.</p> <p>6. Retired members: Exempt.</p> <p>7. International members: 50% of dues. a. International members in first year of membership: 10% of International member dues.</p>					

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>b. International members in second year of membership: 25% of International member dues. c. International members in third year of membership: 50% of International member dues. d. International members in fourth year of membership: 75% of International member dues. e. International members from countries classified by the World Bank, on a yearly basis, as low income or lower middle income: 40% of International member dues. f. International members from countries classified by the World Bank, on a yearly basis, as upper middle income: 70% of International member dues.</p> <p>8. International student members: \$30.00.</p> <p style="text-align: center;">Strikethrough – COMEJC Deletion</p>					
<u>14-23 COMEJC – Amendment to Part 1, Article III. Waivers, A. 5. Limited Practice Waiver (Financial Policy)</u>	Consent Reject	Majority	N/A	N/A	N/A
<u>14-23 COMEJC (S1-NESO) – Substitute for Amendment to Part 1, Article III. Waivers, A.5. Limited Practice Waiver (Financial Policy)</u>	No action taken. See 16-23 RC.	N/A	N/A	N/A	N/A
<u>15-23 COMEJC - Amendment to Part 1. Article III. D. Waivers (Financial Policy)</u>	No action taken. See 16-23 RC.	N/A	N/A	N/A	N/A
<u>16-23 COMEJC - Amendment to Part 1. Article III. Waivers (Financial Policy)</u>	No action taken. See 16-23 RC.	N/A	N/A	N/A	N/A
<u>16-23 RC - Amendment to Part 1. Article III. Waivers (Financial Policy)</u>	Adopted 63-1-0	Majority	Lisa Chandler to update policy	N/A	

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>RESOLVED, that Part 1, Article III. Waivers (Financial Policy) be amended as follows:</p> <p>III. WAIVERS</p> <p>A. Members may apply for a waiver of dues and/or assessments for any of the following reasons:</p> <ol style="list-style-type: none"> 1. Significant financial hardship due to an force majeure or other similar events beyond the member's control. 2. Significant financial hardship due to a debilitating medical condition. 3. The orthodontist has an immediate family member such as a parent, spouse, child or sibling, who requires the orthodontist to be the primary care-giver and the orthodontist significantly reduces his/her practice time. 4. Significant financial hardship due to activation from reserve status to active military duty for the U.S. or Canadian government. 5. Significant financial hardship due to civil unrest or acts of military authority. 6. A "limited practice" waiver of 50% of full active member dues and assessments may be requested by Active or Life Active members with at least 30 cumulative years of membership (excluding student membership) and practice no more than 416 hours per year. 7. A Humanitarian Service waiver of full dues and assessments may be requested by doctors in full-time humanitarian service. Waivers for humanitarian service are not subject to the three-year limitation. 8. Waivers for membership dues are to be considered for individual member's circumstances and may not be granted for events or occurrences that significantly impact the vast majority of the AAO membership. <p>B. Applications for waivers are required and shall be made to the Association except when sections III.A.4. or III.A.5. are applicable.</p>					

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>C. A waiver of 50% or 100% of dues and/or assessments may be granted by the Association, provided such member is also exempt from paying the member's constituent organization's corresponding dues and assessments, as determined by the Association in its sole discretion.</p> <p>D. The final decision of the Association shall be made by the Council on Membership, Ethics and Judicial Concerns and is final and may not be appealed.</p> <p>E. A waiver may be granted for only the current year's dues and/or assessments.</p> <p>F. A waiver may be granted for the same condition for up to three consecutive years and a maximum of three (3) years total for a single event. A "limited practice" waiver may only be used for a maximum of three (3) years.</p> <p>G. Three three-year maximum may be waived if a member has a permanent disability that prevents the member from practicing, and he/she is not yet eligible for retired status.</p> <p>H. Only individuals who are members in good standing may apply for dues waivers.</p>					
<p><u>17-23 COMEJC – Amendment to Policy – B. Disciplinary Proceedings (Principles of Ethics)</u></p> <p>RESOLVED, that the Principles of Ethics, Code of Professional Conduct and Advisory Opinions of the AAO, Disciplinary Proceedings, pages 11 through 14, lines 423 through 573 be amended as follows:</p> <p style="text-align: center;">DISCIPLINARY PROCEEDINGS</p> <p>DISCIPLINARY AND MEMBERSHIP PROCEEDINGS</p> <p>B. DISCIPLINARY PROCEEDINGS:</p>	Consent Adopt	Majority	Lisa Chandler to update policy.	N/A	

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<p>1. Jurisdiction: This Association has jurisdiction to bring disciplinary proceedings against, and to conduct membership proceeding as to, a member, which shall be conducted by the Council on Membership, Ethics and Judicial Concerns (“COMEJC”).</p> <p>2. The AAO administrative staff will receive, and review, <u>and preliminarily evaluate</u> formally submitted <u>written</u> complaints signed by an AAO member or non-member individual or individuals relating to alleged violations of parameters set forth in these Principles of Ethics, Code of Professional Conduct and Advisory Opinions. Such complaints should encompass all pertinent and available information related to the facts of the asserted violation including, but not necessarily limited to, a description of facts related to events or activities, copies of pertinent documents, communications, and when applicable, patient records (e.g., photographs, radiographs, etc.) if available. Such materials shall become the property of the AAO and held in confidence (with exceptions identified below) by the AAO and those designated by the AAO including the COMEJC to examine and process for potential evaluation and subsequent non-disciplinary or disciplinary proceedings or action.</p> <p style="padding-left: 40px;">a. Preliminary Rejection: Upon receipt and examination of complaints, the Association’s executive staff, following consultation <u>and agreement</u> with the Chair of the COMEJC, may reject complaints that it deems to be clearly without merit, patently retaliatory, or fail to include evidence sufficient for a valid complaint <u>as related to the AAO’s Principles of Ethics and Code of Professional Conduct. In the event that COMEJC’s Chair disagrees with staff recommendation to dismiss, the complaint shall advance toward investigation.</u></p> <p>3. Investigation: For those complaints which are not preliminarily rejected, the investigation of disciplinary or membership complaints and/or appeals of membership denials shall occur as follows:</p>					

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<p>a. The Chair of COMEJC shall select three of its members to comprise an “Investigating Committee” to investigate any disciplinary or membership complaints and/or appeals of membership denials. Committee members selected must be unbiased and without conflicts. At a minimum, they must not represent the Association’s constituent organization, nor shall they be from the same general geographic area, as the member they are charged with investigating.</p> <p>b. The Investigating Committee may conclude, in its sole discretion and based upon a preliminary review of any complaint or record of membership decision, that the complaint or record contains insufficient information on which to base an investigation or is patently frivolous or inconsequential. In such case, the matter may be disposed of by written notice to the complainant <u>as well as the subject member(s) identified in the complaint</u> and his or her respective constituency organization (in the case of active and retired members), as the case may be.</p> <p>c. If the Investigating Committee concludes that a complaint or record constitutes a valid and actionable inquiry, the Investigating Committee shall conduct a confidential investigation in order to determine whether disciplinary or membership action is warranted. Such an investigation in the case of disciplinary proceedings shall include contacting the accused member and providing a copy of the complaint to the member as well as the complainant, if necessary to gather all relevant facts. The investigation of whether any non-disciplinary or disciplinary response, including membership in this Association is warranted shall include contacting the applicant or existing member as the case may be, as well as the member’s constituent organization (in the case of active and retired members), and obtaining all relevant facts. Any “whistle blower” complaint, however, submitted by a party who could potentially be subject to retaliation may be considered for further investigation while holding the complainant’s identity</p>					

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<p>in confidence by means of redaction of said name and any other identifying materials from the complaint only if preliminary evaluation by the Investigating Committee determines that a non-reportable letter of concern is, or may be likely as the appropriate disposition of said complaint.</p> <p>Should the Investigating Committee, as it moves through its disciplinary process, later determine that a reportable disciplinary action is instead likely, the subject member of the complaint shall be entitled to know the identity of the complainant to enable the accused member to respond specifically with knowledge of the origin of the complaint. AAO staff, in communication with the complainant, would determine if a willingness to reveal the whistle blower's identity is acceptable to permit any disciplinary process to proceed in such cases. If not, the complaint would be rejected. If the accused member refuses to cooperate or provide information, the Investigating Committee may not allow such refusal to influence its judgment concerning the merits of the complaint. Members of the Investigating Committee shall not, at any time, have any personal or "off the record" communications with the accused member, or anyone advocating for the accused. All communications with the accused member concerning the investigation shall be in writing, and shall only be transmitted through AAO executive staff and shall, when possible, be transmitted in such a way as to prove the sufficiency of the communication (e.g., receipted delivery). The Investigating Committee may, at its discretion, suspend its proceedings if it becomes aware that the accused member is involved in litigation or other official proceedings, such as a state dental board or provincial regulatory body investigation, on the same or substantially similar complaint.</p> <p>d. Subject to Disciplinary Proceedings B.3.f, below, the Investigating Committee shall file its report and non-binding recommendations as to a proposed penalty with the</p>					

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<p>Chairman of COMEJC within a reasonable time after notification of the complaint or membership issue.</p> <p>e. If the Investigating Committee determines that no disciplinary action is warranted or that membership should be maintained or granted, it shall notify the member, as the case may be, the member's constituent organization (in the case of active and retired members), the chairman of COMEJC, and Secretary-Treasurer of this Association. The notice to such member shall be in writing and sent via certified mail-return receipt requested.</p> <p>f. Public Statement Assurance: In the case of the first disciplinary complaint against a member involving public statements, announcements of services and promotional activities where the Investigating Committee has determined that the complaint constitutes a valid and actionable inquiry, the Investigating Committee may, in its sole and absolute discretion, elect to advise the member of its finding and obtain a written agreement from the member to cease the unethical activity and to waive any further right of appeal from, or challenge to, such finding and agreement. If the member enters into and complies with such an agreement, the Investigating Committee shall file its report as to such matter with the Chairman of COMEJC, and no disciplinary action shall be warranted in relation to the Public Statement, announcement of services or promotional activity that is the subject of such agreement. Notwithstanding the foregoing, in the event of a subsequent complaint against the same member involving any Public Statements, announcements of services and promotional activities where the Investigating Committee determines that the complaint constitutes a valid and actionable inquiry, this section (Disciplinary Proceedings B.3.f) shall be inapplicable, and the provisions Disciplinary Proceedings B.2.d and all other related provision of these Disciplinary Proceedings shall apply.</p>					

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<p>4. If the Investigating Committee determines that disciplinary action is warranted or that membership should be terminated or denied, COMEJC shall follow the procedures set forth below:</p> <p>a. Notice: The member <u>or applicant</u> shall be notified in writing of the charges including a statement containing all of the actions about which have been complained, including corresponding provisions of this Code that are alleged to have been violated, <u>in addition to a detailed explanation of the rationale for the decision shall be provided to the party or parties as well as</u> and his/her right to a hearing before three members of the COMEJC selected by the chairman thereof <u>who shall serve as the Hearing Committee</u> who shall not be members of the Investigating Committee (the "Hearing Committee") and who have no bias or conflicts in the matter as previously defined. The accused member shall be given the names, states/provinces of members of the Hearing Committee, and shall have the right to challenge any member on the basis of bias or conflicts. In the event of such a challenge, the Chair of COMEJC, in consultation with AAO executive staff, may determine if a conflict does, in fact, exist. Such notification shall be sent by certified mail, with receipted delivery, to the member's address of record. In the event that a conflict or that a COMEJC member is ineligible to serve on the Investigating or Hearing Committees, the Chair shall appoint an alternative COMEJC representative to serve in his/her place. In the event two alternate Council appointees are ineligible to serve, the Chair shall serve on the designated Committee. If the Chair is unable to serve, the AAO President shall appoint the Trustee Liaison to COMEJC or another AAO Trustee to serve on the Investigating Committee or Hearing Committee if the Trustee Liaison is ineligible. Such notification shall be sent by certified mail, with return receipt requested, to the member's address of record. The member shall be notified that he/she may request a hearing before the Hearing Committee in order to appear and may present evidence, and that he/she may be</p>					

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<p>represented by legal counsel, if desired, at his or her expense.</p> <p>The Hearing Committee may, at its discretion, suspend its proceedings if it becomes aware that the accused member is involved in litigation or other official proceedings, such as a state dental board or provincial governing body investigation, on the same or substantially similar complaint, <u>until a final determination has been made in that matter and any right of appeal has extinguished.</u></p> <p style="text-align: right;">Underline – COMEJC Addition Strikethrough – COMEJC Deletion</p>					
<p><u>18-23 COMEJC – Amendment to Policy – Disciplinary Proceedings, D. Resignation (Principles of Ethics)</u></p> <p>RESOLVED, that the Principles of Ethics, Code of Professional Conduct and Advisory Opinions of the AAO, page 17, lines 708-712 be amended as follows:</p> <p style="text-align: center;">DISCIPLINARY PROCEEDINGS</p> <p>DISCIPLINARY AND MEMBERSHIP PROCEEDINGS</p> <p>D. RESIGNATION:</p> <p>If a member who is the subject of a complaint or other disciplinary or membership action by this Association resigns <u>or is terminated for non-payment of dues at any time during the proceeding, the matter shall be dismissed will continue its disciplinary course with a recorded final decision. and the member may not thereafter reapply for any class of membership. If the member reapplies for membership in the Association in the future, the Council’s disciplinary decision will be imposed.</u></p> <p style="text-align: right;">Underline – COMEJC Addition Strikethrough – COMEJC Deletion</p>	Consent Adopt	Majority	Lisa Chandler to update policy.	N/A	

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<u>19-23 BOT (S1-SAO) Substitute for AAO Reserve Policy</u>	Rejected 31-31-0	N/A	N/A	N/A	N/A
<u>19-23 BOT - AAO Reserve Policy</u> RESOLVED, that the House of Delegates adopt the new policy on Reserves (See Attachment A), and be it further RESOLVED, that once approved by the House of Delegates, all previous reserve policies be sunset and all governance documents be updated to reflect the new policy on Reserves.	Adopted 62-1-1	Majority	Lisa Chandler to update policy	N/A	
<u>20-23 BOT - Amendment to Policy on Reserve - AAO Financial Policy</u> RESOLVED, that the House of Delegates approve the revised Financial Policy of the American Association of Orthodontists to correspond with the new policy on Reserves. <u>Financial Policy of the American Association of Orthodontists</u> IV. BUDGET A. The budget resolution shall be considered after all resolutions with financial impact (including any resolution concerning deficit spending) have been decided. 1. A majority vote shall be required to adopt a non-deficit budget. 2. A majority vote shall be required to adopt a deficit budget which is balanced by a dues increase. 3. A two-thirds (2/3) vote shall be required to adopt a deficit budget that will require funding with <u>undesignated net assets</u> . excess liquid reserves (i.e., the amount of liquid reserves greater than 75% of the total unrestricted expenses less extraordinary items, Excess Reserve Spending approved by the House of Delegates, Expenditures Funded by the Special Assessment and Annual Session Expenses per the independent auditor's	Adopted 64-0-0	Majority	Lisa Chandler to update policy	N/A	

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<p>report as reported on the most recent external public accountants' audit report).</p> <p>4. A three-fourths (3/4) vote shall be required to adopt a deficit budget that will require funding with liquid reserves greater than the amount of excess liquid reserve <u>operating reserves or special purpose funds.</u></p> <p>5. A deficit budget funded through a combination of a dues increase and use of liquid or excess liquid reserves <u>undesignated net assets, operating reserves or special purpose funds</u> shall require the higher of the voting thresholds as noted above.</p> <p>6. Liquid reserves <u>Available unrestricted net assets</u> are defined as cash and investments less total liabilities, less restricted cash and restricted investments.</p> <p style="text-align: right;">Underline – BOT Addition Strikethrough – BOT Deletion</p>					
<p><u>21-23 BOT – Amendment to AAO Reserve Policy (Standing Rules and Orders)</u></p> <p>RESOLVED, that the AAO Reserve Policy be amended as shown below in the AAO Standing Rules and Orders:</p> <p><u>AAO Standing Rules and Orders</u></p> <p>Reserves Policy 49-03 H – May 6, 2003 – Amended May 24, 2005 (15-05 H) – Amended May 8, 2006 (12-06 H) – Amended May 21, 2007 (04-07 H) Amended May 16, 2011 – Amended May 6, 2013 (05-13 H) Amended April 25, 2014 – Amended May 2, 2016 (24-16 H) – Amended May 6, 2019 (32-19 H) – Amended April 25, 2021 (21-21 H)</p> <p style="text-align: center;"><u>AAO Reserves Policy</u></p> <p>AAO shall maintain Liquid Reserves (1) equal to 75% of the average of the previous three years' operating expenses (2). This amount shall be deemed Target Liquid Reserves. Liquid Reserves in excess of Target Liquid Reserves shall be deemed Excess Liquid Reserves. This amount</p>	<p>Adopted</p> <p>64-0-0</p>	<p>Majority</p>	<p>Lisa Chandler to update policy</p>	<p>N/A</p>	

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<p>shall be reduced by appropriations, if any, to determine Unappropriated Excess Liquid Reserves.</p> <p>For purposes of this policy, the following definitions will be used:</p> <p>(1) Liquid Reserves: The lesser of the average of the previous 36 month end Liquid Reserves or the current month-end Liquid Reserves calculated as follows:</p> <p>_____ Cash and Investments at Month-End Market Value _____ Less: Restricted Cash and Investments at Month-End _____ Less: Total Liabilities at Month-End</p> <p>(2) Operating Expenses: Total Expenditures per the annual independent auditor's report _____ Less: Extraordinary Expenses per the independent auditor's report _____ Less: Excess Reserve Spending approved by the House of Delegates _____ Less: Expenditures Funded by Special Assessment _____ Less: Annual Session Expenses per the independent auditor's report</p> <p>When the lower of Actual Liquid Reserves at month-end immediately preceding the meeting of the House of Delegates or Average Liquid Reserves for the 12 month period immediately preceding each meeting of the House of Delegates exceeds Target Liquid Reserves by more than 2%, the Board of Trustees may recommend the House of Delegates approve a dues rebate of up to 50% of Excess Liquid Reserves. An approved dues rebate will be paid to AAO members as a credit against the upcoming year's dues on a pro-rate basis in accordance with each member's current membership classification. If payment by credit is not possible, the AAO will pay the rebate in the form of a check issued to the member.</p> <p>Liquid Reserves Policy 5-00 H — May 2, 2000 — Amended May 6, 2003 (18-03 H)</p> <p><u>AAO POLICY ON LIQUID RESERVES</u></p>					

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<p>The expenditure of liquid reserves, with the exception of capital expenditures up to \$25,000 per project shall require, in the absence of House of Delegates' direction, a 3/4 vote of the Board of Trustees.</p> <p>The purpose of AAO's liquid reserves are:</p> <ol style="list-style-type: none"> 1. To sustain basic operations and core member services during a short-term economic downturn. 2. To continue the operation of those activities designed as fee for service which maintain strong income over expense. 3. To sustain essential member services during a transition to a long term economic downturn. 4. To provide a source of capital for funding of capital expenditures. 5. To cover unbudgeted and extraordinary expenditures brought about by unanticipated challenges or opportunities for emergency funding, e.g., critical activities. 6. To provide the AAO with a source of capital for research and development of new products and services that have the potential to significantly benefit the members <p><u>Non-Liquid Reserves Unavailable Unrestricted Net Assets Policy</u> 6-00 H – May 2, 2000</p> <p><u>AAO POLICY ON NON-LIQUID RESERVES UNAVAILABLE UNRESTRICTED NET ASSETS</u></p> <p>The American Association of Orthodontists' "<u>non-liquid reserves</u>" <u>unavailable unrestricted net assets</u>, consisting of fixed assets (i.e., the 401 North Lindbergh Boulevard property and equipment) shall be used only to fund catastrophic expenses in the event that substantial "<u>liquid reserves</u>" <u>available unrestricted net assets</u> (cash and investments less accounts payable and other liabilities) may have to be expended. The Board of Trustees shall update annually and report both the depreciated value and market value of the <u>non-liquid reserves</u> <u>unavailable unrestricted net assets</u> to the House of Delegates at each annual session.</p> <p style="text-align: right;">Underline – BOT Addition Strikethrough – BOT Deletion</p>					

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<u>22-23 RMSO Amendment to the Manual of the House of Delegates - Head Delegate Chair</u>	Withdrawn	N/A	N/A	N/A	N/A
<u>23-23 BOT – Reduction of CAP Assessment</u>	Rejected 38-25-0	2/3	N/A	N/A	N/A
<u>23-23 BOT (S1-MSO) – Substitute for Reduction of CAP Assessment</u>	Consent Reject	N/A	N/A	N/A	N/A
<u>24-23 RMSO - CAP Assessment & Dues</u>	Withdrawn	N/A	N/A	N/A	N/A
<p><u>28-23 SAO – Consumer Awareness Program Task Force</u></p> <p>RESOLVED, that the Speaker of the House of Delegates appoint a Task Force in June of 2023 consisting of 1 delegate from each constituency, <u>selected by the constituency but not serving on the Council of Communications</u>, the Chair of the Council on Communications, the BOT liaison to the COC, the CFO and Director, <u>the VP of Governance and Membership, and the Director of Marketing and Communications. The BOT Liaison will serve as chair and a non-voting member of the Task Force, and be it further</u></p> <p>Resolved that this task force be charged with a comprehensive review of the Consumer Awareness Program, to include but not be limited to program structure, program effectiveness, funding level, and method of funding, and appearance on the member billing statement, and be it further</p> <p>RESOLVED, that this CAPTF report by February 15, 2024 to the House of Delegates for appropriate action by the 2024 HOD.</p> <p style="text-align: center;">Underline - GLAO Additions Strikethrough – GLAO Deletions Double Underline – SAO Additions Double Strikethroughs – SAO Deletions</p>	Adopted as Amended by SAO/GLAO 60-4-0	Majority	Speaker Hiller to appoint Task Force.	February 15, 2024	
<u>25-23 SAO - Consumer Awareness Program Defined</u>	Consent Reject	N/A	N/A	N/A	N/A

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
<u>25-23 SAO (S1-SAO) - Substitute for Consumer Awareness Program Defined</u> <u>RESOLVED, that the AAO Dues Statement, sent on June 1 annually, designate CAP funding as the Consumer Marketing fund, and be it further</u> RESOLVED, that the AAO Dues Statement, sent on June 1 annually , be modified to redefine the Consumer Marketing Fund as indicated by the asterisk to read: * The Consumer Marketing Fund partially funds the AAO’s Consumer Awareness Program (CAP), the only mass awareness campaign designed to educate consumers about the importance of seeing a specialist for orthodontic treatment Learn more at aaoinfo.org/cap , (see attachment) and be it further RESOLVED, that any references to “assessment” appearing in polices or documents related to the Consumer Awareness Program or the Consumer Marketing Fund be removed or changed to reflect current terminology. <p style="text-align: right;">Underline – SAO Addition Strikethrough – SAO Deletion</p>	Referred to Consumer Awareness Task Force. Adopted 42-20-0	Majority to Refer	CAPTF to review.	February 15, 2024	
<u>26-23 MSO - Delegate Housing at Annual Session</u>	Refer. See 26-23 MSO (S1-GLAO) for House action	N/A	N/A	N/A	N/A
<u>26-23 MSO (S1-GLAO) - Substitute for Delegate Housing at Annual Session</u>	Referred to the Special Committee on Constituent Collaboration (SC3) for further review. 61-3-0	Majority to Refer	SC3, BOT Liaison Dr. Ryan Frost & Staff Liaison Brandon Hackworth to review with committee.	February 15, 2024	
<u>27-23 NESO – Resident Stipend</u>	Refer. See 27-23 NESO (S1-GLAO)	N/A	N/A	N/A	N/A

TITLE	HOUSE ACTION	VOTE REQUIRED	ASSIGNMENT	REPORT DUE DATE	STATUS
	for House action				
<u>27-23 NESO (S1-GLAO) – Substitute for Resident Stipend</u>	Referred to the Special Committee on Constituent Collaboration (SC3) for further review. 60-4-0	Majority to Refer	SC3, BOT Liaison Dr. Ryan Frost & Staff Liaison Brandon Hackworth to review with committee.	February 15, 2024	