

**NATIONAL ACADEMY  
of  
CERTIFIED CARE MANAGERS**

**Continuing Education Provider  
Approval Process**



*Certifying knowledgeable, qualified, and ethical  
professional care managers*

# **NATIONAL ACADEMY OF CERTIFIED CARE MANAGERS**

## **CONTINUING EDUCATION PROVIDER APPROVAL PROCESS**

The mission of the National Academy of Certified Care Managers is to support a high level of competence in the practice of care management. NACCM believes in strengthening the education and training of care managers, encouraging participation in continuing education and professional development, and protecting and empowering consumers of care management through consumer education.

CMCs (Care Manager Certified) must renew their certification every three years. The renewal criteria include earning 45 contact hours of continuing education related to care management practice. NACCM does accept contact hours from other professional CE providers and provides an approval process for CE providers interested in offering programs for CMCs.

**This application is to become an NACCM CMC Continuing Education approved provider.** To apply for CE approval for a single event, please see Appendix B.

### **Provider Approval Criteria**

Educational offerings must:

1. Be no less than one clock hour in duration. A clock hour is 60 minutes of instruction time and does not include breaks, meals, social hours, welcomes or introductions.
2. Include clearly stated and measurable learning objectives that,
3. Maintain or advance the skills and/or knowledge of care managers, and address the content domains identified as the knowledge base needed by qualified care managers (see pages 5 - 6).
4. Allow sufficient time to present the topic in depth and detail for learners to meet the learning objectives.
5. Use presenters having sufficient knowledge of the topic area to meet the learning objectives.

CE providers must:

1. Provide participants with a vehicle to evaluate content, ability to meet learning objectives, environment, and speaker efficacy.
2. Provide each participant who completes a program with a certificate verifying that the program was completed. The certificate shall contain the provider's name and number, title of program, date of program, location, instructor, and number of contact hours.

3. Have a record keeping system for CE programs
4. Retain an attendance record with the signature of the participants for at least five years.
5. Retain all presentation documents for five years, including program title, description, learning objectives, presenter qualifications, location, date, number of contact hours, name and number of participants, participant evaluations, and certificates issued.
6. Have on record a description of how evaluation information is used to evaluate program quality and to plan future programs.
7. Maintain procedures for the identification of program topics, evaluation of content accuracy, and presenter performance.

NACCM reserves the right to audit providers' records at any time with 30 day notice.

### **Application Fees**

The initial application fee of \$500 includes approval of up to 40 hours of submitted programs, professional conferences, webinars, and online courses that meet the NACCM criteria for continuing education (as stated on page 1). For providers with more than 40 hours annually, the application fee is \$1000.

Once the initial application is approved, providers seeking approval for additional programs/conferences need only submit Sections 1 and 5 of the application and a \$50 fee.

Provider approval status is renewed every three years. Providers must submit a new application updating all their organizational information and educational programs.

If a provider is seeking CE approval for a single offering, please see Appendix B.

### **Application Process**

Organizations wishing to be approved as a NACCM CE provider must submit the information below along with check payable to NACCM. Online payment by credit card is also available.

NACCM, CE Approval  
3275 W. Ina Road, Suite 130  
Tucson, AZ 85741

Please retain a copy of your application for your files.

### Section 1

- Name and address of the organization.
- Description of the purpose of your organization;
- Length of time in business;
- Name of contact person for continuing education activities;

### Section 2

- Describe how topics are chosen (include how, who, how often and background of persons involved)
- Provide samples of educational programs such as brochure, objectives, faculty information, fees, evaluation forms etc.
- Outline the program content, objectives, teaching methods and amount of time for each topic.
- Describe how the NACCM domains are incorporated in the program;
- Provide a sample certificate of attendance;
- List the criteria and qualifications used to identify appropriate faculty;
- Describe how program evaluation information is summarized and used.

### Section 3

- How will the program(s) be marketed to care managers (give specific examples, resources etc);
- Describe the source(s) of funding for the continuing education program(s);
- Describe process for registering attendees, monitoring attendance and issuing certificates of attendance.
- Describe your process for notifying registrants when a scheduled presentation is canceled;
- Describe your system for refunding registration fees;
- Explain how participant complaints are processed;
- Outline criteria for granting partial credit to participants attending less than the total offering;

### Section 4

- Describe system for record keeping assuring compliance with above criteria.
- Indicate how and where records are stored, who has access to these records.

### Section 5

- Provide the name of the program/offering and participant objectives.
- Outline content and time for the program/offering. (E.g. Keynote speaker 9-10:30 am (1.5 contact hrs); course A is 10 contact hrs; week one is 5 contact hours; etc.).
- Indicate the date(s), location of the program/offering.
- Provide the name and qualifications of the speaker(s) or faculty.

Once the initial application is made, providers seeking approval for additional programs/offerings need only submit Sections 1, 2, and 5. Every three years all other sections must be updated.

NACCM will acknowledge receipt of the application. The NACCM Education Committee is responsible for reviewing these applications. Appendix A is one part of the review process and is provided here as a guide. NACCM will provide the results of the review in writing along with instructions for noting your provider status on certificates and marketing materials.

## **NACCM**

### **Content Domains and Care Manager Tasks**

*Continuing Education contact hours must address the content domains and care management tasks identified as the knowledge base needed by qualified care managers.*

#### **DOMAIN I - ASSESS AND IDENTIFY CLIENT STRENGTHS, NEEDS, CONCERNS, AND PREFERENCES**

1. Screen a potential client in order to determine the appropriateness of and eligibility for service
2. Conduct a comprehensive assessment of the client
3. Conduct an assessment of the client using standardized instruments
4. Conduct an assessment of the client's informal and formal support system
5. Assess the client's ability to participate in developing the care plan
6. Collect additional data by contacting relevant sources (e.g. physician(s), social support systems, and other care providers) in order to validate and expand the information obtained
7. Synthesize and interpret the assessment data
8. Document all intake and assessment information

#### **DOMAIN II - ESTABLISH GOALS AND A PLAN OF CARE**

1. Prioritize areas of concern in collaboration with client and support system in order to identify potential areas for intervention
2. Identify options and resources that address the areas identified for intervention
3. Discuss with the client the advantages, disadvantages, and costs of available/appropriate options and resources
4. Work with client/responsible party in order to establish mutually agreed upon goals
5. Develop action steps in order to achieve the agreed upon care plan goals
6. Develop a timeline for implementation
7. Document care plan

### DOMAIN III - IMPLEMENT CARE PLAN

1. Coordinate services and interventions
2. Communicate to the client and the client's support system the goals of the care plan
3. Obtain consensus of the client and client support system for the care plan
4. Document action steps taken related to the provision of services and progress toward goals

### DOMAIN IV - MANAGE AND MONITOR THE ONGOING PROVISION OF AND NEED FOR CARE

1. Monitor service delivery and intervention(s)
2. Perform periodic reassessment of client status
3. Evaluate client satisfaction with services
4. Evaluate progress toward goal achievement
5. Determine need for and make adjustments to care plan
6. Document monitoring activities and client status
7. Develop a process for termination of services
8. Document reasons for service termination in client record

### DOMAIN V – ENSURE PROFESSIONAL PRACTICE & SUPERVISION OF CARE MANAGEMENT

1. Promote client autonomy and right to self-determination
2. Recognize and respect diversity with respect to factors such as culture, religion, ethnicity, gender, sexual orientation, and socioeconomic status, in order to uphold client's value system, preferences, and choices
3. Adhere to standards of practice and professional codes of ethics and strategies for identifying and resolving ethical dilemmas
4. Document and analyze business practices, risk management strategies and financial metrics to ensure they are consistent with the standards of practice and code of ethics of the profession and to ensure quality and effective services administration to clients
5. Participate in peer review and/or clinical supervision
6. Develop knowledge of the principles of effective supervision of care management services and perform ongoing monitoring of supervised staff to ensure accountability, success, and self-efficacy

*Content domains, care manager tasks, and percentages were reviewed, updated, and approved by the Board of Directors on September 7, 2016.*

## Sample Continuing Education Topics

Acceptable topics include but are not limited to the following:

- human development, personality, behavior, systems, family, change, adult learning and crisis theory
- conflict resolution techniques
- time management techniques
- motivational techniques
- negotiation and mediation strategies
- problem solving techniques
- interpersonal relations
- communication techniques
- teaching and coaching techniques
- outcome measurement and quality assurance practices
- applicable standards of practice and ethical guidelines
- HIPAA
- informed consent
- professional liability
- legal and ethical issues
- appropriate record keeping and documentation
- writing goals that are specific, measurable, agreed upon, realistic, and time limited
- Reimbursement mechanisms such as health insurance, supplemental insurance, long-term care insurance, etc.
- entitlement programs such as Medicare and Medicaid, Veterans' Administration, SSD, SSI, and their eligibility requirements
- options for financing care such as reverse mortgages, equity loans, annuities
- health issues for individuals with chronic health concerns or disabilities
- techniques for administering and interpreting of structured cognitive screening tools (orientation, memory, and judgment), and behavioral, emotional, and life satisfaction assessment tools
- common medications relating to individuals with chronic health concerns or disabilities
- impact of diversity in areas such as culture, religion, ethnicity, gender, sexual orientation, and socioeconomic status on behavior, perceptions and value systems that relate to health care
- abuse, neglect, and exploitation issues

**Topics not accepted** include marketing and business topics, organization specific procedures or protocols, software training (e.g., MS Word, Excel, PowerPoint, Jewel Code etc.), use of electronics (e.g., phones, PDA, Blackberry, etc.), CPR, organizational meetings, and award ceremonies. This list is not all inclusive. Should you have a question about a specific topic or program, contact the NACCM office for clarification.

**NACCM**  
**Sample Continuing Education Provider Application Check List**

	Yes	No
1. Do the presenter's qualifications indicate adequate knowledge of the topic to meet the learning objectives?	<input type="checkbox"/>	<input type="checkbox"/>
2. Is the target audience clearly identified and described?	<input type="checkbox"/>	<input type="checkbox"/>
3. Is the topic appropriate to care management?	<input type="checkbox"/>	<input type="checkbox"/>
4. Is the presentation content current?	<input type="checkbox"/>	<input type="checkbox"/>
5. Is the content applicable to care management clinical practice?	<input type="checkbox"/>	<input type="checkbox"/>
administration?	<input type="checkbox"/>	<input type="checkbox"/>
education?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does the content summary adequately and logically orient the reviewer?	<input type="checkbox"/>	<input type="checkbox"/>
7. Is the content congruent with NACCM philosophy?	<input type="checkbox"/>	<input type="checkbox"/>
8. Is the method of presentation appropriate to the content? e.g., discussion, lecture, case study, group work	<input type="checkbox"/>	<input type="checkbox"/>
9. Is the method of presentation appropriate for the target audience?	<input type="checkbox"/>	<input type="checkbox"/>
10. Is knowledge of adult learning principles reflected in the provider(s) Application? e.g. measurable outcome objectives, applicability of content and participant involvement?	<input type="checkbox"/>	<input type="checkbox"/>
11. Is the schedule, group size and time frame appropriate to the content?	<input type="checkbox"/>	<input type="checkbox"/>



## **Continuing Education Single Event Approval Process**

To apply for CE approval for a single event, please submit the following information to [jwagner@naccm.net](mailto:jwagner@naccm.net) no later than 30 days prior to the event.

1. Date, time, and schedule of event
2. Description and learning objectives for session(s)
3. CV for presenter(s)
4. Sample certificate of attendance
5. Sample evaluation
6. Marketing materials

The fee for CE approval of a single event is \$100 per full day and \$50 per half-day. You pay by check or online with a credit card.

Please contact Julie Wagner, Director of Administration at [jwagner@naccm.net](mailto:jwagner@naccm.net) with any questions or for further information.