

**NATIONAL ACADEMY
of
CERTIFIED CARE MANAGERS**

CMC RENEWAL INSTRUCTIONS



*Striving to certify knowledgeable, experienced,
and ethical care managers*

POLICY

The National Academy of Certified Care Managers (NACCM) requires renewal of certification every three (3) years. The renewal process assures that the Care Manager Certified (CMC) maintains care management practice and continues to expand care management knowledge.

It is the responsibility of the CMC to submit the CMC Renewal Form and Continuing Education Summary Form(s) along with the renewal fee by the 15th of the month of expiration. (*E.g. Certification expires June 30th, renewal application due to NACCM June 15th*). Applications received after the renewal deadline are subject to a late fee. A candidate may submit a written request along with payment for a one-time extension of six (6) months.

If certification lapses for more than six (6) months, the CMC must re-apply, meet application criteria, pay associated fees, and sit for the examination.

Upon approval of the renewal application, a new certificate is mailed to the CMC.

Criteria for Certification Renewal

In order to renew, CMCs must:

1. Provide care management service as care manager, care manager supervisor, administrator of a care management program, or consultant to a care management program during the three year certification period.
2. Earn a total of 45 contact hours of continuing education over the three (3) year certification period (approximately 15 per year).
3. Participate in ongoing professional consultation/supervision and provide documentation of continuing education on the forms provided.

If unable to meet the above criteria, the CMC may renew by examination.

RENEWAL FEES

The following fees apply:

Application for certification renewal	\$195
*Late fee up to 90 days	\$75
*Late fee over 90 days	\$100
*Six month extension fee (must be requested in advance in writing)	\$100

**Late and extension fees are in addition to the application fee & non-refundable*

Payment may be submitted by check with the application or paid online through PayPal at www.naccm.net.

For **renewal by examination**, current exam fees will apply.

Refunds

If an applicant is found ineligible for certification renewal for any reason, the renewal fee will be refunded less a \$75 processing fee.

If an applicant withdraws their certification renewal for any reason, the renewal fee will be refunded less a \$75 processing fee.

REQUIREMENTS FOR RENEWAL:

Practice:

The CMC seeking renewal must be actively engaged in care management practice during the certification period in one or more of the following roles: direct care management practice, care manager consultation/supervision (as a leader or participant), administrator of a care management program or practice, consultant/educator regarding care management program development, professional consultation/supervision, quality assurance, or education.

The CMC's care management practice must include Content Domains and Care Manager Tasks (see list on pages 9-11).

Professional Consultation/Supervision:

NACCM views supervision as an ongoing process of consultation and performance appraisal for the purpose of maintaining and improving the quality of one's care management practice. Professional consultation/supervision may be conducted by professional peers, mentors, or supervisors in formal and/or informal arrangements. Activities may include face-to-face, individual, group or peer review of performance, record review or audit, case review, or client satisfaction survey/analysis. The content of professional consultation/supervision should include discussion of care management issues, ethical issues, care plan development and care management interventions, use of clinical skills, and core care manager functions. The supervision may be provided onsite, electronically, or via teleconference.

While NACCM does not require a specific number of hours per year for certification renewal, ongoing participation in professional consultation/supervision is required.

Continuing Education:

Certification renewal requires a minimum of 45 hours of documented continuing education throughout the three (3) years of certification.

Continuing education hours can be obtained either as a participant or a presenter of a program meeting NACCM criteria.

Continuing education content must be:

- At least one hour (60 minutes) in length.
- Related to the NACCM Content Domains and Task Statements (see pages 9 - 11). *Content areas may include but are not limited to those listed on page 12.*
- Presented by certified care managers or other licensed professionals, such as physicians, attorneys, social workers, nurses, psychologists, researchers, etc., in the field.
- Targeted to a professional audience (does not include networking groups, support groups, community or church groups, etc.).
- Offered in the context of a college level course, institute, seminar, workshop,

conference, or in-service training.

- Accrued during the three year certification period (approximately 15 hours per year).

While continuing education contact hours can be accrued through in-person or online events, in-person participation is encouraged whenever possible. Professional journal with a post-test and home study programs are accepted.

The following types of presentations do not meet the CE requirements stated above: marketing presentations, informational exchanges or networking activities, church groups, clubs, support groups, CNA/caregiver training, CPR training, etc.

Teaching*

CMCs may accrue continuing education hours by teaching at colleges and universities, institutes, seminars, workshops, and conferences. Verification of the content, and length (time) of the presentation must be provided. A presentation or course cannot be submitted more than once per year.

Curriculum Development*

CMCs may accrue continuing education credits for curriculum development activity, provided:

1. The course under development is at the college level; **and**
2. The course content is care management specific.

The curriculum development and course cannot be submitted for the same year and not more than once per year.

** Teaching and/or curriculum development may not exceed ten (10) contact hours per year during the certification period.*

Field Placements, Practicums, Peer Consultation/Supervision

Because of the variability of field placement requirements nationally, field

placement or practicum supervision does not meet the requirements of continuing education.

Supervisory sessions, peer consultation (telephonic or in-person), or case reviews do not count as continuing education and contact hours are not earned for these activities.

Calculating Contact Hours

In calculating the 45 contact hours of continuing education, the following guidelines apply:

- 1 contact hour = 60 minutes of classroom time
- 1 academic semester credit course = 15 contact hours

Introductory and closing remarks, business meetings, exhibits, networking meetings, support groups, breaks, meals, receptions, etc., will not be included in the computation of contact hours.

Proof of attendance

It is the responsibility of the CMC to maintain CE certificates or proof of participation on file. Submission of CE Certificates with renewal is not required for courses that are pre-approved by NACCM. CE Certificates are required for those courses that are not pre-approved by NACCM.

CMC must keep all documentation on file for three (3) years following submission of the renewal. NACCM reserves the right to conduct random audits to verify professional continuing education at any time during the certification period for which the renewal is requested.

Any one of the following are accepted forms of proof of attendance at or participation in an educational activity:

1. A photocopy of an official continuing education certificate or certificate of attendance that includes the CMC's name, the name, location and date of the program, the number of contact hours earned, and the name of the presenter or sponsoring organization.
2. The program agenda or syllabus, with the presenter's name and credentials,

the content or course objectives, location, dates, total number of hours attended, and the CMC's name.

3. A letter on the sponsoring organization's letterhead, giving the name of the program, presenter's name and credentials, content, location, dates, total number of hours attended, and the CMC's name.
4. A formal course transcript from an educational institution that includes CMC's name and passing grade(s).
5. A letter or other documentation verifying the teaching or curriculum activities, giving the CMC's name, program location, dates, subject taught, and total number of hours of instruction or curriculum development.

APPLICATION INSTRUCTIONS

Complete the CMC Renewal Form and Continuing Education Summary Form, providing all information requested and submit along with payment.

Continuing Education Summary Form

Please complete a separate *Continuing Education Summary Form* for each year of certification.

All documentation must be kept by the CMC for three (3) years following submission of the renewal. *NACCM reserves the right to conduct random audits to verify professional practice, professional consultation/supervision, and continuing education at any time during the certification period for which the renewal is requested.*

Please note that incomplete applications will delay processing of your renewal and potentially interrupt your period of certification.

Please mail, fax, or email the completed renewal forms along with payment to:

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

Fax: 520.325.7925

email: sgarcia@naccm.net

Payment may be submitted by check with the application or paid online through PayPal at www.naccm.net.

FAILURE TO MEET RENEWAL CRITERIA

Failure to fulfill the continuing education requirement by the renewal date renders the certification in suspension. All rights granted by NACCM are null and void until the requirement is fulfilled and a non-refundable late renewal fee is paid. The applicant has six (6) months from the date on the certificate to be reinstated. If not renewed within the six-month grace period, certification expires.

If the CMC cannot meet the practice and continuing education requirements for certification renewal, or if certification expires, the CMC must reapply for certification. This includes submitting the application and associated fees, sitting for, and passing the certification examination.

Revocation of Certification Policies and Procedures

NACCM is a certifying body that employs the use of a practice-related exam to determine that individuals who use the designation Care Manager Certified meet a minimum standard of experience and knowledge. This is done in an effort to protect consumers and contribute to the professionalization of the care management field.

Consistent with other certifying bodies, NACCM strives to promote and maintain the highest standards of service and conduct for all persons it has recognized and certified to use its certification mark of CMC. Implied in the use of this mark, individuals are expected to comply with:

All laws and requirements that govern their primary profession (when there is one, such as social work, nursing, psychology, etc);

Codes of ethics and standards of practice of any and all professional associations to which they belong related to care management service provision;

And to act in an ethical and professionally responsible manner toward clients, payers, and others who engage services or partner with the Care Manager Certified (CMC).

Misconduct leading to revocation of the CMC may include but is not limited to:

- Falsification of any information in the certification application process;
- Any irregularities in relationship to the testing process;
- Failure to maintain any eligibility requirements;
- Falsification of any information contained in the recertification process;
- Misrepresentation or misuse of certification status;
- Failure to pay initial or renewal fees;
- Revocation of a license in a primary profession;
- Actions that lead to limitations or sanctions imposed by another professional organization/association;
- Any illegal practices.

NACCM reserves the right to revoke the certification of any individual who is found and determined by its internal processes to violate any of the above and to publish certification revocations.

NACCM

Content Domains and Care Manager Tasks

Domain I. Assess and identify client strengths, needs, concerns, and preferences

1. Screen potential clients in order to determine the appropriateness of and eligibility for services and assist the client in making informed choices regarding care management.
2. Explain and discuss the role of the care manager, program parameters, and client rights and responsibilities in order to proceed with the structured assessment process.
3. Assess the client's situation by interviewing, observing where possible, and administering structured instruments, in order to collect data about the client's health and medical history, level of functioning, behavior, mental health, cognition, environment, finances, and formal and informal support system.
4. Verify assessment data by contacting relevant sources such as physician(s), social support systems, and other care providers in order to validate and expand the information obtained.
5. Synthesize and interpret the assessment data by reviewing all available information in order to identify areas of concern.
6. Document all intake and assessment information in order to create a client record for baseline data, statistical analysis, and for quality improvement measures.

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 service options and resources that address the areas for intervention, and discuss their advantages, disadvantages, and costs with the client in order to establish mutually agreed upon goals.
3. Develop action steps in order to achieve the agreed upon care plan goals.
4. Document care plan, including formal and informal providers and the frequency, intensity, duration, cost, and source of payment for services, in order to develop a baseline for tracking, accountability, and quality measurement.

Domain III. Implement care plan

1. Coordinate services and interventions by referring, educating, negotiating, and mediating with client and formal and informal providers in order to meet goals of care plan.
2. Counsel, educate, negotiate, and mediate with client and social support system in order to strengthen and sustain the social support system, identify health promotion behaviors, and meet goals of care plan.
3. Document referrals, coordination of services, and 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 delivery and quality of services and interventions provided in order to assure that agreed upon plan of care was implemented.
2. Perform ongoing monitoring and reassessment of client status and satisfaction with service in order to evaluate progress toward goal achievement, and determine need for and make adjustments to care plan.
3. Document monitoring activities and client status in order to record actions taken and progress toward goal achievement.

4. Discontinue services when client no longer needs or desires services, or becomes ineligible for services, and document discharge plan in client record.

Domain V. Ensure professional practice

1. Advocate for client autonomy by mediating between values and needs of consumer and society in order to preserve client 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 applicable ethical guidelines in order to maintain professional accountability and to protect client rights.
4. Work through ethical dilemmas by identifying the issue(s), consulting with an interdisciplinary team, and identifying strategies in order to preserve client rights and resolve the dilemma.
5. Evaluate and document care management services using tools such as peer review, record auditing, client satisfaction surveys, and grievance procedures and take corrective action in order to promote the quality of care management practice.

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.