CCM®

PACE™
Pre-Approved Continuing Education

PACE™ GUIDE
FOR PRE-APPROVAL

CCMC®
Commission for Case Manager Certification

CONTENTS

INTRODUCTION

The Commission for Case Manager Certification (the Commission) is committed to developing and maintaining exemplary standards of practice for professionals who practice case management. The Commission strives to elevate the quality of services provided to consumers so each professional take pride in his or her chosen field, and so each and every consumer receives services that enhance his or her vocational opportunities.

The Commission believes that CCM® board-certified case managers should continue to expand their skills to enhance the quality of the services they provide. The Commission's certification renewal requirements are designed to encourage CCM board-certified case managers to continue their professional education through the attainment of continuing education (CE) to help them serve their clients more effectively. Continuing education should enhance the knowledge of CCM board-certified case managers above and beyond that which is required for initial certification.

While certified individuals have the option to achieve certification renewal through passing the examination, continuing education is much more frequently used as a method of certification renewal. Those who choose to renew through continuing education are required to achieve eighty (80) contact hours within the five-year period of certification.

To maintain a high quality of continuing education opportunities, the Commission has a pre-approval process for continuing education programs. Organizations that provide continuing education are encouraged to seek pre-approval of their programs, which signifies to all CCM board-certified case managers that the programs are appropriate to use toward meeting the requirements of their certification renewal.

This guide is designed to describe the requirements and procedures involved for those organizations that wish to seek pre-approval of their programs.

Continuing education providers may not promote any activity as pre-approved by the Commission, or use the CE approval statement, until the activity has been formally approved and assigned an activity code and approval number.

APPLICATION CATEGORIES

The Commission provides two types of applications for continuing education approval for organizations: Standard and In-Service.

STANDARD

All continuing education providers can apply using the standard application. These are anything other than employee in-service programs and will appear in our PACE Directory upon approval.

1. Providers submitting standard applications will submit one application for each activity.

2. Providers pay one fee per application.

3. Approval, once granted, is for one year, beginning on the approval date of the application.

4. Activities, once approved, may be offered an unlimited amount of times within the specified approval period.

5. Retroactive approvals are not granted for any program at any time.

IN-SERVICE

The In-Service application category was designed particularly for employers providing in-service continuing education to their employees at no charge and will NOT appear in the PACE directory. (Example: a hospital providing employees with a regularly scheduled seminar series, at no charge to employees.) Orientation programs and programs on organizational policies can be approved for CE as long as the content is related to an identified professional gap.

1. In-Service applicants must submit one activity per application.

2. Approval, once granted, is for one year, beginning on the approval date of the application.

3. Activities, once approved, may be offered an unlimited amount of times within the specified approval period.

4. Retroactive approvals are not granted for any program at any time.

5. In-service activities may be considered a benefit and/or requirement of employment.

APPROVAL REQUIREMENTS

Regardless of the category under which an organization applies, the following requirements must be met.

1. The minimum CE amount that can be submitted for approval is .5 CE, or thirty (30) minutes in duration. The Commission only accepts quarter-hour increments i.e. .5, .75, 1.00, 1.25 CEs etc. The requested CE amount should strictly consist of instruction time and does NOT include introductions, coffee breaks, social hours, meals, etc.

2. The focus of the program must be to improve the participant's knowledge of or skill in the practice of case management.

   a. To be approved, a program must clearly meet one of the domain focus areas for continuing education, as outlined on pages 17-19.

   b. Content presented must be current and at a level that enables case managers to expand their skills to enhance the quality of the services they provide, helping them serve their clients more effectively.

c. Content must be balanced and free from any commercial bias.

3. Ineligible companies (defined as those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients - ACCME, 2020) may submit applications for pre-approval provided the content is non-biased and free from any promotion. All content from ineligible companies will be audited for compliance.

4. The purpose of the program must be clearly defined in terms of expected learning outcomes. Learning outcomes reflect what the learner will be able to do as a result of participating in the educational activity. These must describe significant and essential knowledge that learners will achieve and can reliably demonstrate at the end of a course or program.

5. The program must include an evaluation component completed by the participants. The extent to which the program met each of the stated learning outcomes must be included on the evaluation. The evaluation should also specifically ask how the activity will either be incorporated into or used in their practice.

6. It is the Commission's philosophical belief that all programs must be held in accessible, barrier-free locations so that no one with a disability is excluded from participation. The Commission strongly encourages all programs to comply with relevant federal, state/provincial, and local laws related to serving individuals with disabilities.

ETHICS APPLICATION

APPROVAL REQUIREMENTS FOR PACE ETHICS APPLICATION

To earn CEs in the ethics focus area, the provider must identify the ethical concepts and standards to be presented and how they are connected to the content in the course for which they are applying for pre-approval. **Documentation must include evidence of ethics and its practical application within the body of the activity to be demonstrated either by a comprehensive outline or copy of the presentation document to be submitted as part of the application.**

THE COURSE CONTENT MUST INCLUDE:

» Discussion of ethics as it relates to the CCMC Code of Professional Conduct **and** its practical application to the topic being presented. In the application, the provider will be asked to attest that these are included within the course content when applying for ethics approval.

ETHICS TOPICS INCLUDE, BUT ARE NOT LIMITED, TO:

» History and evolution of values and ethics in Case Management

» Ethics theories, codes, interpretation, and application

» Professional values, character, morals, and self-awareness about professional ethical behavior

» Ethical decision-making processes, models, and dilemma examples

» Ethical conduct

» Ethical/moral development

» Interprofessional collaboration and ethics

» Ethical practice, including multicultural issues, cultural competence, diversity

WARNING: The Commission reserves the right to monitor the programs and activities for which it has granted approval and to withdraw its approval from any program or activity that is offered or presented in a manner that is inconsistent with approval requirements.

PLEASE NOTE: If you would like to receive Ethics CE pre-approval and it is part of a larger course, then you must submit two (2) separate applications - one for the Ethics CE and one for the remaining CEs of the course. Certificate of Completion should include CCMC Ethics approval statement:

This program has been pre-approved by The Commission for Case Manager Certification to provide Ethics continuing education credit to CCM® board-certified case managers. The course is approved for ____ Ethics CE contact hour(s). Activity code: _____ Approval Number: _____

To claim these CEs, log into your CCMC Dashboard at www.ccmcertification.org

APPLICATION PROCESS

FINDING THE APPLICATION

The application can be found on the Commission's website: www.ccmcertification.org.
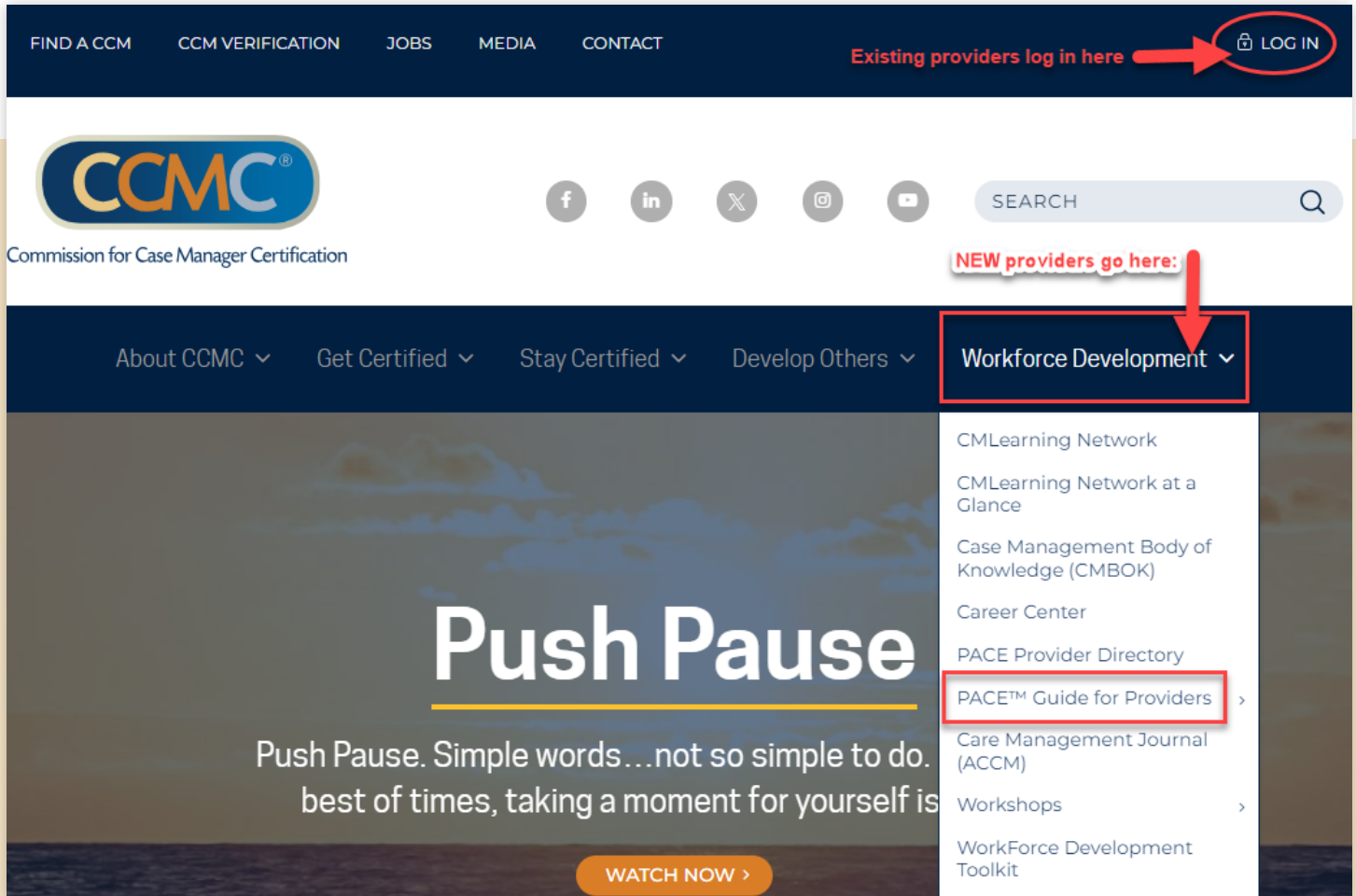
STEP 1

If you are an existing PACE provider, just log into your PACE account www.ccmcertification.org. by clicking on "LOG IN" at the top of the homepage.

New PACE providers hover over "Workforce Development" then choose "PACE Guide for Providers."

PACE™ Guide for Providers

Welcome to the PACE online application! To retain the valued CCM® credential, board-certified case managers must earn 80 hours in continuing education every five years, or re-take the challenging CCM exam. PACE is a simple, streamlined path for organizations to quickly reach case managers with pre-approved workshops, webinars, and continuing education coursework. Please refer to our **PACE Guide** for complete information about PACE, including details about the requirements & instructions on submitting a PACE application. Review our PACE Brochure, which highlights the benefits of pre-approval.

PACE GUIDE >

STEP 2

If you are a brand new provider and have not submitted a PACE application yet, choose the "NEW PACE PROVIDER" button.

If you are a CCM with us and submitting a PACE application for the first time, choose the "I'M A CCM & A NEW PACE PROVIDER" button to login with your CCM dashboard credentials.

For Existing PACE Providers

If you have **already submitted a PACE course** in our system, simply login to your account to submit new applications, manage your course locations, dates and times, and check the status of your applications.

To renew a course, please select "My PACE Courses." You will only have the option to renew your course(s) if you have previously submitted courses through our online PACE application. You may download our PACE seal of approval on your pre-approved course promotional materials.

LOGIN TO MY PACE ACCOUNT >   **PACE RENEWAL GUIDE >**

DOWNLOAD PACE SEAL OF APPROVAL >   **TOOLS TO NAVIGATE THE COVID-19 PANDEMIC >**

IMPORTANT: After receiving your approval letter from the Commission, you must make sure that the certificates issued reflects the correct dates, approval statement, and activity codes/approval numbers issued by the Commission.

For New PACE Providers

If you are **brand new to the PACE program** & have not submitted a PACE application yet, please select one of the buttons below to get started. CCMs, please choose the second button below to log in with your CCM dashboard credentials.

NEW PACE PROVIDER >

I'M A CCM & A NEW PACE PROVIDER >

COMPLETING THE APPLICATION

Once the application is open, you will have the option to either fill out your company profile or log into your account. Please be sure to complete all parts of the online application.

New PACE Applicant

First Name*

Last Name*

Company ID

Company (If Not Found Above)

Address Line 1*

Address Line 2

City*

State*

Choose a State or Province ▼

Zip Code*

Email Address*

Work Phone*

SUBMIT   RESET

STEP 3

New applicants to the PACE online system will be prompted to fill out their company information. If you are a new submitter for a company, you can choose the magnifying glass to see if your company is already stored in the system. Once you fill out all of the company information, please click "Submit."

If you choose " I AM A CCM & A NEW PACE Provider," you will be directed to fill out your employer information and choose "Submit."

CCM and New PACE Applicant

Select Existing Employer

ⓘ Or... Enter your employer if it was not found in the list above

Employer Name:

Enter Employment Information

Title:

Long Title:

Title Category:
Choose Any Title Category ▼

Function:
Choose Any Function ▼

Start Date:

End Date:

Hours/Week:

Remark:

SUBMIT

1. Ethics Course?

2. Course Information

3. Course Offerings & Learning Outcomes

4. Additional Questions

5. Uploads

Review

Please indicate below whether this is an ethics or a general CE course. If you choose "Ethics CE" you will be required to attest that the course meets the ethics criteria on the following page.

🏴 Course content for ethics approval must include a discussion of ethics as it relates to the CCMC Code of Professional Conduct **and** its practical application to the content being presented. For more information on the ethics guidelines, please refer to page 4 of the **PACE Guide**.

Application is for:*
○ Ethics CE
○ General CE

Save

Reset

STEP 4

Please refer to the following screen shots for each section of the application. Be sure to complete all *required fields.

1. Please indicate whether this is an ethics or a general CE activity.

2. If you are applying for ethics pre-approval and choose "Ethics CE," you will be directed to the attestation page below and will need to attest that the content meets the criteria for ethics before proceeding to the next section.

** PLEASE NOTE: If you would like to receive Ethics CE pre-approval and it is part of a larger course, then you must submit two (2) separate applications - one for the Ethics CE and one for the remaining CE for this course. For this application, enter the amount of Ethics CE only.

1. Ethics Course?

Ethics Attestation

2. Course Information

3. Course Offerings & Learning Outcomes

4. Additional Questions

5. Uploads

Review

Ethics Attestation

Ethics course content must include a discussion of ethics as it relates:

1) to the CCMC Code of Professional Conduct and
2) its practical application to the content being presented.*

☐ I Attest

Next

If you choose "Ethics CE" you will be taken to the Ethics Attestation page and will be required to attest that the content meets the ethics criteria as outlined. (This is based on the CCM Code of Professional Conduct.) The "I attest" check box must be checked in order to proceed to the next page.

STEP 5

Be sure to complete all *required fields.

1. Type of Instruction:
   - Meeting, Seminar, Workshop, or Webinar - Live (delivered in real time)
   - Seminar, Workshop, or Webinar - On-Demand (previously recorded)
   - Written/printed (enduring)
   - College/University Course
   - Conference (Live In-person)
   - Conference (Live Virtual)
   - Conference (Hybrid - In-Person, with live and/or recorded virtual sessions)
   - Conference (Recorded virtual)

2. Application Category (In-Service $50 or Standard $125)

3. CE Credits Requested (We do not accept any CEs under .5 and only accept quarter increments)

4. Date of Offering (Applications submitted 10-19 business days prior to date of offering are subject to a $125 priority fee)

5. Word/Test Questions Count - only required for written/printed (enduring) material

6. Does the number of credits requested include only educational content? "Yes or No." **Please note that credit is not awarded for introductions, breaks, or meals.**

7. Program Name

8. Domain Focus (check all that apply)

9. Course Description (this could be just a brief description about the course)

10. Please describe how this activity will improve the professional practice for the attendee.

---

1. Ethics Course?

2. Course Information

3. Course Offerings & Learning Outcomes

4. Additional Questions

5. Uploads

Review

Course Information

Type of Instruction*
[Select One ▼]

Application Category*
[Select One]

CE Credits Requested -- Only Accept Quarter Increments*
[   ]

Date of Offering *(please note that applications submitted 10-19 business days prior to date of offering are subject to a $125 priority fee)**
[   ]

Word Count - Only required for written/printed (enduring) material
[   ]

Test Questions Count - Only required for written/printed (enduring) material
[   ]

Does the number of credits requested include only educational content?*
[Select One ▼]

⚑ Credit is not given for introductions, breaks, or meals.

Program Name*
[   ]

Domain Focus*
☐ Care Delivery and Reimbursement Methods
☐ Psychosocial Concepts and Support Systems
☐ Quality and Outcomes Evaluation and Measurements
☐ Rehabilitation Concepts and Strategies
☐ Ethical, Legal, and Practice Standards

Course Description
[   ]

Please describe how this activity will improve the professional practice for the attendee*
[   ]

[Save]

[Reset]

STEP 6

Be sure to complete all *required fields.

1. Under "Manage Offerings," please choose the "CLICK HERE-MANAGE OFFERING" button.

Manage Offerings *

Please fill out required course information by clicking the link below before saving this page. Then, choose "add a new course offering".

Click Here - Manage Offering

Learning Outcomes

A minimum of three (3) learning outcomes are required for all activities. Learning outcomes will be what the learner will do after this activity (active), not what the presenter will do (passive). Outcomes must include one of these action verbs.

Learning Outcome #1*

Left navigation:
1. Ethics Course?
Ethics Attestation
2. Course Information
3. Course Offerings & Learning Outcomes
4. Additional Questions
5. Uploads
Review

Course Offerings

Please add all program course offerings below. Multiple dates can be added if the program will be offered again after the initial date.

add a new course offering ←

No offerings have been set up for this course yet.

2. Once you click on "Manage Offering," a new tab will populate on your browser. Click on "add a new course offering."

Course Offering Information

Instructions
For standard approval courses, please make sure all relevant fields below are filled out in their entirety so that the offering is displayed properly in the PACE directory.

Course Date *
03/11/2024
Use either "MM/DD/YYYY" or "MM/DD/YYYY HH:MI AM" date formats.

Address Line 1

City

State
- select a state -

Province

Postal Code

Country
- select a country -

Fee
Enter numeric value only.

Course Registration Link

Special Instructions

Is this an Online Program?

All of this information will be populated in CCMC PACE Directory.

3. This pop-up box appears to complete the course offering. The course date is automatically populated for the initial offering based on the date entered in the Course Information section.

Be sure that **all mandatory and any relevant fields are completed in their entirety** so that the offering is displayed properly in the PACE directory.

For written/enduring programs, please select "Yes" for the field that asks if the activity is an online program. You will then be asked to put in the last date that the course will be available.

Managing course offerings after the course has been approved: After you have added the information about this course and you have additional offerings in the future, from your CCMC account choose "Manage Offerings for PACE Courses" to list the rest of them. Please note this option is only available after the application has been approved. You will then select the course from the drop down menu first and then choose "add a new course offering" to add the course offering information. The same pop up box will appear from step #3 to complete. All of this information is going to be displayed on our PACE Directory for standard approval courses (https://ccmcertification.org/pace-provider-directory)

4. Once you have added all your course offerings, you can then edit them if needed by clicking on the pencil icon after the offerings are saved. To go back to the application, exit out of the offerings tab on your browser.

5. Please include at least 3 *Learning Outcomes.* If you have more than 10 Learning Outcomes, you will be able to include them in the next section of the application under Promotional Materials. (Outcome: A written statement that reflects what the learner will be able to do as a result of participating in the educational activity. The outcome addresses the educational needs (knowledge, skills, and/or practices) that contribute to the professional practice gap and achieving the learning outcome results in narrowing or closing that gap. Courses should be planned with a measurable learning outcome in mind. *Objectives* are used to organize specific topics or individual learning activities to achieve the overall *learning outcome.* The learning outcome is identified from the gap analysis. The learning outcome is a reflection of the desired state.)

Manage Offerings *
Please fill out required course information by clicking the link below before saving this page. Then, choose "add a new course offering".
Click Here - Manage Offering

Learning Outcomes
A minimum of three (3) learning outcomes are required for all activities. Learning outcomes will be what the learner will do after this activity (active), not what the presenter will do (passive). Outcomes must include one of these action verbs.

Learning Outcome #1*

Learning Outcome #2*

Learning Outcome #3*

Learning Outcome #4

Learning Outcome #5

Learning Outcome #6

Learning Outcome #7

Learning Outcome #8

Learning Outcome #9

Learning Outcome #10

Does the evaluation measure the learning outcomes?*
Select One

Save

Reset

STEP 7

Be sure to complete all *required fields

1. Does the Certificate of Completion contain our approval statement? Please choose Yes or No.

2. How does a participant enroll in your program? (example: website, email or phone)

3. To what other organizations have you applied for pre-approval of this program? (Example: RN Board of Nursing, CRCC, CDMS)

4. What is the location of your program if it is a live event?

1. Ethics Course?

2. Course Information

3. Course Offerings & Learning Outcomes

4. Additional Questions

5. Uploads

Review

> Does the Certificate of Completion contain the following approval statement: "This program has been pre-approved by The Commission for Case Manager Certification to provide continuing education credit to CCM board certified case managers."*

Select One ▼

> How does a participant enroll in your program?*

> To what other organizations have you applied for pre-approval of this program?*

> What is the fee to participants for the program?

> What is the location of your program if it is a live event? Please enter N/A for home study and internet programs.*

> What value/benefit do you receive from the PACE program?

> How did you hear about us?

> If you have a promotion code, enter it here:

SAVE

RESET

STEP 8

Be sure to complete all *required fields

1. Upload a copy of the Certificate of Completion
2. Upload a copy of the Participant Evaluation Form
3. Upload a copy of the Promotional Material – this should include the detailed outline/agenda of the course.

PLEASE NOTE:

- *If you are requesting for ethics approval, you are required to upload a comprehensive outline or a copy of the presentation.*
- *If you are submitting an application for written or enduring material, you must upload the post-test.*
- *If you are using Pilot Study as the method for calculating CEs, you are required to upload the completed pilot study forms from a minimum of six (6) subject matter experts.*

STEP 9

This is your chance to review your application. Please use the left side navigation bar to go back and correct any section of the application. If you are satisfied with your application, select "Submit and Pay" on the left side navigation bar. The "Submit and Pay" option will only be visible if your application is completed in its entirety.

Documentation /Attachments to be submitted in the "Uploads" section of the Application

You are required to include the following items in your application:

1. *Certificate of Completion* – See page 15 for example. The certificate of completion that you provide to your participants must include:

   a. Participant's name

   b. Name and date of the course

   c. Number of credits awarded

   d. Provider organization name

   e. Title, name and signature of an authorized representative from your organization

   f. The Commission's approval statement with approval number, activity code, and CE amount (see page 15).

   g. Retention statement, which indicates to the participants how long they must keep the certificate in case of audit. The Commission's retention statement policy is that documents must be retained for one year past the participant's CCM board-certified case manager's renewal date.

2. *Program Evaluation* – See page 16 for example. This is a copy of the evaluation your participants will be required to complete at the end of the activity to receive credit. You may use any evaluation method that is appropriate for your organization or program. *Evaluations must include participant assessment of the program's success at meeting stated learning outcomes* and the value of the program to the participant's practice of case management (specifically "Will you change your practice based on this knowledge?" or "How will this activity impact your practice?"

3. *Program Promotional Materials* – See page 15-16 for example. This shows our reviewers how the information about your program is being communicated to the public and your target audience. Must include:

   a. Name of organization

   b. Title of program

   c. Outline and/or agenda for the program (include a detailed schedule for the activity)

   d. Program goal(s)

   e. Learning outcomes

   f. Target audience

   g. CE information - When creating and submitting your promotional materials you may add, *"This program has been submitted to The Commission for Case Manager Certification for approval to provide board-certified case managers with _____ contact hour(s).*

FINAL STEP: PAYMENT

We accept Visa, Mastercard, American Express or you may choose to pay by check. Please be aware that we do not review any application until payment is received.

Option 1 - Credit Card

The preferred method of payment is by credit card. The Commission accepts MasterCard, Visa, and American Express. All credit card payments are processed securely. When paying by credit card, be sure to enter your information as requested on the payment portion of the application. You will be able to print your receipts after the payment section in the application.

Option 2 – Check

You also have the option of paying by check. Checks must be made payable to Commission for Case Manager Certification. A service fee of $35 will be assessed for checks returned for insufficient funds or for charges made to closed accounts. Please send all checks to:

Commission for Case Manager Certification
1120 Route 73, Suite 200
Mount Laurel, NJ 08054

If you choose to pay by check, please print either the checkout screen or the email confirmation that you will receive and send it in with the check and then choose "Mail a Check Payment" at the checkout screen. Please do not send an application with the check.

PROGRAM REVIEW FEES

Review fees are calculated according to the category under which an organization applies and under which they are qualified.

Category or Application Type	Fee*
Standard Approval Category	$125 per Program/Activity
Employers Providing In-Service Education	$50 per Program/Activity
Additional Priority Fee**	$125 per Program/Activity

*All fees are non-refundable.

**An additional priority fee of $125 is charged to all organizations requesting rush processing of their application; this applies to any application submitted 10 to 19 business days prior to the date of offering. Applications submitted less than 10 business days in advance of the date of offering will not be accepted. *No retroactive approvals are processed at any time. No exceptions.*

HELPFUL HINTS FOR GETTING IT RIGHT

» To avoid paying the priority fee, allow enough time to complete, submit, and remit payment for your application. If you are submitting a check for payment, make sure to submit the application and that the check is received 20 business days or more in advance to allow for enough time for payment to be processed once it reaches the Commission's National Office.

» The Commission will communicate with you via the email address you provide on your application. Please be sure to add pace@ccmcertification.org to your safe senders' list to ensure you receive all communication.

CERTIFICATE OF COMPLETION

As a provider of a continuing education activity that has been pre-approved for credits for board-certified case managers, you must provide to each attendee of your event a Certificate of Completion. This documentation allows the participant to submit the credits earned from your organization's activity for renewal of their credential.

The Certificate of Completion must include:

» Approval statement – assigned to the activity that has been approved. This statement is in the approval letter which you will receive after your program has been reviewed and approved.

   a. The Commission Approval Statement (also provided in your approval letter)
This program has been pre-approved by The Commission for Case Manager Certification to provide continuing education credit to CCM® board-certified case managers. The course is approved for _____ CE contact hour(s).
Activity code: _____ Approval Number: _____
To claim these CEs, log into your CCMC Dashboard at www.ccmcertification.org.

» If applying for Ethics CEs, please see the following approval statement that should appear on the certificate:

   a. *This program has been pre-approved by The Commission for Case Manager Certification to provide Ethics continuing education credit to CCM® board-certified case managers. The course is approved for _____ Ethics CE contact hour(s).*
Activity code: _____ Approval Number: _____
**Assigned activity code and approval number should be added to your Certificate of Completion

ONLY after you have received your approval letter from the Commission. (Please note that the activity code starts with a capital letter followed by eight numbers). You may also include the PACE seal of approval.

» Activity descriptors – name of activity, location, and date (if applicable).

» Attendee's name

» Credit amount

» Provider organization name

» Name, title and authorized signature of appropriate person in your organization

Incorrect information distributed to participants will delay the processing of their continuing education credits. The Certificate of Completion is distributed only to those board-certified case managers who have successfully completed the activity.

WARNING: The Commission reserves the right to monitor the programs and activities for which it has granted approval and to withdraw its approval from any program or activity that is offered or presented in a manner that is inconsistent with approval requirements.

RECORD RETENTION:

Each organization approved by the Commission to offer continuing education must maintain the following records, for each approved activity, for a period of five (5) years.

» Course outline (including all dates and locations given, or time(s) offered online)

» Resume, CVs or biographical information for all presenters and/or authors

» Participant list

» Completed Evaluations

» Record of certificates issued

Each provider is required to have written policies, available upon request, which outline refund and cancellation policies.

PROMOTIONAL MATERIALS

Acceptable formats include but are not limited to email invitations, printed brochures and promotional copy on your organization's website.

All promotional materials must include the following:

» Name of organization

» When, where, and how to register for the program

» When and by what means a certification of completion will be issued to participants

» Provider contact information

» Presenter / Speaker biographical information

- » Program Goal(s) includes your target audience

  - » *To educate CCM® board-certified case managers… (should capture the basic premise of your activity)*

- » Agenda - include times and information

  Example:

7:30 - 8:30 a.m.	Registration and Breakfast
8:30 - 9:30 a.m.	Introduction and Overview
9:30 - 10:30 a.m.	Speakers Name and Topics Covered

* Please note that CEs are not awarded for introductions, breaks, or meals.

- » Learning outcomes listed in terms of what the attendee should be able to do as a result of having completed this activity. Should be listed in objective, observable terms. *Example:*

  At the close of this activity, participants will be able to:

  - » *Recognize the relevance of communication as an essential component of effective case management*

  - » *Identify the guiding principles of motivational interviewing*

- » CE information – When creating and submitting your promotional materials you may add, *"This program has been submitted to The Commission for Case Manager Certification for approval to provide board-certified case managers with _____ contact hour(s).*

  You may also add the PACE seal of approval, letting the CCMs know it is pending approval from CCMC. You can download it here.

NOTE: The Commission reserves the right to deny or delay processing of your continuing education application if a brochure or other promotional material is not included as part of your application.

EVALUATION

Must include the following:

- » Name of Program

- » Personal information (to be completed by attendees)

  Example: "Please enter your personal information below. This information will be used for the purposes of distributing CCM credit to you once you have completed the evaluation."

  - » Name

  - » Company

  - » Address, City, State, Zip

  - » E-mail Address

  - » Phone Number

- » Evaluation of program content must measure:

1. How well content met the stated learning outcomes. **Each learning outcome listed in your promotional materials must be measured individually.**

2. Effectiveness of speakers/presenters (if applicable)

3. Overall effectiveness of program content, including

   - » Timeliness & relevance of content

   - » Was the information presented free from commercial bias?

   - » Was technology user-friendly and appropriate to support participant learning (if applicable)

   - » Question regarding how the activity will change or impact personal practice

4. General participant feedback that your organization wishes to capture

NOTE: The Commission reserves the right to deny or delay processing of your application if the evaluation is not included as part of your application.

GUIDELINES FOR CE OFFERED SOLELY THROUGH WRITTEN MEANS (ENDURING MATERIAL)

Enduring material is a printed CE activity that may be used over time and which, in itself, constitutes a planned activity. In an enduring activity the provider creates the content.

AWARDING CONTACT HOURS

Contact hours are determined in a logical and defensible manner. Contact hours are awarded to participants for those portions of the educational activity devoted to the learning experience and time spent evaluating the activity. The method may include but is not limited to complexity of content (Mergener's formula) or pilot study.

One contact hour = sixty minutes. If rounding is desired in the calculation of contact hours, the provider should round to the nearest quarter.

For enduring materials based on complexity of content, the method for calculating the contact hours will use the Mergener formula. The Mergener formula allows for a method of assigning CEs based on the estimated time it takes to complete an Independent Study Learning activity – reading the learning activity content and completing the learner assessment.

The formula is based on the number of words in the text, the number of learner assessment questions and a subjective assessment of the difficulty level of the content using a 5-point Likert scale (use link above to calculate). The word count is to include only the content of the learning activity. The title, author information, references, and other non-

content information is not to be included.

When applying for CE based on the Mergener formula, a copy of the posttest must be uploaded into the application into the "Uploads" section under "Additional Materials."

For purposes of determining the degree of difficulty, please use the following definitions:

Very Easy: The subject area is generally familiar, and the content is generally less complex for the target audience.

Somewhat Easy: The portion of the subject area is generally familiar, and a portion of the content is somewhat less complex for the target audience.

Moderate: The familiarity of the subject area and the complexity of the content would be average for the average member of the target audience.

Difficult: A portion of the subject area is unfamiliar, and a portion of the content is complex for the target audience.

Very Difficult: The subject area is unfamiliar, and the content is complex for the target audience.

Target audience definitions:

» Entry level knowledge and skills in subject area

» Average knowledge and skills in subject area

» Advanced knowledge and skills in subject area

An alternative method to determine CEs for enduring materials can be via a Pilot Study. Participants in a pilot study assist in determining the length of time required for completing an educational activity so the number of contact hours to award can be calculated. Those participants may be awarded contact hours once the number is determined.

The Pilot Study must be conducted prior to approval of CEs, must include a minimum of 6 subject matter experts to determine course timing and the completion of the pilot study form. Completed forms are submitted back to CCMC and uploaded into the "Uploads" section of the PACE application for determination of CE amount.

DOMAIN FOCUS AREAS FOR CONTINUING EDUCATION

The following constitute the domain focus areas that are appropriate for continuing education for case managers. The list below denotes the domain and sub-domain focus areas on the CCM exam. Your organization's continuing education program must fit within one or more of these categories, be current and at a level of knowledge expected of individuals who have already passed the CCM exam.

CARE DELIVERY AND REIMBURSEMENT METHODS

Accountable Care Organizations

Adherence to care regimen

Alternative care facilities (e.g., assisted living, group homes, residential treatment facilities)

Alternative care sites (e.g., non-traditional sites of care, telehealth, virtual care)

Case management models, process and tools

Caseload considerations

Coding methodologies (e.g., Diagnosis-related group, Diagnostic and Statistical Manual of Mental Disorders, International Classification of Diseases, Current Procedural Terminology)

Collaborative/comprehensive/integrated/holistic case management services

Continuum of care/continuum of health and human/social services

Cost containment principles

Differences in and application of age specific care

Factors used to identify client's acuity or severity levels

Financial resources (e.g., waiver programs, special needs trusts, viatical settlements)

Goals and objectives of case management practice

Healthcare delivery systems

Hospice, palliative, and end of life care

Insurance principles (e.g., health, disability, workers compensation, long term care)

Interdisciplinary/interprofessional care team (ICT)

Levels of care and care settings

Life span considerations

Managed care concepts

Management of clients with acute and chronic illness(es)

Management of clients with disability(ies)

Medication safety assessment, reconciliation and management

Military and veteran benefit programs (e.g., TRICARE and Veterans Administration)

Models of care (e.g., patient-centered medical home, health home, chronic care)

Negotiation techniques

Physical functioning and behavioral health assessment

Population health

Private benefit programs (e.g., pharmacy benefits management, indemnity, employer-sponsored health coverage, individual-purchased insurance, home care benefits, COBRA)

Public benefit programs (e.g., SSI, SSDI, Medicare, Medicaid)

Reimbursement and payment methodologies (e.g., bundled payment, case rate, prospective payment systems, value-based care, financial risk models)

Roles and functions of case managers in various care/practice settings

Roles and functions of other providers in various care/practice settings

Transitions of care / transitional care

Utilization management principles and guidelines

PSYCHOSOCIAL CONCEPTS AND SUPPORT SYSTEMS

Abuse and neglect (e.g., emotional, psychological, physical, financial)

Behavioral change theories and stages

Behavioral health concepts and symptoms (e.g., diagnosis, dual diagnoses, co-occurring disorders, substance use)

Client activation and readiness to change

Client empowerment

Client engagement

Client self-care management (e.g., self advocacy, self-directed care, informed decision making, shared decision making, health education)

Client support system dynamics

Community resources (e.g., elder care services, transportation, fraternal/religious organizations, meal delivery services, pharmacy assistance programs)

Conflict resolution strategies

Crisis intervention strategies

Gender health (e.g., sexual orientation, gender expression, gender identity)

Health coaching and counseling

Health literacy

Interpersonal communication (e.g., group dynamics, relationship building)

Interview tools and techniques (e.g., motivational interviewing)

Multicultural, spiritual, and religious factors that may affect the client's health status

Psychological and neuropsychological assessment

Psychosocial aspects of chronic illness and disability

Resources for the uninsured or underinsured

Social determinants of health

Supportive care programs (e.g., support groups, pastoral counseling, disease-based organizations, bereavement counseling)

Wellness and illness prevention programs, concepts, and strategies

QUALITY AND OUTCOMES EVALUATION AND MEASUREMENTS

Accreditation standards and requirements

Cost-benefit analysis

Data interpretation and reporting

Evidence-based care guidelines related to case management

Health care analytics (e.g., health risk assessment, predictive modeling, Adjusted Clinical Group)

Program evaluation and research methods

Quality and performance improvement concepts

Quality indicators techniques and applications

Sources of quality indicators (e.g., Centers for Medicare and Medicaid Services , URAC, National Committee for Quality Assurance, National Quality Forum, Agency for Healthcare Research and Quality, National Quality Strategy)

Types of quality indicators (e.g., clinical, financial, productivity, utilization, client experience)

REHABILITATION CONCEPTS AND STRATEGIES

Adaptive technologies (e.g., text telephone device, teletypewriter, telecommunication device for the deaf, orientation and mobility services)

Functional capacity evaluation

Rehabilitation concepts (e.g., medical rehabilitation, substance use rehabilitation, vocational rehabilitation, return to work strategies)

Rehabilitation post hospitalization or acute health condition

Vocational and rehabilitation service delivery systems

Vocational aspects of disability(ies) and illness (e.g., job analysis and accommodation, life care planning)

ETHICAL, LEGAL, AND PRACTICE STANDARDS (SEE SPECIFIC CRITERIA FOR ETHICS APPLICATIONS)

Case recording and documentation

Ethics related to care delivery (e.g., principles, advocacy, experimental treatments, end of life, advance directives, refusal of treatment/services)

Ethics related to professional practice (e.g., cultural and linguistic sensitivity, code of professional conduct, veracity)

Health care and disability related legislation (e.g., Americans with Disabilities Act, Occupational Safety and Health Administration regulations, Health Insurance Portability and Accountability Act, Affordable Care Act, HITECH Act)

Legal and regulatory requirements applicable to case management practice

Privacy and confidentiality

Risk management

Self-care, safety and well-being as a professional

Standards of practice (e.g., Case Management Society of America Standards of Practice for Case Management, National Association of Social Work Standards for Case Management)

WHAT WON'T BE APPROVED

Any program that is drug or product-based

Vendor fairs/exhibitor booths

Any courses designed to prepare individuals to take the CCM exam

Incomplete applications

Applications received without payment

Retroactive courses and enduring material – we cannot post-approve learning activities at any point in time. **No exceptions.**

Applications received less than 10 business days (two calendar weeks) before date of offering

FREQUENTLY ASKED QUESTIONS

Q. HOW CAN I GET MY ORGANIZATION'S PROGRAM APPROVED FOR CCM BOARD-CERTIFIED CASE MANAGERS?

A. Submit your application with payment at least 20 business days (4 calendar weeks) before you offer your activity.

Q. IF MY PROGRAM IS APPROVED FOR CCM BOARD-CERTIFIED CASE MANAGERS, WILL RNS OR SOCIAL WORKERS BE ABLE TO GET CREDITS FOR IT?

A. The Commission only grants CEs for board-certified case managers. To obtain any other professional type of CEs, please contact the appropriate state licensing/certifying board.

Q. WHAT IS THE CRITERIA REQUIRED TO GET MY ETHICS COURSE PRE-APPROVED?

A. To earn CEs in the ethics focus area, the provider must identify the ethical concepts and standards to be presented and how they are connected to the content in the course for which they are applying for pre-approval. Providers should have clear learning outcomes describing what a participant will be able to do at the end of the presentation and these learning outcomes should be clearly communicated. The course content must include the discussion of ethics as it relates to the CCMC Code of Professional Conduct **and** its practical application to the topic being presented.

Q. WHEN DO I NEED TO SUBMIT TWO APPLICATIONS IF APPLYING FOR ETHICS APPROVAL?

A. If Ethics CE is part of a larger program or course, one application is pre-approved for Ethics CEs only. The second application is for the remaining credits offered within the program or course.

Q. HOW MUCH DOES IT COST TO GET MY ORGANIZATION'S PROGRAMMING PRE-APPROVED?

A. See fee schedule on page 14.

Q. WHAT IS THE DIFFERENCE BETWEEN A STANDARD APPLICATION AND THE IN-SERVICE APPLICATION?

A. Standard is for any programs other than employee in-service programs and will appear in the PACE Directory. In-Service is solely for activities being offered to an organization's employees at no charge and will NOT appear in the PACE Directory.

Q. WHAT IS THE APPROVAL PERIOD?

A. Programs are approved for 12 months, beginning on the start date of program.

Q. I FORGOT TO SUBMIT MY ORGANIZATION'S PROGRAM FOR APPROVAL AND THE ACTIVITY HAS ALREADY TAKEN PLACE. WHAT CAN I DO?

A. The Commission will not retroactively approve programming for any reason, at any time.

Q. HOW FAR IN ADVANCE OF THE ACTIVITY SHOULD AN APPLICATION BE SUBMITTED?

A. Your application must be submitted at least 20 business days (4 calendar weeks) in advance of the activity date. Applications submitted between 10-19 business days must include the additional priority fee of $125.

Q. HOW LONG IS THE TURNAROUND TIME FOR RECEIVING A DECISION ON MY APPLICATION?

A. Because of the large volume of applications we receive, it can take up to 30 calendar days after submission and receipt of payment to decide on an application. If a priority fee is paid, the Commission will expedite the review of your program.

Q. HOW DO I GET THE APPROVAL ONCE MY PROGRAM IS REVIEWED?

A. The final decision letter (approval or rejection) will be emailed to the contact person listed on your application. If approved, this letter will contain your approval number and the CCM approval statement (both of which must be included on any promotional materials and the certificate of completion provided to participants.) Please be sure to add pace@ccmcertification.org to your safe senders list.

Q. HOW MUCH IS THE TOTAL FOR MY PROGRAM APPROVAL IF I NEED TO PAY THE PRIORITY FEE?

A. Please see the fee schedule on page 14.

Q. WHAT IF OUR COMPANY DOES NOT HAVE A BROCHURE FOR THE PROGRAM WE WOULD LIKE TO HAVE APPROVED?

A. If you do not have a brochure, you will need to create one. Your promotional materials can be an e-mail reminder to employees, promotional copy on your website, a formal, printed brochure, etc. There are further details regarding requirements for promotional materials at the end of this guide.

Q. I HAVE NOT RECEIVED MY APPROVAL YET. WHEN WILL I RECEIVE IT?

A. If you have not heard from The Commission via email within 30 business days of your application submission, please email pace@ccmcertification.org or call customer service at 856-380-6836 to check on the status of your application.

QUESTIONS ABOUT THE PACE PROGRAM?

For inquiries about the PACE program or a specific application, please contact:

THE COMMISSION FOR CASE MANAGER CERTIFICATION

Email   pace@ccmcertification.org

Phone   856-380-6836