

# Renewal Guide



**Commission for Case Manager Certification**

ACCREDITED BY THE NATIONAL COMMISSION FOR CERTIFYING AGENCIES

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## 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 and every professional takes 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<sup>®</sup> board certified case managers should continue to expand their skills in order 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) in order 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) clock hours within the five-year period of certification.

In order 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 approval number.

## Application Categories

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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 programs are open to the public 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. No retroactive approvals are 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. (Example: a hospital providing employees with a regularly scheduled seminar series, at no charge to employees.)

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. No retroactive approvals are granted for any program at any time.
5. In-service activities may be considered a benefit and/or requirement of employment.

## Approval Requirements

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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 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 18-21.
  - b. Content presented must be current and at a level that enable case managers to expand their skills to enhance the quality of the services they provide to help them serve their clients more effectively.
  - c. Content must be balanced and free from any commercial bias. Commercial Interest Organizations (defined as pharmaceutical/drug and medical device manufacturers) are permitted to submit applications for pre-approval, provided the content is non-biased and free from any promotion.
3. Commercial interest organizations (**defined as any entity producing, marketing, reselling or distributing healthcare goods or services consumed by or used on patients or an entity that is owned or controlled by an entity that produces, markets, resells, or distributes healthcare goods or services consumed by or used on patients – ANCC, 2015**) may submit applications for pre-approval provided the content is non-biased and free from any promotion. All content from commercial

interest organizations will be audited for compliance.

4. The purpose of the program must be clearly defined in terms of expected learning outcomes. These must describe significant and essential learning 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.

## Renewal Application Process

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### Finding the Renewal Application

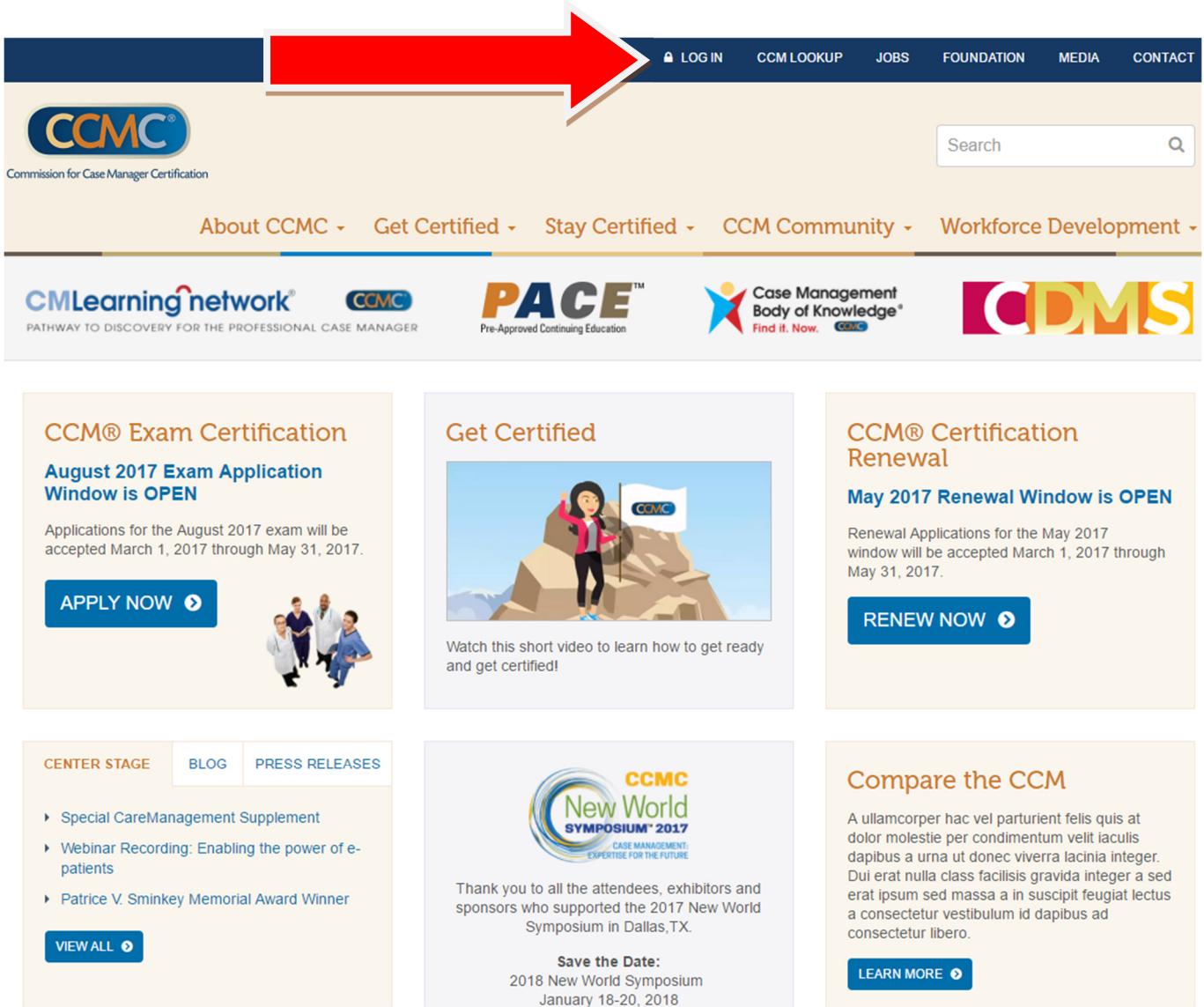


**Please note: You will not be able to submit your course for renewal if you have not previously submitted this course in our PACE online system. You will only have the option to renew your course beginning 90 days prior to the course expiration date.**

The renewal application can be found on the Commission's website: [www.cmcertification.org](http://www.cmcertification.org).

## Step 1

Log into your PACE account by clicking on “LOG IN” at the top of the homepage located at [www.ccmcertification.org](http://www.ccmcertification.org)



The screenshot shows the homepage of the Commission for Case Manager Certification (CCMC). A large red arrow points from the left towards the 'LOG IN' link in the top navigation bar. The navigation bar also includes 'CCM LOOKUP', 'JOBS', 'FOUNDATION', 'MEDIA', and 'CONTACT'. Below the navigation bar is the CCMC logo and a search bar. A secondary navigation bar contains links for 'About CCMC', 'Get Certified', 'Stay Certified', 'CCM Community', and 'Workforce Development'. Below this is a banner for 'CM Learning network', 'PACE', 'Case Management Body of Knowledge', and 'CDMS'. The main content area features three columns of promotional cards: 'CCM® Exam Certification' (August 2017 Exam Application Window is OPEN), 'Get Certified' (with an illustration of a person climbing a mountain), and 'CCM® Certification Renewal' (May 2017 Renewal Window is OPEN). Below these are four more cards: 'CENTER STAGE' (with sub-tabs for 'BLOG' and 'PRESS RELEASES'), 'CCM New World SYMPOSIUM 2017' (thank you message and 'Save the Date' for January 18-20, 2018), and 'Compare the CCM' (with a placeholder Latin text).

**CCM® Exam Certification**  
**August 2017 Exam Application Window is OPEN**  
Applications for the August 2017 exam will be accepted March 1, 2017 through May 31, 2017.  
[APPLY NOW](#)

**Get Certified**  
Watch this short video to learn how to get ready and get certified!

**CCM® Certification Renewal**  
**May 2017 Renewal Window is OPEN**  
Renewal Applications for the May 2017 window will be accepted March 1, 2017 through May 31, 2017.  
[RENEW NOW](#)

**CENTER STAGE** | **BLOG** | **PRESS RELEASES**

- ▶ Special CareManagement Supplement
- ▶ Webinar Recording: Enabling the power of e-patients
- ▶ Patrice V. Sminkey Memorial Award Winner

[VIEW ALL](#)

**CCM New World SYMPOSIUM 2017**  
CASE MANAGEMENT: EXPERTISE FOR THE FUTURE

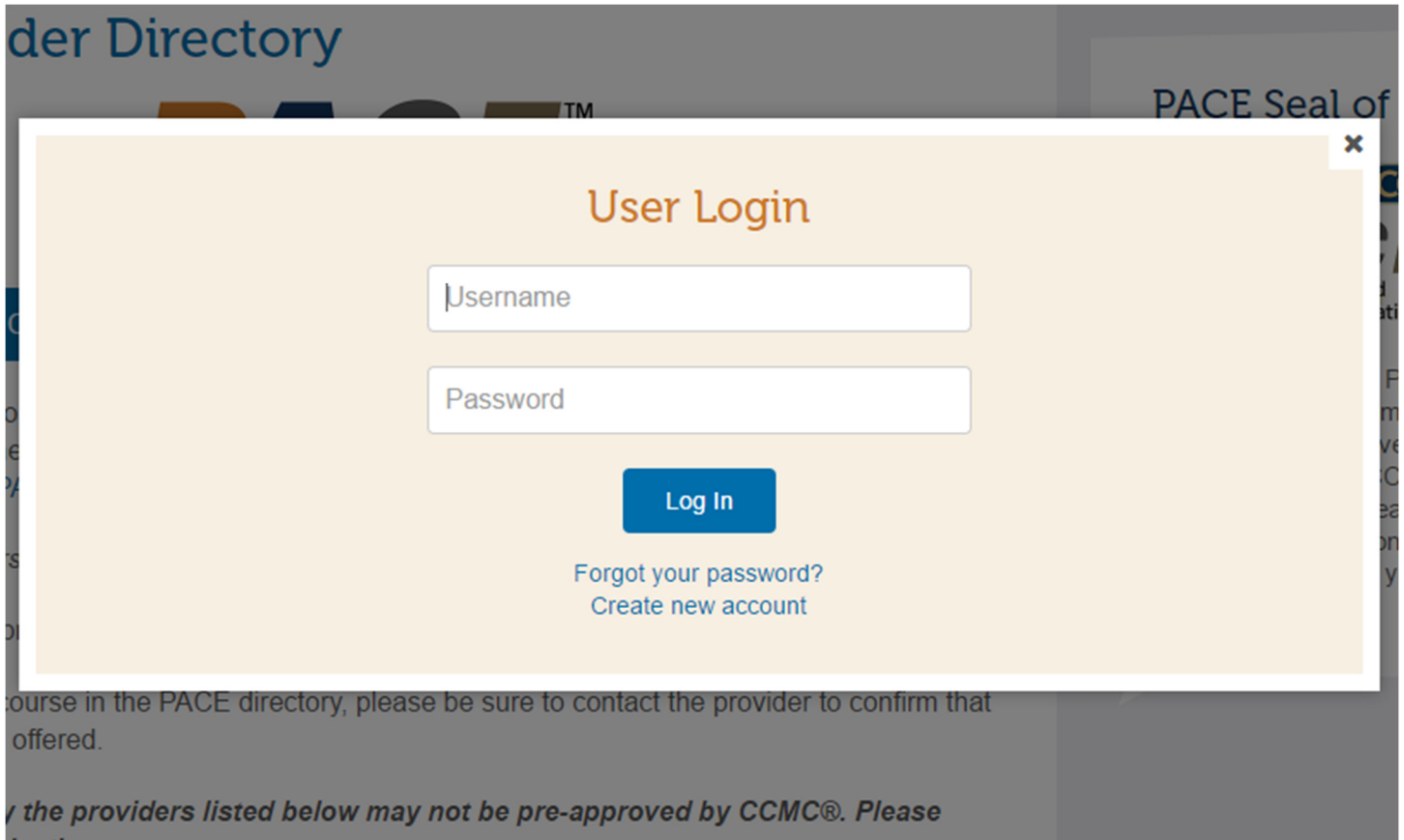
Thank you to all the attendees, exhibitors and sponsors who supported the 2017 New World Symposium in Dallas, TX.

**Save the Date:**  
2018 New World Symposium  
January 18-20, 2018

**Compare the CCM**  
A ullamcorper hac vel parturient felis quis at dolor molestie per condimentum velit iaculis dapibus a urna ut donec viverra lacinia integer. Dui erat nulla class facilisis gravida integer a sed erat ipsum sed massa a in suscipit feugiat lectus a consectetur vestibulum id dapibus ad consectetur libero.  
[LEARN MORE](#)

## Step 2

Please login with your Username and Password that was issued to you previously.



The image shows a screenshot of a web page with a 'User Login' modal form overlaid. The background page has a header with 'der Directory' and 'PACE Seal of'. The modal form is titled 'User Login' and contains two input fields: 'Username' and 'Password'. Below the fields is a blue 'Log In' button. Underneath the button are two links: 'Forgot your password?' and 'Create new account'. The modal has a close button (an 'x' icon) in the top right corner. Below the modal, there is a line of text: 'course in the PACE directory, please be sure to contact the provider to confirm that offered.' and another line: 'y the providers listed below may not be pre-approved by CCMC®. Please'.

der Directory

PACE Seal of

### User Login

  
  
[Log In](#)  
[Forgot your password?](#)  
[Create new account](#)

course in the PACE directory, please be sure to contact the provider to confirm that offered.

y the providers listed below may not be pre-approved by CCMC®. Please

### Step 3

Once you are logged in, click on “MY ACCOUNT” at the top of the page to access the PACE Provider Menu.

Once you clicked on “MY ACCOUNT,” click on “My PACE courses/Renew my Courses.”

The screenshot shows a web application interface. At the top, there is a navigation bar with links: "About CCMC", "Get Certified", "Stay Certified", "CCM Community", and "Workforce". Below this is a "My Account" section. On the left, it says "Welcome, [redacted]" and has a "Log Out" button. On the right, a dropdown menu is open, listing several options. An orange arrow points to the option "My PACE courses/ Renew my Courses".

My Account

Welcome, [redacted]

Log Out

- Apply for Exam Now!
- Update My Profile
- Add/Update Bio and Photo
- Change Password
- Print Receipts
- Pay Open Invoices
- Subscribe to CMBOK
- PACE Provider Menu
  - Submit a New PACE Application
  - Company Profile
  - Company Directory Preferences
  - Become a Featured Provider
  - Manage Offerings for PACE Courses
  - Manage Company PACE Submitters
  - My PACE courses/ Renew my Courses
- Exam Results



#### Step 4

Choose "Eligible for Renewal" from the "Display" drop down menu.

## My Account

**You will only have the option to renew your course 90 days prior to the course expiration date.**

Manage Course for Another Provider

Select Provider

Display

- All --
- Eligible for Renewal**
- Historical Course
- In Process - Applications
- In Process - Renewals
- Under CCMC Review

#### Step 5

Choose "Renew" next to the specific application you would like to resubmit.

Display

course ID	Approval Number	Course Title	Start Date	End Date	Credit	Submitter	Submission History	Application Status	
010430	140000445	Pharmacotherapy and Traumatic Brain Injury	06/01/2014	06/01/2015	1.5	Isabel Melendez	Eligible for Renewal	Application Approved	<input type="button" value="Renew"/>

1 - 1

**Please note: You can only renew courses beginning 90 days prior to their expiration dates. New applications will need to be submitted if the courses have expired.**

## Step 6

You will have to choose if your course has changed.

- If you choose “No,” you will not have the ability to edit the course CE credits, learning outcomes, or type of instruction.
- If you choose “Yes,” you will have the ability to edit all fields in the application. PLEASE NOTE: If the course is ethics-related and it wasn’t pre-approved for ethics CE prior, please select “Yes,” as this will give you the option to mark that this is an ethics course in the application.

You will be required to add course offering information and course uploads.

### Has this course changed?

When choosing "No" you will **not** have the ability to edit the course CE credits, learning objectives, or type of instruction. Course offering information and course uploads will be required when completing the application.

When choosing "Yes" you will have the ability to change all fields in the application. Course offering information and course uploads will be required when completing the application.

Please note: If you are renewing this course as an ethics course, please select "Yes." This will give you the option to mark off that this is an ethics course in the application.

NO  
YES

## Step 7

Your application will automatically populate the information that was entered previously in the application if you selected “Yes” to the previous question. The below screen shots will apply if you selected “No.”

1. Is this an Ethics Course? Select “Yes” if you are applying for Ethics approval.

**\*\*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?
2. Course Information
3. Course Offerings & Learning Outcomes
4. Additional Questions
5. Uploads
Review

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.

An Ethics course is defined as including 1) reference to the CCMC Code of Professional Conduct within the promotional or marketing materials or 2) written explanation from the presenter that states the way and extent to which the CCMC Code of Professional Conduct will be addressed within the presentation.

› Is this an Ethics Course?

Select One

SAVE

RESET

## Step 8

Be sure to complete all \*required fields.

1. Type of Instruction (Multi Day, Seminar/Workshop, Home Study, College/University or Webinar)
2. Course Type (In Person or Online)
3. Application Category (In service: \$50 and Standard: \$125)
4. CE Credits Requested (We do not accept any CEs under .5 and only accept quarter increments)
5. First Date Offered (Applications submitted 10-19 business days prior to course date are subject to a \$125 priority fee)
6. Word/Test Questions Count - only required for home study (written or enduring) where the Mergener Formula is the basis for calculating CEs.
7. 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.
8. Program Name
9. Course Description (this could be just a brief decription 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	

> Type of Instruction*	Select One
> Course Type*	Select One
> Application Category*	Select One
> CE Credits Requested -- Only Accept Quarter Increments*	
> First Date Offered - Applications Submitted 10-19 Business Days Prior to Course Date are Subject to a \$125 Priority Fee*	
> Word Count - Only Required for Home Study	
> Test Questions Count - Only Required for Home Study	
> Does the number of credits requested include only educational content?*	Select One <small>Credit is not given for introductions, breaks, or meals.</small>
> Program Name*	
> Course Description	
> Please describe how this activity will improve the professional practice for the attendee*	

[SAVE](#)  
[RESET](#)

## Step 9

Be sure to complete all **\*required** fields. You will be required to enter in your course offerings in all renewal applications.

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

1. Ethics Course?
2. Course Information
<b>3. Course Offerings &amp; Learning Outcomes</b>
4. Additional Questions
5. Uploads
Review

### 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](#)



>

#### Focus\*

- Psychosocial Aspects
- Healthcare Reimbursement
- Rehabilitation
- Care Delivery and Reimbursement Methods
- Healthcare Management and Delivery
- Psychosocial Concepts and Support Systems
- Quality and Outcomes Evaluation and Measurements
- Principles of Practice
- Rehabilitation Concepts and Strategies
- Ethical, Legal, and Practice Standards
- Case Management Concepts

> Learning Outcome #1\*

> Learning Outcome #2\*

> Learning Outcome #3\*

> Learning Outcome #4

2. Once you click on "Manage Offering," a new tab will pop up with the course offering information. Click on "add a new course offering."

**Submitter:**

**Provider:**

**PACE Submissions: PACE Submissions**

**Subcollection: PACE Submissions**

**You are Currently Editing PACE Submission:**

**Submission Status: Incomplete**

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**Course Offerings**

[add a new course offering](#) ←

No offerings have been set up for this course yet.

3. The dates will automatically populate for you. If you have additional information that you would like to add about this course, please enter it here. Then, click "Save."

**Course Offering Information** ✕

\*Starting at   \*and ending at

Use either "MM/DD/YYYY" or "MM/DD/YYYY HH:MI AM" date formats.

Address Line 1

City

State

Province

Postal Code

Country

Fee

URL

Special Instructions

- After you have added the information about this course and you have additional offerings in the future, choose “add new offerings” again to list the rest of them. All of this information is going to be displayed on our PACE Directory for standard approval courses (<https://ccmcertification.org/pace-provider-directory>)
- Once you add your “MANAGE OFFERING,” you can go back to the application in the previous tab and check off the boxes for the Focus Area(s) that your course falls under.

1. Ethics Course?
2. Course Information
<b>3. Course Offerings &amp; Learning Outcomes</b>
4. Additional Questions
5. Uploads
Review

### 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](#)



#### Focus\*

- Psychosocial Aspects
- Healthcare Reimbursement
- Rehabilitation
- Care Delivery and Reimbursement Methods
- Healthcare Management and Delivery
- Psychosocial Concepts and Support Systems
- Quality and Outcomes Evaluation and Measurements
- Principles of Practice
- Rehabilitation Concepts and Strategies
- Ethical, Legal, and Practice Standards
- Case Management Concepts



#### > Learning Outcome #1\*

#### > Learning Outcome #2\*

#### > Learning Outcome #3\*

#### > Learning Outcome #4

- 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. **(A learning outcome describes the overall purpose or goal from participation in an educational activity.** 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.)

## Step 10

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
<b>4. Additional Questions</b>
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."\*

› 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:

## Step 11

Be sure to complete all **\*required** fields. Course uploads are required to be uploaded for all renewal applications.

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 home study (written or enduring material) using Mergener's, 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.*

1. Ethics Course?	
2. Course Information	> Certificate of Completion* <input type="button" value="Choose File"/> No file chosen
3. Course Offerings & Learning Outcomes	> Evaluation Form* <input type="button" value="Choose File"/> No file chosen
4. Additional Questions	> Promo Material #1* <input type="button" value="Choose File"/> No file chosen
<b>5. Uploads</b>	> Additional Material #1 <input type="button" value="Choose File"/> No file chosen
Review	> Additional Material #2 <input type="button" value="Choose File"/> No file chosen
	> Additional Material #3 <input type="button" value="Choose File"/> No file chosen
	> Additional Material #4 <input type="button" value="Choose File"/> No file chosen
	> Additional Material #5 <input type="button" value="Choose File"/> No file chosen
	> Additional Material #6 <input type="button" value="Choose File"/> No file chosen

## 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** –The certification 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 amount of CE
  - 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** – This is a copy of the evaluation your participants will be required to complete at the end of the activity in order 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** -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 \_\_\_\_ clock hour(s).”*



You may add the PACE seal of approval to your documents.

**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 made.**

#### 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.

#### Helpful Hints for Getting It Right

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- 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](mailto:pace@ccmcertification.org) to your safe senders’ list to ensure you receive all communication.

**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 period(s) offered online)
- Resume, CVs or biographical information for all presenters and/or authors
- Participant list
- Completed Participant Evaluations
- Record of certificates issued

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

**Domain Focus Areas for Continuing Education**

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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**

Adherence to care regimen

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

Case management process and tools

Coding methodologies (e.g., Diagnosis-related group [DRG], Diagnostic and Statistical Manual of Mental Disorders [DSM], International Classification of Diseases [ICD], Current Procedural Terminology [CPT]) Continuum of care/continuum of health and human services

Cost containment principles

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

Healthcare providers including behavioral health and community vendors

Hospice, palliative, and end of life care

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

Interdisciplinary care team (ICT)

Levels of care and care settings

Managed care concepts

Management of acute and chronic illness and disability

Management of clients with multiple chronic illnesses

Medication therapy management and reconciliation

Military benefit programs (e.g., TRICARE, VA, CHAMPVA, TRICARE for Life)

Models of care (e.g., patient centered medical home [PCMH], accountable care organization, health home, special needs plan [SNPs], chronic care model)

Negotiation techniques

Physical functioning and behavioral health assessment

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, case rate, prospective payment systems, value-based purchasing)

Roles and functions of case managers in various settings

Roles and functions of other providers in various 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 (e.g., dual diagnoses; substance use, abuse, and addiction)

Client activation

Client empowerment

Client engagement

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

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

Conflict resolution strategies

Crisis intervention strategies

End of life issues (e.g., hospice, palliative care, withdrawal of care, Do Not Resuscitate)

Family dynamics

Health coaching

Health literacy assessment

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

Interview techniques

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

Spirituality as it relates to health behavior

Support 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

Case load calculation

Cost-benefit analysis

Data interpretation and reporting

Health care analytics (e.g., health risk assessment, predictive modeling, Adjusted Clinical Group [ACG]<sup>®</sup>)

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 [CMS], Utilization Review Accreditation Commission [URAC], National Committee for Quality Assurance [NCQA], National Quality Forum [NQF], Agency for Healthcare Research and Quality [AHRQ])

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

## **Rehabilitation Concepts and Strategies**

Assistive devices (e.g., prosthetics, text telephone device [TTD], teletypewriter [TTY], telecommunication device for the deaf, orientation and mobility services)

Functional capacity evaluation

Rehabilitation post an injury, including work-related

Rehabilitation post hospitalization or acute health condition

Vocational and rehabilitation service delivery systems

Vocational aspects of chronic illness and disability

## **Ethical, Legal, and Practice Standards**

Affordable Care Act (ACA)

Case recording and documentation

Critical pathways, standards of care, practice guidelines, and treatment guidelines

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

Ethics related to professional practice (e.g., code of conduct, veracity)

Health care and disability related legislation (e.g., Americans with Disabilities Act [ADA], Occupational Safety and Health Administration [OSHA] regulations, Health Insurance Portability and Accountability Act [HIPAA])

Legal and regulatory requirements

Meaningful use (e.g., electronic exchanges of summary of care, reporting specific cases to specialized client registries, structured electronic transmission of laboratory test results, use of electronic discharge prescriptions)

Privacy and confidentiality

Risk management

Self-care and well-being as a professional

Standards of practice

## WHAT WON'T BE APPROVED

- Orientation Programs – a specific series of activities designed to familiarize employees with the policies and procedures of an institution
- 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 start date

## 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](mailto:pace@ccmcertification.org)  
Phone            856-380-6836