CDMS PACE™

Pre-Approved
Continuing Education

THE CDMS GUIDE FOR
PRE-APPROVED
CONTINUING EDUCATION

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INTRODUCTION

The Commission for Case Manager Certification® (the Commission), administers and governs the Certification of Disability Management Specialists Credential® (CDMS®). The Commission is committed to developing and maintaining exemplary standards of practice for professionals who practice disability management. The Commission strives to elevate the quality of services provided to consumers so each and every 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 individuals board-certified as disability management specialists (CDMS®s) 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 board-certified disability management specialists 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 board-certified disability management specialists 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 renewal. Those who choose to renew through continuing education are required to complete eighty (80) contact hours within the five-year period of certification, four (4) of which must be in ethics.

To maintain a high quality of continuing education opportunities, the Commission has a pre-approval process for continuing education programs/activities. Organizations that provide or sponsor continuing education and training are encouraged to seek pre-approval of their programs/activities, which signifies to all board-certified disability management specialists that the programs/activities are appropriate to use toward meeting the requirements of their certification renewal.

This CDMS Guide for Pre-Approved Continuing Education is designed to describe the requirements and procedures involved for those organizations that wish to seek pre-approval of their programs/activities.

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 programs are anything other than employee in-service programs.

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 start date of the activity.

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. (Example: an organization providing employees with regularly scheduled seminars 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 start date of the activity.

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 disability case management.

   a. To be approved, a program must clearly meet one of the domain focus areas for continuing education, as outlined on pages 15-16.

b. Content presented must be current and at a level that enables disability management specialists 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 CDMS 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 CDMS 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 Disability 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

» Resolving ethical issues

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 CDMS® board-certified disability management specialists. The course is approved for___ Ethics CE contact hour(s). Activity code: _____ and Approval Number:_____

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.

APPLICATION PROCESS

FINDING THE APPLICATION

The application can be found on the CDMS website: https://www.cdms.org/

STEP 1:

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

Click on "LOG IN" at www.cdms.org.

New PACE providers should hover over the Education tab located in menu and choose "Continuing Education for Providers"

Please choose the option if you are a new PACE provider or if you are a CDMS certificant and a new PACE provider.

About CDMS ▾   Get Certified ▾   Stay Certified ▾   Develop Others ▾   **Education** ▾

Continuing Education for Providers ▸

Core Knowledge Curriculum (CKC) ▸

Commission CE Opportunities

DMEC CE Opportunities

Webinars

CCMC's 2024 Virtual Symposium

CE Pre-Approval (PACE)

Continuing Education Pre-Approval for Providers

Providers offering continuing education (CE) programs in disability management who wish to obtain CDMS pre-approval in order to promote their programs to certified individuals are encouraged to submit an application.

NEW ONLINE APPLICATION AVAILABLE!

No more paper applications! CDMS Pre-Approved Continuing Education (PACE™) applications will be submitted through the NEW platform! In addition, we are dedicated to ensuring that you get the most out of the courses you take and therefore we are changing our CDMS PACE guidelines for providers. Please see the memo that had been sent out recently for additional information and details. *memo reflects old fees.

BLOG: How the Commission the CDMS® Exam and How Prepare for It

VIEW ALL ❯

SEE THE NEW PACE GUIDE!

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.

LOGIN TO MY PACE ACCOUNT

For New PACE Providers

If you are currently **CDMS certified** with an account in the CDMS database **AND** this is your first time submitting an online PACE application, click on the button below.

I AM A CDMS & A NEW PACE PROVIDER

If you are **NOT** CDMS certified **AND** this is your first time submitting an online PACE application, click on the button below. Additionally, providers that have **previously submitted paper applications but have not yet submitted an online PACE application**, please click on the button below to create an account to start submitting applications online.

I AM A NEW PACE PROVIDER

STEP 2:

If you have submitted a PACE application for CDMS online before, please enter your username and password.

If you are a brand-new provider and have not submitted a CDMS PACE application yet, please select "Create new account".

User Login

Username *

Enter your Certified Disability Management Specialist (CDMS) username.

Password *

Enter your password.

- Forgot your password?
- Create new account

LOG IN

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 ▾

Start Date:

End Date:

Hours/Week:

Remark:

This is my preferred employer
☐

Submit

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

New PACE Applicant

First Name*

Middle Name

Last Name*

Company Name*

Degree*

Title*

Preferred Email Address*

Address Type*
Select an Address Type ▾

Street Address Line 1*

Street Address Line 2

City*

State*
Select a State or Province ▾

Zip Code*

Country*
United States of America ▾

Phone Type*
Select a Phone Type ▾

Phone Number*

User Name*

Password*

Repeat Password*

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."

My Account

Welcome, [ ]

LOG OUT

- Update My Profile
- Pay Open Invoices
- Store
- Apply for Exam Now!
- PACE Provider Menu
- Submit a New PACE Application
- My PACE Courses

STEP 3:
To submit a New application, choose "Submit a New PACE application"

COMPLETING THE APPLICATION

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

1. **Ethics Course?**

2. Course Information

3. Learning Outcomes

4. Additional Questions

5. Uploads

Review

Ethics Information

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 CDMS Code of Professional Conduct and its practical application to the content being presented. For more information on the ethics guidelines, please refer to the **PACE Guide**.

Application is for:*
- ○ Ethics CE
- ○ General CE

⚑ 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.

STEP 4: ETHICS
Please indicate whether this an ethics or general CE. Select "Ethics CE" if you are applying for Ethics approval or "General CE" if it is a standard application for general CE approval.

If you are applying for ethics pre-approval and choose "Ethics CE," you will be directed to the attestation page 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 activity, then you must submit **two (2) separate applications.**

ETHICS ATTESTATION

If you chose "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.

The "I Attest" check box must be checked in order to proceed to the next page.

1. Ethics Course?

Ethics Attestation

2. Course Information

3. Learning Outcomes

4. Additional Questions

5. Uploads

Review

Status

Ethics Attestation

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

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

☑ I Attest

[Next]

STEP 5: COURSE INFORMATION

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 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. 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*
[   ]

Focus*
☐ Disability and Work Interruption Case Management
☐ Workplace Intervention for Disability Prevention
☐ Program Development, Management and Evaluation
☐ Employment Leaves and Benefits Administration
☐ Ethics

Course Description
[   ]

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

STEP 6: LEARNING OUTCOMES

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. 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.

1. Ethics Course?
Ethics Attestation
2. Course Information
3. Learning Outcomes
4. Additional Questions
5. Uploads
Review

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 ▾

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1. Ethics Course?
Ethics Attestation
2. Course Information
3. Learning Outcomes
4. Additional Questions
5. Uploads
Review
Submit and Pay

Additional Questions

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 CDMS® board-certified disability management specialists."*
Select One ▾

How does a participant enroll in your 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 CDMS pre approval continuing education for providers program?

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

How did you hear about us?

STEP 7: ADDITIONAL QUESTIONS

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?

Uploads

1. Ethics Course?

Ethics Attestation

2. Course Information

3. Learning Outcomes

4. Additional Questions

5. Uploads

Review

Uploads

You are required to upload a copy of the certificate, evaluation, promotional material & agenda. Please refer to the PACE Guide for the guidelines for these documents.

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 formula** as the method for calculating CEs, you are **required to 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 subject matter experts.** Please find the Pilot Study form here.

Certificate of Completion*

[Choose File]   No file chosen

Evaluation Form*

[Choose File]   No file chosen

Promo Material #1*

[Choose File]   No file chosen

Additional Material #1

[Choose File]   No file chosen

Additional Material #2

[Choose File]   No file chosen

STEP 8: UPLOADS

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.*

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 13 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 13).

    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 CDMS board-certified disability manager specialist's renewal date.

2. *Program Evaluation* – See page 14 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 disability management specialists (specifically "Will you change your practice based on this knowledge?" or "How will this activity impact your practice?"

3. *Program Promotional Materials* – See pages 13-14 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 disability 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 the confirmation page and send it in with the check, and then choose "Mail a Check Payment" on the checkout page.

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 offering date. Applications submitted less than 10 business days in advance of the activity date **will not be accepted. *No retroactive approvals are processed at any time. No exceptions.*

CDMS PACE now offers a renewal application process! You will have the option to renew your course(s) on the online portal beginning 90 days prior to the course expiration date (See instructions starting on page 17.)

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 cdmshq@cdms.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 disability manager specialists, 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.

- *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 CDMS® board-certified disability management specialists. The course is approved for _____ CE contact hour(s).
  Activity code: _____ Approval Number: _____

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

- *This program has been pre-approved by The Commission for Case Manager Certification to provide Ethics continuing education credit to CDMS® board-certified disability management specialists. 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 disability management specialists 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 CDMS® board-certified disability management specialists … (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 disability 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 CDMS board-certified Disability management specialists with___ contact hour(s).

  You may also add the PACE seal of approval, letting the CDMS know it is pending approval from CCMC.

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 CDMS 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: A 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 six 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 application for determination of CE amount.

DOMAIN FOCUS AREAS FOR CONTINUING EDUCATION

The following areas constitute the domain focus areas that are appropriate for continuing education for disability management specialists. Headings in bold denote the domain focus areas, while the bulleted items offer specifics related to that domain focus area. 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 individual who have already passed the CDMS exam.

I. **Disability and Work Interruption Case Management**
Disability and Work Interruption Case Management involves ethical performance of necessary activities pertaining to an individual's illness or injury to ensure quality of care, recovery and cost effectiveness. This entails planning, managing and advocating for that individual's return to meaningful work, a process that includes coordination of benefits and services and implementation of return-to-work plans.

Possible coursework topics under this area may cover how to:

A. Perform comprehensive individual case analyses with consideration to applicable benefits

1. The impact of illnesses and injuries to functional capacity

2. The impact of mental health conditions to functional capacity

3. The impact of comorbid conditions to functional capacity

B. Review and assess product services and strategies to ensure quality care, recovery, and cost effectiveness

C. Utilize effective communication strategies to facilitate collaboration among stakeholders (e.g., conflict resolution, negotiation)

D. Demonstrate multi-cultural competency and address personal bias

E. Conduct worksite/job analyses

1. Best practices for documenting findings

2. Essential functions, modifications, and accommodations

F. Develop individualized worker retention plans (e.g. stay-at-work, return-to-work, transitional work)

G. Leverage benefits, services, and community resources to facilitate optimal functioning (e.g., treating physician, independent clinical evaluations, expert medical opinion)

H. Assess case progress and facilitate change throughout the continuum of care

I. Disseminate and manage information in compliance with standard practice and regulations.

1. Case documentation best practices (e.g., case notes, status reports)

2. Privacy and confidentiality requirements (e.g., HIPAA, informed consent, release of information)

J. Analyze recommended products and services to maximize return on investment

II. **Workplace Intervention for Disability Prevention**
Workplace Intervention for Disability Prevention involves joint labor/management collaboration in the identification of workplace safety and risk factors. It also covers the recommendation and implementation of prevention, health and wellness-intervention practices and strategies, such as ergonomics, job analyses and return-to-work programs.

Possible coursework topics under this area may cover how to:

A. Demonstrate compliance with local, state, and federal regulations (e.g., OSHA, ADAAA)

B. Develop an interactive process to optimize employee functioning in the workplace or vocational rehabilitation options

C. Recommend individual and workplace strategies to address ergonomic, safety, and accessibility needs

D. Incorporate health risk factors and prevention strategies to mitigate loss

E. Leverage health and wellness resources to support employees, the organization, and their communities.

III. **Program Development, Management and Evaluation**
Program Development, Management and Evaluation include identification of, need for and implementation of comprehensive disability management programs utilizing best practices and metrics.

Possible coursework topics under this area may cover how to:

A. Establish disability management program goals by assessing organizational needs and incorporating best practices.

B. Advocate for change in organizational behavior/ culture in order to support disability management program goals.

C. Collaborate in the design, implementation, and evaluation of a sustainable disability management program.

D. Provide education and training consistent with disability management program goals and compliance

E. Determine performance metrics to evaluate disability management program effectiveness and support improvement (e.g., trends, return on investment)

F. Integrate internal and external services/partners to align with disability management program goals

G. Utilize technology to influence disability management outcomes (e.g., telemedicine, web-based portals, electronic health record)

H. Utilize strategies to support an inclusive and diverse workforce (e.g., employee resource groups, cultural sensitivity training)

I. Leverage benefit plans and other services to optimize the health and productivity of employees

IV. **Employment Leaves and Benefits Administration**
Employment Leaves and Benefits Administration includes management of employment leaves, health and welfare plans, payroll and systems management and other risks associated with work interruption.

Possible coursework topics under this area may cover how to:

A. Identify elements of employer leave and benefit plans and their interface with local, state, and federal regulations

   1. Income protection plans (e.g., Short- and long-term disability, Workers' comp, Paid family care)

   2. Job protection plans (e.g., FMLA, Military leave)

   3. Healthcare benefit continuation plans (e.g., Medicare, Medicaid)

   4. Collective bargaining agreements (e.g., Union)

B. Identify how the relationship between employment leaves and work interruptions influences individual or organizational productivity

C. Communicate essential elements of benefits and employment policies to employees, managers, and other stakeholders

V. **Ethics**

Possible coursework topics under this area may include:

A. Ethical Practice in Disability Case Management

B. Ethical Practice in Disability Prevention and Workplace Intervention

C. Ethical Practice in Program Development, Management and Evaluation

## 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 CDMS 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

RENEWAL APPLICATION PROCESS

STEP 1:
After logging in at www.cdms.org, click on "MY ACCOUNT" at the top of the page to access the PACE Provider Menu. Then, click on "My PACE Courses."
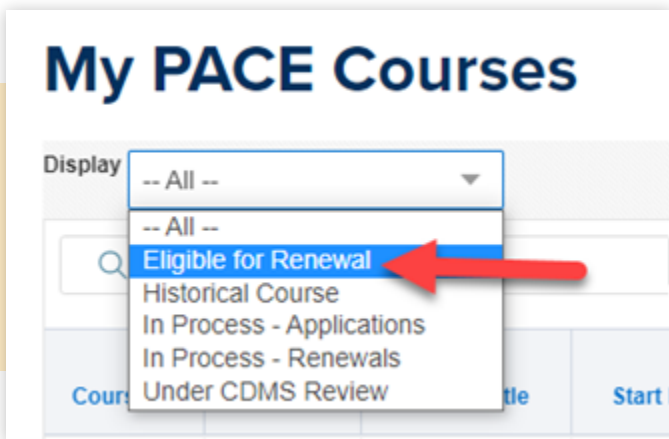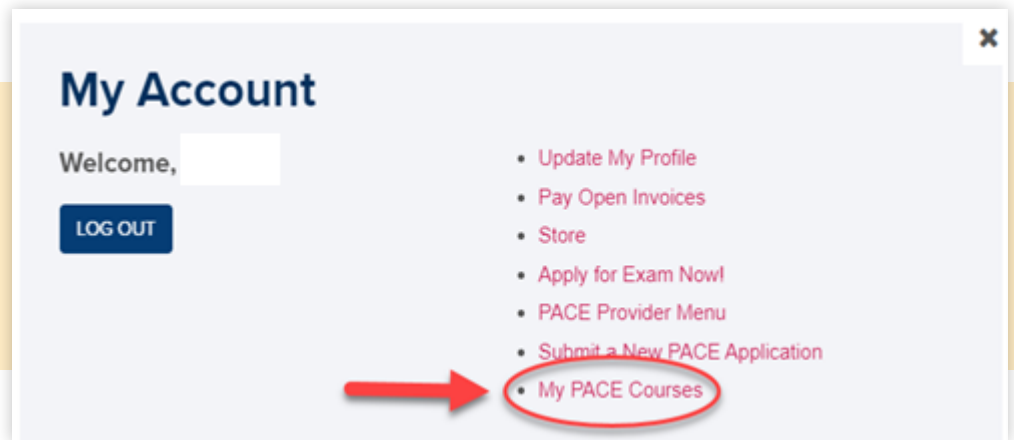
STEP 2:
Choose "Eligible for Renewal" from the "Display" drop down menu.

STEP 3:
Choose "Renew" next to the specific application you would like to resubmit for renewal.

STEP 4:
You will be directed to the application, beginning with the Ethics section. All fields will be pre-populated with what was saved previously with the initial submission and are all editable. As this application is the same format as a new application, complete and save all sections. Refer to the remaining steps in the "Completing the Application" section earlier in this guide on pages 8-12 for reference.

FREQUENTLY ASKED QUESTIONS

Q. HOW CAN I GET MY ORGANIZATION'S PROGRAM APPROVED FOR CDMS BOARD-CERTIFIED DISABILITY MANAGEMENT SPECIALISTS?

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 CDMS BOARD-CERTIFIED DISABILITY MANAGEMENT SPECIALISTS, WILL RNS OR SOCIAL WORKERS BE ABLE TO GET CREDITS FOR IT?

A. The Commission only grants CEs for board-certified disability management specialists. 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 PREAPPROVED?

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 CDMS 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. 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 12.

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

A. Standard is for any program provided for board-certified disability management specialists and is open to the public. In-Service is solely for activities being offered to an organization's employees at no charge.

Q. WHAT IS THE APPROVAL PERIOD?

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

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 CDMS 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 cdmshq@cdms.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 12.

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.

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 cdmshq@cdms.org or call customer service at 1.844.681.8156 to check on the status of your application.

QUESTIONS ABOUT THE CDMS PRE-APPROVAL PROGRAM?

For inquiries about the CDMS Pre-approval program or a specific application, please contact:

THE COMMISSION FOR CASE MANAGER CERTIFICATION

EMAIL: cdmshq@cdms.org

PHONE: 1.844.681.8156