



CERTIFICATION
INFORMATION
PACKET

2006

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<http://www.caremanager.org>

Dear GCM Members:

We are fortunate to have a strong and growing Association. Membership has grown to almost 2000; our Association is fiscally sound; and we have over 100 members volunteering their time in some area of leadership for the Association. Growth in organizations can also bring its own set of challenges.

A big challenge for GCM is how to maintain our reputation for quality as we continue to add members and grow larger. For many of you, one of the most treasured features of belonging to GCM is the quality "seal of approval" in the eyes of the public. This public confidence is a very fragile commodity and can be lost quickly with just a few unfortunate events that negatively effect public perception.

Our reputation for quality is the most important element of the GCM brand and we believe that steps need to be taken to ensure that it is protected. Therefore, your Board of Directors is recommending that all care manager members maintain certification as a way to ensure a minimum level of professional quality as well as enhancing the way GCM is perceived by the public.

A personal challenge

We realize that maintaining certification is a challenge for each member individually but it benefits everyone in the organization. Many members have other professional licenses and advanced degrees in several different fields. But the public, both in your local area and at large, needs a simple way to recognize a "professional" care manager from among the many who may lack skills, but call themselves a care manager. Certification is an independent way of confirming a basic professional level of practice. GCM supports providing the public with ways to evaluate care managers before they engage their services. In the spirit of supporting the profession and investing in your own GCM business, we ask that you join us by becoming certified despite the effort involved. We truly believe the satisfaction of being certified will be worth the investment of pursuing one of the approved certifications.

Self-ensuring standards

Of course, certification is not a guarantee of ethical, moral, or honest behavior; but it is an effort to have our profession conform to a minimal standard level, to agree on a professional skill set. It is our belief that regulation will become a topic in many states in the very near future and GCM wants to anticipate and shape the direction of that discussion. Licensure and regulations are governmentally imposed solutions to protect the public; certification is independent testing that informs the public about protecting themselves.

Enhancing the GCM brand

This is an opportunity for us to influence how others see us - to define our GCM brand identity. To referral sources, users of our website, and the media, we want to be able to describe all care manager GCM members as being certified geriatric care managers. This enhances the value of GCM to every member.

GCM wants to help members get certified

Since some members do not hold a current certification, we want to help members easily navigate this process. Note that while the membership changes would become effective January 1, 2008 for new members, current care manager members are given an additional two years to gain certification (until 2010).

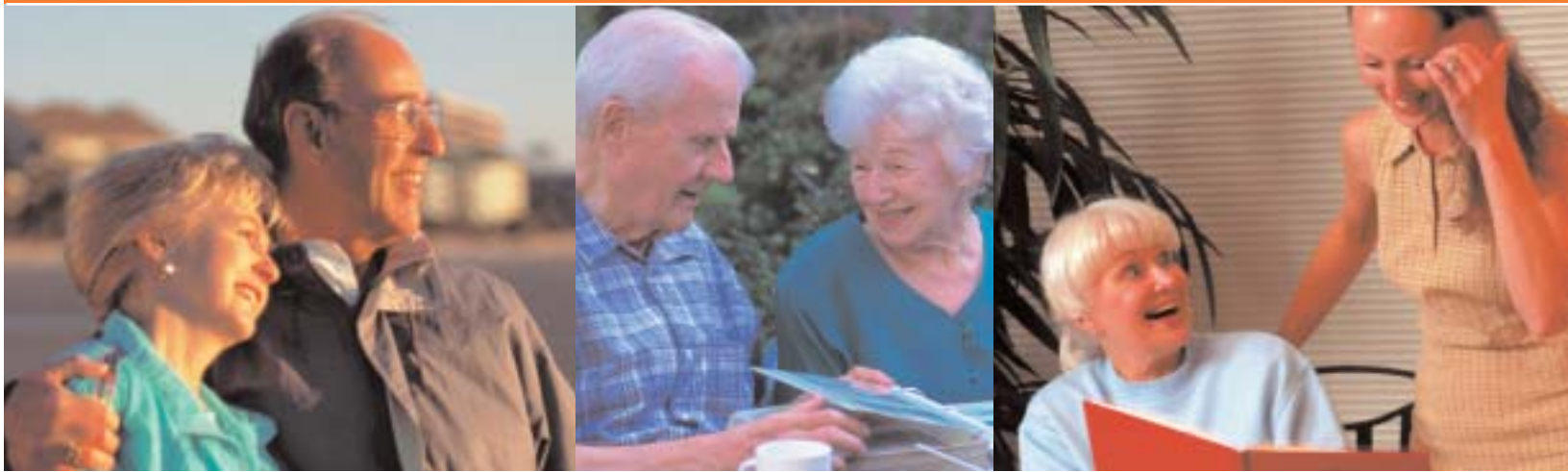
Information included in the following pages will help explain the proposed changes in the bylaws, answer some general questions, and provide a summary of the current Board approved certification bodies. Any suggestion for additional approved certifications should be brought to the attention of the Education Committee Chair, Erica Karp at (huayapaminmyheart@yahoo.com). In addition, GCM is developing ways to facilitate supervision, a requirement for the CMC certification. Of course, the GCM conference provides CEUs qualified for all certifications, and current information about conferences is available on our website. If you have any questions about this proposal, please contact the GCM office at (520) 881-8008.

In August, you will receive your ballot to vote on this proposed bylaws change. Your affirmative vote for this membership change will help our Association move successfully into the future of geriatric care management.

Respectfully,



Linda Aufderhaar
2006 GCM President



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GCM would like to thank the following committee members for their contributions to this publication: Linda Aufderhaar, Debbie Barfield, Norman Hannay, Nina Pflumm Herndon, Erica Karp, Maureen Maguire, Mary Lynn Pannen, Catherine Thompson, Suzanne Modigliani, June Ninnemann and Bob O'Toole.



Questions & Answers about GCM & Certification

CMC

Care Manager Certified

National Academy of Certified Care Managers (NACCM)
www.naccm.net

CCM

Certified Case Manager

Commission for Case Manager Certification (CCMC)
www.ccmcertification.org

C-ASWCM

Certified Advanced Social Work Case Manager

National Association of Social Workers (NASW)
www.socialworkers.org/credentials

C-SWCM

Certified Social Work Case Manager

National Association of Social Workers (NASW)
www.socialworkers.org/credentials

The following fact sheets and grids outline the basic information for acquiring and renewing each of the GCM approved certifications. Specific questions can be directed to the appropriate certifying bodies, as indicated above.

When will certification be required of members?

New members in the CARE MANAGER category will be required to hold one of the approved certifications starting in January 2008.

Any continuing CARE MANAGER member will have until January 2010 to become certified.

On January 1, 2010 all CARE MANAGER members without certification will be moved into a new membership category, entitled ASSOCIATE.

If I am a CARE MANAGER member and choose not to obtain a GCM approved certification, will I still be eligible for continued GCM membership?

Yes, you will still be eligible to remain in the CARE MANAGER category until January 1, 2010. After that date, you will need to hold a GCM approved certification, or be moved into the new ASSOCIATE member category.

Will there be new membership categories?

Yes. The bylaws change, if approved, will modify the current CARE

MANAGER category to require certification for membership in this category. Care managers applying for membership as of January 1, 2008 will need to hold a GCM approved certification to become a GCM CARE MANAGER Member.

The new membership category created by this bylaws change is the ASSOCIATE member category. Membership in this category will require all of the same qualifications as CARE MANAGER members, except the certification requirement.

ASSOCIATE members will be non-voting members of GCM, and will not be listed in the main GCM website search.

For existing GCM CARE MANAGER members, certification will need to be obtained by January 1, 2010. At that time, those members without certification will be moved to the ASSOCIATE Category.

The categories and dues amounts are as follows:

Care Manager (\$245)
Associate (\$245)
Affiliate (\$245)
Student (\$85)

Will my membership benefits change if I am not certified?

Yes. If the GCM membership votes to approve the bylaws change to require certification, the GCM website search will identify certified care managers with an icon that will also link to

a page to explain why certification is important to consumers.

ASSOCIATE and AFFILIATE members will be available only in the advanced search.

Will my license substitute for certification?

No. Although GCM values professional licensure, we also recognize the need to determine a basis for establishing geriatric care management as a unique profession, and believe that certification is at the core of this process.

Will GCM grandfather long-time members into the Care Manager Category?

Current CARE MANAGER members will have a two-year certification transition period (CTP) to become certified. During the CTP, those care managers will remain in the CARE MANAGER category. This status will end on January 1, 2010, when all non-certified CARE MANAGER members will be moved to the ASSOCIATE category.

How will GCM assist me in the certification process?

GCM will continue to offer CEUs at national conferences and chapter events. In addition, GCM committees are currently working on planning telephonic sessions for peer review/consultation/supervision to assist with obtaining and documenting supervision requirements for certification.

What if I am a sole practitioner or live in a rural area and will have a difficult time fulfilling the supervision requirement?

Of the four certifications, only one has an on-going supervision requirement. You may choose to obtain one of the other three certifications, or take advantage of the seminars planned by GCM committees to assist members in obtaining the required supervision hours for the CMC designation. Please see the enclosed document on supervision for a detailed explanation on how to fulfill this requirement.

What are the benefits of certification?

Many members have asked the question - why do I need to be certified if I am already licensed as a Registered Nurse or Social worker?

The following benefits of certification are outlined in the books: *Handbook of Geriatric Care Management* by Cathy Cress, MSW, Chapter 9, and *Care Management Credentialing* by Rona S. Bartelstone and Monika White, who are Geriatric Care Managers.

"Because care management has evolved as a transdisciplinary field, it is important to delineate the functions, roles, values, and ethical perspectives of a competent care manager.

In addition to validating education and experience, there are several reasons to become certified:

- **Informed consumer choice** - enables the consumer to make a discriminating choice of the type of care manager who should be hired for a given circumstance, e.g. nurse vs. social worker vs. psychologist etc.
- **Consumer Protection** - the consumer needs protection from an individual who might call him or herself a care manager but have no training in the care management process, roles, and functions and no understanding of health and social services systems and psychosocial dynamics. Since no licensing or other regulation currently exists, the consumer has no guidelines from which to "shop" for services except for certification. Certification can give the consumer confidence that a care manager has, at a minimum, been supervised, qualified to take an exam and possesses core knowledge about care management.
- **Marketing** - certification can become a selling point not only with individual consumers but also with providers in the system that represents large networks. It can be used to distinguish oneself from those who are not certified and as a proof of core competency for network affiliation or membership.

- **Insurability** - the ability to be covered by [some] malpractice insurance and to receive payments from third-party insurers and other reimbursement sources. With the growth of care management networks that require insurance coverage, there are indications that certification may become the norm in the future.
- **Education** - is another rationale for certification. A defined body of knowledge is necessary to teach care management with uniformity and consistency.
- **Research** - certification enables research that defines specific outcomes and accountabilities as a result of the process of providing care.
- **Self-Regulation** - an essential aspect of any professional field. Just as it is in the best interest of consumers to be involved in defining and creating the systems that work for them, it is in the best interest of care managers to be involved in defining appropriate regulation for their work. In this way, accurate expectations for the individual practitioner or system can be developed. "

We hope the above outlined benefits will help us to move toward a collective vision, not defined solely by our separate professions but as Professional Geriatric Care Managers, a developing profession whose time has come.





CMC Certification

Organization offered by

National Academy of Certified Care Managers (NACCM)
www.naccm.net

Certification Offered

CMC - Care Manager Certified

Fee for Certification

\$225.00 exam fee, \$25.00 for handbook

Prerequisites

Pass the NACCM exam and have educational requirements

Education Requirements

Masters Degree in a related field and at least 2 years of paid-full time supervised care management experience OR Bachelors Degree in a related field with 4 years experience as above OR Associates Degree in a related field with 6 years of experience as above

Examination Requirements

Must meet minimum education requirements to take exam; Certification examination given bi-annually

Work Experience

Full-time direct experience with persons with chronic disabilities and supervised care management experience that includes face-to-face interviews, assessment, care plan development, problem solving, follow-up and quality evaluation

Supervision Requirements

50 hours per year: Individual, group or peer review of performance, use of clinical skills and core care manager functions – see Education Requirements for number of years per degree

Renewal Requirements:

Minimum 1500 hours of care management work experience, supervisory or administrative experience during the 3 year period; written verification of employment, supervision and continuing education

- **Continuing Education**

15 contact hours per year, total 45 hours for 3 year period in topics of domain areas

- **Fee for Renewal**

Every 3 years \$150

- **Documentation for Renewal**

Documentation of continuing education, employment, and supervision on NACCM forms

CMC Certification Requirements

Organization	Certification	Education Requirements	Prerequisite	Exam/Fee	Work Experience	Supervision Requirements
National Academy of Certified Care Managers naccm@snet.net www.NACCM.net (800) 962-2260	CMC	Criteria1: Masters Degree related to care management AND Prerequisite	CM exp to include face-to-face interviews, assessment, care plan development, implementation & monitoring, problem solving & quality evaluation	Application deadline Jan. 31 and July 31. Appl: \$25. Exam fee: \$225	> 2 yrs. paid full-time supervised (50 hrs/yr) CM exp following degree within last 10 yrs	Indiv, group or peer review of clinical skills & care mgr functions 50 hrs/yr--see separate supervision doc
		Criteria 2: Bachelors Degree related to care management AND Prerequisite	CM exp to include face-to-face interviews, assessment, care plan development, implementation & monitoring, problem solving & quality evaluation	Application deadline Jan. 31 and July 31. Application is \$25 Exam fee: \$225	>2 yrs. paid, full-time supervised (50 hrs/yr) CM exp AND 2 add'l yrs paid full-time exp. with clients in related human services field following degree within last 10 yrs	Indiv, group or peer review of clinical skills & care mgr functions 50 hrs/yr--see separate supervision doc
		Criteria 3: Associate Degree related to care management OR RN, LVN, LPN Diploma OR a Bachelors Degree or higher in a non-human services field AND Prerequisite	CM exp to include face-to-face interviews, assessment, care plan development, implementation & monitoring, problem solving & quality evaluation	Application deadline Jan. 31 and July 31. Application is \$25 Exam fee: \$225	>2 yrs paid full-time supervised (50 hrs/yr) CM exp AND 4 add'l yrs direct exp with clients in related human services field following degree within last 10 yrs	Indiv, group or peer review of clinical skills & care mgr functions 50 hrs/yr--see separate supervision doc

CMC Renewal Requirements

Interval	Cont Education Requirements	Prerequisite	Work Experience	Supervision Requirements
Every 3 years, \$150	15 contact hours per year, total 45 hours for 3 year period in topics of domain areas	See work and sup req	Min of 1500 hrs of care mgmt services, as a care manager, supervisor or administrator during the 3 yr period	Written verification of employment & sup prepared on NACCM forms. Documented individual, group or peer review of clinical skills & care mgr functions periodically through the yrs--see separate supervision doc



CCM Certification

Organization offered by

Commission for Case Manager Certification
www.ccmcertification.org

Certification Offered

CCM - Certified Case Manager

Fee for Certification

\$130 for application processing; \$160 exam fee

Prerequisites

Completion of the educational program's licensing or certification process must grant the person the ability to legally and independently practice without the supervision of another licensed professional. Licensure is based on each state's criteria. Certification must have been obtained by the applicant having passed an exam in his/her area of specialization.

Education Requirements

Post secondary degree (nursing diploma or associates, bachelors, masters, or doctorate degree) in a field that promotes the physical, psychosocial, or vocational well-being of the person being served

Examination Requirements

Application deadline: Nov 15 for April exam, May 15 for October exam

Work Experience

Category 1: 12 months of acceptable full-time Case Management employment experience supervised by a CCM. Supervision is defined as systematic evaluation of the quality of delivery of the applicant's case management services

Category 2: 24 months of acceptable full-time Case Management employment experience. Supervision by a CCM is not required under this category

Category 3: 12 months of acceptable full-time Case Management employment experience as a supervisor of individuals who provide direct case management services

Supervision Requirements

See work experience above

Renewal Requirements:

- **Continuing Education**
80 hours (pre- or post- approved) CEUs or exam
Pre-approved CEUs: no fee
Post-approval requests: 4 or more submitted simultaneously: \$35/year
- **Fee for Renewal**
Every 5 years \$150
- **Documentation for Renewal**
CEUs only. No documentation required for work experience or supervision

CCM Certification Requirements

Organization	Certification	Education Requirements	Prerequisite	Exam/Fee	Work Experience	Supervision Requirements
Commission for Case Manager Certification, ccmcertification.org (847) 944-1330	CCM	Post secondary degree (nursing diploma or associate's, bachelor's, master's or doctorate degree) in a field that promotes the physical, psychosocial, or vocational well-being of the person being served	Licensure or Certification: Completion of the ed program's licensing or cert process must grant the person the ability to legally and independently practice without the sup of another licensed professional. Licensure is based on each state's criteria. Cert must have been obtained by the applicant's having passed an exam in his/her area of specialization.	Appl deadline Nov 15 for April exam & May 15 for Oct. exam. Appl Fee: \$130, Exam Fee: \$160	Category 1: 12 months of acceptable full-time CM empl. exp supervised by a CCM. Supervision is defined as systematic eval of the quality of delivery of the applicant's case mgmt services.	Category 1: 12 months of acceptable full-time CM empl. exp supervised by a CCM. Supervision is defined as systematic eval of the quality of delivery of the applicant's case mgmt services.
					Category 2: 24 months of acceptable full-time CM empl exp.	Supervision by a CCM is not required under this category.
					Category 3: 12 months of acceptable full-time CM emp exp as a supervisor of individuals who provide direct case mgmt services.	

CCM Renewal Requirements

Interval	Cont Education Requirements	Prerequisite	Work Experience	Supervision Requirements
Every 5 yrs \$150	80 hrs approved CEUs or Exam Pre-approved CEUs: No Fee. Post-approval requests: 4 or more submitted simultaneously: \$35/yr	Verify that the license or certification on which the CCM is based is active and in good standing	No documentation required for renewal	No documentation required for renewal



C-ASWCM Certification

Organization offered by

National Association of Social Workers
www.socialworkers.org/credentials

Certification Offered

C-ASWCM -- Certified Advanced Social Worker in Case Management for Masters level professionals

Fee for Certification

\$140 for application processing
Additional costs for transcripts

Pre-Requisites for C-ASWCM

NASW Membership (\$190/yr)
<https://www.socialworkers.org/nasw/join/MemberApplication>
Current ACSW, DCSW and/or State Social Work Licensure or a passing score on the ASWB exam

Education Requirements

Masters Degree

Examination Requirements

No examination by NASW; ACSW or DCSW credential or passing score on masters, advanced or clinical ASWB exam

Work Experience

1 year, 1500 paid, supervised hours, post MSW degree with direct case management experience

Supervision Requirements

Minimum 50 hours/year during first 2 years post MSW; then as needed by supervisor; Social Work supervisor preferred

Renewal Requirements:

Maintain ACSW, DCSW or MSW-level state licensure and NASW membership

- **Fee for Renewal:**

Every two years \$80

- **Documentation for Renewal**

20 contact hours of continuing education relevant to case management

C-ASWCM Certification Requirements

Organization	Certification/ Fees	Education Requirements	Prerequisite	Exam/Fee	Work Experience	Supervision Requirements
National Assoc of Social Workers www.social- workers.org/ credentials 202-408- 8600 ext 447	C-ASWCM \$140	MSW	NASW Membership (\$190/yr) One of the follow- ing: current ACSW, DCSW, and/or a current state exam- based social work license or a passing score on the ASWB exam	No	1 yr 1500 hrs. pd, supervised, post MSW, direct case management exp	Min 50 hrs/year 1st 2 years post MSW; Then as needed (By social worker)

C-ASWCM Renewal Requirements

	Interval	Cont Education Requirements	Prerequisite		Work Experience	Supervision Requirements
	Every 2 yrs \$80	20 contact hrs relevant to CM	Maintain ACSW, DCSW or MSW- level state licen- sure & NASW membership		Do not have to document for renewal	Do not have to document for renewal



C-SWCM Certification

Organization offered by

National Association of Social Workers
www.socialworkers.org/credentials

Certification Offered

C-SWCM-- Certified Social Work Case Manager

Fee for Certification

\$140 for application processing
Additional costs for transcripts

Pre-Requisites for C-SWCM

NASW Membership (\$125/yr)
<https://www.socialworkers.org/nasw/join/MemberApplication>
Current ACBSW and/or current BSW
State Social Work Licensure or a passing score on the ASWB exam

Education Requirements

Bachelors Degree, Social Work

Examination Requirements

No examination by NASW. ACBSW credential offered 1991-95 or passing score on ASWB test

Work Experience

1 year, 1500 paid, supervised hours, post BSW degree with direct case management experience

Supervision Requirements

Minimum of 100 hours/year during first 2 years post BSW
Minimum of 50 hours/year during second 2 years
Supervision by social worker preferred

Renewal Requirements:

Maintain ACBSW, BSW-level state licensure and NASW membership

- **Fee for Renewal**

Every two years \$80

- **Documentation for Renewal**

20 contact hours of continuing education relevant to case management



C-SWCM Certification Requirements

Organization	Certification/ Fees	Education Requirements	Prerequisite	Exam/Fee	Work Experience	Supervision Requirements
National Assoc of Social Workers www.social- workers.org/ credentials 202-408- 8600 ext 447	C-SWCM \$140	BSW	NASW Membership (\$125/yr) and ACBSW or cur- rent BSW-level state licensure	No	1 yr, 1500 hrs. pd, supervised, post BSW, direct CM exp	Min 100 hrs/year 1st 2 yrs post BSW; Min 50 hrs/yr 2nd 2 years. Then as needed (By social worker)

C-SWCM Renewal Requirements

	Interval	Cont Education Requirements	Prerequisite		Work Experience	Supervision Requirements
	Every 2 yrs \$80	20 contact hrs relevant to CM	ACBSW or cur- rent BSW-level state licensure & NASW member- ship		Do not have to document for renewal	Do not have to document for renewal



Consultation/Supervision Options

To fulfill CMC Certification AND CMC Renewal Requirements For the National Academy of Certified Care Managers

The National Academy of Certified Care Managers, which offers the "CMC" certification, requires supervision for new applicants and certification renewal. The eligibility requirements for new applicants include two years of paid, full time, supervised (in the amount of 50 hrs/yr.) care management experience.

Full-time employment is defined as a minimum of 35 hours per week of paid employment. Part-time employment can be included using the following example: one year of part-time supervised (25 hrs/yr) employment (at least 17.5 hrs/wk) translates into 6 months of supervised employment. Another way to calculate is 35 hrs/wk X 50 wks/yr = 1750 hrs/yr X 2 yrs = 3500 hrs. The candidate will need to document 3500 hrs of paid and supervised care management experience in order to meet eligibility.

For certification renewal, the CMC must document the method and frequency of care management supervision received and/or given (no minimum number of hours required).

WHO: The consultation/supervision may be done with:

- Professional colleagues
- Mentors, or
- Supervisors/managers

HOW: Consultation/supervision includes:

- Face-to-face meetings
- Record reviews
- Telephonic conference
- Group meetings, or
- Peer review of performance

WHAT: Consultation/Supervision may be formal and/or informal. Content is expected to include:

- The use of clinical skills and core care manager functions
- Record review
- Case examples
- Current practice issues
- Ethical dilemmas, and
- Care management interventions

Acceptable Forms of Consultation/Supervision for the Independent Practitioner/Business Owner/Supervisor of Care Managers**

Consultation/Supervision in Person or Via Telephone

- Establish a paid consultative relationship with a member of GCM in another geographical area
- Establish a paid consultative relationship with a local professional colleague with expertise in the field of geriatrics who does not work in geriatric care management specifically
- Enroll in Consultation/Supervision teleconferencing offered by GCM (Expected Fall of 2006)

Peer-to-Peer Consultation

- Participate in case conferencing sessions at GCM cluster group meetings
- Participate in a local case conferencing group
- Review a peers' client records and provide feed back
- Participate on ethics committee related to care management, health and social service, geriatrics, etc.
- Participate in a journal club using care management journals

Acceptable Forms of Consultation/Supervision for the Care Manager Employee**

Acceptable forms of Consultation/Supervision include the options listed above for independent practitioners as well as Consultation/Supervision offered in your practice setting.

Regular Team Case Conferencing and Clinical Supervision Sessions offered in your practice setting

- Count your organization's internal case conferencing and supervisions by requesting your supervisor sign off on forms described below

Documentation of Supervision/Consultation

For new applicants:

- Administrators, supervisors, must document the method and number of hours of supervision provided to care manager candidate. This information is documented on the Employment Verification Form and signed by the supervisor.
- CMCs in independent or private practice must provide notarized letters from the individual(s) verifying the method and number of hours of consultation/supervision provided to the candidate. The letters must be on letterhead of the author and attached with the completed Employment Verification Form.

For CMC renewal:

- Administrators, supervisors, peers must document the method and frequency of supervision provided to the care manager and /or by the care manager. This information is documented on the Employment Verification Form and signed by the supervisor, administrator or supervisee. The CMC may not verify her/his own supervision or care management hours.
- CMCs in independent or private practice must provide letter from the individual, peer, group or consultant(s) verifying the method and frequency of consultation/supervision provided to the CMC or by the CMC. The letters must be on letterhead of the author and attached with the completed Employment Verification Form.

**Please refer to attached fact sheets and "NACCM Handbook and Application for Candidates for Certification" for the eligibility criteria.*

***All forms of Consultation/Supervision must fulfill the WHO, HOW, WHAT elements outlined above.*



**National Association of
Professional Geriatric
Care Managers**

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