**Case Management**
**INNOVATIVE SOLUTIONS**
**IMPROVED OUTCOMES**

CMSA 2025

**35TH ANNUAL CONFERENCE**

**2025 CMSA ANNUAL CONFERENCE & EXPO**
June 24-27, 2025 | Hilton Anatole | Dallas, TX

cmsa.org

*CMSA's 35th Annual Conference*
# CALL FOR PRESENTATIONS

## June 24-27, 2025
## Dallas, TX

## 2025 THEME:

*Case Management:*
*Innovative Solutions, Improved Outcomes*

## SUBMISSION SITE:

https://cmsa.societyconference.com

### Submission Deadline: Oct 31, 2024

## QUESTIONS:

**Contact the Education Team:  EDUCATION@CMSA.ORG**

**LOGIN using your CMSA profile login information.**
*Please ensure your profile is up to date.*
***If you are new to CMSA, you will need to first create a profile.***

*Congratulations for taking steps to prepare and submit a proposal to present a session at CMSA's 2025 Conference in Dallas, TX. The following information is meant to assist you with a successful submission.*

CE credit is not the only goal of CMSA's conference program. CMSA seeks to offer case management peers quality programming that supports professional growth regardless of their career stage or work setting.

It is important to submit content that follows the recommendations within this packet. The following guidelines are available to assist both new and experienced presenters with resources for better organization and development of your presentations.

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## CONFERENCE OVERVIEW

Case managers are advocates, leaders, influencers, problem-solvers, educators, and more! In every work setting and within healthcare in general, there is a common challenge; how to best meet our clients' needs in an industry that is continually evolving. Legislative and regulatory changes trickle down and lead to more change at the employer level. Initiatives to engage those new to case management, improve our practice, reinforce our value, and protect our profession will lead to increased recognition that case management is the true health care reform.

Case Management is a complex career choice and certainly not a path to take lightly. The need to shift how we practice and adapt to new environments has never been as challenging. But like most processes, time and tenacity produce outstanding results. In support of case managers, CMSA continues to create the path for this rapidly expanding healthcare profession. Conference presentations and poster sessions should spark conversations and innovations, provide strategies and solutions, along with practical tools and successful initiatives for professional case managers and case management systems. We invite you to become a part of the conversation by participating in the Call for Presentations.

### OVERALL CONFERENCE GOALS

The last few years have led to changes in care delivery models and reimbursement. The healthcare workforce has experienced challenges unlike any seen in our lifetime. Industry leaders have not just recognized but openly admitted that health inequities exist and are negatively impacting the health and well-being of specific populations.

> *For 2025, CMSA is looking for presentations that will provide case managers with knowledge and skills to better adapt to this ever-changing landscape.*

These issues impact case managers more than other healthcare professionals because we are involved and immersed in them. We must be prepared for and adapt to the many changes that have come and will continue.

CMSA is requesting that presentations include emerging models of care, i.e., hospital-at-home, virtual hospital care, home-based primary care, telehealth and telerehab, population health, care for the unhoused and other social drivers of health, social drivers of mental health, children with special healthcare needs, maternal/child health and high-risk pregnancy; trauma-informed care, long COVID, care of the neonate, rural community ACOs, interventions to address implicit bias, or workers' compensation. These topics are seeing the most change and we must be prepared. ***CMSA recommends legal and ethics presentations that address one of these areas.*** Leadership and professional development presentations can also address any one of these areas.

**OVERALL CONFERENCE OBJECTIVES: Your proposal should address <u>at least one</u> of the general conference objectives; and be based on CMSA's Standards of Practice for Case Management.**

**Objective One:** The participant will examine emerging care delivery structures and reimbursement models to discover the potential for improvements in health equity, care, outcomes, and satisfaction.

**Objective Two:** The participant will identify best practices and examine evidence-based guidelines for targeted disease states or conditions and wellness for all client populations.

**Objective Three:** The participant will identify opportunities in workforce development, professional development, stability, and strategies that address the achievement of wellness (integrated health) for self and other healthcare professionals.

**Objective Four:** The participant will describe how all members of the care team can deliver patient-centered care in a diverse environment that demonstrates support and safety for clients and staff.

## PRESENTATION CATEGORIES

CMSA seeks presentation proposals for the following categories/topics based on industry research and attendee conference evaluation results. **These topics can be applied in any practice setting.**

- **Ambulatory Case Management**
- **Care of the Older Adult**, *i.e., Dementia*
- **Communication Techniques**, *i.e., Motivational Interviewing, Emotional Intelligence*
- **Community Care,** *i.e., Resource Identification; Establishing patient-provider relationships, collaboration with CHWs, care coordination for immigrants, the unhoused, and uninsured, Community Health integration*
- **DEI / Implicit Bias / Cultural Competencies**
- **Disease / Condition-specific Case Management**
- **Legal / Regulatory / Ethics**
- **Maternal / Child Health / Pediatrics**, *i.e., Mgmt of high-risk pregnancy, strategies to reduce maternal morbidity & mortality, improving outcomes for children with special healthcare needs, access to maternal & child mental health*
- **Mental / Behavioral Health,** *i.e. SUD Case Management in the ambulatory setting*
- **Payer-based / Workers' Compensation / Health Plan Cost.** *containment strategies: alternate funding*
- **Professional Development**, *i.e., Leadership, self-care*
- **Readmission Prevention / Transition Management**, *i.e., Improving communication between hospital and health plan case managers or discharging and receiving case managers*
- **Technology, i.e., HIT, Artificial Intelligence, Telehealth/Telerehab**
- **Value-based Reimbursement / Managed Care / Medicare & Medicaid Programs**

**Topics should be presented in a way that impacts case management across multiple settings or shares tools & resources on how best practices could be implemented within other organizations.**

## PRESENTATION FORMATS

There are several ways to share your expertise in the CMSA Annual Conference Program. Here are a few of the presentation formats available to submit your content for consideration. *Presentations should be 1 hour in length.*

→ **CONCURRENT SESSION:** This is an in-person session with 1-2 presenters. Presenters will present topics in the primary categories listed above from the podium. *These sessions will be recorded and placed in the Conference Digital Content.*

→ **PANEL SESSION:** This is an in-person session with a moderator and up to a maximum of five panel members *(including the moderator if they are also presenting).* Panelists present on stage in a table format. The moderator and panel will determine how each panel member will contribute to the content presented on topics in the primary categories listed above. Panel submissions must demonstrate panelists across multidisciplinary practice settings or expertise representing the topic. *These sessions will be recorded and placed in the Conference Digital Content.*

→ **MILITARY/VA/DoD SESSION:** This category is for anyone who has a topic that is fitting for our MVD audiences either during the MVD Day Pre-Conference Program or during main conference concurrent sessions. Preferred topics should be comprised of discussions that impact case management throughout the various government services. The presentations will be in-person and presented with 1-2 presenters from the podium. Options for panel topics may be submitted, as well. Only Main Conference programming will be recorded and placed in the Conference Digital Content. **NOTE:** *If you would like to present an MVD poster topic, please use the Poster Submission Form.*

→ **POSTER:** This is an in-person session with 1-2 presenters. Poster sessions will be 2 hours in the Expo Hall. Presenters will be given resources to build the poster and present the final outcome on a 4' x 8' board. Great format for new presenters or for presenting case management graphs, research, process improvements, quality improvement, and any other topic or studies that shares proven results and outcomes. *This is an in-person session only.*

→ **DIGITAL-ONLY CONTENT:** This content is pre-recorded and only delivered online in the Conference Digital Content. This session may have 1-2 presenters. ***Digital-only sessions must be recorded by May 1, 2025.***

**NOTE:** Submissions that are NOT selected for their original format preference may be offered to present in another format, *i.e., poster or digital content*. Presenters who indicate interest ONLY in their original format selection may not be offered alternative format options if not selected for their original choice.

## SKILL LEVEL

Please identify the audience skill level applicable to your presentation. The levels and definitions are as follows:

1. **NOVICE**

   Content applies to those new to case management practice, care coordination, and transition management culture. Students and health care professionals unfamiliar with case management may benefit. The content is considered introductory and would advance the skills and knowledge of the novice learner.

2. **INTERMEDIATE**

   Content applies to those with limited case management practice experience and cultural familiarity. Presentations provide information that builds on current knowledge or experience. This involves using concrete situations to understand the underlying structure of the material. The learner may not yet be certified, and content would advance the skills and knowledge of the intermediate-skilled case manager.

3. **ADVANCED**

   Content applies to those who are familiar with case management practice and culture and have been working in this area with a clear understanding of the issues. This course would cover and address the complexities involved in the work. The learner may be in a leadership position or is seeking leadership skills. The learner may hold certification, be active in, or be interested in research or process improvement.

## CONTINUING EDUCATION

CMSA seeks to include as many of these credit types as possible. In the submission, you will be asked to select the credits your presentation content should meet. ***Ninety-nine percent of all sessions will be approved for RN and CCM credits and nothing extra is needed.*** There are a few others that have more specialized criteria that we are seeking, as well. <u>More criteria for these credit types are available at the end of this packet.</u>

- **RN** – Nursing
- **ASWB** – Social Work
- **CCM & CCM Ethics** – Certified Case Manager
- **CDMS & CDMS Ethics** – Certified Disability Management Specialist
- **CRC & CRC Ethics** – Certified Rehabilitation Counselor
- **CPHQ** – Certified Professional in Healthcare Quality
- **CNLCP** – Certified Nurse Life Care Planner
- **CHLCP** – Certified Health Professional Life Care Planner

**Because CMSA files CEs as a Conference and not by individual session, the deadline to have ALL materials will be April 1, 2025. This allows time to verify the information submitted and compile an application for the full conference to the licensing and certification bodies to meet their deadlines. Be prepared to have slides and any other requirements for the different CE credentials to CMSA <u>no later than April 1, 2025.</u>**

## TIMELINES
*These are the estimated timelines for the speaker selection process, program development and CE management for the 2025 Annual Conference.*

| ACTIVITY | TIMELINE |
|---|---|
| **Call for Presentations** | **Sept 1 – Oct 31, 2024** |
| **Committee Review Process** | **Nov 1 – Dec 15, 2024** |
| **Speaker Notifications** | **Jan 6 – Jan 15, 2025** |
| **Speaker Acceptance Period** | **Jan 15 – Jan 21, 2025** |
| **Speaker & Poster Resources Provided** | **Jan 22 – Jan 26, 2025** |
| **Program Development** | **Jan 22 – Feb 7, 2025** |
| **Speaker Preparation\*** | **Jan 26 – Mar 31, 2025** |
| **Poster Preparation\*** | **Jan 26 – Mar 31, 2025** |
| **Final Content Deadlines:** *PPT, Posters, Quizzes, CE resources* | **Apr 1, 2025** |
| **Staff Preparation for CEs** | **Apr 1 – Apr 15, 2025** |
| **Digital Content Recordings** | **Apr 15 – May 1, 2025** |
| **Speaker Registration Deadline** | **May 1, 2025** |
| **Session Handouts and Recording Page Open** | **June 16, 2025** |

*\* Staff support is available during the Speaker and Poster Preparation for feedback and review to ensure the final materials submitted are complete.*

# SUBMISSION INFORMATION

## SUBMISSION REQUIREMENTS

### Submissions are due Oct. 31, 2024

You will be required to log in to the conference site https://cmsa.societyconference.com/ to complete your submission and speaker requirements for consideration.
**Please include information for ALL speakers at the time of submission.**

- **Presenters**
  - Submissions may have up to two presenters (Presenter / Co-Presenter) for concurrent sessions. *Panel/Roundtable discussions may be approved for more and will use a different submission form.*
  - Presenters are limited to two submission types.
  - Presenters are limited to submitting two presentations.
- **Session Title** - 65 characters or less, **not words**
- **Abstract** – A brief description of your session (2000 characters or less, **not words**)
- **Objectives** – **Three (3) MEASURABLE behavioral learning objectives** relevant to the presentation content.
  *Please use verbs from the acceptable learning objectives list below.*
- **Bio** – A brief bio (500 words or less) from each presenter is required at the time of submission.
- **CV/Resume** – A current CV or resume for each presenter is required at the time of submission.
- **Interactive Exercise** – For concurrent/podium sessions, include how you will incorporate an interactive exercise or form of engagement with the audience.

### ACCEPTABLE VERBS FOR LEARNING OBJECTIVES
Full list approved by CCMC (CCM) / **In bold**, approved by CCMC **and** ASWB (SW)

| KNOWLEDGE | COMPREHENSION | APPLICATION | ANALYSIS | SYNTHESIS | EVALUATION |
|---|---|---|---|---|---|
| **arrange** | **classify** | **apply** | **analyze** | build | **appraise** |
| **define** | **compare** | complete | **appraise** | collect | argue |
| **describe** | critique | conduct | **calculate** | **compose** | assess |
| **label** | **describe** | **construct** | catalog | **construct** | **choose** |
| **list** | discuss | **demonstrate** | **categorize** | **create** | **compare** |
| **memorize** | **estimate** | **dramatize** | critique | **design** | **conclude** |
| **name** | **explain** | employ | debate | **develop** | defend |
| **recall** | **express** | execute | diagnose | devise | **evaluate** |
| **recognize** | **identify** | perform | **differentiate** | establish | **interpret** |
| record | **illustrate** | practice | **distinguish** | **formulate** | investigate |
| **relate** | **interpret** | respond | experiment | **integrate** | justify |
| repeat | locate | **role-play** | extrapolate | manage | measure |
| reproduce | reference | sketch | inspect | **modify** | **rate** |
| **select** | reiterate | **solve** | measure | **organize** | report on |
| state | report | **use** | quantify | **plan** | review |
| **tell** | **restate** | | **relate** | prepare | score |
| underline | review | | test | propose | **select** |
| | **summarize** | | theorize | revise | support |
| | **tell** | | | | |
| | **translate** | | | | |

**Knowledge:** Remembering previously learned material.
**Comprehension:** Grasping the meaning of knowledge being learned.
**Application:** Using learned materials in new/concrete situations.
**Analysis:** Breaking down material into its elements; and understanding its underlying structure.
**Synthesis:** Putting parts together to form a new whole; creating new patterns or structures.
**Evaluation:** Judging the value of material for a given purpose, using pre-determined criteria.

## PRESENTATION REQUIREMENTS

These areas must be included in the presentation. Presentations will be **due by April 1, 2025,** for review.

- **PowerPoint Slides** - CMSA will provide a PowerPoint template for the Annual Conference. Please use this template to build your learning content.
  - References cited must be published within the last five years, except for seminal works.
- **Professional Slide Formats** - Presentation materials are expected to follow best practices for professional presentations.
- **Disclosures** – Presenter must declare any vested interest or relationships with the content being presented.
- **Ethics** – For programs addressing ethical principles, be sure to include the specific required content and references as required by CCMC's PACE criteria. This includes connection of content to CCMC's Code of Ethics, program outline and slides. See **Continuing Education Overview** for more details.
- **Citations** – The Presentation must include citations for all graphs, graphics, tables, photos, or videos.
- **Primary Source Literary References** – minimum of three references that will support presentation content.
- **10 Question Quiz** – For sessions qualifying for SW and CRC credits, a quiz is required. Quizzes may only have 3 T/F and should primarily consist of multiple-choice questions addressing the content of the presentation. **See the SESSION QUIZZES section of this Guide**. **These are due April 1, 2025.**

## CONTENT CREATION:

In today's technology, AI tools are efficiently used as writing assistants. This can be useful to tighten up sentences, check spelling, and suggest grammar. However, CMSA presenters should personally create their titles, abstracts, objectives, and presentation content from personal knowledge and expertise on the topic they wish to present. *Submissions and presentations must be the original content of the presenter*.

**AI-generated content and presentations are strictly prohibited.**

## GENERAL SPEAKER TERMS AND CONDITIONS

- Presenters agree that their presentation is **unique and original** and **will not be offered six months before and six months following** CMSA's Conference.
- Presenters understand that their submission will be *deidentified and unaltered* during the review process. *CMSA will make no corrections for typographical or grammatical errors. However, submissions may be returned for revisions and edits, if directed by the Education Committee.*
- Presenters understand that CMSA reserves the right to edit the titles and content of abstract submissions.
- Presenters agree that their presentation and content will not be generated by AI and will represent their personal knowledge, expertise, or research.
- Presenters agree their presentation will be free from commercial bias.
- Presenters understand they are responsible for ALL travel-related expenses *(including hotel, travel, transportation, and meals)*.
- Presenters understand they are required to register for the Conference. *If ONLY attending for your presentation, you will have a complimentary day pass for the day of the presentation. Those attending the entire Conference will be offered a discounted rate on registration.*
- Presenters agree to the recording of their session *(audio and slides)*. Recordings may be used as part of the conference's digital program. *Recorded sessions may also be selected for placement in CMSA's Educational Resource Library for up to three years following the conference.*
- Presenters understand that photos may be taken during their session and used in future collateral or social media posts.

## REVIEW PROCESS

CMSA knows the most well-received sessions often include interactive components that offer opportunities for attendees to engage actively. Therefore, please consider innovative alternatives to traditional lecture formats as you craft your submission, i.e., video enhancements, small group interactive discussion, audience polling, competency practice session of specific skills, etc. Your submission will be blinded to prevent any potential bias. Errors in spelling and grammar may result in a submission rejection.

### SCORING CRITERIA

**SUBMISSIONS ARE BLINDED.**
- **Reviewers will not see the presenter's information and will score only on the quality of the submission content submitted, i.e., category, title, abstract, objectives, etc.**
  - Be sure content is clear, concise, and relatable to the conference theme and objectives.
- ***Please check your submission for any errors before submitting.***
  - Submissions with spelling and grammatical errors will score lower when reviewed.
  - Consider creating in Word first to check word counts, grammar, and spelling before copying to submission fields.
  - Ask a colleague to review and provide feedback before submitting.

Program selections will be based on selection criteria for Concurrent, Panel or Poster, using scoring criteria and qualified needs assessment based on the following:
- **Originality**
- **Emerging Trends**
- **Practical application**
- **Topic and abstract are consistent with the Overall Conference Objectives**
- **Content Level -** *Novice, Intermediate or Advanced*
- **Absence of self or product promotion/marketing**
- **Session Objectives – measurable learning goals written clearly and concisely that define** the knowledge, skills, and abilities the learner will be able to demonstrate following this experience.
- **Presence of at least one interactive exercise/audience engagement within the session.**

### SUBMISSION DEVELOPMENT / TIPS

**ABSTRACT CONSTRUCTION**
The content and quality of the abstract will impact the selection process. *Following is an <u>example</u> of a well-constructed abstract:*

*Health Confidence: A Novel Approach to Patient Education to Reduce Readmissions*

<u>Abstract:</u>
*There is a continued focus on the patient discharge process as hospitals continue to tackle readmission reduction and prevention. The motivating factors are many: reduction of costs and penalties, optimization of payment, achievement of pay for performance measures and improvement of publicly reported quality indicators and patient satisfaction measures. "Potentially preventable readmissions" have been connected to insufficient or ineffective discharge strategies.*

*Chronic, high-profile conditions such as congestive heart failure (CHF), diabetes and chronic obstructive pulmonary disease (COPD) have been identified as the main foci of readmission reduction projects. A review of literature demonstrates that health literacy is intimately tied to a patient's success at managing their chronic condition(s).*

*Current discharge education strategies such as 'teach back' do not appear to be consistently utilized to meet the need of properly preparing this population to self-manage.*

*This presentation will review the importance of health literacy, the impact that lower health literacy plays in patient engagement and readmission reduction, and review tools and strategies to positively impact greater health literacy in our populations.*

Additional criteria that will be used to evaluate your submission include:

**Description of Activities/Approaches Introduced.** The purpose of the issue, project, process improvement, or research is clearly and concisely stated. The proposed issue or problem is presented sufficiently to understand the author's choice of research or practice-based approaches. There is sufficient information described for the project activities such that conference participants will be able to discern if these activities might be helpful to adopt. If appropriate, include where the project, study, or investigation is with outcomes.

1. **Background.** Sufficient background information and evidence are included to connect broader issues, context, rationale, and support for the work.

2. **Learning Impact and Significance.** The abstract addresses the significance of the issue or project/research.
   - The abstract provides content that will be highly engaging, interactive, and practical.
   - The abstract describes a compelling problem or topic in case management practice.
   - The project or issue described can lead the field in new directions or add to and deepen our understanding of issues associated with the topic.
   - The abstract fits into the theme of the Conference.
   - The activity contributes to or enhances the field of online, distance, or e-learning.
   - The potential of the issue, project, or research adds to or deepens our understanding of the issues associated with the topic.
   - Research or practical applications that lead the field in new directions often is more worthwhile than replications of existing studies.

3. **Assessment**. If the project is completed, the results are briefly summarized. If the project is in progress, the author(s) indicate expected outcomes and notes that it is in progress and expected summary outcomes of the projects are addressed.

4. **Mechanics**. The abstract is clear, concise, and well-organized. Abstract honors the standard rules of correct grammar, punctuation, spelling, and formatting.

5. **Interactive Exercises**. Each presentation must include an exercise that engages the audience. This can include polling by a show of hands, polling software (if the internet is available), games, specific discussion topics, or role-play.

## PRESENTER DISCLOSURES AND AGREEMENTS

**When completing the Submission, all speakers will be asked to agree to disclosures and agreements.**
**Here is an overview of the statements you will be asked to review and agree to throughout the application.**

- Presenters understand they are engaged as independent contractor, and his/her opinions do not represent those of CMSA.
- Presenters receive a discounted registration rate to attend the conference and must be registered to present.
- Presenters understand they are responsible for all expenses including, but not limited to registration, travel, ground transportation, hotel, and per diem.
- Presenters understand that CMSA does not provide honoraria.
- Presenters agree to arrive to meeting room at least 15 minutes early for setup.
- Presenters understand that there is no guarantee that the facility will offer complimentary shared Wi-Fi in meeting rooms. *Please check with CMSA before finalizing your presentation.*
- Session and Panel presenters understand that audio and slides will be recorded and may be placed in the digital content for the remainder of the conference; and in the CMSA Educational Resource Library for up to three years for CMSA Members.
- Presenters understand that their presentation must be unique and not offered 6 months prior to or after the CMSA's conference.
- Presenters understand that their submission will be reviewed by CMSA's Education Committee unaltered and will not be corrected for typographical or grammar errors prior to being reviewed.
- Presenters understand that CMSA reserves the right to edit the title, content, and/or objectives of the abstract submission(s).
- Presenters understand that the presentations should be free from commercial/marketing bias. Educational sessions shall not contain marketing content for a product, business, individual service, nor will promotional materials be permitted for distribution to attendees before or after the presentation without prior approval from CMSA. **Note:** *Presenters may include their company logo/name on the title slide and contact/Q&A slide (last slide) only in a PowerPoint presentation*.
- Presenters understand that CMSA does not permit equipment demonstrations during educational sessions. If your session is product/service oriented, CMSA expects the presentation to focus on technologies being used in the field, not solely on a specific product or service that your organization provides.
- Presenters understand that CMSA reserves the right to interrupt a session and/or ban offending presenters from future CMSA events.
- Presenters agree to conduct presentation in a professional manner; and should refrain from use of offensive language and/or profanity.
- Presenters agree to indemnify, hold harmless, and defend CMSA for any alleged liability resulting from Presenter's presentation, both verbal and written, including libel, slander, violation of Copyright, or misstatement of fact.
- Presenters agree to allow their respective PowerPoint or session materials to be posted to CMSA's Conference website for download by registered attendees for review and/or printing. Files will be converted to a PDF file format prior to website posting and shall contain Presenter names and any copyright notice.
- Presenters must declare any vested interests or conflicts of interest in the submission, as well as the presentation, including any commercial, financial, research relationships or interests within the past 12 months that you or an immediate family member have that might affect your independent involvement in the planning of the activity.
- Presenters understand to ensure educational quality and adherence to CE guidelines that pre-approval of session content, PowerPoint, handout and/or poster mockup is required by CMSA and should be submitted for review by the stated deadlines. *A PowerPoint template will be provided once your session has been approved*.
- Presenters understand any additional promotional or educational pieces associated with your educational activity must be conducted with the full knowledge and prior approval. *(i.e., brochures, flyers, giveaways, etc.)*
*CMSA is not responsible for shipping, tracking or other costs related to reproduction and distribution of supplemental handouts or other materials.*
- Presenters understand that CMSA files for CEs as a program and not individual sessions and must abide by strict deadlines to file program CEs. Presenters agree to abide by all CMSA deadlines to meet criteria for continuing educational approval.

## CONTINUING EDUCATION REQUIREMENTS

Today's certification and licensing bodies have become much more stringent in the requirements to issue continuing education credits. While some find the process lengthy and complicated, these requirements must be met for CMSA to issue CE credit. **Here are some highlights of the CE types CMSA will be filing.**

**Please review and see if your content addresses the requirements for any of the below, and then select the ones that will be aligned with your presentation.**
*More support will be provided to complete the requirements once your presentation is accepted.*

### SOCIAL WORK CREDITS:

Social work has some additional requirements that must be met. If you feel your presentation does meet the social work requirements, please be sure to reflect this in at least one learning objective. **To determine if your session would meet the requirements for social work hours, here are some questions about your topic to consider:**

- Does your program address mental health issues, or human behavior in the social environment?
- Does your program address interventions and coping with disabilities, clients' integrity?
- Does your session deal with the patient in his/her environment?

**Theories and Concepts of Human Behavior in the Social Environment**

- Social determinants of health, financial factors, behavioral motivation and/or adherence.
- Address how the unique nature of illness, wellness, and prevention impact clients and/or populations.
- Explore how to empower clients and/or populations toward achieving health, wellness, etc.
- Content explores the impact of macro or societal factors or on micro or individual practice.
- Addresses the ways client behavior is impacted across the various life stages, and the implications for the client and practitioner.

**Full list of acceptable and unacceptable topics for SW programs.**

### CASE MANAGER CERTIFICATION (CCM) CREDITS:

All sessions will be applied for regular CCM credits unless there are ethical principles through the Commission for Case Manager Certification (CCMC).

*To be approved for CCM Ethics, your course MUST reference the CCMC Code of Professional Conduct and Principles and CONNECT it to your topic throughout the presentation and topic outline. See examples of topics below and download more details and FAQ's on the Code of Professional Conduct.*

### APPROVAL REQUIREMENTS FOR CCM ETHICS

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

**THE COURSE CONTENT MUST INCLUDE:**

- Discussion of ethics as it relates to the CCMC Code of Professional Conduct and its practical application to the topic being presented throughout the presentation.

**ETHICS TOPICS INCLUDE, BUT ARE NOT LIMITED, TO:**

- History and evolution of values and ethics in Case Management
- Ethics theories, codes, interpretation, and application
- Professional values, character, morals, and self-awareness about professional ethical behavior
- Ethical decision-making processes, models, and dilemma examples:
  - Ethical conduct
  - Ethical/moral development
  - Interprofessional collaboration and ethics
  - Ethical practice, including multicultural issues, cultural competence, diversity

**CERTIFICATION OF DISABILITY MANAGEMENT SPECIALIST (CDMS) CREDITS:**
The goal of CDMS is to facilitate the physical recovery, rehabilitation, and return-to-work process while seeking to control the escalating costs of injury, disability, and absence for employers, insurance carriers, and the government.

Each CDMS must abide by The CDMS Code of Professional Conduct. Certified professionals must also adhere to any other professional codes of conduct to which they are bound. **CDMS Code of Professional Conduct**

**ETHICS:** In order to earn CEs in the ethics focus area, the content of the program must show evidence that the CDMS Code of Professional Conduct is referenced and properly cited within the presentation or a comprehensive program outline. Examples of such evidence include:

1) reference to the CDMS Code within the promotional or marketing materials or
2) written explanation from the presenter that states the way and extent to which the CDMS Code will be addressed within the presentation.

**Domain Focus Areas for CDMS Continuing Education** *(see pages 7 & 8 for more domain focus area details)*
The following areas constitute the domain focus areas that are appropriate for continuing education for disability management specialists.

**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.

**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.

**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.

**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.

**Ethics:** Coursework topics under this area may include:
- Ethical Practice in Disability Case Management
- Ethical Practice in Disability Prevention and Workplace Intervention
- Ethical Practice in Program Development, Management and Evaluation

**CDMS DOMAIN IDENTIFICATION**
**Submissions that meet any of the domain focus areas will be asked to identify these domains no later than April 1, 2025.**

## COMMISSION ON REHABILITATION COUNSELOR CERTIFICATION (CRCC) CREDITS: www.crccertification.com

The standards of this mandatory code are intended to assure the public that the rehabilitation counseling profession accepts its responsibility to provide caring service to individuals with disabilities. All CRCs/CRCCs are bound to act in accordance with the **Code of Professional Ethics:**

**Domain Focus Areas:** Review pages 11-14 for sub-domain focus areas

- Professional Orientation
- Counseling Theories, Techniques and Evidence-based Practice
- Group and Family Counseling
- Crisis and Trauma Counseling and Intervention
- Medical and Psychosocial Aspects of Chronic Illness and Disability
- Assessment, Occupational Analysis, and Service Implementation
- Career Development and Job Placement
- Demand-Side Employer Engagement
- Community Resources and Partnerships
- Case Management
- Health Care and Disability Management
- Research, Methodology, and Performance Management
- Ethical Standards and Decision-Making for Rehabilitation Counselors

**Ethics Content for CRCs**

The content must show evidence that the CRCC Code of Professional Ethics for Rehabilitation Counselors is the focus for an educational program/activity to be pre-approved for ethics CE. The Code must be referenced and properly cited within the presentation. An example of evidence includes a written explanation from the presenter stating the way and extent to which the CRCC Code will be addressed within the presentation. Must identify the ethical concept and standards to be presented and how it related to course content. **Due April 1, 2025**

## CERTIFIED PROFESSIONAL IN HEALTHCARE QUALITY (CPHQ) CREDITS: This credential validates individuals' knowledge of healthcare quality practices and competencies. www.nahq.org

**Program Requirements**

The learning objective(s) for your program must align with at least one domain area within the Healthcare Quality Competency Framework.

Your program must follow standard best practices for instructional design and development:

- Appropriate and clearly written learning objective(s)
- Clear program title and description
- Topic-level outline with a clear mapping to the Healthcare Quality Competency Framework domain area(s)
- List of teaching and assessment methodologies used
- Current references
- Healthcare quality subject matter expertise utilized during program development

**CPHQ DOMAIN FOR CEs**

If your submission is accepted and you have indicated this is a credential that aligns with your presentation, be prepared to send in the domain in the Healthcare Quality Competency Framework that ties to your objectives and content for your presentation for the NAHQ credit to the CMSA Educational Content Manager. **Due April 1, 2025**

## SESSION QUIZZES

Sessions approved for Social Work and/or CRC credits must also submit a quiz about the program content learned. This quiz is **due by April 1, 2025.**

- Quizzes may be submitted in a WORD document.
- 10 Questions Required:
  - Only three (3) or less questions may be True/False.
  - The remaining should be Multiple Choice.
- Questions should not be overly complicated or written to trick any attendee.
- Provide BOTH Correct and Incorrect responses for each question.
  - Indicate the Correct response by highlighting answer or changing to a RED font.

### True / False Questions:

You may submit a **maximum of three (3)** True and False questions.

- Questions should be formatted as a FACT, not a Question.
- The attendee should determine if the FACT stated is a True or False statement.

**EXAMPLES:**

Aging in place concepts only related to your home environment. True / **False**

All generations have similar needs for things like autonomy, independence, and connection. **True** / False

### Multiple Choice Questions:

For Multiple Choice, you should have at least four (4) responses but 5 choices max.

Both the correct response and the incorrect responses should be provided on the document.

- Correct responses should be **one selection**, not multiple.
  - *(i.e., Answer should not be A & B as the "correct responses.")*
- Avoid creating all questions having the correct response as "All of the Above."
- If there are multiple right answers, try making the question as "which one is NOT correct" and have one preferred response.

Multiple Choice options should be formatted as a question and not as a statement.

Do not use a fill-in-the blank format where a word is selected to complete a blank in a statement.

**EXAMPLES:**

What is the most popular home upgrade?
- A. **Remodeling the bathroom**
- B. Getting new windows
- C. Improving the kitchen
- D. Adding on rooms

All the following statements are TRUE <u>EXCEPT</u> which one?
- A. Generational differences are like cultural differences.
- B. **All generations are in competition with each other.**
- C. Work environment should make everyone feel welcome to share ideas and ask for help.
- D. Everyone does not see things like you do.

| *Instead of this format for a question.......* | *....Consider* |
|---|---|
| When sharing a client/patient with a transdisciplinary team, best practices for the care planning process include:<br>A. Collaborating on care goals<br>B. Creating the care plan solo and then seeking input from the team<br>C. Create action items for each member of the team<br>D. **A and C only**<br>E. All of the above | When sharing a client/patient with a transdisciplinary team, which of the following is **NOT** a best practice for the care planning process?<br>A. Collaborating on care goals<br>B. **Creating the care plan solo and then seeking input from the team**<br>C. Create action items for each member of the team<br>D. All of the above |

## PROFESSIONAL BIOS, CVs, and RESUMES

Professional bios tell more of a story where CVs and resumes provide a list of career and educational highlights. Usually written in third person, bios are written in an engaging, storytelling format that shares experiences and highlights that capture the essence of a person.

### CREATING A BIO

The bio should give a snapshot of where you currently are in your career, your level of experience, education and your core skills, strengths, and expertise that you bring to the table. This can include career highlights and notable achievements that are related to supporting the topic you will be speaking on to show your expertise in this area sharing unique qualifications, interests, and career milestones.

### BIO TIPS:
1) **500 words or less**
2) **Write in third person.** This shows more authority.
3) **Be concise.** This is an overview of professional accomplishments.
    - It is not necessary to share when and where you earned degrees, licensures, and certifications, unless it relates to the topic being presented.
    - This detail will be identified in the CV / resume you provide.
4) **Relevance is key.** Keep it succinct and to the point.
5) **Make it interesting.** Keep the reader intrigued to want to hear you speak.
6) **Avoid telling it all**. The reader does not want your life story, just the highlights that set you up as someone qualified to present a high-level overview of the topic.
7) **Be authentic and sincere.** Do not exaggerate your accomplishments.
8) **Avoid using industry jargon.**

### HOW TO WRITE A BIO:
**Begin with these key sentences to get you started, then tie them together in a paragraph to tell your story.**
   - [Full Name] [Credentials] is a [professional title] with [company name]. *May add number of years with company or in that role.*
   - [Name] currently [brief overview of expertise in your role currently].
   - [Name or pronoun] has [mention your achievements or milestones].
   - [Name/pronoun] is a [mention any relevant awards, trainings, publishings, or honors related to your topic]. *May also share any unique degrees or certifications here if relevant to the topic presenting to show expertise.*
   - [Name or pronoun] is pursuing [goals, projects, training, etc. that relate to establishing continued growth in this area of expertise].

## DIFFERENCE IN A CURRICULUM VITAE (CV) AND A RESUME

### Curriculum Vitae (CV) versus Resume

Each presenter will need either a CV or a Resume when submitting their proposal. Make sure content is up-to-date and created for your audience.

**Curriculum Vitae** (CV) is a professional career summary for those that have been professionally published.
   - Normally used for academia, education, science, and research
   - Longer than a resume – includes sections such as research, publications, presentations, professional associations, and more.
   - Commonly at least two or more pages

A professional **Resume** is sufficient if you have never been professionally published.
   - Concise summary of professional accomplishments relevant to the industry and audience.
   - Commonly one page

**View Templates for Examples:  Curriculum Vitae / Resume**