



Commission for Case Manager Certification

Criteria for Certification Renewal And Continuing Education

Commission for Case Manager Certification
Renewal Deadline: November 30, 2011
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ACCREDITED BY THE NATIONAL COMMISSION FOR CERTIFYING AGENCIES

CONTENTS

| | |
|---|----|
| Certification Renewal Program | 3 |
| Guidelines for Renewal | 3 |
| Penalties | 3 |
| Option 1: Online Renewal Process through Continuing Education Attainment | 3 |
| Change of Address | 6 |
| Privacy Information | 6 |
| Continuing Education Requirements | 6 |
| Focus Areas | 7 |
| Pre-Approved Continuing Education | 9 |
| Post-Approval of Continuing Education | 9 |
| Documentation and Audit | 10 |
| Criteria for Appropriate Continuing Education | 11 |
| Option 2: Renewal through Re-Examination | 12 |
| Certification Exam Schedule | 12 |
| Late Renewal Requests | 12 |
| Appeals | 13 |
| Retirement Designation | 14 |
| Fees | 15 |
| Contacting CCMC | 15 |
| Frequently Asked Questions | 16 |

Certification Renewal Program

The Commission for Case Manager Certification (CCMC) believes that individuals certified as case managers (CCM®s) should continue to expand their skills in order to enhance the quality of the services they provide. CCMC's certification renewal requirements are designed to encourage case managers to continue their professional education through courses and other activities that will help them serve their clients more effectively. The CCMC conducts a job analysis every five years to ensure that the CCM® certification and examination accurately reflect the practice of case management. CCM®s are required to renew their certification every five years to remain current in the field of case management.

The CCMC certification renewal program uses continuing education opportunities to help practitioners achieve the following goals:

- Obtain information on current trends
- Explore new technologies
- Develop balanced professional judgment and enhance critical skills
- Acquire knowledge in specific focus areas

Guidelines for Renewal

Initial CCM® certification is valid for five years. The CCMC certification renewal program allows CCM®s to extend this designation at five-year intervals from the “valid through” date of the initial certification. There are two renewal options:

Option 1: Documentation of 80 clock hours of approved continuing education

Option 2: Re-examination

Penalties

Completing the CCMC renewal form carries with it an acknowledgment that the information provided by the applicant is accurate. If CCMC subsequently learns that a certification was granted on the basis of false, misleading, or inaccurate information, it has the right to revoke or suspend that certification. CCMC also reserves the right to suspend or revoke a certification upon proof that an individual has violated the CCMC Code of Professional Conduct.

Failure to renew your certification will result in the expiration of your certified status. Should you fail to renew your certification, you are required to reapply, meet all CURRENT standards, and achieve a passing score on the certification exam. **Individuals who use the CCM® designation or who otherwise represent themselves as being certified without first having fulfilled these requirements may be denied recertification. Such individuals may also be subject to legal actions.**

OPTION ONE: Online Renewal Process through Continuing Education Attainment

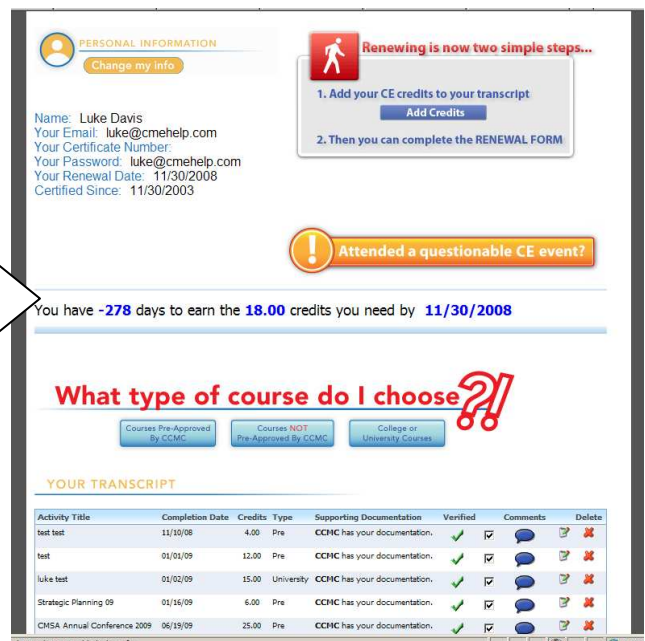
A certification renewal postcard is mailed to all CCM®s approximately three months prior to the “valid through” date printed on their certificates. The online renewal system is activated at this time. The new online renewal process is simple and easy to use.



The CCM® can log into his or her dashboard through “MY CCM DASHBOARD” on the CCMC website at www.ccmcertification.org. The login is the individual’s CCM® number and passwords are generally the last four digits of each person’s social security number (unless a different password has already been created by the CCM®.) Assistance is always available through the CCMC Help Center at support@ccmchelp.org.



CCMs enter all the courses attended for which continuing education credit was attained. Course information is entered into the online transcript on the dashboard.



All 80 continuing education units must be obtained during the CCM®'s current 5-year renewal period and must fall within the focus areas described in this guide.

CCMC strongly encourages all CCM®s to submit their CEUs into their online transcript as they are earned. Internet servers can slow down as volume increases, so CCM®s are advised to begin the renewal process as soon as the renewal form goes "live" on the website, up to three months before the renewal dates of May 31 and November 30.



Documentation of continuing education **MUST** be kept for **ONE YEAR PAST the "valid through" date on the CCM® Certificate**. In the event a CCM® is selected for a random audit of transcripts, this documentation will be requested. Copies of continuing education documentation (except for transcripts and/or grade reports) should be used as they will not be returned.



Once a minimum of 80 continuing education units (CEUs) have been entered, the online renewal form will appear in the upper right-hand corner of the dashboard. This form must be completed, and a copy of the CCM®'s current and unrestricted license or certification, allowing for independent practice, must be uploaded. (Instructions for submitting the license are included in the online renewal form.)

The screenshot shows the 'CE CENTER' dashboard for a user named Luke Davis. It includes a 'PERSONAL INFORMATION' section with fields for Name, Email, Certificate Number, Password, Renewal Date, and Certified Since. A 'Your Renewal' section indicates that the user has not yet added CE credits, filled out the renewal form, or received payment. A prominent notice states 'The Deadline to renew is Sunday, November 30th'. A large arrow points from this notice to the text 'Renewal Form, License Upload, and Payment'.



CCMs submit payment for renewal and any post-approval fees once all renewal requirements have been completed. (For more information on post-approval, please see the *Post-Approval of Continuing Education* section later in this guide.) Post-approval fees are automatically calculated by the system and are added to the renewal fee. Payment can be submitted by credit card online. These fees are nonrefundable. Please see the fee schedule at the end of this guide for current fees.



REMEMBER: There is no additional cost when reporting continuing education credits earned through approved providers.

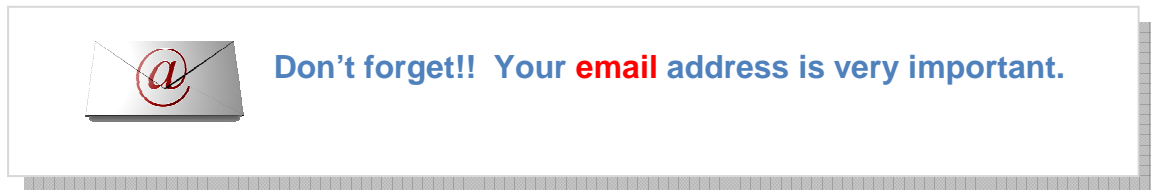


REMEMBER: One to two weeks after completing renewal process, CCM®s should check their online account in "MY CCM DASHBOARD" to confirm that the submitted license has been received, and all renewal steps are marked as completed.

Change of Address

Please notify the CCMC Help Center of any change in address. CCMC requests address correction information from the post office on all of its mail. Therefore, if your address is not current, the mail we send you will be returned to our office even if you have filed a forwarding address with the post office.

CCM®s can also change their contact information at any time by logging into their dashboards at "MY CCM DASHBOARD" on the CCMC website.



CCMC will make every reasonable effort to send the certification renewal postcard and follow up emails to current designation holders. However, it is the individual CCM's responsibility to renew his or her certification by the "valid through" date on his or her certificate.

The entire renewal process is online, and paper renewal applications are no longer available. Online renewal assistance is available through the CCMC Help Center at support@ccmchelp.org or by calling 651-789-3744.

Privacy Information

Information submitted as part of the application, certification, and certification renewal processes becomes the property of the commission and will not be released to outside parties unless authorized by the applicant/certificant or unless required by law. Individual score reports are released to the candidate and are not released to any institution or employer. For research and statistical purposes only, data resulting from the certification or certification renewal process may be used in an anonymous/unidentifiable manner.

The commission does provide a database listing all certificant on its website, which is updated periodically, for the use of the public.

Continuing Education Requirements

CCMC is committed to facilitating the professional development of its certified individuals and has instituted the following requirements, which allow the flexibility to create a more personal experience for self-development.

To ensure that CCM®s maintain their knowledge, skills, and abilities in the field, CCMC requires that the 80 hours be taken in the focus areas that are found on the certification exam and which are continually validated through ongoing role and function studies. The focus areas are listed in this section.

Focus Areas

Please refer to the following focus areas when developing your personalized plan for maintaining your knowledge, skills, and abilities through continuing education.

| Psychosocial Aspects |
|---|
| Abuse and neglect (e.g., emotional, psychological, physical, financial) |
| Multicultural issues as they relate to health behavior |
| Psychological and neuropsychological assessment |
| Psychosocial aspects of chronic illness and disability |
| Self care management (e.g., self advocacy, self-directed care, informed decision making) |
| Health coaching |
| Spirituality as it relates to health behavior |
| Substance use, abuse, and addiction |
| Support programs (e.g., support groups, pastoral counseling, disease-based organizations, bereavement counseling) |
| Wellness and illness prevention concepts and strategies |
| Behavioral health and psychiatric disability concepts |
| Community resources (e.g., elder care services, fraternal/religious organizations, government programs, meal delivery services, pharmacy assistance programs) |
| Crisis intervention strategies |
| Change theories and stages |
| Dual diagnoses |
| End of life issues (e.g., hospice, withdrawal of care, Do Not Resuscitate) |
| Family dynamics |
| Health literacy assessment |

| Healthcare Reimbursement |
|---|
| Cost containment principles |
| Financial resources (e.g., viatical settlements) |
| Healthcare insurance principles |
| Managed care concepts and rules for reimbursement |
| Private benefit programs (e.g., pharmacy benefits management; indemnity; employer-sponsored health coverage; individual-purchased insurance; home care benefits, COBRA) |
| Prospective payment systems and rules for reimbursement |
| Public benefit programs (e.g., SSI, SSDI, Medicare, Medicaid, TRICARE, CHAMPVA) |
| Resources for the uninsured or underinsured |
| Utilization management |

| Rehabilitation |
|---|
| Work adjustment, transitional employment, and work hardening |
| Workers' compensation |
| Assessment of physical functioning |
| Disability compensation systems (e.g., workers' compensation, long-term disability) |
| Assistive devices |
| Ergonomics and assistive technologies |
| Functional capacity evaluation |
| Job analysis, job modification, and job accommodation |
| Job development and placement |
| Vocational aspects of chronic illness and disability |

| Healthcare Management and Delivery |
|---|
| Alternative care facilities (e.g., assisted living, group homes, residential treatment facilities) |
| Management of acute and chronic illness and disability |
| Medical home model |
| Medication therapy management and reconciliation |
| Models of care |
| Palliative care and symptom management |
| Rehabilitation service delivery systems |
| Roles and functions of other providers |
| Transitions of care |
| Continuum of care |
| Critical pathways, standards of care, practice guidelines including the average duration of treatment associated with various conditions and disabilities |
| Healthcare delivery systems |
| Chronic Care Model |
| Healthcare providers including vendors available in the community |
| Interdisciplinary care team (ICT) |
| Levels of care |

| Principles of Practice |
|--|
| Accreditation standards and requirements |
| Ethics (e.g., advocacy, experimental treatments and protocols, end of life, refusal of treatment/services, professional conduct) |
| Health care and disability related legislation (e.g., Americans with Disabilities Act [ADA]; Occupational Safety and Health Administration [OSHA] regulations; Health Insurance Portability and Accountability Act [HIPAA]) |
| Legal and regulatory requirements |
| Risk management |
| Standards of practice |
| Quality indicators (e.g., core measures of the Centers for Medicare and Medicaid Services [CMS], Utilization review Accreditation Commission [URAC], National Committee for Quality Assurance [NCQA], National Quality Forum [NQF], Agency for Healthcare Research and Quality [AHRQ]) |
| Confidentiality |

| Case Management Concepts |
|---|
| Goals and objectives of case management practice |
| Interpersonal communication (e.g., group dynamics; relationship building) |
| Interview techniques |
| Management strategies for clients with multiple co-morbidities |
| Roles and functions of case managers in various settings |
| Negotiation techniques |
| Cost-benefit analysis |
| Data interpretation and reporting |
| Program evaluation and research methods (e.g., outcome, satisfaction) |
| Case recording and documentation |
| Quality and performance improvement concepts |
| Conflict resolution strategies |
| Factors used to identify acuity or severity levels |
| Case load calculation |
| Case management models |
| Case management process and tools |

Pre-Approved Continuing Education

CCMC has a process whereby sponsors of workshops, seminars, and the like can obtain pre-approval of their training programs.

If a sponsor has received pre-approval for a program, CCM® attendees will be given appropriate documentation verifying pre-approval. Pre-approved courses can be entered into individual online transcripts at no extra cost.

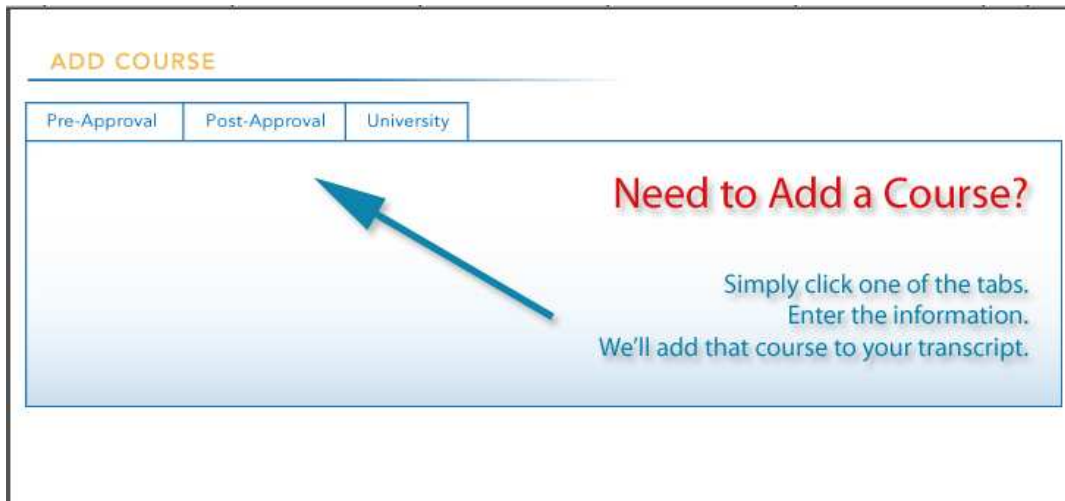
To verify that a program has obtained pre-approval from CCMC, contact the program sponsor directly. CCMC does not publish lists of pre-approved continuing education. Many providers of pre-approved activities will include their CCMC sponsor code and approval number on the certificate of participation. This information is necessary to enter the course on the online transcript as a pre-approved activity.

One clock hour is equivalent to 60 minutes of instruction or participation. Clock hour credit is not given for social hours, coffee breaks, or meals during which instruction is not provided.

Post-Approval of Continuing Education

CCMC will also approve continuing education activities for individuals on a post-attendance basis. Such activities may include (but are not limited to) workshops, seminars, university courses, and similar activities.

Post-approval activities can be entered into the online transcript directly by selecting the Post-Approval tab towards the bottom of the transcript page on the dashboard in "MY CCM DASHBOARD" on the CCMC website:



Please see the fee schedule at the end of this guide for current post-approval fees. All fees are subject to change and are non-refundable. Post-approval activity fees are automatically calculated at the time of renewal and included in the total charged for renewal.



REMEMBER: All clock hours must fall within the CCM®'s current 5-year renewal period.

Documentation and Audit

CCMC requires Certified Case Managers to maintain documentation of participation in all continuing education activities submitted for renewal. **These files should be kept by all CCM®s for ONE YEAR PAST THE "VALID THROUGH" DATE on their current certificate.**

CCM®s may be asked to submit this documentation by CCMC as part of regularly scheduled random audits of CCM® transcripts or upon the CCM®s' submission of a late renewal request or late renewal appeal (as described later in this guide.)



REMEMBER: Any required supporting documentation of continuing education will not be returned after submission.

Documentation considered appropriate for various types of learning activities is listed below:

| | |
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| <i>Workshops, seminars, conferences, in-service training programs</i> | Certificate of attendance or letter from sponsor stating CCM® has completed the program, dates of completion, and number of CEUs awarded. Program agendas may also be requested in case of audit. |
| <i>Home studies, distance learning courses, webinars</i> | Certificate of attendance or letter from sponsor stating CCM® has completed the program, dates of completion, and number of CEUs awarded. Program agendas may also be requested in case of audit. |
| <i>College or university courses</i> | Copy of official transcript or original grade report that documents credits earned. One quarter hour of academic credit equals 10 clock hours (or 10 CEUs); one semester hour equals 15 clock hours (or CEUs). Course description may also be requested if you are selected for a renewal audit. If a college/university course is audit-only (not taken for credit), then documentation indicating actual attendance hours such as a statement from the instructor on university letterhead must be provided. |
| <i>Development of curriculum</i> | List of reference materials used to develop the information, and a copy of the course syllabus and a letter of verification from the chair of the program stating that the CCM® developed the curriculum, including the dates of development. |
| <i>Development of articles, books, and chapters in books</i> | List of reference materials used to develop the information and a copy of the information you developed (must be the complete publication) stating published dates. If contributing editor, a letter from the main editor must be included as well, attesting to the CCM®'s level of participation in the publication. |
| <i>Development of presentations and in-service training programs</i> | List of reference materials used to develop the presentation, outline of the presentation, and a copy of the printed program that lists the CCM® as the presenter and states the length of presentation. Credit is given on a one-time-only basis for the learning experience, which is the research and development, not for the presentation itself. As a rule, the number of clock hours awarded will be twice the number spent making the presentation (i.e. a two-hour presentation would generally merit four hours of credit, or 4 CEUs). |
| <i>Research/Independent study</i> | List of source materials and a copy of the research findings. |

Criteria for Appropriate Continuing Education

To qualify for approval as continuing education, a program must meet the following criteria:

- Continuing education must be above and beyond your normal job duties.
- It must be at least one hour long.
- It must be held in an accessible, barrier-free location so that no individual with a disability would be excluded from taking part. (Reference: Section 504, Rehabilitation Act of 1973 as needed).
- It must include an evaluation by the participants to assess its effectiveness.
- The purpose of the program must be clearly defined in terms of its objectives or expected outcomes.
- It must be designed to increase the participant's knowledge or skill regarding the practice of case management in one or more of the focus areas listed in this guide.
- It must fall within your current 5-year renewal period.



REMEMBER: As noted above, qualifying courses must be at least one hour long.

OPTION 2: Renewal through Re-examination

If a CCM® prefers to renew his or her certification through re-examination, he or she must:

1. Complete a brief online re-examination application
2. Pay the renewal fee along with the exam fee
3. Achieve a passing score on the exam



REMEMBER: If a CCM® does not exercise the re-examination option before the “valid through” date on his or her certificate, the CCM® designation will expire. Individuals with expired CCM® designations are not permitted to resume using the CCM® credential until they have successfully applied for and passed the examination.

Certification Exam Schedule

The CCM® examination schedule is posted on the CCMC website at www.ccmcertification.org.

LATE RENEWAL REQUESTS

CCMC will accept and review formal late renewal requests submitted **within the first 30 days after the “valid through” date** printed on an individual's current certificate. In order to be considered for a late renewal, the CCM must have the following:

1. Documentation of completion of at least 80 hours of continuing education (as described in detail in this guide). All CE clock hours must be completed before the expiration date.

2. A current and unrestricted license or certification that allows for independent practice (see *Certification Guide*, available at www.ccmcertification.org, for more information about primary licensure and certification).
3. A clear and compelling reason -- **that can be documented** -- for having missed the renewal deadline.

Making a Late Renewal Request

Initial contact regarding submission of a late renewal request should be made through the CCMC Certification Center at support@ccmchelp.org. If a CCM is within the initial 30 day period, he or she will be asked to complete and submit a late renewal request form with documentation of the above items.

Late renewal requests submitted after 30 days past the "valid through" date on the certificate are considered denied without review.

If a request is approved, the CCM will be asked to pay the standard renewal fee plus an additional administrative fee for processing the late request (see fee schedule). A renewal certificate will be issued, back-dated to the date of expiration, and the individual will be able to resume use of the CCM designation.

Please note the following are **NOT** considered compelling reasons for late renewal:

1. No receipt of notification of renewal deadline
2. Lack of awareness of renewal deadline or process



The purpose of the late renewal request process is to grant consideration to those individuals who were prohibited by circumstances beyond their control from completing their certification renewal within the scheduled timeframe. It is not intended as a convenience for individuals who have not taken appropriate steps to maintain the integrity and high standards of the CCM® designation.

The late renewal request process can take 2 – 4 months to complete. Individuals who seek to become reinstated as CCMs should take this into consideration when deciding whether to submit a late renewal request or exercise the re-examination option.

APPEALS

CCMC's appeals process is available to any certificant who believes that CCMC inaccurately, inconsistently, or unfairly applied the criteria for certification renewal.

The appeals process is designed to provide:

1. Complete review of the facts at issue
2. A second, independent evaluation of the material presented to document the CCM®'s eligibility for certification renewal
3. Due process
4. Fair, consistent application of the criteria for renewal and continuing education

Requesting an Appeal

At the time a certificant is informed that their certification renewal has been denied (including late renewal requests), he or she will also receive information about his or her right to appeal as well as the procedures and instructions and time schedules for making such appeals.

Initial contact should be made with the CCMC Certification Center at support@ccmchelp.org. The Certification Center will provide a formal appeal form to be completed and returned to the Certification Manager. Appellants are asked to submit the following, along with the appeal form:

1. Documentation of completion of at least 80 hours of continuing education (as described in detail in this guide)
2. A current and unrestricted license or certification that allows for independent practice (see *Certification Guide*, available at www.ccmcertification.org, for more information about primary licensure and certification)
3. If appealing for late renewal: clear and compelling reason -- **that can be documented** – for not having renewed their certification by the through date printed on their certificate.

An Appeals Task Force will be called together to decide on your appeal. If a request is approved, appellants will be asked to pay the standard renewal fee plus an additional administrative fee for processing the appeal. A renewal certificate will be issued, back-dated to the date of expiration, and certificants will be able to resume use of the CCM® designation.

Please note the following are **NOT** considered compelling reasons for approval of renewal appeal:

1. No receipt of notification of renewal deadline
2. Lack of awareness of renewal deadline or process

None of the members of the Appeals Task Force will have taken part in the initial decision-making process to evaluate the renewal documentation in the appellant's file, thus ensuring a second, objective review.

RETIREMENT DESIGNATION

Certified individuals who are retiring from active practice may choose the retirement designation, which changes the CCM® certification to an honorary designation. CCM®/Retired status enables the individual to stay on CCMC's mailing list to receive updates and newsletters from the field of case management. Please see the fee schedule at the end of this guide for current retirement status fees.

If an individual's retirement status changes and he or she wishes to regain use of the CCM® certification, he or she would need to reapply, meet the criteria in effect at the time of re-application, and achieve a passing score on the certification examination.

If an individual believes that he or she may provide consulting or other services in the future using their CCM® certification, he or she should NOT select the retirement designation, but should continue to maintain the CCM® certification.

FEES

All fees are non-refundable unless noted otherwise. Fees are subject to change at any time. All fees can be paid online with a credit card. Checks are NOT accepted.

Standard Fees

Renewal through Continuing Education \$175
This fee must be submitted in full at the time of renewal.

Renewal through Re-Examination \$350
This fee includes \$175 for the renewal fee and \$175 for the examination. The examination fee will be returned to if an individual is determined to be ineligible for the exam.

Continuing Education
Fees are assessed for the post-approval of continuing education.

| | |
|--|------|
| Single program post-approval request | \$15 |
| Annual maximum fee for 4 or more requests (per calendar year) | \$50 |

Retirement Status (one-time fee) \$50

Late Renewal Fees

Late Renewal Request/Appeal \$90

Related Fees

| | |
|---------------------------------------|------|
| Renewal Guide hardcopy | \$ 5 |
| Code of Professional Conduct hardcopy | \$ 5 |
| Replacement Certificate | \$25 |

CONTACTING CCMC

Please remember to include your CCM® number on all correspondence with CCMC.

Certification Center

Commission for Case Manager Certification
90 West County Road C – Suite 300
Little Canada, MN 55117
Phone: 651-789-3744
Fax: 651-489-3387
Email: support@ccmchelp.org

National Office

Commission for Case Manager Certification
15000 Commerce Parkway, Suite C
Mount Laurel, NJ 08054
Phone: 856-380-6836
Fax: 856-439-0525
Email: cmchq@ccmcertification.org

FREQUENTLY ASKED QUESTIONS

How often must I renew my certification?

Every five years following the initial credentialing period.

How do I renew my certification?

CCMC offers two options for renewing a certification (both options require license/certification verification):

Documentation of 80 clock hours of approved continuing education accumulated during the period of certification and completion of online renewal requirements

Renewal through re-examination, which requires successful completion of the CCM exam

If I acquire more than 80 clock hours in a 5-year period, can I apply the excess to the next renewal cycle?

No, since continuing education is intended to keep certificants current with emerging trends and technologies, it may only fall within your current 5-year cycle.

Is there an advantage to submitting my continuing education credits as I earn them?

Yes! If you submit your credits into your online transcript as you earn them, your dashboard will help you to keep track of how much approved continuing education you have on file, and how many hours are still needed prior to the "valid through" date on your current certificate. You will also have the added benefit of not having to do all of the work at once when the renewal application goes "live" on the website.

What is approved continuing education?

Any continuing education activity that a certificant wishes to use toward the renewal of his or her certification must involve one of the focus areas described in this guide and must be above and beyond your normal job duties.

How will I know if a workshop, seminar, conference, or in-service training session I attend qualifies as pre-approved continuing education?

Many organizations seek approval of their activities from CCMC. Such approval is given in advance, and you should simply ask the sponsor of the activity you are considering attending if the activity has been pre-approved by CCMC. When you complete a pre-approved activity, the sponsor should provide you with a certificate of participation which includes their CCMC sponsor code and the activity's approval number.

Can I get continuing education credit for activities that aren't pre-approved by CCMC?

Yes! Any continuing education activity that involves a focus area described in this document can be submitted for approval on a post-attendance basis. The procedure is described in detail in the Continuing Education section of this guide.

How do organizations get pre-approval for their continuing education activities?

Any organization that wishes to have its continuing education activities pre-approved by CCMC should go to the CCMC website at www.ccmcertification.org and click on the "Pre-Approved Continuing Education" (PACE) logo to access the online application and requirements for submission.

How do I pay for CCMC's verification of my continuing education that was not pre-approved?

All education fees are automatically calculated for you and added to your total at the time of renewal.

I have more credits than I need for my renewal but I already paid for some post-approval courses I now realize I don't need. Can I get a refund for the post-approval fees?

All fees are nonrefundable, including the post-approval fees. It's a good idea to enter your PRE-APPROVAL courses first and the post-approval courses only if you need them to make the 80 CEU goal.

I submitted my documentation of continuing education. Why was it mailed back to me?

Since the renewal process is now online, certificants can enter their credits into their online transcripts at their own pace and discretion. Certificants no longer need to submit all that paperwork to CCMC for renewal. But hold on to those certificates because you may need to submit copies of them as part of a random audit or if you need to submit a late renewal request or appeal! (Documentation submitted as part of an audit or late renewal process will NOT be returned.)

The renewal process is completely online now. Can I still renew the old-fashioned way?

No. The only way to renew your certification is through the online process. Our customer service agents are here to help you every step of the way. You will find options for email and live chat on every page in the CE Center. If you do not have access to a computer, please call us at 651-789-3744 and we can help!

I forgot to renew my certification! What do I do now?

If you have a reason driven by extenuating circumstances beyond your control, you can submit either a late renewal request (if within 30 days of your renewal deadline) or a renewal appeal. Keep in mind that you are still required to meet all of the renewal criteria as outlined in this guide, and you will need to present and substantiate a thoroughly compelling case for late renewal.

The late renewal request and appeals processes are thorough and time consuming, therefore you might want to consider the re-examination option outlined in this guide.

I didn't pass the renewal audit. What are my options?

You may apply for renewal through re-examination. Your renewal fee will be credited to the renewal through re-examination fees for the next available exam only. Please see the fee schedule for fee details.