



Commission for Case Manager Certification

# CERTIFICATION GUIDE *to the* CCM<sup>®</sup> EXAMINATION

Commission for Case Manager Certification

ACCREDITED BY:  
THE NATIONAL COMMISSION FOR CERTIFYING AGENCIES



**BEFORE YOU BEGIN YOUR ON-LINE APPLICATION:**

For the best on-line user experience, please use the current versions of **Google Chrome** or **Mozilla Firefox**. **Microsoft Edge** has known incompatibilities with the functionality of the **CCMC Dashboard** site.

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## SECTION 3: THE CERTIFICATION PROGRAM

To earn the designation of board-certified case manager (CCM®), persons who seek this credential must be of good moral character consistent with the CCMC Code of Professional Conduct, meet eligibility requirements, meet acceptable standards of quality in their practice, and must demonstrate that they possess an acceptable minimum level of basic knowledge with regard to the case management process based on the criteria described in this guide.

The certification is valid for five years. It is achieved by satisfying employment requirements, achieving a passing score on the CCM examination and by meeting specific licensure/certification and/or education requirements.

The examination is based on a body of knowledge that encompasses laws, public regulations, and the delivery of case management services as practiced within the United States.

In granting the CCM designation, it is not the intent of CCMC to guarantee that a specific individual is suitable for employment or to impose restrictive staffing requirements on any agency. Rather, the objective is to establish a national certification process that can be used with confidence by any interested party as a measure of an individual's basic knowledge of case management.

CCMC does not discriminate on the basis of race, religion, national origin, gender, age, disability, or marital status. Information submitted as part of the application, certification, and certification renewal processes becomes the property of CCMC and will not be released to outside parties unless authorized by the applicant/certificant or unless required by law. Individual pass/fail results 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 process may be used in an anonymous/unidentifiable manner. CCMC provides a database listing all certifiants on its website. This resource is updated periodically for the use of the public. CCMC also receives and responds to requests for information about the certification status of those holding its credential.

The certification can be renewed at five-year intervals if the individual demonstrates ongoing professional development either through documentation of participation in approved programs of continuing education or by retaking the certification examination and achieving a passing score. Applicants for certification renewal must also meet all other eligibility criteria in place at the time of renewal. Certification renewal is considered an essential part of an effective credentialing process and is intended to promote acceptance of the CCM credential by employers, clients, peers, health care professionals, and health care consumers.

### DEFINITION OF CASE MANAGEMENT

Case Management is a dynamic process that assesses, plans, implements, coordinates, monitors, and evaluates to improve outcomes, experiences, and value.

The practice of case management is professional and collaborative, occurring in a variety of settings where medical care, mental health care, and social supports are delivered. Services are facilitated by diverse disciplines in conjunction with the care recipient and their support system.

In pursuit of health equity, priorities include identifying needs, ensuring appropriate access to resources/services, addressing social determinants of health and facilitating safe care transitions. Professional case managers help navigate complex systems to achieve mutual goals, advocate for those they serve, and recognize personal dignity, autonomy, and the right to self-determination.<sup>1</sup>

### PHILOSOPHY OF CASE MANAGEMENT

Case management is an area of specialty practice within the health and human services profession. Its underlying premise is that everyone benefits when clients\* reach their optimum level of wellness, self-management, and functional capability: the clients being served; their support systems; the healthcare delivery systems; and the various payer sources.

Case management facilitates the achievement of client wellness and autonomy through advocacy, assessment, planning, communication, education, resource management, and service facilitation. Based on the needs and values of the client, and in collaboration with all service providers, the case manager links clients with appropriate providers and resources throughout the continuum of health and human services and care settings, while ensuring that the care provided is safe, effective, client-centered, timely, efficient, and equitable. This approach achieves optimum value and desirable outcomes for all—the clients, their support systems, the providers, and the payers.

Case management services are optimized best if offered in a climate that allows direct communication among the case manager, the client, the payer, the primary care provider, and other service delivery professionals. The case manager is able to enhance these services by maintaining the client's privacy, confidentiality, health, and safety through advocacy and adherence to ethical, legal, accreditation, certification, and regulatory standards or guidelines.

Certification determines that the case manager possesses the education, skills, knowledge, and experience required to render appropriate services delivered according to sound principles of practice.

\* "Client" refers to the recipient of case management services, and can include (but is not necessarily limited to) consumer, client, or patient.

<sup>1</sup> ACMA/CCMC, September 2022





**Supervision is defined as the systematic and periodic evaluation of the quality of the delivery of the applicant's case management services.**

or

**Category 2:** 24 months of acceptable full-time case management employment experience. (Supervision by a CCM is not required under this category).

or

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

Acceptable employment experience **MUST** meet the following conditions:

1. **At least 20% of qualified work time** must focus primarily on case management practice.
2. Perform **at least four** of The Five Core Components of Case Management (Page 6). Within each of the four of the five core components, you must:
  - » Perform **all** Eight Essential Activities with Direct Client Contact (Page 6)
  - » Provide services across a continuum of care, beyond a single episode of care that addresses the ongoing needs of the individual being served
  - » Be responsible for interacting with other relevant parties within the client's healthcare system
3. Your qualifying case management experience **MUST be obtained in the United States, Puerto Rico or the US Territories.**

All employment experience, within the past five years, may be considered by CCMC in determining your eligibility for certification but you do not need to enter five years' worth of employment into the application. You only need to enter as many employment entries into the application that will meet one of the above requirements. Please do NOT enter your entire work history into the application.

Part-time employment experience will be pro-rated based on a 37 hour full-time work week.

Internship, preceptor-ship, practicum, and volunteer activities are **NOT** acceptable employment experience.

### **IMPORTANT - EMPLOYER VERIFICATION**

Included in the information you will be required to enter into the application are: job title(s), employment dates, employer name(s)/address(es), your direct supervisor's(s') name and their email address(es) so your current or previous supervisor(s) can verify your work listed in your application if applicable. This verification is required on an audit basis per the Commission's NCCA accreditation.

It is required to enter your direct supervisor name and email as that is the person who can attest to your job duties while at that job. If your supervisor has left the company, please research them on your own to obtain their email address.

PLEASE NOTE: Applicants have used Facebook, LinkedIn and Google searches to contact their supervisor(s) and obtain their email address(es) if their supervisors are no longer with the company. Human resources cannot complete verification of your employment. If you cannot find their email address, do not add them onto your application.

**It is the applicant's responsibility to obtain correct contact information for their supervisor(s).**

**IT IS STRONGLY RECOMMENDED THAT YOU NOTIFY THE INDIVIDUAL YOU LIST AS A SUPERVISOR in advance, so they know that they may receive a verification request from CCMC.**

### **THE EIGHT ESSENTIAL ACTIVITIES WITH DIRECT CLIENT CONTACT**

**ASSESSMENT** The process of collecting in-depth information about a client's situation and functioning to identify individual needs in order to develop a comprehensive case management plan that will address those needs. In addition to client contact, information should be gathered from other relevant sources (patient/client, professional caregivers, nonprofessional caregivers, employers, health records, educational/military records, etc.).

**PLANNING** The process of determining and documenting specific objectives, goals, and actions designed to meet the client's needs as identified through the assessment process. The plan should be action-oriented and time specific.

**IMPLEMENTATION** The process of executing and documenting specific case management activities and/or interventions that will lead to accomplishing the goals set forth in the case management plan.

**COORDINATION** The process of organizing, securing, integrating, modifying, and documenting the resources necessary to accomplish the goals set forth in the case management plan.

**MONITORING** The ongoing process of gathering sufficient information from all relevant sources and its documentation regarding the case management plan and its activities and/or services to enable the case manager to determine the plan's effectiveness.

**EVALUATION** The process, repeated at appropriate intervals, of determining and documenting the case management plan's effectiveness in reaching desired outcomes and goals. This might lead to a modification or change in the case management plan in its entirety or in any of its component parts.

**OUTCOMES** The process of measuring the interventions to determine the outcomes of case management involvement (e.g. clinical, financial, variance, quality/quality of life, client satisfaction).

**GENERAL** The activities/interventions that are performed across case management practice and process (e.g. maintaining client's privacy, confidentiality and safety, advocacy, adherence to ethical, legal and accreditation/regulatory standards).

## THE FIVE CORE COMPONENTS OF CASE MANAGEMENT

1. Care Delivery and Reimbursement Methods
2. Psychosocial Concepts and Support Systems
3. Quality and Outcomes Evaluation and Measurements
4. Rehabilitation Concepts and Strategies
5. Ethical, Legal, and Practice Standards

## SECTION 6: MORAL CHARACTER

You will need to answer the following questions:

1. Have you ever held a professional license or certification that was revoked, suspended, voluntarily relinquished, or placed on probation or otherwise been disciplined by a professional licensure or certification body?
2. Have you ever been reprimanded or discharged by an employer or supervisor for dishonesty in connection with your employment or occupation?
3. Have you ever been convicted of a felony?
4. During the last seven years, have you been arrested, accused, or convicted of violating any law or ordinance (excluding minor traffic violations)?
5. Have you ever been convicted of violating any law or ordinance dealing with the use, possession, or sale of drugs or alcohol?
6. Have you ever been convicted of violating any statute or ordinance dealing with sexual assault, abuse, molestation, indecent solicitation, obscenity, or similar acts of moral turpitude?
7. Have you ever received or been offered a grant of immunity in a grand jury proceeding?
8. Have you ever held yourself out to be a Certified Case Manager or used the initials CCM in the execution of any documents?

## SECTION 7: INSTRUCTIONS FOR COMPLETING THE APPLICATION

Everything you need to complete your application can be located in your account at [www.ccmcertification.org](http://www.ccmcertification.org). **Please be sure to add our email address to your 'safe senders' list:** [ccmchq@ccmcertification.org](mailto:ccmchq@ccmcertification.org)

Here are a few things to remember:

- » To complete your application, you will need to provide some information. If applying with your license/certification the application asks for that issued your license/certification, the number, state that issued, date you were licensed or certified since and expiration date. *Your license/certification must be active through the last date of test administration. Licenses or certifications on probationary status will not be considered eligible unless documentation has been provided that all terms of the probation have been met.* For applicants who are applying with their degree that information will be area of concentration within the degree, the name of institution, year of graduation and institution website.
- » Any application that does not meet **ALL** of the licensure or certification criteria as well as the acceptable employment experience will be denied **WITH NO REFUND OF THE APPLICATION FEE**. Persons who wish to re-apply would have to submit a new application, pay a second, non-refundable fee, and meet the eligibility criteria in effect at the time of re-application.

CCMC is committed to providing fully accessible, smoke-free testing sites and to helping those candidates who may require exam accommodations due to religious reasons or a functional limitation.

If CCMC subsequently learns that a certification was granted on the basis of false, misleading or inaccurate information, it has the right to suspend or revoke the CCM designation.

## SECTION 8: ONCE THE APPLICATION HAS BEEN SUBMITTED

### NOTIFICATION OF ELIGIBILITY STATUS

Eligibility decisions will be sent by email based on the **Exam Application Schedule and Notification Timeline posted on our website** — <https://ccmcertification.org/get-certified/certification/exam-application-and-window-timeline>.

**Please read this carefully so you know when to expect notification about your application.**

### INITIAL ELIGIBILITY

The CCM examination is administered three times a year. Eligibility, once approved, is valid for the first available testing window. If you are unable or do not wish to take the exam in the first available testing window after your application is approved, you may defer only to the next exam window. If you wish to defer to the next exam window, you must pay a non-refundable fee (see fee schedule on last page). You may only defer one time, after which, if you have not taken your exam, you must submit a new application and pay all fees in place at that time.







- » Legal and regulatory requirements applicable to case management practice
- » Privacy and confidentiality
- » Risk management
- » Self-care, safety and well-being as a professional
- » Standards of practice (e.g., Case Management Society of America Standards of Practice for Case Management, National Association of Social Work Standards for Case Management)

## EXAMINATION STRUCTURE

The exam structure is a total of 180 multiple choice items. The exam is administered in one session, with no predefined breaks. Your exam appointment is three and a half hours. This includes time to get seated, confirm that you have the right exam on your computer, view the tutorial, and complete an end survey. Time allowed for the actual exam is 3 hours. Please remember that while the appointment is three and a half hours, the exam runs for 3 hours.

**Candidates who do not finish the exam in the allotted 3 hours will not be given a refund.**

The exam is constructed to ensure that it is consistent with minimal competency requirements and criteria referenced testing concepts. Using an intensive field-testing process, CCMC has developed a pool of items that contains a comprehensive selection of statistically validated examination items. A task force of case management subject matter experts is charged with continually adding to and upgrading this “item pool.” The certification exam consists of 180 multiple-choice items drawn from CCMC’s item pool. All candidates seeking certification must take this exam, which is based on a body of knowledge encompassing the laws, public regulations and existing delivery systems for case management services in the United States.

Of the 180 items on the exam, 150 are operational items and 30 are pretest items. The 30 pretest items are not used in the scoring of the examination. Of the 150 scoreable items used for each examination; approximately 20% are included in every administration of the examination as “anchor items.” The examination is comprised of 5 major domains and multiple subdomains as referenced above. Each domain is represented by a specific number of items. Each item/ response is referenced to literature in case management and credit is given for each “correct” response based on the literature.

## SAMPLE EXAMINATION ITEMS

The following items are similar to those that will appear on the examination. CCMC has a practice exam and a test prep mobile app available on our website:

1. **The goal of case management in a cross-cultural environment is to:**
  - A. Assist the client in accepting the medical system.
  - B. Maintain standard American medical practice.
  - C. Achieve a treatment plan that addresses the client’s culture.
  - D. Differentiate culture and medical practice.
2. **A strategy for coping with physical disability is to focus on:**
  - A. Each aspect of the crisis simultaneously.
  - B. Manageable components of the crisis.
  - C. Premorbid personality.
  - D. Depression symptoms.
3. **The effectiveness of case management services is evaluated most completely:**
  - A. After the extent of the benefits coverage is determined.
  - B. After the case is closed.
  - C. By measuring the costs incurred by the insurer.
  - D. By input from the client.
4. **The payment method in which the number of services provided does not affect the amount of income a provider receives is:**
  - A. Risk based.
  - B. Threshold protection.
  - C. Capitation.
  - D. Fee-for-service.
5. **A functional capacity evaluation primarily:**
  - A. Assesses pain behavior.
  - B. Documents consistency of effort.
  - C. Determines return-to-work capabilities.
  - D. Documents disability determination.
6. **Because of the close connection between medical and indemnity benefits in the workers’ compensation arena, any medical cost containment measures must be balanced with:**
  - A. Appropriate return-to-work efforts.
  - B. Regulation of medical fee schedules.
  - C. Treatment guidelines to control utilization.
  - D. Limitations of the employee’s ability to change providers.
7. **The best indication of suitability of the home environment is the:**
  - A. Degree of client preference to remain in the home environment.
  - B. Number of injuries the client has sustained.
  - C. Ability of the client and family to safely manage activities of daily living.
  - D. Number of hazards present in the environment.
8. **The key to evaluating self-help devices for the individual with a disability is whether the device:**
  - A. Was ordered by the physician.
  - B. Provides mobility for the client.
  - C. Allows functioning at maximum potential.
  - D. Requires frequent maintenance.
9. **To preserve client confidentiality, the case manager should:**
  - A. Supply medical reports only to the employer.
  - B. Avoid unauthorized disclosure of medical information.
  - C. Be selective in disclosing medical information.



recommended passing scores for each part of the exam using a method called the modified-Angoff approach.

In this method, each expert considered examination items individually and made a judgment about the probability that a minimally competent candidate would answer the items correctly. The overall passing scores were then computed as the average of the predicted probabilities for all individual items. This panel then recommended the passing score for the exam to CCMC, which set the passing score. These passing scores represent the minimum level of knowledge that must be demonstrated to pass the examination as a whole.

Because of the need for security, multiple forms of the examination are used over multiple administrations. Each form contains a different combination of items. The passing scores cannot be set as specific raw scores, or numbers of items answered correctly, because some of these forms may be slightly easier or more difficult than others.

Therefore, requiring the same raw scores to pass the different forms would not be fair to all examinees. A statistical procedure called equating is used to adjust for any differences in the level of difficulty among examination forms. Once the examination forms have been equated, a procedure called scaling is used to convert the actual number of correct answers, or raw scores, to a uniform scale. These converted scores are called scaled scores. Scaled scores ensure that all examinees demonstrate the same level of ability in order to pass the examination. CCMC disapproves of using test results for any purpose other than the use for which the examination is developed and conducted. This warning includes using the test results for internship or employment selection. In addition, test results are not to be used to compare educational programs. Certification tests are mastery tests and are not to be used as achievement or selection instruments.

### SCORING MODEL

Each individual who takes the exam is provided a preliminary pass/no pass notification, which displays on the computer screen, and is available to print after completion of exam. This score is considered 99% accurate and is your preliminary pass/no pass result.

Those individuals who pass the exam will be asked to wait until the examination results are available. The examination results will be available on the computer screen and will be available to print after completion of the examination. This score is considered 99% accurate and is your preliminary pass/no pass result.

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### EXAMINATION PROFILES

Candidates should check their application online through “My Account” at [www.ccmcertification.org](http://www.ccmcertification.org) for the final pass/no pass notification based on the **Exam Application Schedule and Notification Timeline posted are on our website.**

**Please read this carefully so you know when to expect notification about your exam results.**

Only those candidates who did not pass will receive a profile via email showing their performance in each content area and on the examination as a whole. The profile will indicate that the candidate was either proficient, marginal, or deficient by domain. This profile is confidential. Individual score reports are not released to any institution or employer and are not provided over the phone. CCMC will not disclose confidential applicant/certificant information unless authorized in writing by the individual or as required by law. If information is released due to a legal matter, CCMC will inform the individual.

### EXAMINATION INQUIRIES

Candidates who feel an error or omission occurred during the examination process or those who question any aspect of the examination procedure may address an inquiry to CCMC Customer Service. If a candidate feels an error or omission occurred during the examination process it will be reviewed by staff and, if necessary, referred to the Certification Services Committee for consideration. Failure by a candidate to achieve a passing score on the certification examination cannot be appealed.

### CERTIFICATES

A certificate and lapel pin will be sent to each candidate who passed the examination. This certificate is the official proof of certification and candidates are entitled to begin using the designation “CCM” after their names as soon as they receive the examination profile that reports the achievement of a passing score. Certificates are mailed from a third party, The Award Group. An email will be sent to you to order your complimentary certificate, with the option to order additional copies and frames to display your certificate. Please be sure to monitor your emails, including your spam folder for an email from the Commission, [ccmchq@ccmcertification.org](mailto:ccmchq@ccmcertification.org). Adding this email to your address book will ensure receipt.

CCMC will not be responsible for issuing replacement certificates that have not been requested within three months from the time the original should have been received, based on the **Exam Application Schedule and Notification Timeline posted on our website.**

**Please read this carefully so you know when to expect your email to order your certificate.**

Duplicate or replacement certificates can be requested from the CCMC Certification Navigators department at 856-380-6836 or [ccmchq@ccmcertification.org](mailto:ccmchq@ccmcertification.org). The information will then be sent to a third party to process, There is a fee for this service.

## CANDIDATES WHO DO NOT PASS

Candidates who do not achieve a passing score on the certification examination will be allowed to re-take the exam in the next available cycle. If you do not pass this “re-take” examination, you will need to complete a new application and pay all fees in place at the time. There is no limit to the number of times you can re-apply and re-take the CCM exam. Fees apply.

CCMC offers three exam cycles annually which means candidates must wait in between cycles to limit knowledge recall. Changing the exam form for each window or requiring the candidate to test on a different exam form in the next window also limits exposure. There is no limit on the number of re-take attempts as long as it is in different cycles. Once CCMC receives the exam results from the testing vendor and it is loaded into the candidate's online account, candidate who are eligible to retake the exam, can submit a retake application and pay the fee through their online account.

If you defer your first exam opportunity and, subsequently, do not pass, you will need to complete a new application and pay all fees in place at the time.

Candidates who do not achieve a passing score on their second attempt or who are unable to sit again during the next exam cycle must submit a new application, together with a second, nonrefundable application fee, to continue their pursuit of the CCM designation. Such re-applications will be subject to all commission criteria in effect at that time.

## SECTION 11:

### FEES

**PLEASE NOTE THAT ALL FEES ARE PAYABLE BY CREDIT CARD ONLY.** Personal and/or company checks, money orders, etc., will not be accepted as payment. All fees are non-refundable unless noted otherwise.

#### STANDARD FEES

**Non Refundable Application Fee** **\$225**

**Examination** **\$195**

This fee is for the examination. It **will** be refunded if you are ineligible to sit for the exam.

**\* Missed Appointment/No Shows:** *If your application is approved and you schedule your exam, but miss your appointment or do not show up for your appointment without a valid and documented excuse the exam fee will not be refunded.*

**Total Paid With Your Application** **\$420**

This is the total amount you pay to complete and submit your application.

## OTHER FEES

### Exam Rescheduling Fees

*The following fees are billed directly from Pearson VUE:*

You may schedule your exam appointment directly through your CCMC account by logging in and choosing "Manage Exam" from the menu items. Alternatively, you may call the Pearson VUE Contact Center to have an agent assist you with scheduling for a \$10.00 USD fee payable by credit card.

### Pearson VUE Rescheduling and Cancellation Policy

You can reschedule your exam for the same testing period by logging into your CCMC account and choosing "Manage Exam" from the menu items. Exams cannot be rescheduled/canceled less than 48 hours prior to your appointment. Failure to reschedule/cancel in time or failure to appear for your appointment will result in the forfeiture of your application & exam fee.

*The following fees are billed directly from CCMC:*

**Deferral Fee** **\$85**

Payable if you defer your exam appointment to the next available exam window. This fee may be in addition to any of the fees above.

**Retake Fee** **\$195**

Payable if you need to schedule another exam due to not receiving a passing score.

**Special Accommodations** **\$200**

**Missed Appointment/No Show Fee**

In the event that a candidate with a special accommodation has scheduled and missed their exam appointment, this fee is charged by CCMC unless a valid and documented excuse is provided.

### ARE YOU A U.S. VETERAN OR DEPENDENT?

Veterans, reservists and their dependents who are case managers are eligible for education reimbursement under the GI bill for the CCM exam. Certification is an investment in your career. Because the knowledge and skills demonstrated through certification are valuable to employers, it's also an investment they're willing to make on your behalf. For more information, contact us at 856-380-6836 or email us [ccmchq@ccmcertification.org](mailto:ccmchq@ccmcertification.org).



Commission for Case Manager Certification

## QUESTIONS? PLEASE CONTACT US:

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