



Chapter Dispatch

Volume 5 Issue 58

November 2007

Important dates:

Sept 1- Nov 30

Member Get A Member Campaign

2008 CALENDAR

November 14-26 SOP Public Comment Period

January 15 IRS Reports Due

January 15 Treasurer Reports

February 14 CMOY/AOSE Award Nomination Deadline

June 19-23 18th Annual Conference Orlando, FL.

2007 Fall Member-Get-A-Member Campaign

As the fall membership drive comes to a close, your participation in member development campaigns can still play an important and vital role in ensuring the vitality of the Society and the case management industry. Your efforts never go unnoticed and each time you recruit a new member or spread the word about case management you contribute to CMSA's growth, as well as strengthen the Society's position as the leader in the Case Management industry.

This is a great way for you to get involved in the recruitment! Simply print out the Member-Get-A-Member applications located at www.cmsa.org/recruit. Don't forget to put your name and chapter on the 'recruited by' section to get credit.

You must also be a member to qualify! You may recruit Individuals or even a group Company Membership! Please continue to round up your case/care management, coworkers, friends, and colleagues and recruit new members.

When your recruits join CMSA, you receive the following for each new member:

FIRST RECRUIT:

A CMSA Member pin

EACH RECRUIT:

A \$5 CMSA coupon for each person recruited

FIVE OR MORE RECRUITS:

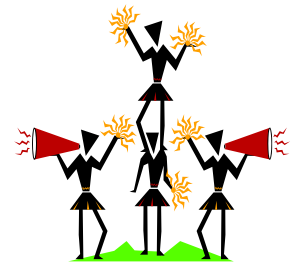
One free year of CMSA membership

TOP RECRUITER:

A complimentary Orlando 2008 conference registration

For more information and ideas on how to promote the program, visit

www.cmsa.org/recruit



As of November 15th about 66

members have been

recruited!

Keep up the Good Work!

Charon Dillard

is in the lead with 6 recruits.



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Your Chapter's Fiscal Period

All CMSA Affiliated Chapters fiscal year just concluded August 31. For some of you, this means a time to transition officers.

For all of you, this means it is time to begin planning and strategizing for the next fiscal year. Financial reports for the past fiscal year should begin being



Reports deadline is January 15. Start to-

compiled. Budgets costs for the next year should be discussed now.

For more information on the financial obligations of the organization, please review the

Treasurer's Guide at: www.cmsa.org/PDF/Chapters/ChapterTreasurerGuide.pdf.

This is also a good time to set chapter goals and reflect on past year's accomplishments.

Reports deadline is January 15. Start today!

Officer Update Form

Many chapters have recently undergone elections for a new term. Please be sure to get the names, titles and email addresses of these new officers, board members and committee chairs to CMSA National to update the Leadership Database.



spondence, reports, chapter checks disbursement,

This information is used to determine who to include on corre-

chapter contact information, etc.... For the official Officer Update Form, please visit www.cmsa.org, under Membership, then Chapters, then Chapter Resources. Please complete mail, fax to 501-221-9068, or email to njackson@acminet.com.

CSC Registered Agent Invoices

In July, CMSA's Registered Agent (Corporation Service Company or CSC) mailed an invoice for services to each affiliated chapter for this next year, **beginning Sept 1, 2007 to Aug 31, 2008.** Corporations are required by the DC Statute to engage the services of a registered agent. Also, most states require that you have a registered agent

when you incorporate within your state, as well. Each chapter is incorporated in DC as a to a Domestic Corporation but in your state, you would be registered as a Foreign Corporation. Your invoice may reflect services for DC (Domestic) and maybe local (state) fees (Foreign) – if you used CSC for the local agent.

The invoices might have gone to your chapter Treasurer, President, or Executive Director. Please make sure that these invoices are passed along to the proper person for payment and processed to keep the chapter in good standing with DC. This is very important!

Nominate your Local CMOY & AOSE Award

Take a moment to nominate your peer for a Case Manager of the Year (CMOY) award or Award of Service Excellence (AOSE). The deadline is **February 14, 2008**. Each year at the annual conference, CMSA presents these two prestigious awards to members whose case management careers elevate professional stan-

dards, enhance individual and leadership performance, and exemplify merit and distinctions. Visit www.cmsa.org Click on "Your Career" then on "Awards" to download forms and view previous award winners. That special case manager deserves and award, so why not help recognize a deserving

CMSA member who has significantly impacted the field of case management. Contact CMOY/ AOSE Staff Liaison Michele Lee at mlee@acminet.com (501) 225-2229 ext 1120

Chapter Excellence & Innovation Award Program



Enter your chapter's best projects in CMSA's 2007 Chapter Excellence & Innovation Awards (CEIA). Entries will be accepted in the five categories:

- Best use of *Technology*
- *Conference*
- *Educational Programming*

- *Membership Development*
- *Print.*

Entries will be taken until **February 28, 2008**. Entries reflect activities from **Jan 1-Dec 31**. Visit www.cmsa.org, click on "Your Career" then on "Awards" to find out more and to download entry

forms. Recipients of these awards will be recognized at the Orlando 2008 Annual Conference.

Ask Barbara

In response to the great presentation by Barbara Dunn, Esq., CMSA's Legal Counsel's, at the Chapter Leadership Workshop in Denver. We will now have an ask Barbara section in the Dispatch. She will provide



various articles she has written on the legal issues of an organization. This will also be an opportunity for your chapter to ask her questions about liability, copyright issues, ect. You can for-

ward any questions that you have for Barbara to Michele Lee, mlee@acminet.com.

Chapter Presidents Council

The Chapter Presidents council Representative nomination packets will be sent out in January 2008. This liaison position is the voice for the chapter leaders to the National Board and shares industry issues, requests, needs, and solutions related to chapters. This position is elected by the Chapter Presidents in March 2008. The Term of Office will begin June 2008 during CMSA's Annual Conference. **As the CPC Representative the person elected will serve on**

the Board of Directors, the following minimum criteria apply:

- Case manager "A" member in good standing by the date of election (March 15, 2008).
- CMSA member for two (2) years by the date of election (March 15, 2008)
- Individual must be serving as president or Pres-Elect of a fully affiliated chapter and be in office of President on the day of election (March 15th).

Nomination of a vice President will be accepted if this is the office that assumes the presidency as of this date.

- The newly Elected CPC Representative will close the CPC meeting at the Annual conference with a five minute overview of goals for the up coming year.

Local Chapter Directory

Visit cmsa.org and click on membership, then chapters, then local chapter's directory. Review the information for your chapter to make



sure it is current and up to date. This area can be used to post meeting and event announcements, in addition to your local chapter's websites. As current and perspective members of CMSA visit the website

they will be able to view events happening in their area. Send updates and notices to njackson@acminet.com.

“Avoid Leadership Vacuums by continuously grooming board members with additional responsibilities”

-Richard Maladecki

Introducing the New Company Membership Portal

The national office will be launching a new company portal. We are excited that this new feature will be added soon. This new portal will assist companies to manage their own accounts at their convenience. The account manager will be able to add, remove, and invite new to their account at any time. This will be a great talking point for recruiting new company memberships. To find out more information on Company Memberships visit [Case Management Society of](#)

[America > Membership > Company Membership.](#)

SOP Public Comment Period

The Case Management Society of America is soliciting comments on The CMSA Standards of Practice for Case Management - Revised 2002 (SOP). The SOP Committee is preparing to undertake the next revision of the SOP (2007-2008). Specifically, the committee would like you to make com-

CMSA



ments regarding elements within the current SOP that should be changed, added or deleted. The committee will review and consider all input from the public comment period following their official launch November 14 and will close November 26, 2008. For the first time, the SOP review committee will also consider

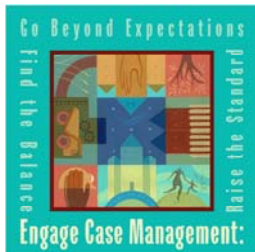
input from a broader perspective (i.e., social work, military, etc.) and encourages your participation in this important project.

This public comment period will end at midnight (Central Time) on November 26, 2007.

Follow the link below for more information on submission.

[Case Management Society of America > Public Comment > SOP](#)

18th Annual Conference



Save the date June 17-21. CMSA's 18th Annual Conference

& Expo is the largest case management event of the year and an exclusive opportunity for you to

connect with over 300 companies that will be available and ready to share knowledge, insights, and cutting-edge solutions. Our educational sessions will engage your unique abilities to move from "what is" toward "what can be." You're invited to join us on this incredible journey

as we create new ways to add professional value, develop critical thinking skills, enhance careers and learn experientially. This conference will be your source of cutting-edge practical advice, proven strategies, and how-to guidance.

Letter from your CPC Rep



It's been great to see the discussions and sharing on the CPC Forum. I hope you're enjoying Peter's updates regarding what national is doing. Please carry the exciting news and updates back to your local chapters so they too may understand the tremendous strides that CMSA is making as it brings CM's "to the table" on many fronts. If you ever need additional clarification, please contact Peter, myself or the national office.

Remember, the scheduling format for the 2008 Orlando Conference has changed in response to memberships/ attendees requests. This entails the Leadership Forum with National Speaker on Tuesday morning with the Conference itself opening on Tuesday afternoon and concluding on Friday. In addition, I'm pleased to also inform you that the Chapter Leaders are invited to an informal session that Monday evening, to network, share and learn from each other. So PLEASE, as you prepare your budget and schedules for next year, anticipate including this HUGE opportunity for your chapter leaders to participate with others from across the nation. Both years that I've attended, I've come away amazed at the varied formats, programming and diversity that is evidenced and shared at this meeting. I believe the Monday night session will definitely compliment your experience. PLAN NOW to see US there!

As your CPC Rep to the CMSA BOD, I'm on the Education Committee. We are currently reviewing the 2007 Denver offerings in preparation to upload them to the website, in the Educational Resource Library. Soon your colleagues will be able to share and earn CE's for those sessions you raved on about! Also, you may want to download and listen to some of the sessions that you were unable to attend because of time conflicts. Remember by completing the Post-test you can immediately print a CE certificate. That CE information is saved on line for you and BEST of ALL, it's FREE as a MEMBER BENEFIT!!- I believe this is one of the Best Kept Secrets of CMSA- but it shouldn't be a secret- make sure all your chapter members are aware of this. If you have questions or need assistance please contact national office for further information on accessing the library- it's a simple process, and only requires an initial CMSA profile setup, which many already have completed, for continued access.

I'm still looking for several volunteers to help finalize information for the Speakers List, so just e-mail me now and we'll be glad to include you in the fun! cherylhumphrey@comcast.net

Enjoy this wonderful winter season, and remember to join in the CPC Forum discussions.

Cheryl

Chapter Highlights

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Detroit, MI

The CMSA Detroit Chapter is gearing up for what is hoped to be another successful dinner conference schedule for 2007. They also are planning a drive to push for over a 500 in their membership this fall through the spring of

2008. This drive was kicked off at their September meeting and will strive for a goal of 500 members or more by the end of the spring 2008. The Detroit Chapter is also looking forward to their elections of new board members this fall as well. As one board member

stated it is always "Good" to have New Faces, New Ideas and a New Attitude! This is just an addition to a hard working group of current board members. Here's to a "Great" 2007-2008 year to all of you!

Springfield, MO

The Springfield and the Greater Ozarks chapter had their annual conference November 3rd, 2007. It was held at the University Plaza Convention Center in Springfield, Missouri. The topic was "A Direct Connection to ALS/MS". The vendor gala was

held the prior evening of November 2nd and included appetizers, soft drinks, coffee, and tea.

Besides having experts on pharmacology such as Lynn Kelly, the president and pharmacist at a local home parenteral company, and Mary Fink a RN with 25 plus years experience in the field of MS,

there was a motivational speaker who is a RN and has MS along with a RN who is active in the local CMSA chapter who experienced caring for a family member with ALS.

Las Vegas, NV

CMA-LV: Vegas Baby..Reporting Election Results

CMA-LV proudly announces and Congratulates there new 2008 Board Members. The chapter is looking forward to growing chapter under their very capable leadership.

Meanwhile, the Board of CMA-LV will host a reception for Peter Moran, when he is in Las Vegas for a CM conference, as a well as planning for their annual business meeting and holiday gathering combo event on Dec. 4th, 2007. Most of all they are all shocked that another year is almost near an end and the chapter are celebrating their third year anniversary as a chapter of CMSA!!

Hudson Valley, NY

The Hudson Valley Chapter of CMSA's Celebration of Case Management Week was a huge success last month at Sam's of Gedney Way. Graciously sponsored by Roche Laboratories, Rob Adamson, Pharm. D., speaker, shared information titled "Preparing for Pandemic Influenza." Rob was charming, funny and very informative and will be repeating this presenta-

tion at the 3rd annual Capital District meeting in Albany on November 15, 2007. Thank-you to all who were able to attend!

Long Island, NY

CMSA LI held its Annual Conference on October 17, 2007 at the beautiful Westbury Manor on Long Island, NY. The topic was Ethics in Healthcare: Issues and Insights in Case Management. The turnout was great and keynote speaker, Diann Uustal, RN, MS,Ed.D. captivated the audience with her dynamic and heart-felt presentation on ethics. She had the audience laughing and crying with her case studies and stories. Dr. Uustal

is a truly masterful presenter who had her audience asking for more, even after a late weekday evening! The Annual Conference was a huge success. The LI chapter is looking forward to welcoming Peter Moran, RN,C, BNS, MSN, CCM, CMSA National President, to its next meeting on December 12, 2007. Peter will speak on ER Case Management - Incorporating Standards into Practice Outcomes, Case Studies. For more information, please see www.cmsali.org. The chapter is looking forward to their December 12th holiday meeting with Peter as our guest speaker!

Also, congratulations in is order CMSALI members Claudia Curtis, RN, Leona Campbell Corbet, RN and Jeanne Romano, RN they were the only members of the Care Management Department of St Catherine of Siena Medical Center to be promoted to the new Clinical Ladder III status. Additionally, they were 3 of only 23 nurses institution-wide to achieve this level. Congratulations ladies!

Cincinnati, OH

Congratulations!!!

The Southern Ohio Valley Chapter of CMSA is proud to announce the winners of the 2007 Case Manager Leadership award and Case Manager Excellence in Service award.

Mary Beth Newman, RN, MSN, A-CCC, CMAC, CCP, was awarded the Case Manager Leadership award. Mary Beth has been very active in CMSA on the local and national levels. Mary Beth was a founding member of

SOV CMSA as well as the first President. She continues to be very active in the local chapter currently serving as Secretary. She is a CMSA Director and has been a presenter at several CMSA Annual Conferences. Mary Beth is Program Manager for Care Management at Anthem Blue and Cross Blue Shield. She is responsible for maintaining a consistent "best practice" care management program for the company's 5-state Central Zone. Her experience includes the development, implementation, and evaluation of targeted care management programs for Anthem's man-

aged care population.

Teresa Emmons, RN, BSN, CCM, CMCN, was awarded the Case Manager Excellence in Service award. Teresa is an active member of SOV CMSA and is on the Membership Committee. She is also a member of the American Society for Metabolic and Bariatric Surgery and the National Association of Bariatric Nursing. During the past year, Teresa was a major contributor in the development of the National Bariatric Surgery Case Management Program for WellPoint/Anthem Blue Cross and Blue Shield.

Dallas, TX

It was a grand week of celebration for this year's National Case Management Week! The Chapter hosted several events that spotlighted case managers across all lines of practice.

The Fall Seminar was held Oct 16th & 17th beginning with an all day CCM prep class on the 16th followed by a 2 track seminar on the 17th. The annual Fall Seminar, held to coincide with Case Management Week, strives to attract non-CMSA members who are practicing case management in the north Texas area. The Hospital Track & Worker's Comp Track are specifically de-

signed to meet the needs of case managers working in those targeted environments. The Chapter Membership Secretary attended both days to provide information on the advantages of CMSA membership & to be available to assist with membership application. This year's seminar brought over 45 attendees to the prep class & over 100 to the day seminar. Nancy Skinner provided the opening & closing sessions of the seminar speaking to the challenges faced by today's case manager & what to expect in the future.

The monthly Chapter dinner meeting was also held during Case Management Week. There, the two proclamations declaring Dallas & Ft Worth recognizing the special week were presented. Door prizes were

awarded along with a catered meal & excellent ceu presentation.

November will see a business meeting held in conjunction with the monthly dinner meeting. Chapter business will be discussed along with reports from the very active Strategic Planning Committee as well as Membership & Community Outreach committees.

Plans are also underway for the December Holiday Party. Each year the Chapter designates a local charity to support during the holidays. This year The Family Place will receive all proceeds from the door during the Holiday Party as well as individual attendee donations. The party theme is "Casino Night!" & will guarantee a great time for all!

The 7 traits of Effective Leaders: How Many Do You Share?

Are the leaders born or made? Can you lean superior leadership skills? No one is sure, but experts have noticed seven specific actions that successful leaders carry out, regardless of the organization or cause, they lead.

Effective leaders....

...Make others feel important. If your goals and decisions are self-centered; followers will lose their enthusiasm quickly. Emphasize their strengths and contributions, not your own.

...Promote a vision. Followers need a clear idea of where you're leading them, and they need to understand why that goal is valuable to them. Your job as a leader is to provide that vision.



...Follow the Golden Rule. Treat your followers the way you enjoy being treated. An abusive leader attracts few loyal followers.

...Admit mistakes. If people suspect that you're covering up your own errors, they'll hide their mistakes, too, and you'll lack valuable information for making decisions.

...Criticize others only in private. Public praise encourages others to excel, but public criticism only embarrasses and

alienates everyone.

...Stay close to the action. You will need to be visible to the member so of your organization. Talk to people, visit other office and work sites, ask questions, and observe how business is being handled. Often you will gain new insights into your work and find new opportunities for motivating your followers.

... Make a game of competition. The competitive drive can be a valuable tool if you use it correctly. Set team goals, and reward members who meet or exceed them. Examine your failures, and celebrate your group's successes.

- Adapted from **The Toastmaster**

Leadership

Much has been written about leadership and you should take the time whenever the opportunity arises to read ideas on how to be a more effective leader.

Here are ten basic keys:

(1) **Integrity:** always tell the truth and always keep your promise, even if it hurts to do so.

(2) **Trust:** You must first demonstrate your trust in people by making yourself vulnerable before you can expect them to place their trust in you.

(3) **Respect:** If you really don't care about your people they will sense your lack of concern and will not have respect for you.

(4) **Fairness:** Treat all members fairly and equally regardless of your personal feelings.

(5) **Vision:** To be a true leader, you must have an unfaltering vision, be able to communicate it to your people, and get them to understand and share in your excitement for the vision.

(6) **Optimism:** You must always be positive and confident that the company will succeed; but you should also be realistic.

(7) **Decisive:** A leader must make decisions and stick with them as long as they make sense. Consensus is not always better than an individual decision, particularly in a crisis situation. Trust your intuition. Intuition draws upon your ex-

perience, stored knowledge and information you may not even realize you have in your head.

(8) **Example:** You must practice what you preach or you will have little credibility.

(9) **Teamwork:** Insist on mutual respect, courtesy and cooperation among your people.

(10) **Authority:** Remember that authority is not vested in your position as the boss. Authority resides with the people who report to you and they have the power grant it to you or not.

Adapted from <http://www.zeromillion.com/favicon.ico>.

Ask Barbara

This is was a question was asked by one of the chapter leaders in preparation for the Holidays, with all of the holiday party's coming up.

The importance of taking appropriate actions to limit liability resulting from someone overindulging during group functions or while on business

It is important for groups or organizations, to adopt policies, preferably the organization's board of directors and honored by all in positions of responsibility, to help limit the organization's potential liquor liability.

In approximately half of the states, the courts have developed a "host liability" standard for assessing liability. As with the better-known dram shop liability, anyone who provides alcoholic beverages to an intoxicated individual or to a minor runs the risk of being held responsible for liability they may cause even though they are not a licensed seller of the liquor. This is based on the duty the host owes to third parties who may suffer damage as a result of the host's liquor generosity. What this means is that the sponsor of the event has a duty to third parties to prevent someone who has attended a function who has become intoxicated from causing injury or damage to a third party. The courts have generally held the host liable when the events seem to indicate he has failed to take advantage of opportunities to prevent the person from becoming intoxicated and driving or engaging in some other activity that endangers themselves or others.

For organizations and meeting planners this places an additional burden of risk management. Two common ways to help manage this risk are to include contractual language limiting liability relative to the serving or sale of alcohol with the facility where the event is held and secondly to maintain adequate insurance that covers potential host liquor liability. However, it is not always possible to limit liability contractually in, for example, a hospitality suite setting. Therefore, in addition to these, the organization should also establish definite policies and service requirements, such as:

1. Only use bartenders or servers who have been properly trained.
2. Always also have non-alcoholic beverages available.
3. "Card" people who may appear to be under age.
4. Establish designated driver programs, as appropriate, and provide for rooms if an overnight stay is needed to sleep it off.
5. Have non-salty food available.
6. Encourage people to drink responsibly with signs and in registration materials and remind them of the severe penalties intoxicated individuals may face.
7. Avoid open, unattended bars.
8. Close bars in advance of the end of the event.
9. Limit the time of the event or hours of the hospitality suite.
10. If it's a cash bar, offer free non-alcoholic beverages.
11. Sell or provide a limited number of drink tickets.
12. Monitor the event.
13. Designated staff should not imbibe, they should supervise.

Following the above-recommended precautions will not ensure that organization will not be sued should someone who has attended one of its functions and over imbibed then injure or kill somebody or themselves. However, they will help prevent that from occurring and help the organization from being found liable for damages, and they will also likely result in a more favorable public reputation for the organization, not to mention saving it substantial money, which can then be better used to promote and improve their industry.

The only way to protect the organization, its members and innocent third parties is for the organization to take a stand in favor of responsible alcoholic consumption at its functions.



News From CCMC

All future CCM exams to be administered in electronic format

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To access the Certification Guide and Application, please visit the CCMC's website at

www.ccmcertification.org.

CCMC is partnering with Prometric to deliver the certification examinations electronically, starting with the Fall 2008 examination cycle.

There are many benefits to computer-based testing (CBT):

- **More flexibility in site locations.** Previously, only 65 exam sites were available. Now there are over 300 locations nationwide for you to schedule at a location convenient to you.
- **More flexibility in choosing when to take the exam.** Rather than requiring you to take the exam on a particular date and time, you will have your choice of seating over the course of a week-long window.
- **More opportunities to apply.** The exam will be offered in three windows per year, as opposed to the two dates currently offered.
- **Shorter exam.** Prometric has demonstrated that the exam can be shortened without sacrificing examination reliability or validity. The current 6-hour exam will be reduced to approximately 3 hours.
- **Faster results.** Rather than waiting two months for your scores, you'll receive your score report approximately 2-3 weeks following the exam.

Since 1993, the CCM has been the gold standard in case management certification, with over 26,000 certificates nationwide. Offering a reliable computer-based examination will provide increased service to our candidates.

APPLICATION PROCESS UPDATE

Streamlining will simplify the application process

With the ability to offer exams three times per year, CCMC will also streamline the application process. The new application (available in February 2008) will contain all forms required for certification:

- Application
- License Verification Form
- Employment Verification Form

Rather than requiring a separate application and examination fee, only one fee will be submitted for the entire certification process. A partial refund for those not found eligible to sit for the exam will be provided.

This will greatly reduce the steps and challenges applicants have reported in the past in meeting deadlines and obtaining their employment documentation and other verifications. More improvements to the process are anticipated, and will be announced in February.

If you have questions or need more information, visit the website (www.ccmcertification.org) or email at info@ccmcertification.org. Please forward this information to those who may be interested.