



Chapter Dispatch

January 2008

Volume 5 Issue 59

Important dates:

2008 CALENDAR

February 29 Chapter of Excellence Award Entries are due

February 14 CMOY/AOSE Award Nomination Deadline

June 18 Chapter Leadership Workshop

June 19-23 18th Annual Conference Orlando, FL

Chapter Excellence & Innovation Award Program

Enter your chapter's best projects in CMSA's 2008 *Chapter Excellence & Innovation Awards (CEIA)*. Entries will be accepted from **January 1 until Feb 29**. Visit www.cmsa.org/professional/awards/ceia/ to find out more and to download award entry forms.

Judged by impartial individuals outside of CMSA according to set criteria, the CEI As recognize chapters that embody CMSA's Mission – *Advancing Case Management!*

Recipients of these awards will be recognized at the Orlando 2008 Annual Conference for promoting the growth and value of case management and supporting the evolving need of the case management professional.

Tips on Entering the Competition:

Fill out the entry forms as completely as

possible. Judges look at the description on the form, so provide information as completely, yet concisely, as possible. Supporting reports, brochures, videotapes, and photos are optional, but welcomed.

Concentrate on the goal, its impact, the outcome and significance of the success. While numbers are very important, also include how the activity improved the lives of those involved or the community at large.

Chapter Excellence and Innovation Award Categories:

- Best Use of Technology
- Conference
- Educational Programming Membership Development
- Print

CMOY & AOSE Award Nomination

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 standards, 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. Does your chapter have someone who meets the dedication and leadership in case management or the essence of a case manager to qualify for one of the prestigious awards below? Why not nominate them today? Nominate your local chapter award winners for a National award! Contact CMOY/ AOSE Staff Liaison Michele Lee at mlee@acminet.com (501)225-2229 ext 1120

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.

Your Chapter's Fiscal Period

All CMSA Affiliated Chapters fiscal year just concluded Au-

gust 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 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**

was January 15. Send them in soon.

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. This information is used to determine who to include on correspondence,



reports, chapter checks disbursement, 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

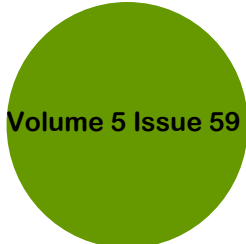
njackson@acminet.com.

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 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



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Snap for Seniors

The CMSA Senior Housing Locator, powered by SNAPforSeniors is a **member only**, online management tool which allows you to quickly and easily find the senior housing options which best fit your client's specific requirements.

lating into a better fit between prospective residents and facilities. Search by criteria such a geographic location, license type, facility names, availability status, payment types, care services and lifestyle amenities.

Save Time- A single database of 65,000+ senior housing facilities in the U.S. eliminates the need to consult multiple sources. Search for nursing for nursing homes, assisted living facilities, CCRCs, Residential care homes and more with a click of the mouse.

Stay Current- Facility information is regularly updated and maintained form more than 200 data sources ensuring current information despite the 20% annual turnover in senior housing providers.

Improve Outcomes- Advanced search options yield tailored results, trans-



New Member Benefit

Maintain Objectivity- All facilities receive free listings, eliminating the bias that many referral services and advertisement-based websites possess.

A growing number of facilities have detailed listings comprised of 150+ data elements, some displaying photo galleries, virtual tours and current availability.

Visit [Case Management Society of America > CMSA Senior Housing Locator](#) for more information

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.

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

18th Annual Conference



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. **Online Registration is now open.** For more information on fees and registration visit.

[Case Management Society of America > Conference > 18th Annual Conference & Expo - ORLANDO, FL](#)

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 con-

venience. 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](#).

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.

Chapter Highlights

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Las Vegas, NV

On January 15th CMA-LV had their education meeting with a presentation by Jennifer Christian from UMC North in Tucson, Arizona on Bone Marrow Transplants. It was an excellent presentation and well received by the attendees. There was information presented about CMSA conference in Orlando in June as well as requesting a volunteer for the Public Policy Liaison Network Committee. CMA-LV will be offering their 3rd Annual

Case Management Certification Class in 2008 to help case managers/social workers prepare for the CCM exam. The attendees were informed of the Case Manager of the Year and National Award of Service Excellence awards through CMSA and nominations being open until February 14th. They were all encouraged to nominate that special case manager.

Cincinnati, OH

Plans have been finalized for the Third Annual Occupational Health and Acute Care Case Management Conference "Yesterday, Today, & Tomorrow" February 9, 2008 in Mason, Ohio. Speakers include Peter Moran, President CMSA; Connie Commander, Immediate Past President CMSA; Susan Rogers, Past President CMSA; Kevin Carroll; and Lisa Linn Siefert. Presentation topics include: MRSA Antimicrobial Insights; Overview of Bariatric Surgery and Associated Nutritional Risks; Successful Rehabilitation of Persons with Limb Loss; Employer's Perspective: Case Management Opportunity; and ER Case Management: Incorporating Standards into Practice, Outcomes: Case Studies.

CELEBRATING THE LIFE of a CASE MANAGEMENT LEADER and ACTIVE MEMBER of SOV CMSA

On Friday, January 4, 2008, Shelley Ratliff, RN, CCM, passed away after a long battle with breast cancer. Shelley was a friend, mentor, advocate, leader, SOV CMSA founding member and 2006 SOV CMSA Board member. SOV CMSA would like to honor her passion for case management. Look for an announcement regarding the Shelley Ratliff Case Management Scholarship in the near future.



Dallas, TX

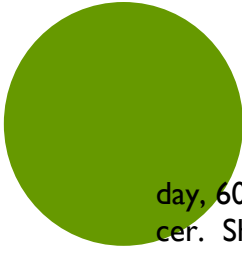
DFW CMSA

A new exciting year for DFW!

Several of the Chapter members have made a commitment to grow their hair for the year. The hair will then be donated to "Locks of Love" for making wigs for children who have lost their hair to disease or the treatment of disease.

The Community Outreach Committee is collaborating with Special Olympics. Chapter members will work with the group when the games are held in the DFW area later this year. The Committee also has plans to participate in the MDA Telethon on Labor Day, Diabetes Walk in November and Alzheimer's Walk in October.

Julie Carroll, long time Chapter member, past president and current membership secretary will, for the second time, participate win the 3-



day, 60 mile Walk For The Cure for breast cancer. She is currently collecting sponsorship monies and will walk in the fall.

Registrations are now being taken for the annual Educational Conference to be held in April. The conference committee has been working hard since August to ensure that this will be the best-of-the-best DFW conferences! This year's conference, "Solving The Healthcare Puzzle", will offer 5 tracks including one for social workers with all required ethics ceu hours pre-approved!

The Strategic Planning Committee, in collaboration with the West Texas Case Management Society, will hold a 2 day seminar the end of February. The first day will be a CCM prep class with the following day offering 2 tracks. Texas Medical Foundation, Medicare PRO, will provide one all day track addressing hot topics related to inpatient stays.

Public Speaking: 3 Rules for PowerPoint Slides

By: Colleen Kettenhofen

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1. Bullets and phrases: When I conduct public speaking training, I always remind my audience to keep their PowerPoint slides easy to read. Pretend you're on the interstate where someone could read the information driving 55 miles per hour. Bullets work best as they are easier to read than sentences. Also, you are less likely to read the slides this way. The biggest rule with PowerPoint slides is to keep them big, bold, and simple. Your slides should resemble a billboard. No more than 6 bullets per slide and 6 to 8 words per line. Stick to three colors per PowerPoint slide, otherwise your audience will start focusing more on color and less on your content.

2. Font choices: Often, people come up to me privately in my public speaking training seminars and confide that many of their colleagues use print that is too small for anyone to read. They secretly urge me to tell everyone attending that the print must be large enough to read the PowerPoint slide. In addition, I'm often told by the person who hires me that many of their employees put too much information on their slides. With public speaking and visual aids, less is more.

Pick simple fonts, but make certain they're large enough to read for people in the back rows. The print size should be at least a 28 font for titles and at least 22 point for other text. Simple fonts with clean lines are much easier to read. For instance, Times New Roman, Gothic and Verdana are good choices. Within those font families you have the ability to enhance a page using italics and bold, just go easy on the underlines. And never put letters in all capitals. Instead, use upper and lower case lettering. It is much easier to read, and doesn't look like you're shouting.

3. Color and contrast: Take into consideration the size of the room in which you'll be speaking. Will everyone in that last row be able to read the information on your PowerPoint slides? In order to assist them in reading what's on screen, choose soft easy-on-the-eyes background colors such as light blue or turquoise blue. For lettering, choose a contrasting color differing from your background such as white, black or navy. For example, use light lettering on a dark background, or dark lettering against a light background. Never use all sentences in black print against a plain white background. It is boring and no one will read it.

Public speaking and the cardinal rule: you never want to read what's on the screen. After all, you are the presenter. Your audience assumes you're the expert. Also, when you read what's on your slides, mostly likely your back is to the audience. They won't focus on you. They'll just lose focus and start thinking about other things. Therefore, use bullets and phrases as opposed to sentences on your slides and in handouts. Think of what's on your slides only as fast food for the eyes.

In my public speaking training, I frequently see highly educated, knowledgeable people trying to cram too much information on a single slide. This is especially true when presenting technical material. Technical people have a propensity to put too many words, charts, colors and graphs on a single slide. Know your material, yet keep it simple. Practice. Rehearse with your PowerPoint slides. Get honest feedback from your friends, family members and colleagues. You can do it. Good luck!

Article Directory : <http://www.articledashboard.com>

“Employees v. Independent Contractors – Creating the Correct Classification to Minimize the Risk of Costly Claims”

By

Barbara F. Dunn and Nathan J. Breen

While most in the meetings industry may have a basic understanding as to the difference between an employee and an independent contractor, this is a field where a little knowledge can be dangerous. Frequently, while parties are careful to specify that each is an independent contractor, more attention is devoted to ensuring that this contractual language is in place than to structuring the underlying arrangement to ensure that the parties will be considered independent contractors for taxation and liability purposes. It is not uncommon for parties to operate for years under the mutual assumption that each is an independent contractor only to have a court or agency disagree and impose liability where the parties assumed that none existed.

Creating the Correct Classification

The determination as to employee or independent contractor status varies from agency to agency and from state to state. From a federal tax point of view, the Internal Revenue Service has some twenty questions it asks relative to a determination of the status of the third party. These questions relate primarily to the degree of control the hiring party has over the service provider. State unemployment compensation and insurance laws are far more restrictive with respect to who qualifies as being an independent contractor versus an employee. The key elements in all contracts with someone who is to be an independent contractor, is accurately setting forth the relationship.

Here is a basic checklist as to provisions which should be included in independent contractor agreements, whether planner, caterer, band, special events, administrative assistant, etc.:

- Who are the parties?
- What is the job description? What is it that is to be accomplished as opposed to how is the job to be done? Give the goal, not the way to achieve it.
- What is the compensation going to be? Here it is far preferable to provide for a set fee as opposed to any kind of hourly basis. Hourly pay or control over the time that a person is spending will result in the party's being viewed more as an employee as opposed to an independent contractor.
- A declaration that the individual or firm is an independent contractor.
- A declaration that the individual or firm is responsible for all taxes, worker's compensation, unemployment insurance coverage, etc.
- A provision that the independent contractor shall provide indemnification for any errors or omissions that may create liability, be named as a co-insured on general liability and other insurance policies, plus provide notification if the insurance is cancelled or lapses.
- Be specific in the authority that the independent contractor has to bind the hiring party.

Ask Barbara cont.

- Reserve the right to say “no” as to subcontractors.
- Recognize that with outsourcing it should be based on what is done, not was to be done.
- Make sure to file required tax information. For any individual or partnership used as an outsourcing agency that is paid over \$600, you must file with the IRS and give the contractor a Form 1099 report. Failure to do so can cost you in penalties. If the group is a corporation, there are no reporting requirements.

The Significance of Making a Correct Determination

Whether parties to a contract are determined to have created an employer/employee or an independent contractor relationship has substantial implications with respect to each will be treated for taxation purposes. While companies that engage independent contractors may do so in part to avoid tax liability they incur with employees, those that are found by the IRS to have misclassified workers as independent contractors may be subjected to large government penalties and employment tax liabilities, including 100 percent of the combined worker-employer Social Security contribution, federal income tax not withheld, and unemployment insurance tax. The engaging company generally cannot recover these amounts from the independent contractor.

Another potentially high stakes result of the employee/independent contractor determination involves liability for injuries caused by the employee or independent contractor. Employers are liable for injuries caused by their employees where such employees are acting within the scope of their employment, whereas they will generally not be liable for the actions of an independent contractor.



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.