

Certification Guidelines: Credential Standards and Requirements Table

Certified Behavioral Health Case Manager (CBHCM) - Provisional & Upgrade



*Define Yourself as a Professional
through Certification.*

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CBHCM - PROVISIONAL AND UPGRADE STANDARDS & REQUIREMENTS TABLES

The purpose of this document is to provide detailed CBHCM-P credential specific information, including CBHCM Provisional and Upgrade standards, requirements and application policies and procedures. This document is to be read in conjunction with the FCB’s overall administrative requirements that are detailed in the following FCB Candidate Guides:

- [Candidate Guide: Application Process](#)
- [Candidate Guide: Examination Process Credential Award](#)
- [Candidate Guide: Maintenance and Renewal Process](#)

Applicants are responsible to read, understand and follow the information in the FCB’s Candidate Guides, this document, and the FCB’s [Code of Ethical and Professional Conduct and Disciplinary Procedures](#). All documents are posted online. Please contact the FCB at 850-222-6314 if you have any questions.

Grandparenting Period: The FCB is accepting CBHCM applications under the grandparenting standards (no exam or on-the-job supervision requirements) through August 31, 2018. Applicants must earn the full credential prior to January 1, 2019 in order to certify under the grandparenting standards. Any CBHCM-P applications that are received during the grandparenting period and are still “in process”, or have not achieved full certification, prior to January 1, 2019 will be transitioned to the full standards, which means meeting on-the-job supervision requirements and earning a passing score on the CBHCM exam.

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CERTIFIED BEHAVIORAL HEALTH CASE MANAGER - PROVISIONAL (CBHCM-P)

The Certified Behavioral Health Case Manager - Provisional (CBHCM-P) designation is for individuals who have met the formal education and training requirements for the CBHCM however do not yet have the required work experience providing direct targeted case management services to adults and/or children with mental health conditions, substance use disorders, and/or those involved in the child welfare system who require behavioral health case management services however do not have the necessary work experience hours. A CBHCM-P must have a Bachelor's degree and training in the performance domains of:

- Engagement and Assessment (initial and ongoing)
- Service Planning and Development (initial and ongoing)
- Coordination, Linkage and Monitoring
- Documentation
- Professional, Legal and Ethical Responsibilities

The CBHCM-P credential is only available for entry-level applicants. There is no provisional process for a CBHCM Supervisor.

The CBHCM credential satisfies the statutory requirement of s. 394.4573, F.S. and is recognized by the Agency for Health Care Administration (AHCA) for billing purposes.

The Child Welfare series of credentials **does not** satisfy the statutory requirement of s. 394.4573, F.S. **and** the Behavioral Health Case Manager series of credentials **does not** satisfy the statutory requirement of s. 402.40, F.S.

Individuals holding the CBHCM-P credential have met all FCB provisional administrative requirements and all credential specific standards and eligibility requirements that have been established for the credential.

PROVISIONAL APPLICATION PROCESS

Applying for a CBHCM-P credential is a multi-step process. The individual applicant may work with the employer to complete all required steps as they progress through training and earning the necessary work experience.

The first step in the application process is to complete an individual account and profile in the FCB online certification system. The FCB will not accept certification application documents or application fees until you have created your online account. The applicant, and not the employer, must create the individual account. You will need the following information for your online profile:

- name and demographic information
- primary contact information
- current employer and contact information
- information regarding your criminal history, if any
- information regarding any history of professional misconduct, if any
- your agreement to follow the FCB Code of Ethics and participate in the investigation and disciplinary processes, if any

The FCB recommends you use your personal email address, and not a work email, as this email will also be your user name. The system will assign you a temporary password. Please reset your temporary password to a unique password you will remember.

The next step is to complete the online application for the CBHCM Provisional credential. Once logged into your account, click on Apply for New Certification. From the list of available certifications, select Certified Behavioral Health Case Manager – Provisional.

CBHCM-P STANDARDS AND ELIGIBILITY REQUIREMENTS (DURING GRANDPARENTING PERIOD)

TOPIC	MINIMUM REQUIREMENT
<p><i>Please review the Candidate Guide: Application Process and the following CBHCM-P standards and eligibility requirements for application.</i></p>	
<p>Formal Education</p>	<p>Applicants must hold a minimum of a Bachelor’s degree.</p> <p>Eligible degrees are issued by educational institutions holding United States Department of Education and/or the Council on Higher Education Accreditation (CHEA) recognized accreditation at the time of degree award.</p> <p>During grandparenting, an unofficial transcript will be accepted.</p> <p>Applicants who earned their degree at an educational institution outside of the United States (US), must have their credentials evaluated by an organization approved by the FCB. This is done at the applicant’s expense and must be done prior to applying for certification. All documents in a foreign language must be translated by a certified translator into English. The evaluation must provide documentation that formal education/degree is equivalent to an accredited US institution and the course work met the content and hour requirement for a degree awarded in the US. The FCB must receive an original evaluation mailed directly from the educational evaluation service.</p>
<p>Content Specific Training</p>	<p>During the grandparenting period, there are two available paths for verifying the content specific training requirement:</p> <p>Option 1: Completion of an AHCA-approved training curriculum within 3-months of hire. AHCA-approved training meets the content requirement as stated in the <i>Targeted Case Management Training Requirements</i> section of the <u>Florida Medicaid Mental Health Targeted Case Management Handbook</u>.</p> <p>Verification of the AHCA-approved training will be submitted by the employer of the applicant.</p> <p>OR</p> <p>Option 2: 50 total clock hours of training divided as follows:</p> <ol style="list-style-type: none"> 1. Engagement and Assessment (initial and ongoing): 9 hours 2. Service Planning and Development (initial and ongoing): 8 hours 3. Coordination, Linkage and Monitoring: 13 hours 4. Documentation: 10 hours 5. Professional, Legal and Ethical Responsibilities: 10 hours <p>Eligible training must be taken from an FCB Approved Education Provider within the last 10 years (no time limit on college coursework taken as part of a degree program). FCB Eligible Training Guidelines and Providers are listed online at http://flcertificationboard.org/resources/approved-education-providers/</p> <p>Recommended training topics for each domain are listed at the end of this document.</p> <p>Verification of the 50 hours of content specific training and supporting documentation is submitted to the FCB by the applicant. Applicants must complete (1) the FCB Training Verification Form and (2) attach approved supporting documentation for each entry listed on the Form.</p>
<p>Related Work Experience</p>	<p>Related Work Experience is not required during the provisional application process however is necessary when completing the upgrade to full certification.</p>
<p>On-the-Job Supervision</p>	<p>On-the-Job Supervision is not required during the grandparenting period. When the grandparenting period closes, all applicants must meet these requirements as a condition of certification.</p>

TOPIC	MINIMUM REQUIREMENT
Recommendations	Recommendations are not required during the grandparenting period. When the grandparenting period closes, all applicants must meet these requirements as a condition of certification.
<i>Please review the <u>Candidate Guide: Examination and Credential Award</u> and the following CBHCM exam requirements.</i>	
Exam	The CBHCM exam is not required during the grandparenting period. All provisional applications received during the grandparenting period but not fully certified prior to January 1, 2019, will have to pass the exam for certification. All new applications received after August 31, 2018 will have to pass the exam for certification.

ELECTRONIC APPLICATION AND SUPPORTING DOCUMENTATION REQUIREMENTS

All applicants **MUST** first establish an online account with the FCB. After establishing the online account, complete the Certified Behavioral Health Case Manager - Provisional (CBHCM-P) electronic application. Hard copy applications are only available for applicants who meet ADA requirements related to accommodations for using computers and related technologies. Please contact the FCB for additional assistance. All other applicants, please see the link below for access to the portal.

<https://portalfcb.cyzap.net/dzapps/dbzap.bin/apps/assess/webmembers/login?webid=FCB>

All credential-specific requirements are documented on FCB forms. All forms are posted online, under the credential specific tab, at <https://flcertificationboard.org/certification/case-management-credentials/>.

Applicants must:

- Download and provide the *CBHCM & CBHCMS Training Verification Form – AHCA-Approved Curriculum* to your employer if you have completed the AHCA-approved training within 3-months of hire **OR** complete the *Training Verification Form* if you have completed 50 hours of FCB approved training. The completed form and supporting documentation is uploaded to the electronic application.
- Save and upload a copy of your diploma and/or transcript.

All applicants have a maximum of 12 months to earn the CBHCM-P credential, starting from the date the application and the certification fee are received by the FCB.

When your fee has been processed and your application has been successfully submitted, you will receive a system email and, shortly thereafter, you will receive a personal email of introduction from your assigned Certification Specialist. This person will serve as your single-point-of-contact throughout the certification application, examination and award processes.

ELECTRONIC APPLICATION COMPONENTS & SUBMISSION PROTOCOL

Applicants have up to 30 calendar days to complete the electronic application. Applications not submitted within 30 days will be automatically deleted, including all data and attachments.

An application is considered submitted when the applicant has progressed through all of the screens, providing all system required information, and making the application fee payment.

Once the application is submitted and the fee payment is received, the application is “locked.” This means that the applicant can no longer make changes to data entered into the application and cannot add additional files of supporting documentation. If changes need to be made to the application and/or additional documents need to be attached, please work directly with your assigned Certification Specialist, who will make the necessary changes/updates.

SECTION	REQUIRED DATA	REQUIRED ATTACHMENTS
Other Certification or Licensure	Enter the requested information for any non-FCB certification or license you may hold. If you do not hold other credentials, select the “next” button.	No applicant-provided attachments are required. If you report another credential(s), please upload a copy of the credential.
Formal Education/Degree	Enter the requested information for the highest level degree you hold.	Unofficial transcripts will be accepted during the grandparenting period. Save and upload a copy of your degree or transcript.
Content Specific Training	You are not required to enter any fields of data.	If you have completed 50 hours of FCB approved training, upload a completed <i>Training Verification Form</i> and supporting documentation for each course/training event listed on the form.
Current Employer	Enter the requested information for your current employer.	There are no applicant-provided attachments in this section.
Assurance and Release	Read the agreements on this page as you are bound by FCB policy and procedure once you check the check box and select the “next” button.	There are no applicant-provided attachments in this section.
Final Review and Application Submission	Review all entered information. If any edits need to be made, make them at this time. Additional documents cannot be uploaded after you select the “submit” button. If you do not select the “submit” button with 30 days of starting the application, the system will delete the application, including all entered data and attachments.	There are no applicant-provided attachments in this section. When you submit your application, you will be taken to the fee payment screen.

SECTION	REQUIRED DATA	REQUIRED ATTACHMENTS
Fee Payment	The certification fee is due at this time. The preferred method is to pay online by credit card.	<p>Your application is not submitted until payment is made.</p> <p>Credit card payments made online are secure and have no additional fees. Credit card payments made by phone will incur an additional \$5.00 convenience fee per transaction.</p> <p>All fees are non-refundable.</p>

HARD COPY APPLICATION DOCUMENTS AND SUBMISSION PROTOCOL

Applicants must download the following forms from the FCB website and provide the forms to the appropriate people for completion and submission to the FCB.

- CBHCM & CBHCMS Training Verification Form – AHCA-Approved Curriculum* **OR** *Training Verification Form*

Your assigned Certification Specialist will upload all hard copy documents to your electronic application. You will be able to track the status of each requirement from your online account.

REQUIRED DOCUMENTATION	APPLICANT PROVIDED	NON-APPLICANT SOURCE
Formal Education	On application, report highest level degree(s).	No documentation required from a non-applicant source unless providing a translated degree evaluation, which must come direct from the evaluating agency.
Content Specific Training	If you completed 50 hours of FCB approved training, complete <i>Training Verification Form</i> and collect copies of supporting documentation. Upload all documents.	If you completed the AHCA-approved training within 3-months of hire, employer will document and submit <i>CBHCM & CBHCMS Training Verification Form – AHCA Approved Curriculum</i> with copies of supporting documentation.

All forms must be filled out electronically – handwritten forms will be denied.

All forms and supporting documentation must be submitted to the FCB by the individual signing off on the form/submitting supporting documentation. Forms and documents provided by the applicant will be denied.

All hard copy documents and fee payments may be made to the FCB via mail, email or fax.

US Mail: FCB ♦ 1715 South Gadsden Street ♦ Tallahassee, Florida, 32301

Email: Applicants are assigned a Certification Specialist when their application has been received at the FCB. Please ask the applicant for their Certification Specialist’s name and email address. In the absence of a specified person, FCB accepts email at admin_assist@flcertificationboard.org.

FAX: 850-222-6247

Fee Payment: The preferred method of fee payment is online, using your secure certification account. You can make payments and receive immediate electronic receipts when using the online payment system. Credit card payments made over the phone (850-222-6314) will incur a \$5 convenience fee per transaction. Fees are non-refundable and non-transferable. **DO NOT MAKE A FEE PAYMENT UNLESS YOU ARE SURE YOU ARE READY TO MOVE FORWARD.**

CBHCM-P UPGRADE STANDARDS AND ELIGIBILITY REQUIREMENTS (DURING GRANDPARENTING PERIOD)

Certified Behavioral Health Case Manager Full Certification is awarded after the provisionally certified professional has completed specified on-the-job work experience requirements. Full certification must be earned prior to the expiration of the CBHCM-P credential, 12-months after passing the exam.

TOPIC	MINIMUM REQUIREMENT
<i>Following are the CBHCM Full Certification standards and eligibility requirements for application.</i>	
Provisional Certification	Applicant must have an active CBHCM Provisional credential.
Related Work Experience	<p>2,000 hours of work experience providing direct behavioral health case management services to adults or children in the fields of mental health, substance abuse or child welfare. One year of full-time employment at 40-hours per week, equals 2,080 hours.</p> <p>Volunteer experience and non-clinical internships are not eligible for certification purposes.</p> <p>Eligible work experience occurred within the last 10 years.</p> <p>Applicants providing case management services to other related target populations may request a related work equivalency review. The application is posted online at</p>
On-the-Job Supervision	On-the-Job Supervision is not required during the grandparenting period. When the grandparenting period closes, all applicants must meet these requirements as a condition of certification.
Recommendations	Recommendations are not required during the grandparenting period. When the grandparenting period closes, all applicants must meet these requirements as a condition of certification.
Exam	There is no exam for the CBHCM upgrade credential. Applicants have already passed a test of clinical knowledge by earning the provisional credential.
<i>Please review the Candidate Guide: Credential Maintenance and Renewal and the following CBHCM requirements.</i>	
Continuing Education	10 CEUs per year. Training must be related to CBHCM performance topics.
Renewal	<p>Biennial, on March 31st of the renewal year.</p> <p>All credentials issued during the grandparenting period will expire March 31, 2019, then every 2 years thereafter. All CBHCM credentials issued through the CBHCM-P Upgrade process are valid for slightly less than or slightly more than 12 months, pending on the issue date:</p> <ul style="list-style-type: none"> • Credentials issued for the first time in the months of April – December, will expire/must renew on the upcoming March 31st. • Credentials issued for the first time in January, February or March, will expire/must renew the following March 31st. • After the first renewal, the credential will be issued for a 2-year period, always expiring on March 31st of the biennial renewal year.

CBHCM-P UPGRADE ELECTRONIC APPLICATION AND SUPPORTING DOCUMENTATION REQUIREMENTS

After logging into your online account, complete the Certified Behavioral Health Case Manager (CBHCM) Upgrade electronic application. Hard copy applications are only available for applicants who meet ADA requirements related to accommodations for using computers and related technologies. Please contact the FCB for additional assistance. All other applicants, please see the link below for access to the portal.

<https://portalpcb.cyzap.net/dzapps/dbzap.bin/apps/assess/webmembers/login?webid=FCB>

All credential-specific requirements are documented on FCB forms. All forms are posted online, under the credential specific tab, at <https://flcertificationboard.org/certification/case-management-credentials/>.

Applicants must:

- Download and provide the following forms to the appropriate individual to complete and submit to the FCB: *CBHCM-P Upgrade Work Experience Verification Form*. See the [Hard Copy Application Documents and Submission Protocol](#) section of this document for additional details.

All applicants have a maximum of 12 months to earn the CBHCM credential, starting from the date the application and the certification fee are received by the FCB.

When your fee has been processed and your application has been successfully submitted, you will receive a system email and, shortly thereafter, you will receive a personal email of introduction from your assigned Certification Specialist. This person will serve as your single-point-of-contact throughout the certification application, examination and award processes.

CBHCM-P UPGRADE HARD COPY APPLICATION DOCUMENTS AND SUBMISSION PROTOCOL

Applicants must download the following forms from the FCB website and provide the forms to the appropriate people for completion and submission to the FCB.

- CBHCM-P Upgrade Work Experience Verification Form*

Your assigned Certification Specialist will upload all hard copy documents to your electronic application. You will be able to track the status of each requirement from your online account.

REQUIRED DOCUMENTATION	APPLICANT PROVIDED	NON-APPLICANT SOURCE
Work Experience Verification	On application, report employer(s) who will submit verification documentation. Provide each employer with a <i>Work Experience Verification Form</i>	Employer will document and submit related work experience on the <i>CBHCM-P Upgrade Work Experience Verification Form</i> . Employers must attach a position description specifying all related duties

All forms must be filled out electronically – handwritten forms will be denied.

All forms and supporting documentation must be submitted to the FCB by the individual signing off on the form/submitting supporting documentation. Forms and documents provided by the applicant will be denied.

All hard copy documents and fee payments may be made to the FCB via mail, email or fax.

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Email: Applicants are assigned a Certification Specialist when their application has been received at the FCB. Please ask the applicant for their Certification Specialist’s name and email address. In the absence of a specified person, FCB accepts email at admin_assist@flcertificationboard.org.

FAX: 850-222-6247

Fee Payment: The preferred method of fee payment is online, using your secure certification account. You can make payments and receive immediate electronic receipts when using the online payment system. Credit card payments made over the phone (850-222-6314) and check/money order payments will incur a \$5 convenience fee per transaction. Fees are non-refundable and non-transferable. **DO NOT MAKE A FEE PAYMENT UNLESS YOU ARE SURE YOU ARE READY TO MOVE FORWARD.**

UPDATING THE APPLICATION/ADDING FILES

Once you submit your electronic application, you are “locked out” of it and cannot make any changes or upload additional documents. If this needs to happen, please work directly with your assigned Certification Specialist, who will update your application as necessary.

CERTIFICATION PROCESS CHECKLIST

By submitting the CBHCM-P application, you are stating/agreeing that you, the applicant, have read all the required policy and procedures covered in the following documents:

- [Candidate Guide: Application Process](#)
- [Candidate Guide: Examination Process and Credential Award](#)
- [Credential Specific Standards Table](#)
- [Code of Ethical and Professional Conduct and Disciplinary Procedures](#)

FCB System Registration and Application for the CBHCM-P

- Online account created
- Online application submitted
 - Identify current or prior licenses/certifications
 - Identify highest level of education completed. Save and upload a copy of your degree and/or transcript.
 - Upload the *Training Verification Form* and supporting documents if you completed the 50 hours of FCB approved training.
 - Identify current employer information.
- Fee payment made. All fees are non-refundable.

FCB System Registration and Application for the CBHCM-P Upgrade

- Maintain active CBHCM-P credential. If the CBHCM-P has expired, you cannot proceed.
- Online upgrade application submitted
 - Identify individuals who will submit *CBHCM-P Upgrade Work Experience Verification Form*.
Download and distribute the required form to each individual for completion & submission.
- Fee payment made. All fees are non-refundable.

TRAINING TOPICS BY DOMAIN

DOMAIN	TOPICS
Engagement and Assessment (initial and ongoing) (9 hours)	<ul style="list-style-type: none"> • Assessment Instruments, Procedures and Techniques • Screening Instruments, Procedures and Techniques • Behavioral Health Conditions – Mental Health/Substance Use • Risk Factors/Risk Assessment/Risk Management • Client Engagement • Client Matching to Service Array • Motivational Interviewing • Functional Assessment • Abuse and Neglect
Service Planning and Development (initial and ongoing) (8 hours)	<ul style="list-style-type: none"> • Client Placement Criteria • Strengths-based or Client-centered Service Planning • Developing Goals and Objectives • Measuring Success • Stages of Change • Evidence-based Practices • Human Development • Principles of Recovery • Development of Service Plans • Health Literacy
Coordination, Linkage and Monitoring (13 hours)	<ul style="list-style-type: none"> • Active Care Coordination • Community Resources/Services • Case Management • Special Population Needs • Benefits and Entitlement Programs • Insurance and Health Maintenance Options • Linkage to Formal and Informal Supports • Advocacy and Communication Skills • Multidisciplinary Teamwork • Confidentiality Laws and Regulations • Strategies to Build Partnerships and Alliances
Documentation (10 hours)	<ul style="list-style-type: none"> • Assessment, Treatment, Progress, Discharge or Transfer Summaries • Clinical Documentation • Electronic Health Records/Technology • Privacy & Confidentiality • Progress Notes • Psychosocial Summaries • Reports/Record Keeping/Records Management

DOMAIN	TOPICS
Professional, Legal and Ethical Responsibilities (10 hours)	<ul style="list-style-type: none"> • Boundaries / Transference • Computer Ethics • Cultural Competence • Ethical Decision Making / Code of Ethics • Laws / Rules & Regulations • Organizational Ethics • Policy in Human Services • Privacy / Confidentiality / HIPPA • Relationships / Dual Relationships • Sexual Misconduct