

Certified Medical Director: Application – Initial Certification

Application deadlines are April 1 and October 1.

X

We appreciate your interest in the CMD program. It is recommended that you print the application to reference as you review this application packet. Allocate at least **30 minutes** to complete the application and supporting documents. For a summary of the application process, please visit <u>https://paltmed.org/certification/initial-certification</u>.

Submit applications -

by email: cmd@paltmed.org or by fax: 888-249-6533

Applications will be received via a password-protected format.

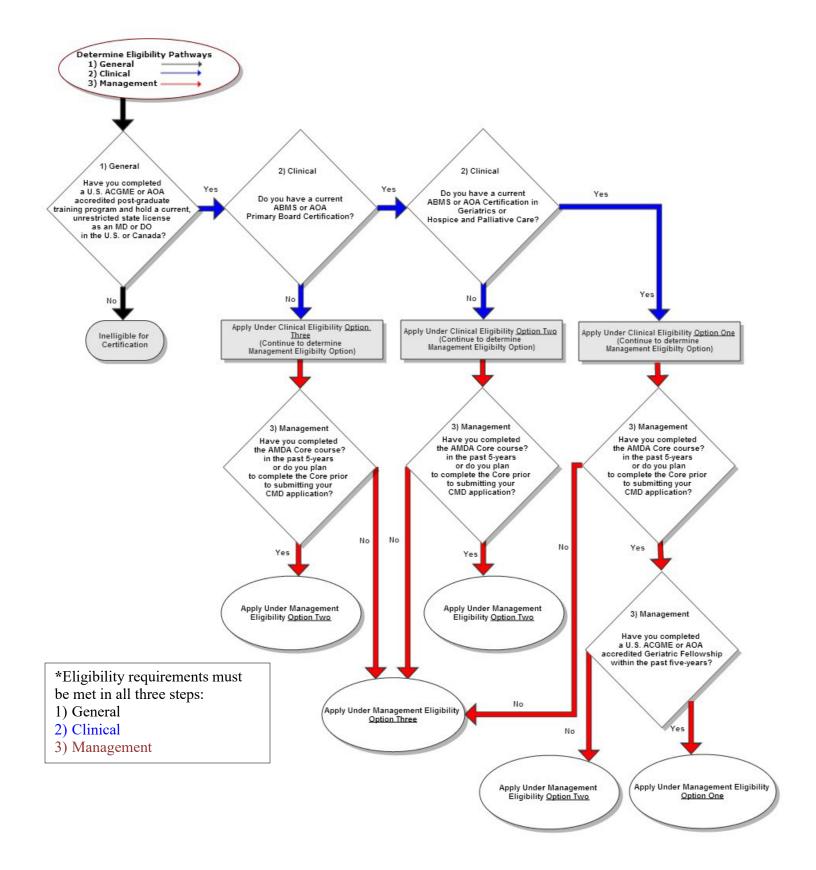
If you pay by check (payable to **PALTmed**), in the memo field indicate *CMD application* and *applicant's name*. Please mail to:

PALTmed (Certification Council) 9891 Broken Land Parkway #101 Columbia, MD 21046

Main telephone line: 410 740 9743



Certified Medical Director: Initial Certification (Eligibility Pathways*)





At a Glance: Certified Medical Director (CMD) - Initial Certification

Step One: General Eligibility

- Completion of a U.S. ACGME or AOA accredited post-graduate training program, or a Canadian Royal College of Physicians and Surgeons or College of Family Physicians accredited post-graduate training program; OR completion of relevant U.S. post-graduate training and successful attainment of U.S. state licensure to practice medicine^{1,2}
- Current, unrestricted, state license as an MD or DO in the U.S. or an equivalent license to practice medicine in Canada
- Completion of PALTmed's Core Curriculum on Medical Direction in Long-Term Care (or its equivalent³) within five years of application. For details visit https://paltmed.org/education .
- Spend a minimum of <u>8 hours each month</u> in service as a medical director/associate medical director in a post-acute and longterm care setting
- Between 2-4 years of experience as a clinician in PALTC within the past five years
- Between 2-3 years of experience as a Medical Director in PALTC within the past five years
- Demonstrated current professional integrity, competence, training, and experience and moral character

Select one option each from Step 2 and Step 3

Options for step 2 and step 3 are independent of each other.⁴

Step Two: Clinical Education and Experience

Applicants who do not hold an ABMS or AOA certification in a Primary Specialty must apply under Option 3 for step two.

Option 1

- Two (2) years of clinical practice in post-acute and long-term care within the past five (5) years AND
- Current ABMS or AOA Certification in a Primary Specialty WITH EITHER
 - Completion of an ACGME or AOA accredited fellowship in geriatrics or other relevant clinical program completed within the preceding five years of application (e.g., pediatric, psychiatric, MR/DD)

OR

ABMS Certificate of Added Qualifications in geriatric medicine or other equivalent certification (e.g., hospice, home care)

Option 2

- Three (3) years of clinical practice in post-acute and long-term care within the past five years AND
- Current ABMS or AOA Certification in a Primary Specialty AND
- CME: Sixty (60) hours of AMA PRA Category 1 CreditsTM, AAFP-approved, or AOA-approved credits in clinical medicine relating to post-acute and long-term care in the preceding three years. A minimum of 12 of these credits must come from live coursework. Up to 48 of these credits can come from self-study activities. See CME definition enclosure.

Option 3

- Four (4) years of clinical practice in post-acute and long-term care within the past five years AND
- CME: Seventy-five (75) hours of AMA PRA Category 1 CreditsTM, AAFP-approved, or AOA-approved credits in clinical medicine relating to post-acute and long-term care in the preceding three years of application A minimum of 15 of these credits must come from live coursework. Up to 60 of these credits can come from self-study activities.

Step Three: Medical Management Education and Experience⁵

Option 1

- Two (2) years post-fellowship, within a five-year period preceding CMD application submission, in the role of medical director or associate medical director in a post-acute and long-term care facility/setting AND
- Completion of a fellowship in geriatric medicine within the past five years.

Option 2

- Two (2) years, within a five-year period preceding CMD application submission, in the role of medical director or associate medical director in a post-acute and long-term care facility/setting AND
- CME: 14 hours of approved CMD management courses within five (5) years of application. See CME definition enclosure.

Option 3

- Four (4) years, within a five-year period preceding CMD application submission, in the role of medical director or associate medical director in a post-acute and long-term care facility/setting AND
- In lieu of completing the Core: Completion of an Individualized Education Program (IEP) in post-acute and long-term care Medical Management equivalent to the Core Curriculum for a minimum of seventy-five (75) contact hours within five (5) years of application. A written plan for the IEP must be submitted and approved by the PALTmed Certification Council prior to completion of the program and submission of the application. IEP coursework must be reviewed and approved by the Certification Council.



¹If you have not completed an accredited post-graduate training program, please submit a letter describing your post-graduate training in the U.S. for the PALTmed Certification Council (council) to consider.

²A candidate may submit a letter requesting a waiver of a requirement to explain his/her special circumstances for the Certification Council's consideration.

³ The Core is an intensive course with comprehensive content specific to Medical Direction in the Long Term Care setting. In lieu of completing the Core **and prior to submission of the certification application**, certification candidates may submit an Individualized Education Plan (IEP), under Step Three, Option 3, to the Certification Council for review.

After the council determines if the proposed coursework constitutes an "equivalency", the candidate will be advised of the council's decision. <u>Historically, true equivalent coursework has been difficult to find</u>. The council does not want to discourage experienced Medical Directors from exploring their own education histories to determine if they have completed equivalent studies and includes the language about equivalent coursework out of fairness.

⁴In addition to meeting eligibility under Step One, applicants must complete education and practice requirements under one option for Step Two <u>and</u> one option for Step Three. <u>Options for Step Two and Step Three are independent of each other</u>. Select the option that best describes your education and experience under each step.

⁵Applicants who do not hold an ABMS or AOA certification in a Primary Specialty must apply under Option 3 for step two.

Application Process

- 1) Complete and sign the application form.
- 2) After meeting eligibility requirements, submit the application form with required documentation and the application review fee **by April 1 or October 1**.
- 3) Staff will review the application and send a letter of notification that:
 - (a) your application is complete for review at the next scheduled Certification Council meeting, OR
 - (b) your application requires additional documentation/information with a due date that will take the date of the next scheduled council meeting into consideration.
- 4) Application review meetings are held in June and December of each year. The council will review the individual's professional qualifications and the information supporting the qualifications and criteria. The council, at its discretion, may require completion of additional educational activity prior to awarding initial or recertification status.
- 5) Candidates will receive notification of their status by e-mail within four weeks of the council meeting.

Initial Certification Application Fees: \$525 PALTmed member \$625 non-member

If you need assistance completing the application, or if you are not sure if you currently meet eligibility requirements, please contact us by –

email: <u>cmd@PALTmed.org</u> telephone: 410-992-3115 (east coast).



Certified Medical Director Program

CME Definitions

<u>**Clinical CME**</u>: Eligible clinical education credits must come from within the <u>three years preceding</u> the date of application submission. Both PALTmed-sponsored and non-PALTmed coursework on clinical topics relating to the post-acute and long-term care setting may be submitted for consideration.

Clinical credit hours are *AMA PRA category 1 Credits*TM, AAFP-approved, or AOA-approved credits on topics such as: diabetes, stroke, pressure ulcers, falls, hypertension, dementia, or other clinical issues seen in the long-term care patient population. (This is **in addition to** CME earned from the Core Curriculum, which is **step 1** of the CMD application process.)

<u>Management CME</u>: Eligible management credits must come from within the <u>five years preceding</u> the date of application submission. Both PALTmed-sponsored and other coursework will be considered. Management topics relate to the management and leadership responsibilities in the post-acute and long-term care settings.

Management credits can come from such topics as: billing and coding, communications with patients and staff, ethics, risk management, QI, leadership, cultural diversity, regulations, or other topics that pertain to the management responsibilities of the post-acute and long-term care Medical Director. (This is **in addition to** CME earned from the Core Curriculum.)

If you complete CME activities **through PALTmed**, **no need to submit copies of the certificates or the transcript**.

If you already have earned CME credits from state chapters or other organizations, send certificates or the transcripts <u>with titles</u> for our review. (MOC reports are not acceptable since the number of CME hours earned is not indicated.)



Explore the PALTmed education catalog at paltmed.org/education

⇔(filter by credit type)⇔

Questions about PALTmed education activities? Email <u>education@paltmed.org</u> or call 410-992-3116 for assistance.

For the **Certified Medical Director (CMD) program**, visit paltmed.org/certification or email <u>cmd@paltmed.org</u>.



Application

SECT	ION 1: GENE	RAL ELIG	IBILIT	Y INFORMATI	ION
STEP 1:					
Name:			D	DO	
Date of Birth (required for license check):		PAL	Tmed Member?	Yes No	
Street Address:					
City:		State:		Zip:	
Office Phone:		C	office Fa	x: optional	
E-mail: to receive application i	updates				
United States ACGME Medical		ate?	Yes	No	
Name of Medical School:					
Graduation Date:					
International Medical School G	aduate?	Yes	🗌 N	o 🗌 USM	LE Exam Flex
Name of Medical School:					
Country:			Gra	duation Date:	
Date of Legal Qualification to	practice in the	e United Stat	es:		
	Pos	st-Graduat	e Train	ing	
PGY 1 (or Internship)					
Institution:					
City:	Sta	ite:	(Country:	
		Date C	Date Completed:		
PGY 2-3 (or Residency)					
Institution:					
City:	State:		Count	ry:	
Specialty:			Date C	Completed:	
Current Licensure: Attach a copy of your current license with expiration date for primary state of practice.					
State:	License #:			Expiration I	Date:
State:	License #:			Expiration I	Date:
Number of consecutive clinical	practice years i	n a long terr	n care se	etting:	
Number of consecutive years M					ce in a long term care setting
immediately preceding applicati					
Total number of hours per mont	h you serve as	in the role as	s Medica	al Director:	
	SECTION	N 2: OPTIO	N SELI	ECTION	
Select one option <u>each</u> for step 2 do not hold an ABMS or AOA					
STEP 2: Clinical Medicine Eli	gibility				
I am applying under option:	One One		T	wo	Three
STEP 3: Medical Managemen	t Eligibility				
I am applying under option:	One			Two	Three



SECTION 3: VERIFICATION OF ELIGIBILITY					
Education Eligibility (supply documentation for each yes responsesee checklist enclosure)					
1. Do you hold a current ABMS	or AOA certificate in a prima	ary specialty?] yes	s 🗌 no
Name of Board of Primary	Name of Board of Primary Specialty:				
Expiration date of current	t certification:				
Date of certification or mos	t recent recertification:				
2. Do you have a current <i>Certificate of Added Qualifications</i> in geriatrics or equivalent certification in hospice or home care?					s 🗌 no
Expiration date of current	t certification:				
Date of certification or mos	t recent recertification:				
3. Have you completed a Geriat	ric Fellowship within the past	5 years] yes	s 🗌 no
Year you completed your F	ellowship:		•		
Name of Fellowship progra	m:				
List the long term care facilitiexperience eligibility period.	Attach additional pages if ne		vices for	· all y	years of your Clinical
Facility Name and			Dates o	f Em	ployment
(e.g., SNF, hospice, assisted live	-		Dutts		
Facility 1 Name	Site of Service 1	From: (mm/dd/yyy	yy)	To:	(mm/dd/yyyy)
Address		City	State		Zip Code
Facility 2 Name	Site of Service 2	From: (mm/dd/yyy	-	To:	(mm/dd/yyyy)
Address		City	State		Zip Code
List all long term care facilitie Management experience eligib					
Facility Name and	l Site of Service		Dates o	f Em	ployment
(e.g., SNF, hospice, assisted live			Dates		
Facility 1 Name	Site of Service 1	From:(mm/dd/yyy		To:	(mm/dd/yyyy)
Address		City	State		Zip Code
		-			-
Facility Administrator's Name		Administrator'	s Contac	t Pho	ne Number
Number of hours of service each	h month as medical director:				
Facility 2 Name	Site of Service 2	From: (mm/dd/yyy	-	To:	(mm/dd/yyyy)
Address		City	State		Zip Code
Facility Administrator's Name Administrator's Contact Phone Number					
Number of hours of service each	h month as medical director:				



SECTION 4: CODE OF CONDUCT

This application MUST be signed by the Medical Director applicant only. Please read the statements below thoroughly before signing the application. By signing below, you agree to abide by the PALTmed Certification Council *Code of Conduct* and attest to the truthfulness of all information provided by you in support of your application.

Applications will not be processed without the candidate's signature.

The Certification Council is dedicated to the delivery of competent, comprehensive, and compassionate medical care to all people residing in post-acute and long-term care facilities. To further these goals, all **certified medical directors** in post-acute and long-term care (PALTmed CMD) shall:

- commit to the advancement of physician leadership and excellence in medical direction throughout the post-acute and long-term care continuum.
- maintain a commitment to life-long learning in both clinical and management education.
- uphold the ethics of the medical profession in all aspects of the care rendered.
- serve as a model of personal and professional integrity and skills.
- respect the law while recognizing the responsibility to seek changes in the law for the best interests of the people entrusted to their care.
- work diligently with all professional colleagues to create a milieu that fosters the highest attainable degree of care.
- place the competent, compassionate care of all their patients above any financial reward or inducements.
- advocate for all persons who reside in the facility.
- participate in those activities that contribute to an improved community.
- respect the individual's right to autonomy in decision making.
- strive to strengthen understanding of CMD expertise in the community, in part, through display of the acronym CMD per the Statement of Use declaration.

During the period of certification, I understand that I am required to notify in writing the Certification Council within 30 days of any adverse actions as listed below:

- Federal and state licensure and certification actions, including reprimands
- Adverse clinical privileges actions
- Adverse professional society membership actions
- Negative actions or findings by private accreditation organizations and peer review organizations
- Health care-related criminal convictions and civil judgments
- Exclusions from participation in a Federal or state health care program (including Medicare and Medicaid exclusions)
- Other adjudicated actions or decisions

I do hereby certify that the information submitted to PALTmed in this application (and the attached documentation) for certification or recertification is true, correct, and complete in all respects. I understand that information made part of this application may be verified by the PALTmed or its representatives by contacting the named facilities or institutions as well as national registries of licensure and other peer review groups for disciplinary or other activity, including but not limited to FACIS and the National Practitioner Data Bank. Further, I accept that misrepresentation of the information provided herein can result in the denial or loss of CMD certification. I further accept that failure to make notification of adverse actions as listed above may result in revocation of my CMD credential.

Name of Candidate (print):

Signature of Candidate (*sign or type*):

Date:

Fax or e-mail the completed application and application fee to:

cmd@paltmed.org, fax: 888-249-6533 Questions? Contact us at 410-992-3115 (east coast) or email cmd@paltmed.org.



APPLICATION CHECKLIST

Before mailing your application, use the checklist below to ensure that you have completed the sections pertinent to your individual education, practice, and experience and that you have enclosed all required documents in support of your application.

Return this checklist with your application. Application deadlines are April 1 and October 1.

Applications received by the dates above must be complete to ensure timely review.

I have completed all required information in	n Step	o 1.
--	--------	------

- I have selected the option for Clinical Education and Experience under which I will apply.
- I have selected the option for Management Education and Experience under which I will apply.
- I have completed all information pertinent to one of the three options for Clinical Education and experience eligibility.
- I have completed all information pertinent to one of the three options for Management Education and experience eligibility.
- I have signed and dated the application.
- I have included payment of the application fee.

Documentation: I have enclosed the following required documentation -

Verification of completion of PGY 1-3 program and/or Fellowship (as applicable)

Current state medical license (**required**)

Current ABMS or AOA certificate in primary medical specialty (as applicable)

Current Certificate of Added Qualifications or equivalent (as applicable)

Code of Conduct (required)

Practice Disclosure form (required)

CME certificates or transcripts with credit hours in Clinical Medicine education (as applicable)

CME certificates with credit hours in Medical Management (as applicable)

Employment Verification form(s) (required)

Individualized Education Program (as applicable, option 3 only)

PAYMENT: Submit the non-refundable application fee of \$525 (PALTmed members) or \$625 (non-members). *Payment must accompany the application.*

I have enclosed the amount of \$ through	n the payment option note	ed below:
Check payable to PALTmed MasterCard V	isa 🗌 American	Express Discover
Card #	Expiration Date (mm/yy)	Security # (3-4 digit code on back of card)
Name on card:		
Billing address and ZIP code for card:		
Signature of Cardholder (sign or type):		Date:



Fellowship Form

Dear Program Director:

PALTmed administers a certification program for medical directors in long term care settings (PALTmed CMD). One option that is recognized toward the clinical education requirement is completion of an ACGME or AOA accredited fellowship in geriatrics, pediatrics, MR/DD, or other specialties dedicated to teaching about care for frail elders or children and young adults with chronic conditions and developmental delays.

The PALTmed Certification Council requests your signature on this form as verification that the physician named has completed, **within the past 5 years**, an accredited fellowship as described above.

Please return this form to the physician named below.

Graduate Fellow's Name:		
Fellowship Specialty:	A	ccredited by:
Name of Program Director:		
Name of Institution:		
Street Address:		
City:	State:	Zip:
Long Term Care Facility Rotation:		
Facility Name:		
Number of Months' Experience:	Pe	ercentage of Time:
Facility Name:		
Number of Months' Experience:	Pe	ercentage of Time:
Total Length of Fellowship (in months):	From:	To:
I attest that the Graduate Fellow named above including practical and didactic experience is the second sec		
Program Director's Signature:		Date:

Please return this form to: <u>cmd@paltmed.org</u>



Practice Disclosure Form

SECTION 5: All certification candidates MUST complete and sign this <i>disclosure form</i> . Carefully read and answer each question and supply information/documentation as instructed to do so in the shaded area after each
 answer. Attach additional documentation as necessary. 1. Are your hospital privileges and or nursing home privileges active and in good standing in all facilities in which you practice (i.e., not been denied, suspended, diminished, revoked, or not renewed)? Yes No
If your answer to this question is "No," please document the information on a separate sheet of paper.
 Are your memberships in professional organizations, or renewals thereof, active and in good standing (i.e., not been denied or subject to disciplinary or corrective action)? Yes No
If your answer to this question is "No," please document the information on a separate sheet of paper.
3. Is your professional license to practice active and in good standing in all states (i.e., has not been denied, limited, suspended, or revoked in any state)? Yes No
If your answer to this question is "No," document the information on a separate sheet of paper.
4. <u>Have you ever</u> been disciplined or formally accused of wrongdoing by your state licensure board or any other state licensing authority? <u>Yes</u> No
If your answer to this question is "Yes," document the information on a separate sheet of paper.
5. Are you aware of any situation or circumstance which has ever or might in the future result in disciplinary activity, limitation of your professional licensure, or other sanction by your state licensure board or any other state licensing authority?
□Yes □No
If your answer to this question is "Yes," document the information on a separate sheet of paper.
 Is your DEA registration number (Narcotics License) active and in good standing (i.e., not been denied, suspended, or revoked)?
If your answer to this question is "No," document the information on a separate sheet of paper.
 Do you have any current medical and/or psychiatric problems which would adversely affect your ability to practice your profession? Yes No
If your answer to this question is "Yes," document the information on a separate sheet of paper.
8. Have you voluntarily resigned privileges while under investigation at a hospital or nursing home within the past six years?
Yes No
If your answer to this question is "Yes," document the information on a separate sheet of paper. Please list all of the facilities for which you served as medical director, assistant medical director, or associate medical director in the <u>past</u> six years and your reason(s) for leaving.
I give permission to the Certification Council to complete a malpractice and licensure review using national data search resources.

Name (*print*):______

Signature (sign or type): _____ Date: _____

The PALTmed Certification Council reviews applicants' file and conducts a FACIS search to establish current, unrestricted medical licensure.

Approval of an application is based on demonstrated current professional integrity, competence, training, and experience and moral character. Decisions of the Certification Council are final.



Section 6: Verification Form - Employment/Experience

Applicant Instructions

Completion of this form is necessary to verify experience as a medical director or associate medical director.

- 1. Fill in your name on the line "Name of Medical Director."
- 2. The administrator(s) of the facility(ies) in which you currently serve must complete and sign the form to verify current employment/experience as a medical director or associate medical director.
- 3. Depending on the length of service needed to fulfill the certification requirements (as noted in your application,) the administrator(s) of the facility(s) you have served in the past may be required to verify your employment/experience as a medical director or associate medical director.
- 4. Copy this form as needed.
- 5. This completed form must accompany your application.

Dear Facility Administrator:

The PALTmed Certification Council administers a certification program for medical directors in postacute and long-term care settings. A requirement for certification is that the physician must serve as medical director in a long-term care setting. Employment/Experience verification is sought for the individual named below.

Please return this form to the medical director/associate medical director named below.

Thank you, Certification Council

Name of Medical Director/Associate Medica	l Director		
Name of Facility			
Type of Facility (e.g., SNF, hospice, su	bacute)		
Street Address			
City	State	Zip	
Dates of employment/experience: from		to	
Number of hours of service per month as M	Iedical Director/A	ssociate Medical Director	
Name of Administrator		Phone ()	
Signature of Administrator		Date	



Step 3, Option 3: Individualized Education Plan (refer to enclosure *Accepted Education Activities*).

To the Applicant:

If you do not have ABMS or AOA Certification in a primary medical specialty, you must complete this documentation to record 75 continuing education hours in clinical medicine related to long term care.

Individualized programs must be approved by the PALTmed Certification Council <u>prior</u> to submission of the <u>completed application</u>. This review of your intended program may save you from efforts that will not qualify for CMD or may encourage you as you move through the process.

Review the information below and submit an outline of your program for review by the Certification Council before submitting your completed application.

A form is enclosed to record your clinical hours. Please use the form to give the council the most complete summary of your plan. You may copy additional pages of the form as needed.

Activities that have been completed, activities in progress, and future activities may be considered. All activities must be completed within <u>three years from the date of application</u>. The enclosed education documentation forms provide space to relate the relevance of each learning activity to clinical issues in long-term.

Pre-approval of your plans by the Certification Council is intended to aid the process of completing the certification application. It does not necessarily guarantee the success of your completed certification application, which the council must review separately.

Name (print):			
Address:			
City	State	ZIP	
Phone ()	Email		



Step 3, Option 3: Individualized Education Plan

Accepted Education Activities

Be sure to review the enclosure Core Curriculum objectives.

Continuing Education: 75 credit hours

- 1. Coursework and Self Study:
 - Self-study should be limited to 80% of hours claimed.
 - Face to face (live) coursework has unlimited hours.
 - Up to 10 hours can be claimed from "Grand Rounds"

2.	Teaching clinical medicine in long term care: Teaching must be part of an ACGME or	
	AOA post- graduate program. Credit hours are provided once for repeated content.	
	Maximum number of hours to be considered for teaching10	*

- 3. Publications related to clinical medicine in long term care: up to a maximum of five articles at two credits per article.

*If you claim teaching hours, please complete the information requested here (for item 2 above):

Level of students	s: medical student resident/intern fellow practicing
	physician other (please describe)
Vour name	



PALTmed Core Curriculum Objectives

- Develop practical skills needed to fulfill the role and responsibilities of the medical director.
- Identify the unique aspects of the long term care environment that impact the medical director's job.
- Describe the organizational responsibilities and dynamics of the medical director and the interdisciplinary team.
- Develop communication skills to deal with responsibilities for the interdisciplinary team, residents, and their families.
- Explain the resident care responsibilities of the medical director, including emergency care, quality management, family systems, and ethical considerations.
- Enhance leadership skills and team building towards a stronger role for the medical director with the interdisciplinary team.
- Develop human resource skills to deal with difficult situations and improve personal effectiveness in this area.
- Improve the medical director's ability to learn and practice in the evolving environment of health care delivery.
- *Apply newly acquired knowledge to daily facility and practice activities.*

Core Curriculum Topic Areas

- 1. Overview of Long Term Care
- 2. Regulatory Environment
- 3. Medical Information Management
- 4. Infection Control
- 5. Employee Health & Safety
- 6. Resident's Rights
- 7. Financial Issues
- 8. Introduction to Medical Care Delivery Systems
- 9. Essential Health Information Tools in Medical Direction (MDS, RAI, OSCAR and others)
- 10. Medical Staff Oversight
- 11. Biomedical Ethics
- 12. Working with Families
- 13. Medical Director's Contract
- 14. Personality Profiles
- 15. Influencing Employee Behaviors
- 16. Quality Management and Risk Management
- 17. Integration of Systems Theory
- 18. Medical Directors Relationship to the Organization
- 19. Integration of Medical Director's Role and Development of Individualized Action Plans