

# CMT/CHDS Recertification GUIDELINES & POLICIES



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# CMT/CHDS Recertification Guidelines and Policies

CMTs/CHDSs maintain their credential and build on their competency through participation in level 2 continuing education activities relevant to medical transcription and healthcare documentation. Recertification is required every three years. This is necessary for the practitioner to function effectively in today's fast-paced healthcare environment.

A minimum of 30 continuing education credits (CECs) must be accrued with at least 24 of these in the core areas of Clinical Medicine, Medical Transcription Tools, Technology and the Workplace, and Medicolegal Issues. The remaining 6 required CECs may be obtained in either the Core areas mentioned above or the Optional areas of Complementary Medicine, Healthcare Industry and Professional Development. It is recommended that CMTs/CHDSs obtain more than the minimum 30 CECs, in the event a question arises as to the creditworthiness of an activity.

Membership in AHDI is not a requirement for the CMT/CHDS credentials; however, it is encouraged because of the opportunities and benefits afforded members.



## *Understanding Recertification*

Upon initial certification, CMTs/CHDSs are placed in a 3-year continuing education (CE) cycle based on the anniversary month of their exam, expiring the last day of the month. (Example: A transcriptionist successfully passing the CHDS exam in September 2017 will need to recertify by September 30, 2020.)

All CMTs and CHDSs are responsible for knowing when their cycle ends. This information is sent at the time of initial certification and recertification and can be found on the CMT/CHDS Certificate or Validation of Recertification.

## *Recertification Continuing Education (CE) Requirements*

- Accrue at least 30 continuing education credits (CECs), including 24 CECs in the Core Areas; 6 CECs from Core Areas and/or Optional Areas
- Completing the CE Summary Form
- Returning the Recertification Agreement
- Paying recertification fee

## ***Accruing and Reporting Credits***

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Each 3-year CE cycle begins on the date specified in the letter of notification of certification. No CECs are awarded for initial certification.

CMTs/CHDSs must record AHDI-approved CE activities on Continuing Education Summary Forms and submit them at the end of each 3-year cycle. (See "Filling Out CE Summary Forms.")

All forms and fees must be received in the Modesto office by the recertification deadline. All activities reported must have taken place within the 3-year cycle. CECs earned in excess of the minimum required are not carried over to the next cycle.

## ***Earning Continuing Education Credits***

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Continuing education credits may be earned by participating in creditworthy activities relevant to medical transcription and healthcare documentation. An activity is defined as a single presentation, lecture, educational course, workshop on a single topic, approved quiz, or article summary. Live activities such as lectures, workshops, seminars, and symposia may be approved for CE credit based on contact hours. No credit is given for activities less than 30 minutes in length. All activities are evaluated individually for creditworthiness; e.g., when several educational activities are part of a larger program, each activity is evaluated individually for creditworthiness and number of credits that may be approved. A written summary of a creditworthy activity earns only 1 CEC regardless of the length of the original activity. All activities must meet the requirement of providing level 2 content of an appropriate scope and nature for a recertifying CMT/CHDS.

**Proof of attendance forms, summaries, and quizzes should be submitted at the end of cycle only in the event of notification of audit, along with the Continuing Education Summary form, fees, and Recertification Statement and Agreement.**

CMTs/CHDSs are awarded credit for approved activities (relevant to medical transcription/healthcare documentation) as follows:

- 1 CEC for each approved summary of a creditworthy article, book chapter, or book; televised, videotaped, or audiotaped program; observed procedure.
- 1 CEC for completion of each "post-test" (passing score of 85% or higher submitted as part of the documentation), or self-graded quizzes. Ten CECs for each college-credit course (or college-credit equivalent) whose contact hours meet or exceed 10 hours of activity.

The maximum number of CECs allowed for any single continuing education activity is 10. For clarification, a single source or activity is defined as any course or book providing professional development in a single content area. For more detail on what activities are classified as single source, download the [AHDI Recertifying Resource Guide](#). It is a goal of AHDI's

recredentialing program to ensure that CMTs/CHDSs are engaging in diverse, well-rounded continuing education and not earning all 30 CECs from a single activity, course, or product.

CECs for completion of AHDl modules and videos, as well as audiocassettes of creditworthy speakers at AHDl national conferences, are as originally specified for each. Proof of attendance is required when completed in a group setting; a summary (worth 1 CEC) is required for independent study or proof of completion if reviewed by recording as opposed to attending the original session.

Authors desiring CE credit for writing must submit a summary of the article, book chapter, or book, or a copy of the publication itself, for which they are seeking credit. This request for approval should be submitted prior to the submitting the Continuing Education Summary form.

Speakers making creditworthy presentations may receive the same number and type of continuing education credits as those attending the presentation. Credit is awarded one time only during a 3-year cycle to speakers making multiple presentations of the same creditworthy program.

Instructors may receive credit for documented presentation of instructional material (i.e., teaching a class) one time only during a 3-year cycle if the content meets level 2 criteria. The number of approved credits may vary based on length and scope of content.

AHDl will automatically accept approved continuing medical education (CME) credits as CE credits for CMTs/CHDSs when submitted at the time of recertification and accompanied by documentation of CME approval. CMTs/CHDSs should request separate approval by AHDl for CME programs directed to physicians and other healthcare providers. A list of preapproved activities is listed on the [Activity Provider List](#).

## ***Continuing Education Activities***

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All creditworthy continuing education activities must be formally presented by qualified professionals on creditworthy topics relevant to medical transcription/healthcare documentation and directed to professional audiences. Articles, presentations, and workshops directed to lay audiences or the general public are generally not creditworthy. Live presentations must be given by someone with expert knowledge of the subject sufficient to respond to questions.

CMTs/CHDSs are required to earn at least 30 CECs in several areas of study over their 3-year cycle. The distribution is as outlined in the table below.

[CEC Requirements Table](#)

## ***Recertification Fees***

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Recertification fees will be \$60 every 3 years for AHDI members and \$90 every 3 years for non-AHDI members. This fee sustains record-keeping and notification systems over the next 3-year CE cycle. The fee is required, nonrefundable, and nontransferable. Statements for Recertification Fees are generated by the certification program and are separate from AHDI dues notices.

Payment must accompany recertification forms and must be received in the Modesto office by the recertification deadline.

Upon recertification, each CMT/CHDS receives an acknowledgement notice and new certificate noting the new cycle expiration date. Recertification is valid for 3 years.

## ***Extensions***

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Extensions may be granted to allow CMTs/CHDSs additional time to accrue CECs. Extension requests must be submitted in writing and accompanied by a \$50 extension fee prior to the original recertification deadline. Final recertification documentation and the normal recertification fee above must be submitted within the 60-day extension period. Award of a 60-day extension will result in a permanent change of your recertification deadline. For example: a recertification deadline of 3/31/2018 may be extended to 5/31/2018. The new recertification deadline from this point on will be 5/31 every three years. Extension requests and questions may be directed to the Credentialing Department by calling (toll free) 800-982-2182 ext. 2456 or (direct) 209-527-9620 ext. 2456.

## ***Early Submissions***

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You may submit your Recredentialing materials/fees up to 3 months in advance. You will not be able to earn CECs toward your next cycle until after your paperwork for your current cycle is processed and approved. For clarification or further information, please contact us at [credentialing@ahdionline.org](mailto:credentialing@ahdionline.org).

## ***Review, Audit, Denial***

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AHDI may audit a CMT's or CHDS's reported CE activities at its discretion, request additional information at any time, or deny credit based on information provided.

AHDI randomly identifies approximately 20% of the summary forms in each cycle for audit. When audited, a CMT/CHDS must submit proof of attendance, quiz completion, and/or activity summary for activities listed on the summary forms. Certification will expire for CMTs/CHDSs who do not provide the required documentation.

## ***Failure to Recertify***

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All CMTs/CHDSs are responsible for tracking their own CECs that have been approved during their 3-year cycle and to know their recertification cycle end date. CMTs/CHDSs should notify AHDI promptly if reminders, fee statements, or recertification materials have not been received as expected. It is the CMT's or CHDS's responsibility to notify AHDI of any changes in address, name change, or contact information (also see "Change of Name, Address" section below). CMTs/CHDSs who do not submit the proper forms and fees to the Modesto office by the deadline will be considered lapsed and will no longer be eligible to identify themselves as a CMT or CHDS. You will be given a 90-day period to reinstate your credential. If you do not recertify during the reinstatement period, the only way to become certified again is by successfully passing the CHDS exam.

## ***Lapsed Notices and Grace Period***

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A lapsed notice will be sent to any CMT/CHDS who does not submit the proper documentation and fees prior to their recertification deadline (or extension date). CMTs/CHDSs have 90 days from the original expiration date to submit their documentation and fees in order for their credential to be reinstated. There is a \$50 reinstatement fee due, along with the original recertification fee, at the time of reinstatement. Individuals whose certification has expired are no longer eligible to identify themselves as a CMT or CHDS. If they do not recertify during the 90-day grace period, the only way to become certified again is by successfully passing the CHDS exam.

## ***Certification Status***

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The certification status of an individual is public information, and certification staff will respond to oral or written requests for verification. Certification status (presently certified, never certified, certification lapsed, or certification revoked), certification date, the cycle ending date, and reason no longer certified (if certification has lapsed or been revoked) may be released.

## ***Change of Name, Address***

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In order to protect the individual CMT/CHDS, notification of a name change must be made in writing and sent to the certification program at AHDI via email, fax, or mail. A printed copy of the notice is filed with the CMT's or CHDS's records for documentation. Notice of address changes may be made orally or in writing.

## ***Approval of Continuing Education Activities***

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All CE activities presented by components must be approved using a CEC Approval Request form. All CEC Approval Request forms must be submitted electronically.

### [CEC Approval Request eForm](#)

Forms submitted via postal mail or fax will not be reviewed. Please do not submit hand-written forms that have been scanned. Scanned forms prohibit AHDI from completing the approval section at the bottom of the page and returning it to you with signature and approval decision. Approvals are not considered finalized until and unless they have been signed off by certification staff. **Individual CE Requests**

Individual CMTs/CHDSs must request credit approval from AHDI for any CE activities that have not been prior-approved by AHDI. These requests must be made at the time they are earned, not at the end of cycle. All CECs submitted at end of cycle must already have been approved. In the event of audit, quizzes, narrative summaries of prior-approved articles, and article summaries from other educational industry-related sources must be submitted along with the Continuing Education Summary form at the end of the recertification cycle in order to demonstrate completion.

## ***AHDI Component Association CE Requests***

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AHDI local chapters and state/regional associations must request approval for creditworthy activities they sponsor. They should provide proof of attendance to CMTs/CHDSs and others who are present. The proof of attendance must indicate the number and category of each activity approved by AHDI. Component associations are encouraged to keep records of attendance and make them available to CMTs/CHDSs upon request. While AHDI will process approval requests up to 30 days after an event, if you are seeking approval for a component meeting or event, we strongly encourage you to submit your request for approval well in advance of your event so that your marketing materials can accurately reflect a program that has been approved for continuing education. You should never assume and/or announce approval for your event sessions prior to our notification.

### [Component CE Approval Request form](#)

Each CMT/CHDS attending a component-sponsored event should confirm that the activity has been approved for credit and obtain proof of attendance at the time of the activity.



## ***Filling Out CE Credit Approval Requests***

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To facilitate processing approval requests, submit one form for each activity, even when there are several activities on the same day or within the same symposium, seminar, or convention. Fill out the form completely. You may attach supporting documentation if it will not fit in the space provided and further clarifies the request. (Send copies only, or make copies for your records; AHDI will retain documentation for our files and will not return copies to you.) All forms must be submitted electronically (use a downloaded form, submit only 5 requests per email or your email may be filtered as spam by our servers). Make sure to include all required information, as described below.

- Name and address of the person to whom the response to the request should be returned.
- Name of the sponsoring chapter, organization, institution, or article source.
- Complete name of the presentation, article, or activity.
- Description of the activity content and list 3 to 5 learning objectives for each activity.
- Speaker's (or author's) name and credential or title.
- Speaker's (or author's) qualifications to address the topic.
- Date(s) of activity.
- Length of time of the activity in hours and/or minutes, or beginning and ending times. (Do not include breaks or meals.)
- Number of CECs requested. Mark the appropriate category as you understand it. See CE Requirements Table above.

Send your request to AHDI and keep a copy for your records. The approved form will be returned to the person requesting approval by email within 72 hours.

If information is insufficient to determine creditworthiness, you will be notified so that additional information can be provided and processing completed. If approval is denied, a reason will be given. Contact certification staff any time you disagree with a decision or need further clarification. It is possible that a decision may be reversed following discussion if sufficient supporting information is given.

## ***Proof of Attendance***

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Proof of attendance and other documentation must be retained by each CMT/CHDS until notice of recertification has been received. These should be sent to AHDI only if requested in case of audit. Proof-of-attendance documents should contain the following:

- Name of sponsoring organization
- Date(s) and time(s) of activities
- Title of each presentation, activity, or course
- Name of each speaker, facilitator, or instructor

AHDI component associations should also provide:

- Number and category of CECs approved for each presentation or workshop segment.

A credit approval request form signed by a representative of a non-AHDI activity (e.g., tumor board, grand rounds) may serve as proof of attendance.

## ***College Courses/Independent Study***

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Requests for approval of college courses and independent study programs must include (1) a fully completed CEC Approval Request form, and (2) a copy of the catalog description, course curriculum, or other information detailing creditworthiness (list of textbooks). These should be submitted prior to or within 30 days following course completion. Proof of completion with a final grade of C or higher should be submitted at end of cycle, regardless of audit.

## ***Written Summaries***

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Activities requiring written summaries must be completed during the current 3-year CE cycle; that is, creditworthy material must have been read, viewed, or heard during the CE cycle, although it may have been published previously. The information must still be current and relevant. See the AHDI [Recredentialing Resource Guide](#) for further details regarding timeline eligibility guidelines of published works.

Summaries should be submitted and should contain the source of the article or location/sponsor of the program; name and qualifications or credentials of author or presenter; date of activity; page number(s) and volume or publication date of printed source. Websites should be identified by their Internet address and date accessed. These summaries are to be submitted along with the Continuing Education Summary Form at the end of the Recertification Cycle in the event of an audit.

A 300-word summary should be written in outline or narrative form so that they convey the essence of the article or presentation. Summaries must be typed or legibly printed and suitable for photocopying. AHDI will not process illegible summaries.

When available, a graded and scored post-test or quiz may be submitted in lieu of a summary. This is to be submitted with the Continuing Education Summary form at the time of recertification in the event of an audit.

## ***Filling Out CE Summary Forms***

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Forms must be completed as directed; those filled out incorrectly or incompletely will be returned for correction or completion. Additional summary forms are available online or by request, and blank forms may be photocopied. Other computer-generated forms may be submitted as long as all information requested on the CE summary form is provided.

**Note: If a Summary form is submitted more than 3 months before the end of a cycle, you will be notified by phone or email to resubmit the summary form and supporting documentation for recertification at the appropriate time.**

Carefully follow the directions below for submitting CE summary forms at the end of each 3-year cycle.

- Type or carefully print all information.
- Fill in name and address. Indicate any recent changes.
- Fill in CMT/CHDS number and date submitted.
- Check appropriate CE cycle dates.
- Provide contact information (phone, fax, email).
- List only one activity per line.
- Include for every activity: title, sponsor or source, month/day/year of activity, number and category of CECs approved for that activity.
- In the event you are randomly audited, include copies of all activities (such as article summaries, quizzes, and proof of attendance documents) with the Continuing Education Summary form and other required recertification materials and fees to demonstrate completion of the activity.

List each educational session or speaker separately when part of a symposium or meeting with multiple sessions. EXCEPTION: For events consisting of multiple sessions, you may attach a copy of the proof of attendance or meeting program and enter the event title, sponsor, date(s), and total number of CECs by category if and only if ALL the following information appears on the documentation:

- Name of program/event
- Program sponsor
- Date(s)
- Title of each presentation
- Category and number of CECs for each approved presentation
- Do not write in the section labeled "For Certification Use Only."
- Send your completed CE Summary Form (and any copies of proofs of attendance or programs, if requested for audit purposes) to AHDI. Keep a copy for your records until you receive notice of recertification.

***Before Submitting Paperwork, Ask Yourself These Questions:***

- Do I have a total of 30 approved credits in the required distribution (at least 24 in the core categories)?
- Have I provided all information requested on the form?
- Have I attached all the quizzes such or article summaries?
- Have I signed and dated my recertification agreement and paid all fees?
- Am I meeting the deadline?

If you can answer “yes” to all of the above, congratulate yourself for doing your part. Validation of recertification will be sent to you as soon as processing is completed.

[CE Summary Form \(PDF\)](#) or [CE Summary Form \(Word\)](#)