



# PROVIDER STATUS HANDBOOK

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2016

OHIO CHEMICAL DEPENDENCY PROFESSIONALS BOARD

# Table of Contents

Overview	2
Provider Status	2
CE Broker	2
Provider Account Information	2
Provider Name and Number	2
Provider Contact Information	3
Provider Account Users	3
Approving Educational Events	3
Delivery of Educational Events	3
Live	3
Distance Learning	3
Unauthorized Events	4
Content Areas	4
Counselor Education Classifications	4
Gambling Education Classifications	6
Prevention Education Classifications	7
Prevention Administrative/Supervisory Education Classifications	9
Clinical Supervision Classifications	10
Presenters	11
Awarding Hours	11
Attendance Verification	11
Records Retention	12
Entering Educational Events into CE Broker	12
Adding a Course	12
Instructions to Add a Course	12
Adding/Editing Course Dates	13
Instructions to Add/Edit a Course Date	13
Submitting Course Completions	14
Instructions for Entering Course Completions	14
Board Monitoring	14
Provider Status Renewal	15

## Overview

### ***Provider Status***

Provider status authorizes an organization to use their provider number for the approval of relevant educational events held during their provider period. Provider periods are valid for one year or two years and are renewable at the end of each period. Relevant educational events are those events which cover one or more of the Board's approved subject areas.

Providers can approve unlimited courses during their provider period. The Board will monitor these offerings and provide feedback/corrections as needed. It is the Provider's responsibility to use their approval number for relevant educational events that they offer or co-host and to assign appropriate subject area approvals to those events.

### ***CE Broker***

The Board will establish an account with CE Broker for each Provider. CE Broker is the electronic learning management system the Board and its Providers use for the approval and monitoring of continuing education. The CE Broker system creates a searchable database of all approved courses of which attendance can be uploaded to the professionals transcript once completed.

Providers can access their CE Broker account at <https://launchpad.cebroker.com/>. Providers can contact the CE Broker support team M-F 8am - 8pm EST at 1-877-434-6323 or [support@cebroker.com](mailto:support@cebroker.com). Providers can also chat live with CE Broker support staff once logged in to their account.

## Provider Account Information

### ***Provider Name and Number***

Providers must list their Provider Name and Provider Number on all certificates they issue for approved educational events. The Provider name must be listed as it appears in the CE Broker system. The Provider name is used by professionals to search for completed courses to add to their transcript. If the Provider name on the certificate of completion does not match the Provider name in the CE Broker system, the professional will not be able to find the course they completed.

Providers can access their Organizational Profile in CE Broker to view their Provider name and number. Providers can update/correct their Provider name on their profile page

to ensure that it matches the name that is displaying on all certificates issued by the Provider.

### ***Provider Contact Information***

Providers are responsible for maintaining accurate contact information with the Board using their Organizational Profile in CE Broker. Contact information will be used by Board staff to contact the Provider as needed and by professionals seeking to complete a course offered by the Provider.

### ***Provider Account Users***

Providers must establish an individual who will serve as their primary contact with the Board. This individual will receive all important communication from the Board as it relates to their Provider status. Providers will use the Organizational Profile in CE Broker to designate their primary contact.

Providers may also create additional users who will have access to their Provider account in CE Broker to complete any of the necessary provider functions in the system. Providers will use the Users page in CE Broker to add new users and assign security access.

## **Approving Educational Events**

### ***Delivery of Educational Events***

The Board accepts both live and distance learning educational events as valid forms of education.

#### **Live**

Live events include workshops, seminars, classes and conferences. Live trainings shall include an attendance registration mechanism. Professionals who do not attend the full length of the educational event may only receive credit for the portion of the event they attend.

#### **Distance Learning**

Distance Learning events include online courses, home study courses and webinars. Providers that approve distance learning events shall provide a mechanism for verifying attendance/completion of the event by the professional and shall include a testing component to demonstrate acquired knowledge from completion of the event.

## **Unauthorized Events**

There are certain types of events which the Board does not recognize as educational events. For these events, no continuing education credit shall be authorized by a provider.

Unauthorized Events Include:

- Programs leading to a high school diploma or equivalency certificate
- In-service programs that deal with internal organizational affairs such as benefits, organizational structure or policy and procedures
- Participation in department or committee meetings, delegate assemblies or similar meetings
- Meetings for policy making or problem solving purposes
- Business meetings of professional associations or societies
- Programs delivered through the mass media unless they are an integral part of an educational program, which has prior board approval
- CPR/first aid classes

## ***Content Areas***

The Board credentials chemical dependency counselors, clinical supervisors and prevention specialists for the state of Ohio. Providers may grant continuing education approval for educational events which cover one or more of the content areas required for certification, licensure or renewal of a Board credential.

Educational events must have documented goals/objectives and an established agenda which demonstrate appropriateness for one or more of the content areas. Providers should not approve educational events which do not have appropriately documented goals/objectives and an established agenda.

Appropriate content areas include:

## **Counselor Education Classifications**

The content areas in this series focus on education appropriate for counselors (CDCA, LCDC II, LCDC III, LICDC, LICDC-CS):

### **C1 - Theories of Addiction/Addiction Knowledge**

- Models and theories used to describe addiction, contemporary and historical
- Effects of addiction on individuals including the biological, psychological (cognitive and affective), social and spiritual dimensions of life and functioning; the interaction of the social and cultural contexts with addictive processes
- Differentiation of addiction from other medical and psychological conditions

## **C2 - Counseling Procedures & Strategies with Addicted Populations**

- Theories of counseling and psychotherapy employed in the treatment of psychoactive substance abuse and addiction
- Techniques utilized in the treatment of psychoactive substance abuse and dependence
- Models of treatment utilized in the treatment of psychoactive substance abuse and addiction, contemporary and historical
- Interaction of theories of personality with theories of counseling and psychotherapy; professional issues including counter-transference, boundary setting and characteristics and dynamics which decrease the effectiveness of therapists
- Relapse prevention
- Dual diagnosis

## **C3 - Group Process & Techniques Working with Addicted Populations**

- Models of group therapy
- Dynamics of therapy groups
- Components of group process and analysis; dynamics of facilitation
- Effects of addictive processes on group therapy
- Effects of individual diversity of group process

## **C4 - Assessment & Diagnosis of Addiction**

- Assessment procedures
- Diagnostic interviewing
- Use and interpretation of testing instruments for psychoactive substance abuse and dependence
- Criteria for determining diagnosis; criteria for determining appropriate modality and level of treatment
- Use of collateral data in the assessment process, including professional and nonprofessional material
- Dual diagnosis

## **C5 - Relationship Counseling with Addicted Populations**

- Models and techniques of assessing relationship dysfunction
- Use and interpretation of instruments used in the assessment of relations
- Theories of counseling and psychotherapy employed in the treatment of dysfunctional relationships
- Techniques and strategies utilized in the treatment of dysfunctional relationships
- Effects of addictive processes on relationship systems
- Effects of addictive processes on human growth and development
- Differential assessment of dysfunction resulting from codependency and other medical and psychological conditions
- Codependency

## **C6 - Pharmacology**

- Pharmacology of both drugs of abuse and those used in detoxification and the treatment of addiction and mental and emotional disorders including the action of pharmaceuticals and the physiological response, the interaction of pharmaceuticals, tolerance, the appropriate use of psychotropics with addicted persons and the effects of drugs on sensation and perception, learning and memory, human growth and development, sexual functioning and behavior

### **C7 - Prevention Strategies**

- Models of prevention of psychoactive substance use, abuse and dependence, contemporary and historical
- Methods and components utilized in the interpretation of a needs assessment
- Function of evaluation instruments; social and cultural influences on the use of psychoactive substances
- Risk factors associated with the use, abuse and dependence on psychoactive substances
- Prevention and intervention strategies used with various groups identified by age, gender, ethnicity, sexual orientation, ability; employee assistance programming, student assistance programming
- Wellness

### **C8 - Treatment Planning**

- Models of treatment planning; adapting treatment strategies to individual needs and characteristics including persons with other medical and psychological conditions
- Criteria for admission, continuing care and discharge appropriate to diverse levels of treatment
- Methods of documenting the course of treatment
- Relapse prevention

### **C9 – Legal & Ethical Issues in Counseling**

- Principles supporting and informing the ethical codes pertaining to addictions counselors
- Specific knowledge of appropriate ethical codes and laws associated with addictions counseling
- Obligations and procedures which encourage the ethical conduct of counselors

## **Gambling Education Classifications**

The content areas in this series focus on education appropriate for individuals who hold the gambling disorder endorsement:

### **G1 - Basic Knowledge of Gambling Disorder**

- Understanding the history, prevalence and social impact of gambling in the US
- Understanding the history and theoretical basis for treatment of gambling disorder as well as familiarity with current research and literature in the field

- Knowledge of gambling disorder terminology, progression of the disorder, and withdrawal symptoms
- Knowledge of client evaluations for gambling disorder including screening, intake, assessment and diagnostic criteria

### **G2 - Gambling Counseling Practice**

- Understanding the effect of gambling disorder on the gambler personally, interpersonally, financially, as well as management of the disorder and the recovery process
- Knowledge of skills in gambling disorder treatment including individual, group and family counseling, interventions and treatment planning
- Understanding the relationship of gambling disorder to substance abuse
- Understanding of sociocultural values and attitude systems related to finances, gambling disorder and spiritual concerns
- Knowledge of client care in gambling disorder treatment including case management, referral resources, report and record keeping, and consultation.
- Knowledge of the steps, traditions and philosophy of Gamblers Anonymous, its relation to various treatments and the programs of Gam-Anon and Gam-A-Teen

### **G3 - Special Issues in Gambling Treatment**

- Understanding special populations as it relates to gambling disorder including adolescents, older adults, female gamblers, cultural minorities and criminal justice
- Knowledge of relapse and relapse prevention as it relates to gambling disorder
- Understanding suicide, co-occurring disorders and chronic illness as it relates to gambling disorder

### **G4 - Professionalism in Gambling Treatment**

- Understanding administrative and clinical supervision as it relates to gambling disorder treatment
- Knowledge of client rights in gambling disorder treatment including confidentiality, informed consent, and non-discrimination
- Knowledge of counselor responsibilities in gambling disorder treatment including reporting duties, client welfare, inter-professional relationships and continuous quality improvement

## **Prevention Education Classifications**

The content areas in this series focus on education appropriate for prevention professionals (RA, OCPSA, OCPS I, OCPS II):

### **P1 - Foundation in Chemical Use/Abuse/Dependency**

- Risk factors that increase risk for ATOD (illicit, prescribed and over-the-counter)

- drug use, abuse and substance use disorders
- Protective factors that reduce risk for ATOD use, abuse and substance use disorders
- ATOD-related health and impairment problems
- Trends and current issues related to ATOD use, abuse, substance use disorders and behavioral health
- Not allowable: Education/training on assessment or counseling techniques

## **P2 - Foundation in Prevention of AOD Use Abuse/Dependency**

- Prevention science on ATOD use, abuse, substance use disorders and other behavioral health problems
- Historical perspectives on prevention
- Prevention theory and research
- Current prevention program models

## **P3 - Ethics for Prevention**

- Professional code(s) of conduct/ethics related to the prevention profession

## **P4 - Planning & Evaluation**

- Information gathering and data analysis techniques
- Stages of community readiness
- Assessment of community conditions
- Strategies to build community capacity
- Strategic planning processes
- Logic models as a planning and evaluation tool
- Theory of Change concepts
- Problem prioritization strategies
- Components of effective prevention program planning
- Effective, outcome-focused prevention programming development
- Prevention program evaluation instruments/models/strategies
- Validity, reliability and cultural relevancy of evaluation instruments/models
- Evaluation activities to document program fidelity
- Sustainability strategies

## **P5 - Education & Skill Development**

- Training and group facilitation techniques
- Prevention strategies best practices and models
- Learning styles, instructional strategies and presentation methods
- Information gathering techniques and data sources
- Training evaluation models, instruments and processes
- Current behavioral health trends and research
- Prevention resources for instructional programming
- Cultural diversity and competency
- Prevention intervention protocols

## **P6 - Community Organization**

- Strategies for mentoring and organizing community members
- Understanding community characteristics
- Strategies for capacity-building, engagement and collaboration
- Strategies for identifying community readiness and moving leaders to higher levels of readiness
- Advocacy strategies and promotion techniques
- Intercommunity organizational structures and patterns of communication
- Elements of formal agreements
- Negotiating skills and strategies
- Networking and outreach strategies

## **P7 - Public Policy & Environmental Change**

- Political processes
- Evidence-based prevention policies
- Environmental change strategies
- Theory of Change concepts
- Socio-ecological systems theories
- Public health model
- Current behavioral health trends and research
- Advocacy and lobbying (and their differences)

## **P8 - Professional Growth & Responsibility**

- Basic budget requirements set by funders
- Recipient rights and informed consent
- Health disparities that impact diverse communities
- Healthy living strategies
- Conflict resolution strategies
- Organizational dynamics and characteristics
- Regulations and practices regarding ethical fundraising
- Conflicts of interest

## **Prevention Administrative/Supervisory Education Classifications**

The content areas in this series focus on education appropriate for prevention professionals in an administrative/supervisory role:

### **PS1 - Human Resource Management**

- Interpersonal Relations
- Organizational Development
- Employee Development
- Leadership Development
- Conflict Management

- Recruitment
- Emotional Intelligence
- Performance Management
- Organizational Change
- Coaching / Mentoring
- Quality Improvement
- Professional Writing
- Public Relations
- Supervision
- Labor Relations
- Training and Development

### **PS2 - Fiscal Management**

- Statistics
- Finance
- Accounting
- Grant Writing
- Budgeting
- Financial Procedures
- Risk Management

## **Clinical Supervision Classifications**

The content areas in this series focus on education appropriate for clinical supervisors:

### **S1 - Counselor Development**

- Includes clinical supervision models; teaching and training methods and strategies; assessment theories, practices and tools; feedback purpose and process; motivational techniques to promote career development; communication processes or techniques; problem solving and conflict resolution models; theories of stress management; appropriate professional boundaries regarding clients or fellow staff; adult learning models; special populations; ethics and ethical problem solving; agency policy regarding appropriate counselor-client and supervisor-supervisee relationships.

### **S2 - Professional & Ethical Standards**

- Includes public relation techniques; professional organizations, their goals and objectives; government agencies; agency, state and professional codes; route of reporting ethical violations; credentialing requirements; impact of nutrition and exercise on physical and mental well-being; stages of human development; various cultures, values and lifestyles; confidentiality laws; grievance process.

### **S3 - Program Development & Quality Assurance**

- Includes developing program goals and objective; methods of program development; program needs assessments; clinical services improvement

planning; relationship building to enhance service delivery; advocacy; development and implementation of quality improvement and quality assurance processes; monitoring client outcomes; client access, engagement and retention; facilitation of staff learning.

#### **S4 - Performance Evaluation**

- Includes leadership styles, interview techniques, stress management, observation techniques, functional communication skills, public speaking techniques, basic teaching techniques, comprehensive assessment, career development interventions and strategies, and ways to coordinate supervision with appropriate and reasonable work assignment

#### **S5 - Administration**

- Includes monitoring techniques; management practices; orientation procedures and practice; motivational skills; consultation strategies; staff development; program assessment and development methods; deference between consultation and supervision; agency's hiring and termination policies; performance appraisals.

### ***Presenters***

Providers shall ensure that presenters of educational events are appropriately qualified to instruct on the content area(s) for which the educational event will cover. Appropriate qualifications may include credentialing, training, education and/or experience in that field of study.

Providers shall obtain presenter bios/resumes as verification of appropriateness of a presenter.

### ***Awarding Hours***

Providers shall award one hour of continuing education credit for every one hour of instruction time in an educational event. Providers may approve continuing education credit in quarter hour increments. Providers shall not award credit for registration, lunch or break periods. If an educational event is offered and documented during the lunch period, credit can be awarded for the lunch period presentation.

Providers who offer distance learning educational events must determine the average amount of time for the completion of the event and establish hours offered based on that average. Providers shall maintain a record of how they determined the average and provide it to the Board if requested.

### ***Attendance Verification***

Providers are required to provide verification of attendance for each participant who completes an educational event. The attendance verification may include a certificate of attendance and/or submission of a course completion in CE Broker.

Certificates of attendance must include the name of the participant, the title of the educational event, the date of the event, the number of hours awarded, the Provider's name and the Provider number. Certificates must be signed by an individual administering the educational event.

The Provider is also responsible to provide each attendee with the approved content areas for each educational event. This information may be included on the certificate or on alternate documentation prepared by the Provider.

Providers may not charge additional fees for individuals to receive educational credit or initial certificates.

### ***Records Retention***

Providers must maintain educational event information including goals/objectives, agendas, presenter bios/resumes for Board review upon request. The Board will review educational events on a quarterly basis and request supporting documentation when necessary. The Board will notify the Provider upon the completion of each quarterly review of any recommended corrections for future educational events.

Attendance rosters of each educational event must be held by the Provider for five years.

## **Entering Educational Events into CE Broker**

Providers shall log educational events in the CE Broker system for Board monitoring.

### ***Adding a Course***

Providers shall add educational events no more than 30 days after the completion of the educational event. If a Provider adds an event prior to the event date they have the opportunity to advertise that event in the CE Broker searchable system for professionals to find and attend.

### **Instructions to Add a Course**

1. Log in to CE Broker at <https://launchpad.cebroker.com/>.
2. Navigate to the "Courses" page and select the "New Course" link.
3. Enter the Course Name as it will appear on the certificate of completion.
4. Enter a Course Description. This course description will display when a professional searches for available courses and when the Board conducts your

- quarterly review.
5. Choose the Course Type (Delivery Method).
  6. Determine if the educational event will be advertised. Advertising will allow the educational event to show up in the searchable section of CE Broker for professionals to find and attend. If advertising, you can list the website where professionals can learn more about the event.
  7. Enter the date the course will be offered. You can also add the price of the event and the location as optional features. Once entered press the “Add Offering” button. If the course is offered on more than one date, repeat this step as needed until all dates are entered.
  8. Enter the number of hours authorized for the educational event. Hours are listed by profession type and subject area.
    - a. For each profession type, enter the number of hours authorized in the appropriate subject area(s) for that profession type. If no hours are entered for a profession type, no credit will be granted.
    - b. For subject areas, split out the total number of hours among the subject areas for each profession type. For example, a six hour class might cover three hours in subject area C1 and three hours in subject area C2. You cannot list six hours in both subject areas.
  9. Enter the Presenter Name(s) and Credentials(s). If multiple presenters, you can list “Various”.
  10. Review the summary of information entered for the course. If all is correct, press the “Finish” button.

Upon completion of this process, the CE Broker system will grant a course tracking number for the educational event.

### ***Adding/Editing Course Dates***

Once an educational event has been added in CE Broker, Providers can add or edit the date(s) of the event through the course link. Providers shall add educational event dates no more than 30 days after the completion of the educational event. Adding the date(s) in CE Broker allows professionals who complete the course to search for the date they attended and upload their certificate into their transcript. If a Provider adds an event date prior to the event they have the opportunity to advertise that event in the CE Broker searchable system for professionals to find and attend.

### **Instructions to Add/Edit a Course Date**

1. Log in to CE Broker at <https://launchpad.cebroker.com/>.
2. Navigate to the “Courses” page.
3. Select the Name of the course for which you wish to add/edit a date and press the “View Summary” button.
4. Beside the “Offerings” heading select the “Edit” link.
5. Enter the new Date(s) of the Course or if editing an existing date select the “Edit” link beside an existing date.

6. Add a course fee and location if desired and press the “Add Offering” button.
7. The system will create a course publishing number for each event date.
8. Repeat this process if the educational event is being offered multiple times.

### ***Submitting Course Completions***

Once an educational event has taken place, Providers have the option to record participant attendance in CE Broker by submitting course completions. Submitting course completions in CE Broker allows verification of completion of hours to populate directly to the professionals CE Broker transcript.

### **Instructions for Entering Course Completions**

1. Log in to CE Broker at <https://launchpad.cebroker.com/>.
2. Navigate to the “Courses” page.
3. Select the Name of the course for which you wish to enter course completions and press the “Manage Roster” button.
4. Press the “Add” button.
5. Enter the license number and completion date for each attendee
  - a. The license number will include the license abbreviation, then a period, then the license number (ie. CDCA.123561, OCPS.412589)
  - b. Enter the date the educational event was completed.
  - c. Indicate partial credit if the professional did not attend the entire event.
  - d. Press the “Post” button.
6. If uploading multiple attendees, review the excel file course completion upload options.

## **Board Monitoring**

Providers will open their educational events, at no charge, to the Board or a Board designated individual to allow them to monitor an event. Providers will cooperate with the Board should an official monitoring be required.

Providers will use their provider number only for educational events presented during their approved provider status. Providers may not use their provider number once their provider status has expired.

Failure to log educational events in CE Broker in a timely and consistent fashion may result in the termination of a Provider status.

## **Provider Status Renewal**

Providers may renew their provider status. Providers can access their Organizational Profile in CE Broker to view their expiration date. Providers will receive a message in their CE Broker message box when it is time to renew. The message will include a link that will allow them to pay their renewal fee online.