



Role and Function Analysis

Table of Contents

Introduction.....	3
Initial Development and Evaluation	5
Validation Study	8
Who Responded to the Survey?.....	9
Validation of Practice	22
Validation Scales.....	22
Tasks Within Performance Domains	24
Reliability Analysis for Domains	31
Survey Respondent Subgroups' Evaluations	31
Conclusion	39
Appendix A: Copy of the Role and Function Survey	
Appendix B: Copy of the Invitation Letter	

INTRODUCTION

The Certification of Disability Management Specialists Commission (CDMSC) conducted a national role and function study to define the responsibilities and duties of the Certified Disability Management Specialist. The purpose of the role and function study was to define logical, practice-related, and research-based content to support CDMSC's certification program, and specifically CDMSC's certification examination. CDMSC identified a group of Certified Disability Management Specialists who met with CASTLE Worldwide, Inc., to define four performance domains (major elements of practice) and 32 tasks, as well as the knowledge and skills required for certification candidates to perform the tasks competently.

The role and function study panel of experts consisted of Certified Disability Management Specialists and other experts in the field of disability management. The panel met for three days in Schaumburg, IL. The group was charged with analyzing disability management at a level that correlates closely with initial certification, with particular attention to the divergent ways that disability management may be practiced in different settings and with different types of clients.

Consistent with the purpose of the study, CDMSC desired to adhere to established standards within the professional certification community for the conduct of role and function studies. These guidelines have their foundation in logically sound and legally defensible procedures drawn from psychometric literature and case law. These principles and procedures are outlined in federal regulation (*Uniform Guidelines on Employee Selection Procedures*) and manuals, such as *Standards for Educational and Psychological Testing* (published by the American Educational Research Association, 1999). CASTLE employed these standards as well as those of the National Commission for Certifying Agencies (NCCA, 2006) in all phases of the study.

As the primary process for identifying the competency areas and knowledge needed for proficient performance in a profession, role and function studies offer a clear and useful basis for defining the essential components of certification examination. This is because role and function studies provide the basis for content validity, which is the most commonly applied and accepted validation strategy for establishing certification and other standard-setting programs. Validation through systematic role and function studies helps to document that the competence to be inferred when a candidate has achieved certification bears a sound link to the significant elements of practice that characterize the profession. This was the underlying intent of the study.

CDMSC's role and function study is an integral part of ensuring that its certification program has practice-related validity and that the aspects of disability management addressed by the certification program reflect the requirements of settings, client groups, and conditions. The study identified the importance, criticality, and difficulty of the domains and tasks delineated by the expert panel. These ratings play an important role in determining the content of the certification program.

The role and function study consisted of the following four major phases, which provide the organization of this report:

- I. Initial Development and Validation. The panel of experts identified the domains, tasks, knowledge, and skills essential to the proficient practice of disability management.
- II. Online Review. A group of four members of the expert panel met by telephone conference call for a series of online reviews of the knowledge and skill lists. This review brought about refinements and helpful consistency to the lists.
- III. Validation Study. A sample of Certified Disability Management Specialists, augmented by samples of individuals believed to work as disability management specialists but who were not CDMSC-certified, was invited to review and validate the work of the panel of experts. The names and contact information for these participants were drawn from CDMSC and cooperating organizations. A qualified and representative sample of disability management specialists, both certified and not, provided data in this phase.
- IV. Development of Specifications for the Certification Examination. Based on the ratings gathered from the disability management specialists who responded to the survey, a plan for the certification examination was developed, including specifications to provide direction for decision making about and the design of the CDMSC certification assessment and to support related programs of the organization.

CDMSC appointed a panel of experts to define the essential framework of the role and function study. This group met face-to-face for three days, and a subset of the group met by conference call periodically. CDMSC leadership and staff advised CASTLE about key activities and reviewed the draft report many times. The panel and CDMSC staff were essential to the project's success. Members of the task force and CDMSC staff are listed below:

Cherie King, Sc.D., CDMS, CRC, CDMSC Examination Committee Chair	Hartford, CT
Suzann Bylund, RN, CM/CPDM	St. Louis, MO
Carol W. Davis, CEBS	Chattanooga, TN
Sue Dierksen, MPH, RN, COHN-S/CM	Chicago, IL
Donald Gonzales, MS, CRC	Los Angeles, CA
Rochelle Habeck, Ph.D., CRC	Kalamazoo, MI
John W. Lui, Ph.D., CDMS, CRC	Menomonie, WI
Mary Masal	Dallas, TX
Janis Moebus, CRC	St. Paul, MN
D. T. North, MSOD, CDMS	Olympia, WA
Leanne Sneath	Portland, OR
Patricia Starratt, PHR	Los Angeles, CA
CDMSC Staff:	
Carla DeFlorio, CAE, Chief Executive Officer	Chicago, IL
Nancy Nehmer	Chicago, IL
Project Consultant:	
James P. Henderson, Ph.D.	Raleigh, NC

INITIAL DEVELOPMENT AND EVALUATION

The Certification of Disability Management Specialists Commission (CDMSC) is the only nationally accredited and independent organization that certifies disability management specialists that analyze, prevent, and mitigate the human and economic impact of disability for employees and employers. The delivery of disability management services involves a complex interplay among workers with disabilities, employers, insurance carriers, labor unions, medical service providers, government agencies, and others.

- A major goal of disability management is to facilitate the worker's physical recovery, rehabilitation, and return-to-work process while, concurrently, controlling the escalating costs of injury and disability for employers, insurance carriers, and government.
- Within this context of competing interests, the disability management specialist must function in an objective and ethical fashion.
- The disability management specialist must maintain a balance between providing services and interventions that protect jobs for workers with disabilities while controlling the financial, safety, and other risks that confront employers.

Consistent with its mission, CDMSC awards certification to individuals who satisfy its eligibility criteria and pass its certification examination. As part of a strategy for updating its examination program, CDMSC is conducting an analysis of the role and function of disability management specialists. The purpose of the role and function study is to determine the knowledge and skill that newly certified disability management specialists must have to provide competent service, especially with respect to the Certified Disability Management Specialist (CDMS). The role and function study focuses on relevant elements of responsibility in the field and defines work that newly certified CDMSs perform in the variety of settings in which they are employed.

The role and function study began with a preliminary review of literature and preparatory discussions in September 2008, and a meeting of the CDMSC on November 5, 2008, in Schaumburg, IL. Following preliminary activities, CDMSC convened a panel of experts with CASTLE November 6 – 8, 2008, also in Schaumburg. Facilitated by CASTLE, the panel of experts outlined performance domains, tasks, and knowledge and skills that are essential to the performance of newly certified disability management specialists. A large scale validation study conducted in March and April 2009 provided useful information that was used to assess the appropriateness of the various elements of the disability management specialist's role and function as delineated by the panel of experts.

Two key definitions provide clarity for the role and function study:

Target Audience: The target audience for the certification role and function study included newly certified CDMSs as well as individuals working in a similar capacity but without the CDMS designation. The CDMS prevents and minimizes the human and economic impact of illness and disability for both the employee and employer to optimize quality of care, productivity, organizational health, and regulatory compliance.

Minimally Competent Disability Management Specialist: The minimally competent CDMS has attained the essential skills and knowledge to practice the profession of disability management in a manner that will likely cause no harm to come to the client.

Early Steps in the Role and Function Study

The first steps in conducting the role and function study included a preliminary review of literature in disability management, the preparation of instructional materials, a meeting with CDMSC's examination committee, and a three-day meeting with the panel of experts whose members represent a broad range of industries, regions, and settings. The purpose of the preliminary analysis was to inform CASTLE of the essential responsibilities of the disability management specialist and key terminology used in the field. Building on this information, CASTLE prepared instructional materials that members of the expert panel used to inform their participation in the role and function study and that CASTLE used to convey essential explanations during the meeting. The objective of the meeting was to define the domains of practice, tasks, and knowledge and skills required for each task at a level commensurate with certification.

Preliminary Analysis

In order to provide leadership for the role and function study, CASTLE became acquainted with the roles and major responsibilities of disability management specialists. CDMSC provided CASTLE with several documents, which CASTLE reviewed thoroughly. The CDMSC website also offered helpful insight. The preliminary analysis enhanced CASTLE's familiarity with terminology, major responsibilities, and the general background and qualifications of the newly certified CDMS.

Instructional Materials

Key to the success of a role and function meeting were the materials used to inform participants about key concepts. The instruction booklet for the role and function study included CDMSC's certification target audience, essential definitions, and examples of performance domains, tasks, knowledge, and skills. The instruction booklet also included a set of validation scales that are commonly used in role and function studies and worksheets that were used for various purposes in the project.

Instructional materials were used during the meeting of the panel of experts as a means of building understanding among participants about key concepts and terms and to orient the essential thought processes and activities of the meeting.

Role and Function Meeting

The panel of experts reviewed and reached consensus on the target audience definition and then offered suggestions for performance domains that are appropriate for the newly certified. Through facilitated discussion, participants reached consensus on four performance domains. They are:

- I. Disability and Work Interruption Case Management
- II. Workplace Intervention for Disability Prevention
- III. Program Development, Management, and Evaluation
- IV. Employment Leaves and Benefits Administration

For each performance domain, members of the panel of experts worked in separate focus groups to draft tasks, which the whole group then reviewed and refined through a consensus process. The participants' diversity led to discussions which challenged the terminology, phrasing, and every aspect of the statements, with the resulting consensus representing a position that all members of the panel believed to be valid.

At the end of the meeting in Schaumburg, all members of the expert panel evaluated each performance domain and task, rating them on importance and criticality to their current practice as disability management specialists and the level of difficulty that new certificants have in performing the domains and tasks.

Based on the work of the expert panel, CASTLE and CDMSC developed an electronic validation survey. The process of review informed revisions and led to validation study of a large sample of disability management specialists. The results of the validation survey are the major focus of this report.

VALIDATION STUDY

Questionnaire Design and Distribution

CASTLE developed an online questionnaire to be completed by a large sample of disability management specialists for the purpose of collecting data on the performance domains, tasks, and knowledge and skills identified by the panel of experts. The questionnaire phase of the role and function study was important because practicing disability management specialists should have input into the delineation of their practice. This input is critical because the panel of experts, though highly qualified and representative in many key ways, constituted only a small portion of the field. Evaluation by the larger professional community is essential in order to make generalizations about the performance domains, tasks, and knowledge and skills to the population of disability management specialists. The questionnaire was also designed to solicit demographic information from the respondents to ensure that a representative response from disability management specialists was achieved.

The sampling plan was designed to ensure representation from newly certified CDMSCs as well as disability management specialists who qualified to participate but were not CDMSC-certified. The objective in the sampling strategy was to achieve the following stratification with 1,500 qualified participants:

- 750 Certified Disability Management Specialists
- 150 Members of the International Association of Rehabilitation Professionals
- 150 Certified Occupational Health Nurses identified as case managers
- 150 Certified Case Managers
- 200 Certified Professional Disability Managers
- 100 from the database of the Disability Managers Employers Coalition

CDMSC staff requested cooperation from these organizations and worked diligently with them to achieve the planned stratification. For various reasons, some organizations were not able to participate, and the final sample included the following:

- 950 Certified Disability Management Specialists
- 200 Members of the International Association of Rehabilitation Professionals
- 200 Certified Case Managers
- 156 from the database of the Disability Managers Employers Coalition

As the collection of mailing lists concluded, CASTLE sought the participation of 1,586 active disability management specialists by sending an invitation letter on CDMSC stationery through the U.S. postal service. The letter was signed by the CDMSC executive director and invited all of these individuals to participate in the study. Of these individuals, 968 had e-mail addresses, and they received the same letter through this medium two days later. The letter explained the purpose of the survey and its role in the role and function study. The letter included the URL for the online survey as well as the addressee's username and password, and the e-mail provided a hot link to the survey. Undeliverable letters were returned to CDMSC, where staff attempted to locate current addresses, so that, in all, 23 letters were deemed undeliverable. There were 224 e-mails that bounced back to CASTLE, reducing the number of participants to 1,363. CASTLE

monitored responses and sent two post card and e-mail reminder notices to individuals who had not completed the survey.

Of the questionnaires distributed for the survey, CASTLE received 259 qualified, usable responses. The response rate (16.6%) is considered satisfactory for a role and function survey, especially given that the survey was long — 20 to 25 minutes being required to complete it — and complex. However, not all individuals responded to every question, so the total number of responses per question varies.

Who Responded to the Survey?

There were several reasons for collecting demographic data from respondents. One was to determine the degree of diversity within the respondent group along dimensions that may be seen as influencing practice, and another was to assess the degree to which the respondent group reflects the known characteristics of the population of disability management specialists. As can be seen in the tables and graphs on the following pages, the survey respondents represented the desired diverse population of disability management specialists.

The first demographic question asked respondents to characterize their current work status. As shown in Table 1, the largest group of respondents (22.01%) are employed full time doing CDMS work with their employer’s customers.

Table 1: Which of the following best describes your current work status?

	Frequency	Percent
Full time employee doing CDMS work in combination with other work within my employer's organization	42	16.22
Full time employee doing CDMS work only part of the time with my employer's customers	17	6.56
Full time employee doing CDMS work with my employer's customers	57	22.01
Full time employee doing CDMS work within my employer's organization	40	15.44
Part time employee doing CDMS work with my employer's customers	9	3.47
Part time employee doing CDMS work within my employer's organization	6	2.32
Self employed working as a CDMS in combination with other specialties	47	18.15
Self employed working exclusively as a CDMS	17	6.56
No response	24	9.27
Total	259	100.00

Table 2 and Table 3 both address the location in which survey participants are employed as CDMs. Table 2 lists responses sorted by the first digit of the respondents' ZIP Code, which shows the west coast of the United States as the most prevalent region. Table 3 lists responses by the state or province indicated by the respondent, and Washington state shows the largest number.

Table 2. Please select the state or province where you are employed as a Certified Disability Management Specialist (Sorted by Zip Code)

First Digit of Zip Code	Frequency	Percent
0 (CT, ME, MA, NH, NJ, RI, VT)	9	3.48
1 (DE, NY, PA)	11	4.25
2 (DC, MD, NC, SC, VA, WV)	18	6.95
3 (AL, FL, GA, MS, PR, TN)	36	13.89
4 (IN, KY, MI, OH)	24	9.27
5 (IA, MN, MT, ND, SD, WI)	33	12.75
6 (IL, KS, MO, NE)	19	7.34
7 (AR, LA, OK, TX)	15	5.80
8 (AZ, CO, ID, NV, NM, UT, WY)	13	5.01
9 (AK, CA, HI, OR, WA)	49	19.30
Canada	3	1.16
No Response	29	11.20
Total	259	100.00

Table 3: Please select the state or province where you are employed as a Certified Disability Management Specialist.

	Frequency	Percent
Alabama	2	0.77
Alberta	2	0.77
Arizona	2	0.77
California	9	3.47
Colorado	4	1.54
Connecticut	1	0.39
Florida	22	8.49
Georgia	8	3.09
Idaho	2	0.77
Illinois	12	4.63
Indiana	2	0.77
Iowa	3	1.16
Kansas	1	0.39
Louisiana	3	1.16
Maine	1	0.39
Maryland	3	1.16
Massachusetts	2	0.77
Michigan	6	2.32
Minnesota	26	10.04
Missouri	3	1.16
Nebraska	3	1.16
Nevada	3	1.16
New Brunswick	1	0.39
New Jersey	2	0.77
New York	6	2.32
North Carolina	8	3.09
Ohio	16	6.18
Oklahoma	1	0.39
Oregon	4	1.54
Pennsylvania	5	1.93
Rhode Island	1	0.39
South Carolina	2	0.77
South Dakota	1	0.39
Tennessee	4	1.54
Texas	11	4.25
Utah	2	0.77
Vermont	1	0.39
Virginia	4	1.54
Washington	37	14.29
West Virginia	1	0.39
Wisconsin	3	1.16
No response	29	11.20
Total	259	100.00

Respondents were asked to identify their current occupation from a list provided in the survey (Table 4), or they could list their occupation. There were 22 Other Responses that are listed in Table 4a.

Table 4: Please identify your current occupation (please mark only one selection).

	Frequency	Percent
Administrator (Manager)	24	9.41
Disability Management Consultant	36	14.12
Human Resource Manager	1	0.39
Job Development/Placement	1	0.39
Nurse Case Manager	49	19.22
Occupational Therapist	2	0.78
Physical Therapist	1	0.39
Rehabilitation Counselor	75	29.41
Rehabilitation Nurse	3	1.18
Return-to-Work Coordinator	6	2.35
Social Worker	3	1.18
Staff/Clinical Nurse	1	0.39
Supervisor (Rehabilitation Staff)	1	0.39
Vocational Evaluator	3	1.18
Other	22	8.63
No response	27	10.59
Total	255	100.00

Table 4a: Other Responses

Response
Administrator/Rehab Counselor/RTW Coordinator/Human Resource Consultant
Business Project Manager
Case Manager
Claim Consultant/IME Coordinator
Disability Case Manager
Life Care Planner
Manager for Case Managers
Qualified Rehabilitation Consultant
Quality Improvement
Quality Review Specialist
Rehabilitation Counselor, Vocational Evaluator, and on the Board of Directors
Retired Disability Management Consultant
Team Manager, Return-to-Work Specialist, and Account Manager in Disability Management
Vocational and Disability Analyst - Expert Witness
Vocational Case Manager
Vocational Case Manager - Return-to-Work, Assessment, etc.
Vocational Consultant
Vocational Rehabilitation Consultant
Vocational Rehabilitation Counselor
Vocational Services Specialist
Vocational Rehabilitation Counselor and Vocational Evaluator
VSS Auditor

On the whole, respondents were experienced, with the largest group (27.03%) having worked more than 20 years in the field.

Table 5: How many years total have you been working in the field of Disability Management (please mark only one selection)?

	Frequency	Percent
Less than one year	3	1.16
1 to 3 years	5	1.93
4 to 6 years	16	6.18
7 to 10 years	37	14.29
11 to 15 years	46	17.76
16 to 20 years	56	21.62
More than 20 years	70	27.03
No response	26	10.04
Total	259	100.00

Longevity with the respondents' current employer reveals that the largest number have worked in their current positions for one to three years. Please see Table 6.

Table 6: How many years have you been employed as a CDMS with your current employer or your own company (please mark only one selection)?

	Frequency	Percent
Less than one year	23	8.88
1 to 3 years	60	23.17
4 to 6 years	50	19.31
7 to 10 years	33	12.74
11 to 15 years	25	9.65
16 to 20 years	21	8.11
More than 20 years	21	8.11
No response	26	10.04
Total	259	100.00

Given that the group of respondents is experienced, it is reasonable to expect that the largest number (23.17%) reported being 50 to 54 years old (Table 7).

Table 7: Which of the following best describes your current age (please mark only one selection)?

	Frequency	Percent
Less than 30 years	5	1.93
30 - 34 years	7	2.70
35 - 39 years	14	5.41
40 - 44 years	24	9.27
45 - 49 years	41	15.83
50 - 54 years	60	23.17
55 - 60 years	56	21.62
Over 60 years	25	9.65
No response	27	10.42
Total	259	100.00

Almost half of the respondents report having an average open caseload volume (Table 8) in the range of 11 to 50 cases.

Table 8: What is your monthly average open caseload volume, considering both in person and/or telephonic cases (please mark only one selection)?

	Frequency	Percent
10 or fewer cases	24	9.27
11 to 50 cases	126	48.65
51 to 100 cases	28	10.81
101 to 250 cases	16	6.18
More than 250 cases	3	1.16
Not applicable	35	13.51
No response	27	10.42
Total	259	100.00

About two-thirds of the respondents indicate they work for 25 or fewer companies/employers, as shown in Table 9.

Table 9: For how many companies/employers do you provide services at this time (please mark only one selection)?

	Frequency	Percent
25 or fewer companies/employers	174	67.18
26 to 100 companies/employers	44	16.99
101 to 500 companies/employers	5	1.93
501 or more companies/employers	9	3.47
No response	27	10.42
Total	259	100.00

Just over one-third (35.08%) of the respondents report that their employer is a private (proprietary) rehabilitation company. The classifications shown in Table 10 were provided in the survey, but some participants took advantage of the opportunity to record their employer's specific classification, and these are listed in Table 10a.

Table 10: What is the best classification for your current employment (please mark only one selection)?

	Frequency	Percent
Business/industry	14	5.65
College or university	7	2.82
Government	15	6.05
Insurance company	42	16.94
Medical center/general hospital	16	6.45
Private (proprietary) rehabilitation company	87	35.08
Private practice	24	9.68
Public school system	1	0.40
Social welfare agency	2	0.81
Third party administrator	13	5.24
No response	27	10.89
Total	248	100.00

Table 10a: Other Responses

Response
Case Management
Independent Consultant Contracting with a Government Agency
Insurance-Based Case Management Company
Nationwide Integrated Healthcare Delivery System
Strictly Worker's Comp Injuries
Transportation
Utility
VP of Clinical Services for Home Care Company (Long-term)
Workers Comp Plan Administrator for Self Insured Groups

In Table 11 are descriptive statistics concerning the percent of respondents' time devoted to cases with various types of disability. If the categories provided did not suffice, respondents were free to list specific language, and these are reported in Table 11a.

Table 11: What percentage of your time in your current employment setting do you spend working with cases of the following disability types (the total should equal 100%)?

Task	N	Mean	Std. Dev.
Alcohol and substance abuse	233	3.18	6.99
Cardiac conditions	233	2.76	7.38
Developmental disabilities	233	1.72	4.51
Learning disabilities	233	2.24	4.67
Mental/behavioral health	233	8.44	12.51
Musculoskeletal disabilities	233	50.56	30.36
Neurological disabilities	233	15.39	15.81
Sensory impairments	233	2.98	5.60

Table 11a: Other Responses

Response
Amputations
Absence from Workplace (Marital Dissolution)
Birth Injury
CAT Cases
Chronic Medical
Chronic Pain
Combination Disorders
Disabilities Not Identified
Esthetics
General Medicine
Genetic Disorders
Senior Consultant/Project Manager to System-Wide Program
Cancer
Industrial Injuries
Injuries on the Job
Maternity
Multiple Trauma
Obstetrics, General Medicine, and Surgery
Orthopedic
Physical Impairments
Psychiatric
Amputations
Rehabilitation
SCI
Severe Burns
Short Term Disability Due to Maternity or Other Conditions or Injuries
TBI
Teaching
Traumatic Brain Injury
Various Worker's Comp-Related Industrial Injuries
Visually Impaired
Vocational
Worker's Compensation Injuries
Work Injuries
Wound Care

The respondents were asked to estimate the percentage of their time currently spent in four work activities (Table 12). If respondents could not account for their time with these categories, they were free to list additional work activities in which they spent time. See Table 12a.

Table 12: What percentage of your time in your current employment setting do you spend in the following work activities (the total should equal 100%)?

Task	N	Mean	Std. Dev.
Disability case management	230	29.17	27.83
Return-to-work coordination	230	18.60	19.22
Vocational counseling, assessment, and job placement/job development	230	21.13	26.03
Managerial/consultative roles in disability management	230	21.99	32.40

Table 12a: Other Responses

Response
Account Consulting
Administration and Teaching
Administrative
Disability Consulting
Education/Presentation
Field Case Management RN in Louisiana
Forensic Analysis
Geriatric CM/aging in Place
LCP Reseach, Coordinating Out-of-Country Cases
Legal
Managing Staff
Medical Case Management
Medical Social Worker
National Environmental Health & Safety (Departmental) plus ad hoc IDM Consultative Activities
Paperwork
Paramedical Esthetics
Product Development and Operations Delivery
Testimony
Travel
Vendor Selection and Management
Vocational Expert
Vocational
WC CM

Respondents classified the occupation of their most recent previous employer. The vast majority reported having been employed in a rehabilitation- and/or disability-related profession. See Table 13 and Table 13a.

Table 13: How would you classify the occupation in your most recent previous employment (please mark only one selection)?

	Frequency	Percent
Business finance/risk	5	1.93
Environmental health and safety	2	0.77
Health care plan administrator	2	0.77
Human resources	6	2.32
Rehabilitation- and/or disability-related profession	188	72.59
Other	26	10.04
No response	30	11.58
Total	259	100.00

Table 13a: Other Responses

Response
Adult Corrections
Budget Manager and Staffing for Nursing Division of a Hospital
Claims Adjuster
CM
Consultant
Health Care Administrator
Health Care Social Worker and Certified Case Manager (CCM not CDMS)
Health Care/Occupational
Hospital Staff/ICU
Insurance Case Manager
Insurance Operations Mng
Life Care Planner
Medical Case Management
Medical Management Workers' Comp
Mental Health Social Work
Nurse
Occupational Health
Paramedical Esthetics
Registered Nurse
Vocational Rehabilitation Counselor
Secretarial
Vocational Expert

The next question in the survey concerned respondents' current qualifications in disability management. Table 14 shows that the largest number (71.81%) hold certification as a CDMS, but that nearly as many respondents hold credentials that were not available on the pull-down menu. Table 13a lists the Other Responses for this question.

Table 14: Which of the following certifications or licenses do you have current at this time (please mark all that apply)?

	Frequency	Percent
ABVE	5	1.93
CCM	81	31.27
CDMS	186	71.81
COHN	2	0.77
CRC	61	23.55
CRRN	5	1.93
CVE	8	3.09
GPHR	29	11.20
PHR	2	0.77
SPHER	29	11.20
Other	184	71.04

Table 14a: Other Responses

Response
ABDA
ARM
B.Sc., P.T.
CCAA
CEES
Certified Professional in Utilization Review
Certified Rehabilitation Provider
CLCP
CLCP, MSCC, QRC
CLCP,LPC
CMCN
CPDM
CPUR
CSHE (Specialist in Health Ergonomics
CSP
Currently working on CDMS
CWCP
GCDF
HIAA
LAC (Licensed Associate Counselor), NCC (National Certified Counselor)
LCPC
LPC
LLPC
LNCC
LRC, LMHC
LSW
NBCC
NCC
NCC, CLCP
OTR
OTR/L, QRC
Ph.D.
PHN, QRC
PT, CPE
QRC
QRC, OTR/L
QRP
QRP, FIALCP
QRP. RN, Medicare Set A Side Allocator
RN
RN, CNS
RN, QRC

About as many respondents report their highest level of education as a bachelor’s degree as a master’s degree, and when these two groups are combined, they account for more than 75% of the respondents. Responses are presented in Table 15 and Table 15a.

Table 15: What is the highest level of education that you have earned (please mark only one selection)?

	Frequency	Percent
Nursing diploma	7	2.70
Associate degree	11	4.25
Bachelor's degree	102	39.38
Master's degree	99	38.22
Doctoral degree	7	2.70
Other	3	1.16
No response	30	11.58
Total	259	100.00

Table 15a: Other Responses

Response
CAGS
Graduate studies
Post Graduate

The last question in the demographic part of the survey addressed annual income earned from disability management. The results are presented in Table 16.

Table 16: What is your annual income as a Certified Disability Management Specialist (please mark only one selection)?

	Frequency	Percent
\$25,000 or less	11	4.25
\$25,001 to \$50,000	27	10.42
\$50,001 to \$75,000	108	41.70
\$75,001 to \$100,000	49	18.92
More than \$100,000	29	11.20
No response	35	13.51
Total	259	100.00

Validation of Entry-Level Practice for the Disability Management Specialist

Validation Scales

Respondents were asked to evaluate each performance domain and task, rating them using scales for importance, criticality, and difficulty. Five-point scales were used for all three measures, with a response of “4” representing the highest rating. The scale anchors for importance, criticality, and difficulty are listed below as a reference.

Importance was defined as the degree to which the performance domain or task is essential to the competent practice of the entry-level CDMS. Criticality was defined as the degree to which inability to perform duties in each performance domain or task could be seen as causing harm to stakeholders. Finally, difficulty was defined as the degree of complexity of the domains and tasks for the entry-level CDMS. Participants were asked to evaluate each of the performance domains and tasks using the scales as they are presented below. Participants were asked to assign each element of practice **only one** estimate. The specific questions used in the survey were:

Importance: How essential is the domain or task to the competent performance of the entry-level Certified Disability Management Specialist?

- 0 = Of No Importance
- 1 = Of Little Importance
- 2 = Moderately Important
- 3 = Very Important
- 4 = Extremely Important

Criticality: To what degree would the inability of the entry-level Certified Disability Management Specialist to perform duties in each performance domain or task be seen as causing harm to stakeholders? (Harm may be seen as physical, psychological, emotional, legal, financial, etc.)

- 0 = No Harm
- 1 = Minimal Harm
- 2 = Moderate Harm
- 3 = Substantial Harm
- 4 = Extreme Harm

Difficulty: Difficulty refers to the degree to which performance of the domains or tasks is complex for the entry-level Certified Disability Management Specialist.

- 0 = Not Difficult. Performance of tasks in this domain is easy, predictable, and routine.
- 1 = Minimally Difficult. Performance of tasks in this domain is slightly complicated.
- 2 = Moderately Difficult. Performance of tasks in this domain is somewhat complicated.
- 3 = Very Difficult. Performance of tasks in this domain is clearly complicated.
- 4 = Extremely Difficult. Performance of tasks in this domain is highly complicated and involves extensive decision making.

With ratings from 0 to 4 for these scales, the classical descriptive statistics indicate that the means, or average scale values, range from 1.64, just above the scale mid-point (moderate endorsement) to 3.11 (strong endorsement). The standard errors of the mean, which describe the theoretical range within which the means of other samples drawn from this sample population would lie, are reasonably small. The standard deviation statistics describe the spread of the response distributions, with small estimates indicating relatively tight groupings and large estimates indicating relative diversity of opinion.

Inspection of the domain statistics indicates that respondents endorse importance at a relatively higher level than criticality and difficulty. Further, Workplace Intervention received the highest endorsements for importance and criticality, and difficulty. Likewise, Disability and Work Interruption Case Management received the second highest endorsements on these two scales. Program Development, Management, and Evaluation is the most difficult domain for the entry-level CDMS.

Table 17: Domain Importance

Domain	N	Mean ¹	SEM	Std. Dev.
I. Disability and Work Interruption Case Management	258	3.06	0.05	0.78
II. Workplace Intervention for Disability Prevention	259	3.11	0.05	0.83
III. Program Development, Management, and Evaluation	256	2.71	0.06	0.95
IV. Employment Leaves and Benefits Administration	259	2.22	0.07	1.14

Ratings: 0 = Of No Importance, 1 = Of Little Importance, 2 = Moderately Important, 3 = Very Important, 4 = Extremely Important

Table 18: Domain Criticality

Domain	N	Mean ¹	SEM	Std. Dev.
I. Disability and Work Interruption Case Management	255	2.20	0.06	0.97
II. Workplace Intervention for Disability Prevention	255	2.28	0.06	1.02
III. Program Development, Management, and Evaluation	252	1.80	0.06	1.02
IV. Employment Leaves and Benefits Administration	255	1.71	0.07	1.06

Ratings: 0 = No Harm, 1 = Minimal Harm, 2 = Moderate Harm, 3 = Significant Harm, 4 = Extreme Harm

Table 19: Domain Difficulty

Domain	N	Mean ¹	SEM	Std. Dev.
I. Disability and Work Interruption Case Management	258	1.95	0.05	0.82
II. Workplace Intervention for Disability Prevention	257	1.89	0.06	0.91
III. Program Development, Management, and Evaluation	255	2.02	0.06	0.89
IV. Employment Leaves and Benefits Administration	258	1.64	0.06	0.93

Ratings: 0 = Not Difficult, 1 = Minimally Difficult, 2 = Moderately Difficult, 3 = Very Difficult, 4 = Extremely Difficult

Tasks Within Performance Domains

Within each performance domain is a set of task statements that supplies essential detail about the domain. In essence, task statements provide an operational definition of the domain by identifying what is done, how it is done, and why. Respondents were asked to evaluate each task using the importance, criticality, and difficulty scales as defined above. The following pages present the list of task statements followed by statistical tables that account for the data.

I. Disability and Work Interruption Case Management

1. Perform comprehensive individual case analyses (e.g., initial evaluation, vocational assessment, multi-point assessment) and benefits assessments using best practices in order to develop appropriate interventions.
2. Review disability case management interventions using standards of care in order to promote quality care, recovery, and cost effectiveness.
3. Promote collaboration among stakeholders using effective communication strategies in order to optimize functional recovery.
4. Perform worksite/job analyses using observation, interview, and records review in order to determine the requirements of jobs and appropriate accommodations.
5. Develop individualized return-to-work and work retention plans consistent with practice standards and program policies by collaborating with relevant stakeholders in order to facilitate successful employment outcomes.
6. Implement interventions using appropriate counseling, behavior change techniques, and accommodation options in order to optimize functioning and productivity.

7. Coordinate benefits, services, and community resources (e.g., orthotics, prosthetics, functional capacity evaluation, independent medical evaluations, durable medical equipment, home care, assistive technology, vocational rehabilitation) through strategic planning in order to facilitate optimal functioning.
8. Monitor case progress by assessing medical, health, and functional conditions on an on-going basis in order to optimize functional recovery and facilitate successful employment outcomes.
9. Communicate effectively in compliance with practice standards and regulations using electronic technology and information systems in order to efficiently disseminate appropriate information, keep stakeholders informed, document case activities, and prepare reports.
10. Develop solutions that optimize the health and employment situation of employees by addressing their health and work/life issues in a holistic manner in order to address barriers that affect productivity and employment outcomes.
11. Communicate essential elements of benefits and employment policies to employees using clear language and appropriate documentation in order to mitigate adverse impact and facilitate informed decision making.

II. Workplace Intervention for Disability Prevention

1. Implement disability prevention practices (risk mitigation procedures such as worksite/job analysis, job accommodation, ergonomic evaluation, health and wellness initiatives, health/disease management, and work/life programs) through training, education, and collaboration in order to change organizational behavior and integrate prevention as an essential component of organizational culture.
2. Develop a comprehensive transitional work program through collaboration with relevant stakeholders in order to facilitate optimal productivity, work retention, and value in the workplace.
3. Develop an interactive process for worksite modification, job accommodation, or task reassignment incorporating appropriate resources (e.g., ergonomics, assistive technologies) in order to facilitate optimal functioning in the workplace and foster work retention.

4. Recommend strategies to address ergonomic, safety, and risk factors using available data in order to prevent disability and mitigate exposure.
5. Recommend strategies that integrate benefits plan designs and related services (e.g., work/life programs, community resources, medical services) by evaluating alignment and effectiveness in order to promote prevention, optimal productivity, quality care, and cost containment.
6. Promote health and wellness interventions that demonstrate measurable value by targeting the specific needs of employees and the organization in order to increase organizational health and productivity.

III. Program Development, Management, and Evaluation

1. Establish program goals by assessing organizational needs and evaluating best practice in order to direct program design.
2. Design the program in cooperation with a team of champions (e.g., management, labor) and supporting policies, practices, roles, and benchmarks in order to achieve established program goals.
3. Design a financial plan that sustains a viable disability management program for multiple years by evaluating the resources needed in order to assist the organization in sizing its financial obligation.
4. Develop staff consistent with program goals and the financial plan in order to achieve established program goals.
5. Select the metrics by which the program will be evaluated based on goals and design, best practice, and benchmarking data in order to assess effectiveness and make adjustments as needed.
6. Implement cross-functional processes consistent with program philosophy, objectives, and best practice in order to meet program goals.
7. Offer education and training through collaboration with stakeholders (e.g., supervisors, management, employees, labor organizations) in order to promote program goals.
8. Manage the program's operational and financial performance on an ongoing basis using established metrics in order to identify costs, trends, and productivity loss for the purpose of program evaluation and return on investment.
9. Integrate data from all relevant sources by collecting, organizing, and interpreting information and by using available information systems in order to support decision

making for program improvement and to assess cost effectiveness and return on investment.

10. Procure internal and external services using commonly accepted selection criteria in order to achieve program goals.
11. Manage service providers using defined performance standards in order to maximize the quality of services and return on investment.

IV. Employment Leaves and Benefits Administration

1. Manage employment leaves in accordance with local, state, and federal requirements in order to maintain legal and regulatory compliance.
2. Administer health and welfare plans consistent with government regulations and corporate requirements in order to provide appropriate employee entitlements as they pertain to work interruptions.
3. Manage payroll and systems data relevant to employment leaves and benefits by maintaining accurate records in order to comply with legal and regulatory requirements (e.g., Sarbanes Oxley, employment and benefits laws).
4. Identify risks associated with work interruptions and employment leaves by referring to pertinent internal and external resources and regulations in order to influence organizational decision making.

Tables 20, 21, 22, and 23 report respondents' evaluations of the importance, criticality, and difficulty of tasks within the four performance domains. Generally speaking, descriptive statistics for tasks in Disability and Work Interruption Case Management have relatively high importance and criticality, while the tasks in Workplace Intervention for Disability Prevention are relatively difficult. Tasks in Program Development, Management, and Evaluation are relatively less critical than other domains, with average ratings for all tasks below the scale mid-point, although they are moderately to very important.

Table 20: Domain I: Disability and Work Interruption Case Management

Tasks	Frequency	Importance	Criticality	Difficulty
Perform individual case analyses and benefits assessments	235	3.47	2.49	2.03
Review disability case management interventions	235	2.89	2.11	1.79
Promote collaboration among stakeholders	233	3.17	2.10	1.91
Perform worksite/job analyses	233	3.07	2.24	1.77
Develop return-to-work and work retention plans	227	3.24	2.25	2.04
Implement interventions	223	2.92	2.10	2.11
Coordinate benefits, services, and community resources	225	3.03	2.10	1.81
Monitor case progress	224	3.06	2.06	1.62
Communicate in compliance with practice standards and regulations	225	2.95	1.91	1.42
Develop solutions that optimize health and employment	224	2.62	1.76	1.81
Communicate benefits and employment policies	226	2.70	1.93	1.55

Importance: 0 = Of No Importance, 1 = Of Little Importance, 2 = Moderately Important, 3 = Very Important, 4 = Extremely Important

Criticality: 0 = No Harm, 1 = Minimal Harm, 2 = Moderate Harm, 3 = Significant Harm, 4 = Extreme Harm

Difficulty: 0 = Not Difficult, 1 = Minimally Difficult, 2 = Moderately Difficult, 3 = Very Difficult, 4 = Extremely Difficult

Table 21: Domain II: Workplace Intervention for Disability Prevention

Tasks	Frequency	Importance	Criticality	Difficulty
Implement disability prevention practices	228	2.90	2.05	2.26
Develop a transitional work program	228	3.01	2.02	2.23
Develop process for worksite modification, job accommodation, or task reassignment	227	2.93	2.00	2.17
Recommend strategies to address ergonomic, safety, and risk factors	225	2.67	1.90	1.77
Recommend strategies that integrate benefits plan designs and related services	224	2.29	1.49	1.83
Promote health and wellness interventions	225	2.26	1.46	1.63

Ratings: 0 = Of No Importance, 1 = Of Little Importance, 2 = Moderately Important, 3 = Very Important, 4 = Extremely Important

Ratings: 0 = No Harm, 1 = Minimal Harm, 2 = Moderate Harm, 3 = Significant Harm, 4 = Extreme Harm

Ratings: 0 = Not Difficult, 1 = Minimally Difficult, 2 = Moderately Difficult, 3 = Very Difficult, 4 = Extremely Difficult

Table 22: Domain III: Program Development, Management, and Evaluation

Tasks	Frequency	Importance	Criticality	Difficulty
Establish program goals	223	2.35	1.43	1.78
Design the program	223	2.47	1.53	2.07
Design a financial plan	223	2.29	1.51	2.31
Develop staff	220	2.36	1.52	1.95
Select the metrics for evaluating the program	217	2.29	1.40	1.99
Implement cross-functional processes	216	2.08	1.35	1.85
Offer education and training	215	2.50	1.43	1.74
Manage program's operational and financial performance	215	2.31	1.47	2.00
Integrate data from all relevant sources	217	2.33	1.44	2.03
Procure internal and external services	216	2.17	1.35	1.65
Manage service providers	216	2.46	1.62	1.79

Ratings: 0 = Of No Importance, 1 = Of Little Importance, 2 = Moderately Important, 3 = Very Important, 4 = Extremely Important

Ratings: 0 = No Harm, 1 = Minimal Harm, 2 = Moderate Harm, 3 = Significant Harm, 4 = Extreme Harm

Ratings: 0 = Not Difficult, 1 = Minimally Difficult, 2 = Moderately Difficult, 3 = Very Difficult, 4 = Extremely Difficult

Table 23: Domain IV: Employment Leaves and Benefits Administration

Tasks	Frequency	Importance	Criticality	Difficulty
Manage employment leaves	219	2.46	1.85	1.62
Administer health and welfare plans	219	2.48	1.88	1.84
Manage payroll and systems data	219	2.17	1.73	1.72
Identify risks associated with interruptions and leaves	220	2.31	1.65	1.84

Ratings: 0 = Of No Importance, 1 = Of Little Importance, 2 = Moderately Important, 3 = Very Important, 4 = Extremely Important

Ratings: 0 = No Harm, 1 = Minimal Harm, 2 = Moderate Harm, 3 = Significant Harm, 4 = Extreme Harm

Ratings: 0 = Not Difficult, 1 = Minimally Difficult, 2 = Moderately Difficult, 3 = Very Difficult, 4 = Extremely Difficult

RELIABILITY ANALYSIS FOR DOMAINS

The reliability of the scales for performance domains was assessed in order to determine how consistently the tasks measured the performance domain of interest. Reliability refers to the degree to which tests or surveys are free from measurement error. With inconsistency (i.e., unreliability), it would be impossible to interpret the results of the study. Reliability analysis expresses the adequacy of data reported for the importance, criticality, and difficulty ratings of each performance domain based on the tasks.

Reliability, reported in Table 24, was measured by estimating internal consistency (Cronbach's Alpha) using the respondent's ratings for importance, criticality, and difficulty for each performance domain. This procedure calculates the extent to which the task ratings within a performance domain consistently measure what other tasks within that performance domain measure. Reliability coefficients range from 0 to 1 and should be above .7 to be judged as adequate. All of the coefficients exceed .80, a very good outcome.

Table 24: Reliability

Reliability	Importance	Criticality	Difficulty
Disability and Work Interruption Case Management	0.84	0.92	0.88
Workplace Intervention for Disability Prevention	0.86	0.90	0.86
Program Development, Management, and Evaluation	0.95	0.96	0.93
Employment Leaves and Benefits Administration	0.91	0.92	0.87

Survey Respondent Subgroups' Evaluations

When measuring opinion about the responsibilities that characterize a profession, the possibility that individuals in various settings have differing views of the profession is to be expected. Finding meaningful differences in domain or task ratings among different subgroups might indicate that one should not generalize the survey results from one subgroup to another. With this in mind, the responses of specific subgroups were compared. Subgroups were defined by years of experience as a disability management professional, monthly average open caseload, number of companies/employers for whom services are provided, best classification of current employer, highest level of education, and annual income from disability management. Although a small number of between-group differences exceeded one, in general the means showed close agreement. Consequently, the mean responses of the various subgroups do not vary to a practical extent, indicating general agreement between and among the different subgroups of respondents.

The following charts illustrate the similarities in means, or averages, for the responses of subgroups of at least five respondents. Means are not reported for subgroups with fewer than five respondents. Only minor variations occur among the responses. The similarity in the ratings provides support for generalizing from the survey results to the general population of qualified disability management specialists.

Table 25a: Years Working in the Field of Disability Management, Domain I

Number of Years	Frequency	Importance	Criticality	Difficulty
Less than one year	3	---	---	---
1 to 3 years	5	3.20	2.00	1.80
4 to 6 years	16	2.63	1.94	1.94
7 to 10 years	37	3.14	2.16	2.05
11 to 15 years	46	3.27	2.36	1.98
16 to 20 years	56	3.04	2.29	2.02
More than 20 years	70	3.00	2.20	1.90
No response	26	3.08	2.00	1.77

Table 25b: Years Working in the Field of Disability Management, Domain II

Number of Years	Frequency	Importance	Criticality	Difficulty
Less than one year	3	---	---	---
1 to 3 years	5	3.60	2.60	1.80
4 to 6 years	16	2.69	2.06	1.88
7 to 10 years	37	3.11	2.38	1.62
11 to 15 years	46	3.28	2.45	2.04
16 to 20 years	56	3.25	2.36	2.13
More than 20 years	70	2.91	2.20	1.89
No response	26	3.23	1.92	1.56

Table 25c: Years Working in the Field of Disability Management, Domain III

Number of Years	Frequency	Importance	Criticality	Difficulty
Less than one year	3	---	---	---
1 to 3 years	5	3.50	1.75	1.25
4 to 6 years	16	2.75	1.94	2.31
7 to 10 years	37	2.68	2.00	2.05
11 to 15 years	46	2.76	1.68	2.07
16 to 20 years	56	2.75	1.93	2.11
More than 20 years	70	2.56	1.66	1.97
No response	26	2.88	1.65	1.79

Table 25d: Years Working in the Field of Disability Management, Domain IV

Number of Years	Frequency	Importance	Criticality	Difficulty
Less than one year	3	---	---	---
1 to 3 years	5	2.60	2.00	1.40
4 to 6 years	16	1.56	1.19	1.63
7 to 10 years	37	2.27	1.73	1.57
11 to 15 years	46	2.63	1.82	1.78
16 to 20 years	56	2.39	1.93	1.79
More than 20 years	70	1.90	1.56	1.59
No response	26	2.12	1.56	1.38

Table 26a: Monthly Average Open Caseload, Domain I

Number of Cases	Frequency	Importance	Criticality	Difficulty
Not applicable	35	3.11	2.29	1.91
10 or fewer cases	24	3.21	2.42	2.13
11 to 50 cases	126	3.08	2.23	1.98
51 to 100 cases	27	2.86	1.93	1.93
101 to 250 cases	16	3.00	2.40	2.00
More than 250 cases	3	---	---	---
No response	27	3.07	2.00	1.74

Table 26b: Monthly Average Open Caseload, Domain II

Number of Cases	Frequency	Importance	Criticality	Difficulty
Not applicable	35	3.20	2.29	1.91
10 or fewer cases	24	3.13	2.79	2.29
11 to 50 cases	126	3.10	2.27	1.88
51 to 100 cases	27	3.04	2.21	1.89
101 to 250 cases	16	3.00	2.27	1.94
More than 250 cases	3	---	---	---
No response	27	3.26	1.96	1.54

Table 26c: Monthly Average Open Caseload, Domain III

Number of Cases	Frequency	Importance	Criticality	Difficulty
Not applicable	35	2.77	1.71	2.23
10 or fewer cases	24	3.08	2.04	2.13
11 to 50 cases	126	2.60	1.83	2.01
51 to 100 cases	27	2.63	1.63	1.96
101 to 250 cases	16	2.75	1.93	2.06
More than 250 cases	3	---	---	---
No response	27	2.92	1.67	1.72

Table 26d: Monthly Average Open Caseload, Domain IV

Number of Cases	Frequency	Importance	Criticality	Difficulty
Not applicable	35	2.49	1.91	1.77
10 or fewer cases	24	2.25	1.83	2.08
11 to 50 cases	126	2.00	1.59	1.54
51 to 100 cases	27	2.50	1.82	1.75
101 to 250 cases	16	2.94	2.07	1.69
More than 250 cases	3	---	---	---
No response	27	2.11	1.54	1.33

Table 27a: Number of Companies/Employers for Whom Services are Provided, Domain I

Number of Companies/Employers	Frequency	Importance	Criticality	Difficulty
25 or fewer	172	3.08	2.23	1.97
26 to 100	44	3.14	2.36	2.09
101 to 500	5	2.80	1.80	2.00
501 or more	9	2.56	1.78	1.56
No response	25	3.07	2.00	1.74

Table 27b: Number of Companies/Employers for Whom Services are Provided, Domain II

Number of Companies/Employers	Frequency	Importance	Criticality	Difficulty
25 or fewer	172	3.12	2.30	1.85
26 to 100	44	3.05	2.41	2.23
101 to 500	5	3.00	2.00	2.40
501 or more	9	2.89	2.22	1.89
No response	25	3.26	1.96	1.54

Table 27c: Number of Companies/Employers for Whom Services are Provided, Domain III

Number of Companies/Employers	Frequency	Importance	Criticality	Difficulty
25 or fewer	172	2.72	1.81	2.00
26 to 100	44	2.55	1.86	2.32
101 to 500	5	2.60	1.20	1.80
501 or more	9	2.78	1.89	2.00
No response	25	2.92	1.67	1.72

Table 27d: Number of Companies/Employers for Whom Services are Provided, Domain IV

Number of Companies/Employers	Frequency	Importance	Criticality	Difficulty
25 or fewer	172	2.18	1.67	1.63
26 to 100	44	2.23	1.86	1.82
101 to 500	5	2.80	1.40	1.40
501 or more	9	2.89	2.22	2.11
No response	25	2.11	1.54	1.33

Table 28a: Best Classification of Current Employment, Domain I

Best Classification	Frequency	Importance	Criticality	Difficulty
Business/industry	24	3.29	2.29	2.36
College/university	6	4.00	3.57	2.71
Government	15	2.93	2.00	1.60
Insurance company	42	3.07	2.26	1.98
Medical center/general hospital	16	2.75	1.94	2.06
Mental health center	0	---	---	---
Private nonprofit rehabilitation company	0	---	---	---
Private (proprietary) rehabilitation company	85	3.03	2.18	1.93
Private practice	23	3.08	2.26	1.92
Public school system	1	---	---	---
Social welfare agency	2	---	---	---
Third-party administrator	13	3.08	2.31	1.54
Other	11	2.82	2.09	2.27
No response	27	3.07	2.00	1.78

Table 28b: Best Classification of Current Employment, Domain II

Best Classification	Frequency	Importance	Criticality	Difficulty
Business/industry	24	3.29	2.86	2.57
College/university	6	3.71	3.14	2.71
Government	15	3.27	2.07	1.33
Insurance company	42	3.00	2.45	2.00
Medical center/general hospital	16	3.13	2.19	2.13
Mental health center	0	---	---	---
Private nonprofit rehabilitation company	0	---	---	---
Private (proprietary) rehabilitation company	85	2.99	2.16	1.87
Private practice	23	3.08	2.39	1.96
Public school system	1	---	---	---
Social welfare agency	2	---	---	---
Third-party administrator	13	3.31	2.54	1.85
Other	11	3.27	2.00	1.64
No response	27	3.26	1.96	1.50

Table 28c: Best Classification of Current Employment, Domain III

Best Classification	Frequency	Importance	Criticality	Difficulty
Business/industry	24	3.07	2.14	2.14
College/university	6	3.50	2.83	2.33
Government	15	2.47	1.67	1.87
Insurance company	42	2.71	1.83	2.00
Medical center/general hospital	16	2.94	1.69	2.56
Mental health center	0	---	---	---
Private nonprofit rehabilitation company	0	---	---	---
Private (proprietary) rehabilitation company	85	2.56	1.72	1.94
Private practice	23	2.63	1.91	2.17
Public school system	1	---	---	---
Social welfare agency	2	---	---	---
Third-party administrator	13	2.85	1.62	1.69
Other	11	2.64	1.64	2.36
No response	27	2.88	1.67	1.80

Table 28d: Best Classification of Current Employment, Domain IV

Best Classification	Frequency	Importance	Criticality	Difficulty
Business/industry	24	2.71	1.93	1.79
College/university	6	2.86	2.57	1.57
Government	15	2.00	1.87	1.60
Insurance company	42	2.24	1.64	1.81
Medical center/general hospital	16	3.19	2.38	2.13
Mental health center	0	---	---	---
Private nonprofit rehabilitation company	0	---	---	---
Private (proprietary) rehabilitation company	85	1.91	1.42	1.50
Private practice	23	2.13	1.83	1.75
Public school system	1	4.00	3.00	2.00
Social welfare agency	2	2.00	1.50	1.50
Third-party administrator	13	2.38	1.77	1.69
Other	11	2.45	1.82	1.55
No response	27	2.19	1.65	1.44

Table 29a: Highest Level of Education, Domain I

Highest Level of Education	Frequency	Importance	Criticality	Difficulty
Nursing diploma	7	3.29	2.57	1.86
Associate degree	11	3.45	2.00	1.82
Bachelor's degree	102	2.93	2.16	1.97
Master's degree	98	3.06	2.19	1.95
Doctoral degree	7	3.57	3.00	2.43
Other	3	---	---	---
No response	27	3.17	2.17	1.87

Table 29b: Highest Level of Education, Domain II

Highest Level of Education	Frequency	Importance	Criticality	Difficulty
Nursing diploma	7	3.00	2.57	2.00
Associate degree	11	3.00	2.09	1.55
Bachelor's degree	102	3.13	2.28	1.88
Master's degree	98	3.09	2.29	1.96
Doctoral degree	7	3.71	2.86	2.29
Other	3	---	---	---
No response	27	3.13	2.10	1.69

Table 29c: Highest Level of Education, Domain III

Highest Level of Education	Frequency	Importance	Criticality	Difficulty
Nursing diploma	7	3.14	2.14	1.57
Associate degree	11	2.64	1.73	1.73
Bachelor's degree	102	2.65	1.75	2.05
Master's degree	98	2.69	1.79	2.08
Doctoral degree	7	2.86	2.29	2.29
Other	3	---	---	---
No response	27	2.93	1.77	1.81

Table 29d: Highest Level of Education, Domain IV

Highest Level of Education	Frequency	Importance	Criticality	Difficulty
Nursing diploma	7	2.43	2.14	1.71
Associate degree	11	2.36	1.55	1.36
Bachelor's degree	102	2.25	1.67	1.65
Master's degree	98	2.16	1.71	1.70
Doctoral degree	7	2.86	2.43	2.00
Other	3	---	---	---
No response	27	2.10	1.59	1.40

Table 30a: Annual Income from Disability Management, Domain I

Annual Income	Frequency	Importance	Criticality	Difficulty
\$25,000 or less	11	3.36	2.55	2.00
\$25,001 to \$50,000	26	3.00	2.15	1.85
\$50,001 to \$75,000	107	3.15	2.28	2.02
\$75,001 to \$100,000	49	2.82	2.16	1.90
More than \$100,000	29	2.97	2.00	2.03
No response	30	3.18	2.12	1.83

Table 30b: Annual Income from Disability Management, Domain II

Annual Income	Frequency	Importance	Criticality	Difficulty
\$25,000 or less	11	3.45	2.82	2.27
\$25,001 to \$50,000	26	2.96	2.12	1.41
\$50,001 to \$75,000	107	3.17	2.32	1.94
\$75,001 to \$100,000	49	2.98	2.31	2.04
More than \$100,000	29	3.03	2.21	2.14
No response	30	3.20	2.12	1.59

Table 30c: Annual Income from Disability Management, Domain III

Annual Income	Frequency	Importance	Criticality	Difficulty
\$25,000 or less	11	2.73	2.36	2.36
\$25,001 to \$50,000	26	2.27	1.88	1.93
\$50,001 to \$75,000	107	2.35	1.86	2.04
\$75,001 to \$100,000	49	2.26	1.63	2.06
More than \$100,000	29	2.25	1.59	2.17
No response	30	2.83	1.77	1.75

Table 30d: Annual Income from Disability Management, Domain IV

Annual Income	Frequency	Importance	Criticality	Difficulty
\$25,000 or less	11	2.45	1.91	2.00
\$25,001 to \$50,000	26	2.00	1.50	1.41
\$50,001 to \$75,000	107	2.26	1.79	1.75
\$75,001 to \$100,000	49	2.24	1.69	1.55
More than \$100,000	29	2.14	1.62	1.76
No response	30	2.23	1.64	1.43

CONCLUSION

CDMSC conducted the role and function study to describe the practice of Certified Disability Management Specialists as a means for determining the content specifications for its certification examination. One thousand five hundred eighty-six disability management specialists on the rolls of several organizations were asked to participate in the validation survey, and when the individuals who could not be reached were dropped from the total, 259 (16.6%) provided qualified, usable responses. Responses to items in the demographic portion of the survey support the conclusion that participants constitute a reasonable sample of the profession across a variety of practice settings.

Domains were validated using scales for importance, criticality, and difficulty. Tasks and knowledge and skill statements were validated using scales for criticality and difficulty. The importance scale offered insight into how essential the domain is for the entry-level Certified Disability Management Specialist. Criticality (potential for harm) and difficulty (how often) scales also supplied support for decision making about the role and function, which should be considered when making decisions about the certification examination.

Data collected in the validation study is reliable and gives clear evidence that the domains and tasks are accurate elements of responsibility for the entry-level Certified Disability Management Specialist and that the knowledge and skill are appropriate. The certification examination should assess knowledge and skill associated with these essential responsibilities because they bear a demonstrable basis in practice.

Test Specifications

The recommended test specifications presented in this section are based on the equal contribution of all respondents on the importance and criticality scales for a test of 125 scored items.

Table 31: Domain Specifications Based on Importance and Criticality

Domain	Importance	Criticality	Percent of Test	Number of Questions
Disability and Work Interruption Case Management	3.06	2.20	29.99	38
Workplace Intervention for Disability Prevention	3.11	2.28	31.51	39
Program Development, Management, and Evaluation	2.71	1.80	21.66	27
Employment Leaves and Benefits Administration	2.22	1.71	16.84	21

Classification System for the Certified Disability Management Specialist

The following pages present the content classification system validated through the 2009 CDMSC Role and Function Study.

Task Specifications for Domain I Based on Importance and Criticality

Disability and Work Interruption Case Management	Importance	Criticality	Percent of Test	Percent of Domain	Number of Questions
Perform individual case analyses and benefits assessments	3.47	2.49	3.7	12.34	5
Review disability case management interventions	2.89	2.11	2.62	8.72	3
Promote collaboration among stakeholders	3.17	2.10	2.86	9.55	4
Perform worksite/job analyses	3.07	2.24	2.96	9.86	4
Develop return-to-work and work retention plans	3.24	2.25	3.13	10.45	4
Implement interventions	2.92	2.10	2.64	8.79	3
Coordinate benefits, services, and community resources	3.03	2.10	2.74	9.12	3
Monitor case progress	3.06	2.06	2.71	9.04	3
Communicate in compliance with practice standards & regulations	2.95	1.91	2.42	8.08	3
Develop solutions that optimize health and employment	2.62	1.76	1.98	6.6	3
Communicate benefits and employment policies	2.70	1.93	2.23	7.45	3

Disability and Work Interruption Case Management		
010000		38 Questions
010100	Perform comprehensive individual case analyses (e.g., initial evaluation, vocational assessment, multi-point assessment) and benefits assessments using best practices in order to develop appropriate interventions.	5 Questions
	Knowledge of:	
010101	Case management principles and practice	
010102	Medical, functional, vocational, psychological, and social aspects of disability	
010103	Medical terminology, treatment, and protocols	
010104	Benefits systems, plan designs, and processes	
010105	Internal and external resources	

010106	Diverse populations and their characteristics	
010107	Work, health, and work/life behaviors	
010108	Psychosocial adjustment theory	
010109	Case documentation	
010110	Ethical, legal, and regulatory issues	
010111	Psychometrics	
	Skill in:	
010112	Gathering medical, functional, psychological, and vocational information	
010113	Administering, scoring, and interpreting assessment tools	
010114	Using accepted interviewing techniques	
010115	Interpreting case-specific local, state, and federal regulations	
010116	Synthesizing data in order to compile a comprehensive overview of case information	
010117	Interpreting benefits systems and plan designs	
010118	Developing an action plan for case management	
010119	Maximizing internal and external resources	
010120	Documenting pertinent case activities and results	
010121	Sharing pertinent case information with appropriate stakeholders	
010122	Using time management principles	
010123	Organizing and maintaining case files	
010124	Working effectively across and within diverse populations	
010200	Review disability case management interventions using standards of care in order to promote quality care, recovery, and cost effectiveness.	3 Questions
	Knowledge of:	
010201	Case management principles and practice	
010202	Medical, functional, vocational, psychological, and social aspects of disability	
010203	Medical terminology, treatment, and protocols	
010204	Internal and external resources	
010205	Cost containment strategies	
010206	Health and welfare, and company benefits	
010207	Ethical, legal, and regulatory issues	
010208	Diverse populations and their characteristics	
010209	Organizational practice and policy	
	Skill in:	
010210	Gathering relevant case information	
010211	Analyzing data (e.g., benefits, medical and functional reports, internal and external resources, plan designs, available financial resources)	
010212	Synthesizing information	
010213	Using medical terminology, treatments, and protocols	
010214	Adhering to standards of quality care	

010300	Promote collaboration among stakeholders using effective communication strategies in order to optimize functional recovery.	4 Questions
	Knowledge of:	
010301	Case management principles and practice	
010302	Effective communication strategies	
010303	Negotiation and conflict resolution strategies	
010304	Organizational practice and policy	
010305	Employee/labor relations and policy	
010306	Medical, functional, vocational, psychological, and social aspects of disability	
010307	Ethical, legal, and regulatory issues	
	Skill in:	
010308	Identifying key stakeholders	
010309	Developing partnership with stakeholders	
010310	Identifying and addressing the conflicting interests of stakeholders	
010311	Influencing and negotiating solutions with stakeholders	
010312	Facilitating attitude and behavior change	
010313	Using return-to-work and work retention applications	
010400	Perform worksite/job analyses using observation, interview, and records review in order to determine the requirements of jobs and appropriate accommodations.	4 Questions
	Knowledge of:	
010401	Worksite/job analysis techniques and methods	
010402	Worksite/job modification and accommodation practices and strategies	
010403	Medical, functional, vocational, psychological, and social aspects of disability	
010404	Ergonomics and human factors	
010405	Occupational information resources	
	Skill in:	
010406	Collecting worksite/job analysis data through observations, assessments, and interviews	
010407	Identifying job functions and quantifying their exertional and non-exertional demands	
010408	Analyzing worksite/job analysis data	
010409	Interpreting worksite/job analysis information (e.g., observations, records, data from interviews)	
010410	Negotiating and implementing job accommodations	

010500	Develop individualized return-to-work and work retention plans consistent with practice standards and program policy by collaborating with relevant stakeholders in order to facilitate successful employment outcomes.	4 Questions
	Knowledge of:	
010501	Medical, functional, vocational, psychological, and social aspects of disability	
010502	Classification of job functions and skills	
010503	Transferable skills analyses	
010504	Ergonomics and human factors	
010505	Vocational planning process	
010506	Job development and placement theory and approaches	
010507	Career development theory	
010508	Employment law and practice	
010509	Employee/labor relations and policy	
010510	Benefits systems, plan designs, and processes	
010511	Return-to-work and work-retention principles	
010512	Internal and external resources	
010513	Conflict resolution	
010514	Ethical, legal, and regulatory issues	
010515	Diverse populations and their characteristics	
010516	Organizational climate and culture	
	Skill in:	
010517	Gathering personal, vocational, medical, psychological, and functional information	
010518	Interpreting personal, vocational, medical, psychological, and functional information	
010519	Assessing psychosocial issues	
010520	Conducting worksite/job analyses	
010521	Using worksite/job modification and accommodation strategies and techniques	
010522	Synthesizing functional capacity and job demand information	
010523	Identifying key stakeholders	
010524	Assessing business management and labor issues	
010525	Developing transitional work plans	
010600	Implement interventions using appropriate counseling, behavior change techniques, and accommodation options in order to optimize functioning and productivity.	3 Questions
	Knowledge of:	
010601	Counseling theory and techniques	
010602	Behavior change techniques	
010603	Medical, functional, vocational, psychological, and social aspects of disability	
010604	Job modification and accommodation practices and strategies	
010605	Personality and motivation theory	

010606	Diverse populations and their characteristics	
010607	Effective communication strategies	
010608	Ethical, legal, and regulatory issues	
	Skill in:	
010609	Performing initial and ongoing case assessments	
010610	Using interviewing techniques	
010611	Using counseling approaches effectively	
010612	Interpreting functional, medical, psychological, vocational, and occupational information	
010613	Implementing job accommodations and recommendations	
010614	Making referrals to internal and external resources	
010615	Documenting pertinent case activities and results	
010616	Working effectively across and within diverse populations	
010700	Coordinate benefits, services, and community resources (e.g., orthotics, prosthetics, functional capacity evaluation, independent medical evaluations, durable medical equipment, home care, assistive technology, vocational rehabilitation) through strategic planning in order to facilitate optimal functioning.	3 Questions
	Knowledge of:	
010701	Disability and health-related work interruption case management	
010702	Benefits systems, plan designs, and processes	
010703	Internal and external resources	
010704	Employment law and practices	
010705	Employee/labor relations principles	
010706	Ethical, legal, and regulatory issues	
	Skill in:	
010707	Interpreting functional, medical, psychological, vocational, and occupational information	
010708	Synthesizing information	
010709	Using internal and external resources and benefits systems	
010710	Developing strategic plans	
010711	Employing cost containment strategies	
010712	Partnering with vendors and stakeholders	
010713	Providing benefits counseling	
010800	Monitor case progress by assessing medical, health, and functional conditions on an on-going basis in order to optimize functional recovery and facilitate successful employment outcomes.	3 Questions
	Knowledge of:	
010801	Disability and health-related work interruption case management benchmarks	
010802	Evidence-based practice	
010803	Case management	
010804	Medical, functional, vocational, psychological, occupational, and social aspects of disability	
010805	Benefits systems, plan designs, and processes	

010806	Ethical, legal, and regulatory issues	
	Skill in:	
010807	Applying the principles of disability and health-related work interruption case management	
010808	Using established best practice and benchmarks	
010809	Analyzing medical, health, personal, occupational, vocational, psychological, and functional information	
010810	Synthesizing and interpreting data	
010811	Interpreting health and welfare, and company benefits plans	
010812	Monitoring case progress	
010813	Identifying assets and barriers to recovery	
010900	Communicate effectively in compliance with practice standards and regulations using electronic technology and information systems in order to efficiently disseminate appropriate information, keep stakeholders informed, document case activities, and prepare reports.	3 Questions
	Knowledge of:	
010901	Ethical, legal, and regulatory issues	
010902	Electronic technology and information systems	
010903	Time management strategies	
010904	Cost containment strategies	
	Skill in:	
010905	Adhering to ethical requirements in data management	
010906	Managing time and resources	
010907	Organizing case activities	
010908	Using electronic technology and information systems	
010909	Documenting pertinent case activities and results	
010910	Sharing pertinent case information with appropriate stakeholders	
011000	Develop solutions that optimize the health and employment situation of employees by addressing their health and work/life issues in a holistic manner in order to address barriers that affect productivity and employment outcomes.	3 Questions
	Knowledge of:	
011001	Problem solving methods	
011002	Medical, functional, vocational, psychological, and social aspects of disability	
011003	Factors influencing the whole person	
011004	Benefits systems, plan designs, and processes	
011005	Internal and external resources	
011006	Diverse populations and their characteristics	
011007	Strategies for balancing work/life activities	
	Skill in:	
011008	Counseling (e.g., work/life issues, benefits)	
011009	Synthesizing information	
011010	Making referrals to internal and external resources	

011011	Facilitating behavior changes	
011012	Developing problem solving strategies	
011013	Advocating for workplace policy and practices that mitigate work/life barriers	
011100	Communicate essential elements of benefits and employment policies to employees using clear language and appropriate documentation in order to mitigate adverse impact and facilitate informed decision making.	3 Questions
	Knowledge of:	
011101	Benefits systems, plan designs and processes	
011102	Employment law and practices	
011103	Effective communication strategies	
	Skill in:	
011104	Synthesizing information	
011105	Providing benefits counseling	
011106	Providing information to facilitate informed decision making	
011107	Projecting potential impact of decision options	

Task Specifications for Domain II Based on Importance and Criticality

Workplace Intervention for Disability Prevention	Importance	Criticality	Percent of Test	Percent of Domain	Number of Questions
Implement disability prevention practices	2.90	2.05	6.31	20.04	8
Develop a transitional work program	3.01	2.02	6.45	20.47	8
Develop process for worksite modification, job accommodation, or task reassignment	2.93	2.00	6.24	19.79	8
Recommend strategies to address ergonomic, safety, and risk factors	2.67	1.90	5.39	17.11	7
Recommend strategies that integrate benefits plan designs and related services	2.29	1.49	3.62	11.49	4
Promote health and wellness interventions	2.26	1.46	3.50	11.10	4

020000	Workplace Intervention for Disability Prevention	39 Questions
020100	Implement disability prevention practices (risk mitigation procedures such as worksite/ job analysis, job accommodation, ergonomic evaluation, health and wellness initiatives, health/disease management, and work/life programs) through training, education, and collaboration in order to change organizational behavior and integrate prevention as an essential component of organizational culture.	8 Questions
	Knowledge of:	
020100	Productivity, disability prevention, and risk mitigation practice and procedure	
020101	Organizational development and behavior	
020102	Business management strategies	
020103	Labor relations	
020104	Human resource management	
020105	Adult learning and group dynamics	
020106	Change management strategies	
020107	Program evaluation and reporting	
020108	Financial and statistical modeling	
020109	Effective communication strategies	
020110	Company benefits and programs	
020111	Job modification and accommodation practices and strategies	
	Skill in:	
020112	Evaluating organizational culture (e.g., labor/management relations, communications)	
020113	Evaluating policy, programs, and procedure	
020114	Facilitating sponsorship by leveraging the expertise of stakeholders	
020115	Advancing team development	

020116	Promoting behavior change	
020117	Organizing information	
020118	Communicating a business case effectively	
020119	Negotiating and influencing	
020120	Managing financial resources	
020121	Implementing a continuous improvement approach to productivity and prevention	
020122	Identifying content experts	
020123	Implementing effective training with the use of technology	
020124	Implementing job accommodations and recommendations	
020200	Develop a comprehensive transitional work program through collaboration with relevant stakeholders in order to facilitate optimal productivity, work retention, and value in the workplace.	8 Questions
	Knowledge of:	
020201	Labor/management relations and contracts	
020202	Employment law and practices	
020203	Transitional work program development and implementation	
020204	Pertinent federal, state, and local regulations (e.g., ADA, OSHA, Workers Compensation, HIPAA)	
020205	Organizational development and succession planning	
020206	Ergonomics	
020207	Interpretation of medical information, functional capacity, and medical aspects of disability	
020208	Jobs available in the organization and their requirements	
020209	Job and worksite modification, accommodation, and work hardening methodologies	
020210	Assistive technology	
020211	Psychosocial adjustment	
020212	Vocational assessment and counseling	
020213	Job development and job placement	
020214	Effective communication strategies	
020215	Ongoing needs of the workforce	
	Skill in:	
020216	Conducting an organizational assessment of essential job functions	
020217	Evaluating applicable policy and procedure	
020218	Partnering with human resources (e.g., staffing)	
020219	Communicating a business case effectively	
020220	Developing sponsorship from management	
020221	Synthesizing information	
020222	Complying with employment law and labor contracts	
020223	Partnering with vendors and stakeholders	
020224	Facilitating a team approach	
020225	Managing financial resources	
020226	Budgeting	
020227	Facilitating attitude and behavior change	
020228	Implementing data collection strategies	

020229	Interpreting disability, health, and absence data	
020230	Communicating effectively with stakeholders	
020231	Using information systems	
020232	Applying occupational and functional information to transitional work	
020233	Identifying assets and barriers to disability recovery	
020234	Implementing a continuous improvement approach to transitional work programs	
020235	Adapting to the ongoing needs of the workforce	
020300	Develop an interactive process for worksite modification, job accommodation, or task reassignment incorporating appropriate resources (e.g., ergonomics, assistive technologies) in order to facilitate optimal functioning in the workplace and foster work retention.	8 Questions
	Knowledge of:	
020301	Business management strategies	
020302	Organizational development and succession planning	
020303	Group dynamics	
020304	Employment practice	
020305	Worksite/job analysis	
020306	Vocational assessment and counseling	
020307	Psychosocial adjustment theory	
020308	Medical and rehabilitation treatment and protocols	
020309	Ergonomics	
020310	Job and worksite modification, accommodation, and work hardening methodologies	
020311	Assistive technologies	
020312	Employment law and practices	
	Skill in:	
020313	Conducting an organizational assessment of essential job functions	
020314	Evaluating policies and procedures	
020315	Partnering with human resources and legal counsel	
020316	Communicating a business case effectively	
020317	Developing sponsorship from management	
020318	Synthesizing and communicating information	
020319	Applying labor relations law and contracts	
020320	Partnering with vendors and stakeholders	
020321	Facilitating group process and team consensus	
020322	Managing financial resources	
020323	Budgeting	
020324	Facilitating attitude and behavior change	
020325	Implementing data collection strategies	
020326	Interpreting disability, health, and absence data	
020327	Communicating effectively with stakeholders	
020328	Using information systems	
020329	Identifying assets and barriers to disability recovery	
020330	Applying job modification and accommodation practices and	

	strategies	
020331	Identifying resources for technical assistance	
020332	Applying work hardening and conditioning methodologies	
020333	Using assistive technologies	
020334	Coordinating resources	
020335	Working effectively across and within diverse populations	
020400	Recommend strategies to address ergonomic, safety, and risk factors using available data in order to prevent disability and mitigate exposure.	7 Questions
	Knowledge of:	
020401	Trend analysis and incident investigations	
020402	Risk management principles	
020403	Ergonomics	
020404	Worksite/job analysis	
020405	Safety, health, and environmental factors	
020406	Employment practice	
020407	Health and welfare benefits	
020408	Pertinent federal, state, and local regulations (e.g., ADA, OSHA, Workers Compensation, HIPAA)	
020409	Job modification and accommodation practices and strategies	
020410	Medical terminology, treatment, and protocols	
020411	Best practices for addressing ergonomic, safety, and risk factors	
	Skill in:	
020412	Evaluating policies and procedures	
020413	Applying employment law and labor contracts	
020414	Implementing data collection strategies	
020415	Collecting medical, functional, vocational, and psychosocial data	
020416	Interpreting and communicating data	
020417	Synthesizing information	
020418	Communicating a business case effectively	
020419	Influencing behavior change	
020420	Applying occupational information to worksite interventions	
020421	Assessing work functions and behaviors	
020422	Conducting job analyses	
020423	Implementing job modification and accommodation practices and strategies	
020424	Communicating effectively with stakeholders	
020425	Partnering with vendors and stakeholders	
020426	Applying regulatory standards	

020500	Recommend strategies that integrate benefits plan designs and related services (e.g., work/life programs, community resources, medical services) by evaluating alignment and effectiveness in order to promote prevention, optimal productivity, quality care, and cost containment.	4 Questions
	Knowledge of:	
020501	Benefits plan designs and contracts	
020502	Pertinent federal, state, and local regulations (e.g., ADA, OSHA, Workers Compensation, HIPAA)	
020503	Service delivery models	
020504	Business management strategies	
020505	Organizational development and change management strategies	
020506	Methods and metrics for evaluating the impact of benefits plans	
	Skill in:	
020507	Evaluating the impact of benefits plan designs, policy, and procedures	
020508	Identifying relevant data sources	
020509	Identifying indicators of satisfaction and productivity	
020510	Interpreting disability, health, and absence data	
020511	Synthesizing information	
020512	Communicating effectively with stakeholders	
020513	Communicating a business case effectively	
020514	Facilitating a team approach	
020515	Coordinating resources and services	
020516	Partnering with vendors and stakeholders	
020517	Facilitating attitude and behavior change	
020518	Applying employment law and labor contracts	
020519	Partnering with human resources	
020520	Budgeting	
020521	Managing financial resources	
020522	Using information systems	
020523	Applying tools to evaluate efficiency and effectiveness	
020600	Promote health and wellness interventions that demonstrate measurable value by targeting the specific needs of employees and the organization in order to increase organizational health and productivity.	4 Questions
	Knowledge of:	
020601	Best practice in health and wellness	
020602	Illness and injury prevention	
020603	Health and disability trends	
020604	Workforce demographics that affect health (e.g., gender, age)	
020605	Public health community resources	
020606	Evaluate and communicate return on investment	
020607	Program evaluation and reporting	
020608	Psychosocial adjustment theory	
020609	Personality and motivation theory	

020610	Diverse populations and their characteristics	
020611	Organizational development and change management strategies	
	Skill in:	
020612	Analyzing employee health risk data	
020613	Implementing data collection strategies	
020614	Interpreting disability, health, and absence data	
020615	Evaluating policies and procedures	
020616	Estimating financial impact	
020617	Partnering with human resources	
020618	Identifying best practices and providers	
020619	Applying interventions to address mental health, substance abuse, and workplace stressors	
020620	Facilitating attitude and behavior change	
020621	Partnering with public health, medical communities, vendors, and stakeholders	
020622	Synthesizing information	
020623	Communicating effectively with stakeholders	
020624	Coordinating resources	
020625	Using information systems	
020626	Evaluating the efficiency and effectiveness of health and wellness interventions	

Task Specifications for Domain III Based on Importance and Criticality

Program Development, Management, and Evaluation	Importance	Criticality	Percent of Test	Percent of Domain	Number of Questions
Establish program goals	2.35	1.43	1.94	8.96	2
Design the program	2.47	1.53	2.18	10.08	3
Design a financial plan	2.29	1.51	2.00	9.25	3
Develop staff	2.36	1.52	2.08	9.60	3
Select the metrics for evaluating the program	2.29	1.40	1.86	8.57	2
Implement cross-functional processes	2.08	1.35	1.62	7.50	2
Offer education and training	2.50	1.43	2.07	9.56	3
Manage program's operational and financial performance	2.31	1.47	1.97	9.11	2
Integrate data from all relevant sources	2.33	1.44	1.94	8.94	2
Procure internal and external services	2.17	1.35	1.69	7.81	2
Manage service providers	2.46	1.62	2.30	10.62	3

030000	Program Development, Management, and Evaluation	27 Questions
030100	Establish program goals by assessing organizational needs and evaluating best practice in order to direct program design.	2 Questions
	Knowledge of:	
030101	Principles of needs assessment	
030102	Principles of program design, management, and evaluation	
030103	Qualitative and quantitative research design	
030104	Statistical applications	
030105	Benefits entitlement systems and processes	
030106	Safety and risk management principles	
030107	Employee/labor relations principles	
030108	Principles of business and finance	
030109	Human resource principles	
030110	Pertinent federal, state, and local regulations (e.g., ADA, OSHA, Workers Compensation, HIPAA)	
030111	Disability and health-related work interruption management	
030112	Business and corporate terminology	
030113	Organizational development theory	
030114	Industry-specific best practice	

	Skill in:	
030115	Implementing project management	
030116	Using computer skills	
030117	Applying qualitative and quantitative methods	
030118	Integrating the principles of business and finance	
030119	Applying plan design principles	
030120	Working effectively across and within diverse populations	
030121	Synthesizing research	
030122	Promoting ethical practice	
030123	Communicating effectively	
030200	Design the program in cooperation with a team of champions (e.g., management, labor) and with supporting policies, practices, roles, and benchmarks in order to achieve established program goals.	3 Questions
	Knowledge of:	
030201	Principles of business and finance (e.g., cost/benefit analysis, return on investment)	
030202	Best practice disability management concepts and principles	
030203	Communication and presentation principles	
030204	Financial and statistical modeling	
030205	Group theory and team building	
030206	Project management	
030207	Disability policy and procedure	
030208	Organizational development	
030209	Organizational structure (e.g., stakeholders, subject matter experts)	
030210	Stakeholder needs and interests	
	Skill in:	
030211	Communicating effectively	
030212	Influencing and negotiating with others	
030213	Evaluating the effectiveness of programs	
030214	Gathering, synthesizing, and interpreting disability management program findings	
030215	Interpreting financial and risk data	
030216	Presenting qualitative and quantitative research	
030217	Analyzing the cost and benefits of potential actions	
030218	Presenting data pertaining to variations across settings	
030219	Facilitating meetings	
030220	Evaluating team members (e.g., learning styles, meeting behaviors)	
030221	Designing programs aligned with organizational rewards and incentives	
030300	Design a financial plan that sustains a viable disability management program for multiple years by evaluating the resources needed in order to assist the organization in sizing its financial obligation.	3 Questions
	Knowledge of:	
030301	Principles of business and finance	
030302	Communication and presentation techniques	

030303	Financial and statistical modeling	
030304	Business strategy and planning (e.g., budget cycles)	
030305	Standard business analysis tools (e.g., fishbone diagrams, Pareto charts)	
030306	Stakeholder needs and interests	
	Skill in:	
030307	Identifying stakeholders	
030308	Developing financial plans	
030309	Interpreting financial and risk data	
030310	Comparing program data to best practice and research	
030311	Presenting qualitative and quantitative research	
030312	Analyzing complex data sets	
0304000	Develop staff consistent with program goals and the financial plan in order to achieve established program goals.	3 Questions
	Knowledge of:	
030401	Leadership principles	
030402	Organizational behavior, development, and theory	
030403	Communication and presentation techniques	
030404	Staff development principles and practices	
030405	Personality and motivation theory	
030406	Adult learning theory	
030407	Supervision theory	
030408	Best practices and principles of disability management	
030409	Program design, management, and evaluation	
	Skill in:	
030410	Applying leadership principles	
030411	Advocating for staff development needs	
030412	Using personality and motivation assessment methods	
030413	Communicating effectively	
030414	Applying effective instructional strategies	
030415	Using effective presentation skills	
030416	Applying concepts of organizational development	
030417	Applying concepts of program design	
030418	Incorporating change management strategies	
030419	Working effectively within the financial plan	
030500	Select the metrics by which the program will be evaluated based on goals and design, best practice, and benchmarking data in order to assess effectiveness and make adjustments as needed.	2 Questions
	Knowledge of:	
030501	Program evaluation tools and methods	
030502	Effective strategies for communicating data	
030503	Communication tools and linkages (e.g., electronic data linkages)	
030504	Research-based programming	
030505	Metric identification and development	

030506	Industry specific best practices	
	Skill in:	
030507	Selecting metrics by which the program is to be evaluated	
030508	Identifying sources of data	
030509	Identifying methods for collecting data	
030510	Identifying methods for analyzing data	
030511	Evaluating results against established metrics	
030512	Interpreting and explaining data	
030513	Producing effective reports based on chosen metrics	
030514	Making effective presentations	
030600	Implement cross-functional processes consistent with program philosophy, objectives, and best practice in order to meet program goals.	2 Questions
	Knowledge of:	
030601	Program philosophies and objectives	
030602	Organizational policy and procedures	
030603	Industry-specific best practices	
030604	Team building and management	
030605	Organizational process mapping relevant to program	
030606	Program management principles	
030607	Change management strategies	
030608	Negotiation and conflict resolution strategies	
	Skill in:	
030609	Communicating effectively	
030610	Working effectively across departments or groups within the organization	
030611	Teaching others about program philosophy, objectives, practices, and procedures	
030612	Using effective presentation skills	
030613	Bringing others together to reconcile differences when they occur	
030614	Incorporating change management strategies	
030700	Offer education and training through collaboration with stakeholders (e.g., supervisors, management, employees, labor organizations) in order to promote program goals.	3 Questions
	Knowledge of:	
030701	Adult learning theory	
030702	Group dynamics	
030703	Program design and goals	
030704	Industry-specific best practices	
030705	Employee/labor relations	
030706	Pertinent federal, state, and local regulations (e.g., ADA, OSHA, Workers Compensation, HIPAA)	
030707	Organizational development principles	
	Skill in:	
030708	Applying leadership techniques	

030709	Developing curriculum/training elements	
030710	Designing training programs consistent with adult learning theory	
030711	Communicating effectively	
030712	Using effective presentation skills	
030713	Applying principles of organizational development in training approach	
030714	Incorporating change management strategies	
030800	Manage the program's operational and financial performance on an ongoing basis using established metrics in order to identify costs, trends, and productivity loss for the purpose of program evaluation and return on investment.	2 Questions
	Knowledge of:	
030801	Business plans and models	
030802	Change management strategies	
030803	Statistical and financial applications and modeling	
030804	Strategies for identifying and analyzing program costs and benefits (e.g., productivity loss)	
030805	Effective communication strategies	
030806	Communication tools and linkages. (e.g., electronic data linkages)	
030807	Organizational development	
030808	Industry-related benchmarks	
	Skill in:	
030809	Integrating business plans and models with stakeholder interests	
030810	Constructing business cases for programs based on their financial performance	
030811	Influencing and negotiating with others	
030812	Making effective presentations	
030813	Communicating effectively	
030814	Planning and modeling	
030815	Analyzing data sets	
030816	Targeting program improvements based on analysis	
030900	Integrate data from all relevant sources by collecting, organizing, and interpreting information and by using available information systems in order to support decision making for program improvement and to assess cost effectiveness and return on investment.	2 Questions
	Knowledge of:	
030901	Information systems	
030902	Decision-making strategies	
030903	Project management principles	
030904	Standard statistical analytics	
030905	Organizational structure (e.g., stockholders, SMEs)	
030906	Financial administration	
	Skill in:	
030907	Identifying sources of data and data collection strategies	
030908	Identifying strategies for integrating data from various sources	

030909	Identifying methods for analyzing data	
030910	Interpreting results and drawing reasonable conclusions	
030911	Using data for decision making	
030912	Communicating effectively	
031000	Procure internal and external services using commonly accepted selection criteria in order to achieve program goals.	2 Questions
	Knowledge of:	
031001	Community resources and service delivery models	
031002	Performance standards	
031003	Objective selection criteria	
031004	Procurement practices	
031005	Effective communication strategies	
031006	Negotiation and conflict resolution	
031007	Statistical and financial applications	
031008	Vendor and product evaluation methods (e.g., use of evidence-based practices)	
031009	Best practice principles of disability management	
031010	Public relations	
	Skill in:	
031011	Researching community and business resources	
031012	Translating stakeholder needs to vendor communities	
031013	Persuading vendors to respond to stakeholder need	
031014	Maintaining relationships with a wide vendor community	
031015	Incorporating research into the selection of vendors	
031016	Maintaining optimal transparency in the selection process	
031017	Applying analytical and critical thinking	
031018	Writing grants and requests for proposals	
031019	Responding to grant and proposal requests	
031020	Influencing and negotiating with others	
031021	Developing business strategies and plans	
031100	Manage service providers using defined performance standards in order to maximize the quality of services and return on investment.	3 Questions
	Knowledge of:	
031101	Vendor management principles	
031102	Information Systems	
031103	Vendor and product evaluation methods (e.g., use of evidence-based practices)	
031104	Methods for determining cost benefit	
031105	Best practices of disability management	
031106	Program design, management, and evaluation	
	Skill in:	
031107	Developing and managing vendor relationships	
031108	Influencing and negotiating with others	
031109	Building effective teams with vendors	

031110	Analyzing costs in relation to outcomes and the contract	
031111	Integrating communication links with and among service providers	

Task Specifications for Domain IV Based on Importance, Criticality, and Difficulty

Employment Leaves and Benefits Administration	Importance	Criticality	Percent of Test	Percent of Domain	Number of Questions
Manage employment leaves	2.46	1.85	4.57	27.11	6
Administer health and welfare plans	2.48	1.88	4.69	27.83	6
Manage payroll and systems data	2.17	1.73	3.75	22.28	4
Identify risks associated with interruptions and leaves	2.31	1.65	3.84	22.78	5

040000	Employment Leaves and Benefits Administration	21 Questions
040100	Manage employment health-related leaves in accordance with local, state, and federal requirements in order to maintain legal and regulatory compliance.	6 Questions
	Knowledge of:	
040101	Definitive sources of information (e.g., Internet, published materials)	
040102	Subject matter experts within the organization (e.g., legal, HR)	
040103	Information systems	
040104	Pertinent federal, state, and local regulations (e.g., ADA, OSHA, Workers Compensation, HIPAA)	
040105	Effective communication strategies	
040106	Organizational practice and policy	
040107	Principles of change management	
040108	Employee/labor relations principles	
040109	Human resource principles	
040110	Mathematical concepts related to benefits management	
	Skills in:	
040111	Managing one's own time and the time of others	
040112	Applying new information to current and future problem-solving and decision making	
040113	Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems	
040114	Solving problems	
040115	Maintaining focus on stakeholders	
040116	Communicating effectively	

040200	Administer health and welfare plans consistent with government regulations and corporate requirements in order to provide appropriate employee entitlements as they pertain to health-related work interruptions.	6 Questions
	Knowledge of:	
040201	Pertinent federal, state, and local regulations (e.g., ADA, OSHA, Workers Compensation, HIPAA)	
040202	Benefits and entitlement programs and systems	
040203	Benefits plan design	
040204	Organizational practice and policy	
040205	Employee/labor relations principles	
040206	Human resource principles	
040207	Organizational structure (e.g., stakeholders, subject matter experts)	
040208	Negotiation and conflict resolution	
040209	Principles of change management	
040210	Information systems	
	Skills in:	
040211	Managing one's own time and the time of others	
040212	Applying new information to current and future problem-solving and decision making	
040213	Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems	
040214	Solving problems	
040215	Maintaining focus on stakeholders	
040216	Communicating effectively	
040300	Manage payroll and systems data relevant to employment leaves and benefits by maintaining accurate records in order to comply with legal and regulatory requirements (e.g., Sarbanes Oxley, employment and benefits laws).	4 Questions
	Knowledge of:	
040301	Pertinent federal, state, and local regulations (e.g., ADA, OSHA, Workers Compensation, HIPAA)	
040302	Benefits and entitlement programs and systems	
040303	Benefits plan design	
040304	Employee/labor relations principles	
040305	Human resources principles	
040306	Organizational structure (e.g., stakeholders, subject matter experts)	
040307	Negotiation and conflict resolution	
040308	Principles of change management	
040309	Organizational practice and policy	
040310	Information systems	
	Skills in:	
040311	Managing one's own time and the time of others	
040312	Applying new information to current and future problem-solving and decision making	

040313	Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems	
040314	Solving problems	
040315	Influencing and negotiating with others	
040316	Maintaining focus on stakeholders	
040317	Communicating effectively	
040318	Analyzing the costs and benefits of potential actions	
040319	Identifying measures or indicators of system performance	
040320	Working effectively across and within diverse populations	
040400	Identify risks associated with health-related work interruptions and employment leaves by referring to pertinent internal and external resources and regulations in order to influence organizational decision making.	5 Questions
	Knowledge of:	
040401	Pertinent federal, state, and local regulations (e.g., ADA, OSHA, Workers Compensation, HIPAA)	
040402	Benefits and entitlement programs and systems	
040403	Benefits plan design	
040404	Employee/labor relations principles	
040405	Human resources principles	
040406	Organizational structure (e.g., stakeholders, subject matter experts)	
040407	Negotiation and conflict resolution	
040408	Principles of change management	
040409	Organizational practice and policy	
040410	Information systems	
	Skill in:	
040411	Managing one's own time and the time of others	
040412	Applying new information to current and future problem-solving and decision making	
040413	Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems	
040414	Solving problems	
040415	Influencing and negotiating with others	
040416	Maintaining focus on stakeholders	
040417	Communicating effectively	
040418	Analyzing the costs and benefits of potential actions	
040419	Identifying measures or indicators of system performance	
040420	Working effectively across and within diverse populations	

APPENDIX A: COPY OF THE ROLE AND FUNCTION SURVEY



CDMSC Online Role and Function Survey

Please use the link below to complete the survey.

[Click here to begin the CDMSC survey](#)

All responses are kept strictly confidential by CASTLE Worldwide, Inc. Computer programs are used to analyze the data.

Neither individual persons or companies, nor their particular data, will be identifiable in any report generated using information obtained through this survey.

Before accessing the survey, please note the following system requirements:

- JavaScript (This will allow required fields of the survey to be validated.)
- Cookies (Cookies hold data to verify that you have logged in properly and retain your session from page to page. In addition, cookies allow you to stop and restart the survey.)
- Pop-ups (In some browsers, the Help window for the survey may be blocked as a pop-up.)

Please login to start the survey ...

User Name:

Password:

Overview

The Certification of Disability Management Specialists Commission (CDMSC) is conducting a role and function study for disability management specialists. As part of the investigation CDMSC requests your participation in the online role and function survey. The survey will define the basis of the certification examination for disability management specialists for years to come. Your participation in the survey is critical in determining this all-important requirement for CDMSC.

Your participation in the survey should take no more than 25 to 30 minutes. We ask that you respond **NO LATER** than **April 21, 2009**. If you have questions please email us at cdmsc_survey@castleworldwide.com. *If you cannot complete the survey in a single sitting, you can log out and log back in* until you have finished. Thank you in advance for your time and participation in this very important project.

Step 1 Overview: You are currently viewing the survey's Overview page. You may return to this page at any time by clicking Overview on the left.

Step 2 Definition of Terms: In this section, you will be provided with a list of definitions and terms that are used throughout the survey. We suggest that you review the definitions and terms before responding to any survey questions.

Step 3 Domain Evaluation: In this section, you will be asked to review the performance domains that define the role and function of a disability management specialist at the level required for certification. We ask that you rate the importance, criticality, and difficulty of each domain as it pertains to the role and function of an entry level Certified Disability Management Specialist.

Step 4 Task Evaluation: In this section, you will be asked to review the tasks required of an entry level Certified Disability Management Specialist in each domain. You will also be asked to rate the task according to importance, criticality, and difficulty as it pertains to the role and function of an entry level Certified Disability Management Specialist.

Step 5 Demographics: In this section, you will be asked to provide background information about yourself.

You can log out from the survey and log back in as you desire in order to complete it at your earliest convenience prior to the deadline. If you desire to log out, please keep in mind that you should scroll to the bottom of the section you are working on and then click on the NEXT, SUBMIT, or NEXT PAGE button at the end of the section. If you do not click on one of those buttons, your work in that section will be lost. When you return to the survey, use the link you received in the email invitation. You cannot bookmark a page within the survey, exit the survey, and then later try to access the survey using the bookmarked link.

At any time during the survey, you may click on **HELP** to see instructions and description of survey navigation. Thank you in advance for your help with this very important project.

The deadline to complete and submit this survey is **April 21, 2009**.

Definition of Terms

The Certified Disability Management Specialist prevents and minimizes the human and economic impact of illness and disability for both the employee and employer to optimize quality of care, productivity, organizational health, and regulatory compliance.

MINIMALLY COMPETENT STATEMENT

The minimally competent CDMS has attained the essential skills and knowledge to practice the profession of disability management in a manner that will likely cause no harm to come to the client.

Performance Domain: Performance domains are the major responsibilities or duties that define the role and function of disability management specialists at a level commensurate with certification. Four performance domains were developed by a panel of your peers and are included in this survey:

1. Disability and Health-Related Work Interruption Case Management
2. Workplace Intervention for Disability Prevention
3. Program Development, Management, and Evaluation
4. Employment Leaves and Benefits Administration

Tasks: A task is an activity that the individual does in a performance domain. The series of tasks in a performance domain collectively forms a comprehensive and detailed description of the performance domain. Typically, tasks answer such questions as:

What activity did you perform?

To whom or to what was your activity directed?

Why did you perform that activity?

How did you accomplish the activity?

Rating Scales

Importance: Importance is defined as a question: How essential is the domain to the competent performance of the entry-level Certified Disability Management Specialist?

- 0 = Of No Importance. Performance of the task is not essential to the job performance of the competent CDMS.
- 1 = Of Little Importance. Performance of the task is only slightly essential to the job performance of the competent CDMS.
- 2 = Moderately Important. Performance of the task is moderately essential to the job performance of the competent CDMS.
- 3 = Very Important. Performance of the task is clearly essential to the job performance of the competent CDMS.
- 4 = Extremely Important. Performance of the task is absolutely essential to the job performance of the competent CDMS.

Criticality: To what degree would the inability of the entry-level Certified Disability Management Specialist to perform duties in each performance domain or task be seen as causing harm to stakeholders? (Harm may be seen as physical, psychological, emotional, legal, financial, etc.)

- 0 = No Harm. Inability to perform tasks would lead to error with no adverse consequences.
- 1 = Minimal Harm. Inability to perform tasks would lead to error with minimal adverse consequences.
- 2 = Moderate Harm. Inability to perform tasks would lead to error with moderate adverse consequences.
- 3 = Substantial Harm. Inability to perform tasks would lead to error with substantial adverse consequences.
- 4 = Extreme Harm. Inability to perform tasks would lead to error with extreme adverse consequences.

Difficulty: Difficulty refers to the degree to which performance of the domains or tasks is complex for the entry-level Certified Disability Management Specialist.

- 0 = Not Difficult. Performance of tasks in this domain is easy, predictable, and routine.
- 1 = Minimally Difficult. Performance of tasks in this domain is slightly complicated.
- 2 = Moderately Difficult. Performance of tasks in this domain is somewhat complicated.
- 3 = Very Difficult. Performance of tasks in this domain is clearly complicated.
- 4 = Extremely Difficult. Performance of tasks in this domain is highly complicated and involves extensive decision making.

Domain Evaluation

Domain

[Importance](#)

[Criticality](#)

[Difficulty](#)

1. Disability and Health-Related Work Interruption Case Management

Please select...	Please select...	Please select...
------------------	------------------	------------------

2. Workplace Intervention for Disability Prevention

Please select...	Please select...	Please select...
------------------	------------------	------------------

3. Program Development, Management, and Evaluation

Please select...	Please select...	Please select...
------------------	------------------	------------------

4. Employment Leaves and Benefits Administration

Please select...	Please select...	Please select...
------------------	------------------	------------------

Task Evaluation

1. **Domain:** Disability and Health-Related Work Interruption Case Management

Task

[Importance](#)

[Criticality](#)

[Frequency](#)

1. Perform comprehensive individual case analyses (e.g., initial evaluation, vocational assessment, multi-point assessment) and benefits assessments using best practices in order to develop appropriate interventions.

Please select...	Please select...	Please select...
------------------	------------------	------------------

2. Review disability case management interventions using standards of care in order to promote quality care, recovery, and cost effectiveness.

Please select...	Please select...	Please select...
------------------	------------------	------------------

3. Promote collaboration among stakeholders using effective communication strategies in order to optimize functional recovery.

Please select...	Please select...	Please select...
------------------	------------------	------------------

4. Perform worksite/job analyses using observation, interview, and records review in order to determine the requirements of jobs and appropriate accommodations.

Please select...	Please select...	Please select...
------------------	------------------	------------------

5. Develop individualized return-to-work and work retention plans consistent with practice standards and program policies by collaborating with relevant stakeholders in order to facilitate successful employment outcomes.

Please select...	Please select...	Please select...
------------------	------------------	------------------

6. Implement interventions using appropriate counseling, behavior change techniques, and accommodation options in order to optimize functioning and productivity.

Please select...	Please select...	Please select...
------------------	------------------	------------------

7. Coordinate benefits, services, and community resources (e.g., orthotics, prosthetics, functional capacity evaluation, independent medical evaluations, durable medical equipment, home care, assistive technology, vocational rehabilitation) through strategic planning in order to facilitate optimal functioning.

Please select...	Please select...	Please select...
------------------	------------------	------------------

8. Monitor case progress by assessing medical, health, and functional conditions on an on-going basis in order to optimize functional recovery and facilitate successful employment outcomes.

Please select...	Please select...	Please select...
------------------	------------------	------------------

9. Communicate effectively in compliance with practice standards and regulations using electronic technology and information systems in order to efficiently disseminate appropriate information, keep stakeholders informed, document case activities, and prepare reports.

Please select...	Please select...	Please select...
------------------	------------------	------------------

10. Develop solutions that optimize the health and employment situation of employees by addressing their health and work/life issues in a holistic manner in order to address barriers that affect

productivity and employment outcomes.

Please select...	Please select...	Please select...
------------------	------------------	------------------

11. Communicate essential elements of benefits and employment policies to employees using clear language and appropriate documentation in order to mitigate adverse impact and facilitate informed decision making.

Please select...	Please select...	Please select...
------------------	------------------	------------------

2. Domain: Workplace Intervention for Disability Prevention

Task

[Importance](#)

[Criticality](#)

[Frequency](#)

1. Implement disability prevention practices (risk mitigation procedures such as worksite/job analysis, job accommodation, ergonomic evaluation, health and wellness initiatives, health/disease management, and work/life programs) through training, education, and collaboration in order to change organizational behavior and integrate prevention as an essential component of organizational culture.

Please select...	Please select...	Please select...
------------------	------------------	------------------

2. Develop a comprehensive transitional work program through collaboration with relevant stakeholders in order to facilitate optimal productivity, work retention, and value in the workplace.

Please select...	Please select...	Please select...
------------------	------------------	------------------

3. Develop an interactive process for worksite modification, job accommodation, or task reassignment incorporating appropriate resources (e.g., ergonomics, assistive technologies) in order to facilitate optimal functioning in the workplace and foster work retention.

Please select...	Please select...	Please select...
------------------	------------------	------------------

4. Recommend strategies to address ergonomic, safety, and risk factors using available data in order to prevent disability and mitigate exposure.

Please select...	Please select...	Please select...
------------------	------------------	------------------

5. Recommend strategies that integrate benefits plan designs and related services (e.g., work/life programs, community resources, medical services) by evaluating alignment and effectiveness in order to promote prevention, optimal productivity, quality care, and cost containment.

Please select...	Please select...	Please select...
------------------	------------------	------------------

6. Promote health and wellness interventions that demonstrate measurable value by targeting the specific needs of employees and the organization in order to increase organizational health and productivity.

Please select...	Please select...	Please select...
------------------	------------------	------------------

3. Domain: Program Development, Management, and Evaluation

Task

[Importance](#)

[Criticality](#)

[Frequency](#)

1. Establish program goals by assessing organizational needs and evaluating best practice in order to direct program design.

Please select...	Please select...	Please select...
------------------	------------------	------------------

2. Design the program in cooperation with a team of champions (e.g., management, labor) and supporting policies, practices, roles, and benchmarks in order to achieve established program goals.

Please select...	Please select...	Please select...
------------------	------------------	------------------

3. Design a financial plan that sustains a viable disability management program for multiple years by evaluating the resources needed in order to assist the organization in sizing its financial obligation.

Please select...	Please select...	Please select...
------------------	------------------	------------------

4. Develop staff consistent with program goals and the financial plan in order to achieve established program goals.

Please select...	Please select...	Please select...
------------------	------------------	------------------

5. Select the metrics by which the program will be evaluated based on goals and design, best practice, and benchmarking data in order to assess effectiveness and make adjustments as needed.

Please select...	Please select...	Please select...
------------------	------------------	------------------

6. Implement cross-functional processes consistent with program philosophy, objectives, and best practice in order to meet program goals.

Please select...	Please select...	Please select...
------------------	------------------	------------------

7. Offer education and training through collaboration with stakeholders (e.g., supervisors, management, employees, labor organizations) in order to promote program goals.

Please select...	Please select...	Please select...
------------------	------------------	------------------

8. Manage the program's operational and financial performance on an ongoing basis using established metrics in order to identify costs, trends, and productivity loss for the purpose of program evaluation and return on investment.

Please select...	Please select...	Please select...
------------------	------------------	------------------

9. Integrate data from all relevant sources by collecting, organizing, and interpreting information and by using available information systems in order to support decision making for program improvement and to assess cost effectiveness and return on investment.

Please select...	Please select...	Please select...
------------------	------------------	------------------

10. Procure internal and external services using commonly accepted selection criteria in order to achieve program goals.

Please select...	Please select...	Please select...
------------------	------------------	------------------

11. Manage service providers using defined performance standards in order to maximize the quality of services and return on investment.

Please select...	Please select...	Please select...
------------------	------------------	------------------

4. **Domain:** Employment leaves and Benefits Administration

Task

Importance

Criticality

Frequency

1. Manage employment leaves in accordance with local, state, and federal requirements in order to maintain legal and regulatory compliance.

Please select...	Please select...	Please select...
------------------	------------------	------------------

2. Administer health and welfare plans consistent with government regulations and corporate requirements in order to provide appropriate employee entitlements as they pertain to work interruptions.

Please select...	Please select...	Please select...
------------------	------------------	------------------

3. Manage payroll and systems data relevant to employment leaves and benefits by maintaining accurate records in order to comply with legal and regulatory requirements (e.g., Sarbanes Oxley, employment and benefits laws).

Please select...	Please select...	Please select...
------------------	------------------	------------------

4. Identify risks associated with work interruptions and employment leaves by referring to pertinent internal and external resources and regulations in order to influence organizational decision making.

Please select...	Please select...	Please select...
------------------	------------------	------------------

Demographics

Please answer all questions according to the instructions given.

Which of the following best describes your current work status?

- Full time employee doing CDMS work in combination with other work within my employer's organization
- Full time employee doing CDMS work only part of the time with my employer's customers
- Full time employee doing CDMS work with my employer's customers
- Full time employee doing CDMS work within my employer's organization
- Part time employee doing CDMS work with my employer's customers
- Part time employee doing CDMS work within my employer's organization
- Self employed working as a CDMS in combination with other specialties
- Self employed working exclusively as a CDMS

Please select the state or province where you are employed as a Certified Disability Management Specialist. *The drop-down box included 50 states, the District of Columbia, U.S. territories, and all Canadian provinces, along with a response option for "Outside North America."*

Please identify your current occupation (please mark only one selection).

- Administrator (Manager)
- Disability Management Consultant
- Human Resource Manager
- Job Development/Placement
- Nurse Case Manager
- Occupational Therapist
- Physical Therapist
- Rehabilitation Counselor
- Rehabilitation Nurse
- Return-to-Work Coordinator
- Social Worker
- Staff/Clinical Nurse
- Supervisor (Rehabilitation Staff)
- Vocational Evaluator
- Other (Please specify): _____

How many years total have you been working in the field of Disability Management (please mark only one selection)?

- Less than one year
- 1 to 3 years
- 4 to 6 years
- 7 to 10 years
- 11 to 15 years
- 16 to 20 years
- More than 20 years

How many years have you been employed as a CDMS with your current employer or your own company (please mark only one selection)?

- Less than one year
- 1 to 3 years
- 4 to 6 years
- 7 to 10 years
- 11 to 15 years
- 16 to 20 years
- More than 20 years

Which of the following best describes your current age (please mark only one selection)?

- Less than 30 years
- 30 - 34 years
- 35 - 39 years
- 40 - 44 years
- 45 - 49 years
- 50 - 54 years
- 55 - 60 years
- Over 60 years

What is your monthly average open caseload volume, considering both in person and/or telephonic cases (please mark only one selection)?

- 10 or fewer cases
- 11 to 50 cases
- 51 to 100 cases
- 101 to 250 cases
- More than 250 cases
- Not applicable
- Other (Please specify: _____)

For how many companies/employers do you provide services at this time (please mark only one selection)?

- 25 or fewer companies/employers
- 26 to 100 companies/employers
- 101 to 500 companies/employers
- 501 or more companies/employers

What is the best classification for your current employment (please mark only one selection)?

- Business/industry
- College or university
- Government
- Insurance company
- Medical center/general hospital
- Private (proprietary) rehabilitation company
- Private practice
- Public school system
- Social welfare agency
- Third party administrator
- Other (Please specify: _____)

What percentage of your time in your current employment setting do you spend working with cases of the following disability types (the total should equal 100%)?

- Alcohol and substance abuse
- Cardiac conditions
- Developmental disabilities
- Learning disabilities
- Mental/behavioral health
- Musculoskeletal disabilities
- Neurological disabilities
- Sensory impairments
- Other (Please specify: _____)

What percentage of your time in your current employment setting do you spend in the following work activities (the total should equal 100%)?

- Disability case management
- Return-to-work coordination
- Vocational counseling, assessment, and job placement/job development
- Managerial/consultative roles in disability management
- Other (Please specify: _____)

How would you classify the occupation in your most recent previous employment (please mark only one selection)?

- Business finance/risk
- Environmental health and safety
- Health care plan administrator
- Human resources
- Rehabilitation- and/or disability-related profession
- Other (Please specify: _____)

Which of the following certifications or licenses do you have current at this time (please mark all that apply)?

- ABVE
- CCM
- CDMS
- COHN
- CRC
- CRRN
- CVE
- GPHR
- PHR
- SPHER
- Other (Please specify: _____)

What is the highest level of education that you have earned (please mark only one selection)?

- Nursing diploma
- Associate degree
- Bachelor's degree
- Master's degree
- Doctoral degree
- Other (Please specify: _____)

What is your annual income as a Certified Disability Management Specialist (please mark only one selection)?

- \$25,000 or less
- \$25,001 to \$50,000
- \$50,001 to \$75,000
- \$75,001 to \$100,000
- More than \$100,000

APPENDIX B: COPY OF THE INVITATION LETTER

March 27, 2009

Name
Address
City, State ZIP

Dear First Name,

We are writing to invite you to participate in a Certification of Disability Management Specialists Commission (CDMSC) survey which will assess and provide input on the role and function of the Certified Disability Management Specialist (CDMS). The role and function study will provide the basis for determining the content and structure of a valid certification examination.

To begin the role and function study, a panel of experts identified the domains and tasks required for newly certified CDMSs. The purpose of the survey is to solicit feedback from disability management professionals regarding the domains and tasks proposed by the panel. This process is a requirement of the widely accepted test development standards that CDMSC follows.

We estimate it will take 20 to 30 minutes to complete the survey. All responses are kept confidential and your individual responses will not be released. All results will be reported as aggregates.

Your participation in this effort is invaluable in defining the role of the CDMS. ***For your complete participation in this study by the designated deadline, you will be entered into a drawing for a \$200 American Express or VISA gift card.***

To begin the questionnaire, please go to: <http://www.castleworldwide.com/CDMS/>. Please use the following username/password combination to gain access to the questionnaire.

**Username: USERNAME
Password: PASSWORD**

Your response is appreciated by **April 21, 2009**. If you are not able to complete the entire survey in one sitting, you will be able to log out of the system and return as often as you need.

If you have any questions about this survey, please send an e-mail to letusknow@castleworldwide.com.

Thank you for your participation,



Carla R. DeFlorio
Executive Director