



Certified Surgical Services Manager

Certification & Recertification Candidate Handbook

Presented by:



Candidate Handbook

Purpose of the Candidate Handbook

The CSSM Candidate Handbook provides essential information on policies and procedures pertaining to certification and recertification of the CSSM credential. It is your responsibility to familiarize yourself with the contents of this handbook. If you have questions, please feel free to contact CCI at info@cc-institute.org or 888-257-2667 8-4 MT.

All information is subject to change without notice, including test content, exam fees, and policies.



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Introduction to Certification

What is Certification?

Certification, as defined by the American Board of Specialty Nursing Certification (ABSNC), is the formal recognition of the specialized knowledge, skills, and experience demonstrated by the achievement of standards identified by a nursing specialty to promote optimal health outcomes. Retrieved December 6, 2017 from <http://www.nursingcertification.org/about/>.

What are the Purposes of Certification?

- Demonstrates commitment to accountability to the public for safe nursing practice
- Enhances quality patient care
- Identifies registered nurses who have demonstrated professional achievement in providing perioperative nursing leadership and management
- Provides employing agencies a means of identifying professional achievement of an individual nurse
- Provides personal satisfaction for practitioners
- Contributes to a career path for perioperative nurse leaders/managers

What are the Objectives of the CSSM Certification Program?

- Recognizes the individual professional nurse who is proficient in practice
- Strengthens conscious use of theory in assessing, planning, implementing and evaluating patient care
- Enhances professional growth through continued learning that results in greater depth of knowledge and expanded skills

What is the Rationale for Certification?

CSSM certification documents the validation of the professional achievement of identified standards of practice by a nurse manager working in a leadership/management role in the perioperative setting. This voluntary recognition program acknowledges the professional achievement demonstrated by an individual nurse manager's performance which exceeds that required for competent practice in the perioperative setting.

About the CSSM Exam

Being successful at passing the CSSM certification exam requires:

1. Having a thorough and sound foundation of the knowledge and skills required for competent perioperative nursing management practice. Knowledge can be obtained through work experiences and independent learning, as well as through formal educational programs
2. Understanding of the test-taking process. There is a definite skill in answering multiple-choice questions. Becoming familiar with techniques for responding to multiple-choice questions will improve your chances of successful performance on the CSSM exam

How is the Exam Developed?

A *Job Analysis*, including *Test Specifications*, was developed by CCI and a collection of subject matter experts working under the expert guidance of our testing partner, Prometric. The *Job Analysis* describes the overall functions and responsibilities as well as the underlying knowledge and skills that are essential to ensure proficiency as a CSSM. Test specifications were developed based on external ratings and constitute a plan upon which the job-related certification exam was constructed for nurses functioning in this role. CCI intends this document to act as a guideline for development of the certification exam. It is recognized that the *Job Analysis* may not reflect all the specific tasks performed by an individual functioning in this role. For more information on CSSM test development committees, see Appendix A.

CSSM Certification – Earning Your Credential

To earn the CSSM credential, candidates must meet eligibility requirements and pass the national CSSM certification exam. Candidates must take one of two eligibility paths to qualify to take the CSSM certification examination. All requirements for the applicable path must be met.

Who is Eligible to Apply for the Exam?

Eligibility requirements for sitting for the exam include:

Criteria	CNOR Certified	Non-CNOR Certified
Licensure	Have a current unrestricted RN license in the country where currently practicing.	Have a current unrestricted RN license in the country where currently practicing.
Academic Degree	Minimum academic degree is a BA/BS. It is not required that the baccalaureate degree be a BSN.	Minimum academic degree is a BA/BS. It is not required that the baccalaureate degree be a BSN.
Work Experience	Must be currently working in a surgical services management role and have a minimum of two (2) years' and 2,400 hours' surgical services management experience. Work experience in a non-paid, volunteer capacity is acceptable. The management role may be overseeing personnel, a budget, or a service line.	Must be currently working in a surgical services management role and have a minimum of four (4) years' and 4,800 hours' surgical services management experience. Work experience in a non-paid, volunteer capacity is acceptable. The management role may be overseeing personnel, a budget, or a service line.
Surgical Services Management Course Work Requirement	30 contact hours of content specific to the domains of the CSSM Job Analysis. All 30 contact hours must be earned in the 2-year period prior to the date of application to take the CSSM certification examination. The CE material must be from an acceptable provider. Acceptable CE providers are provided in Appendix D. It is the responsibility of the applicant to provide documentation of the applicability of the CE material to the CSSM domains. Academic credit may be submitted in lieu of CE to fulfill this requirement. Six (6) academic credits at either the baccalaureate or graduate level from an accredited program earned in the 2-year period prior to the application date for the CSSM certification examination will be accepted in lieu of CE credit.	50 contact hours of content specific to the domains of the CSSM Job Analysis. All 50 contact hours must be earned in the 2-year period prior to the date of application to take the CSSM certification examination. The CE material must be from an acceptable provider. Acceptable CE providers are provided in Appendix D. It is the responsibility of the applicant to provide documentation of the applicability of the CE material to the CSSM domains. Academic credit may be submitted in lieu of CE to fulfill this requirement. Twelve (12) academic credits at either the baccalaureate or graduate level from an accredited program earned in the 2-year period prior to the application date for the CSSM certification examination will be accepted in lieu of CE credit.

Appendix D outlines requirements for contact hours to meet eligibility requirements.

*The certifying organization does not discriminate among candidates as to age, sex, race, religion, national origin, ethnicity, disability, marital status, sexual orientation, and gender identity.

What are the Subject Areas of the Exam?

The CSSM exam is comprised of the following subjects. For a complete list of task and knowledge statements for the CSSM exam, see Appendix B.

Subject Area	Percent of Exam	Number of Test Questions
1. Communication and Relationship Management	12%	21
2. Strategic Management	14%	25
3. Financial Management	16%	29
4. Human Resource Management	16%	29
5. Operational Management	22%	40
6. Leadership	14%	25
7. Professionalism	6%	11
Total	100%	180

Applying for the CSSM Exam

How Do I Apply for the Exam?

You will need your primary e-mail and password to access your account. To apply for the exam, applicants must create or sign into their [account](#). To complete the online application, you will need the following information; the process will take approximately 15 minutes.

<ul style="list-style-type: none"> • Personal contact information: address, email, home and work phone numbers 	<ul style="list-style-type: none"> • Birth year
<ul style="list-style-type: none"> • Last four digits of your Social Security number 	<ul style="list-style-type: none"> • RN license information: expiration date, state(s) licensed to practice
<ul style="list-style-type: none"> • Highest degree earned 	<ul style="list-style-type: none"> • Supervisor contact information: name, address, email, phone number
<ul style="list-style-type: none"> • Perioperative work history: last two years, date began working in the OR, current position, and current practice area 	<ul style="list-style-type: none"> • Payment
<ul style="list-style-type: none"> • Employer contact information: facility name, address, and phone number 	

How Much Does the Exam Cost?

For a current list of exam fees and available discounts, please visit [CSSM fees and deadlines](#).

When is the Exam Offered?

Candidates may take the exam Monday through Saturday, excluding holidays, year-round. Once your application has been approved, you have a three-month window in which to schedule your test. A candidate's three-month testing window opens the month immediately following approval of the application, as illustrated below. NOTE: Applicants may test only once during any testing window.

Application Approved	Testing Months	Application Approved	Testing Months
January	February, March, April	July	August, September, October
February	March, April, May	August	September, October, November
March	April, May, June	September	October, November, December
April	May, June, July	October	November, December, January
May	June, July, August	November	December, January, February
June	July, August, September	December	January, February, March

Does CCI Verify My Application Information?

Information on applications may be verified. If there is any reason to believe that any applicant might not have met eligibility requirements, or if an outside party informs CCI that an individual has not met certain requirements, the application will be flagged for audit. In addition, 10% of certification applications are randomly selected for audit. The Credentialing Manager will begin the audit by contacting the individual in writing to obtain documentation to substantiate the information in question. Information may be verified by telephone, e-mail message and/or letter. All information gained through verification procedures will be confidential, except in instances where the law demands disclosure of facts. Under no circumstances will the reporting party be disclosed. Should any information on the application be found false, the applicant will be notified and declared ineligible to continue in the certification process. Verification may include but is not limited to the following information.

- Verification of current employment through contact with employer/employing institution.
- Verification of applicant's RN license through NURSYS.
- Verification of professional nursing history through contact with past employers.

**It is the responsibility of the applicant to furnish any information missing from the application. An e-mail will be sent to the applicant detailing the results of the audit after the documents have been reviewed.*

Preparing for the Exam

Disclaimer

As a certification organization, CCI's role is in developing and administering certification examinations to determine the qualifications of candidates for certification. CCI does not require or endorse any specific study guides, review products, and/or training courses. Candidates may prepare for certification examinations with

any educational materials they choose. Purchase of CCI review materials is not a requirement for testing, nor does use of any review materials (CCI or otherwise) imply successful performance on the certification examinations. No study resources are prerequisites for the certification examinations.

Reference Materials

The following are all highly-recommended references for the CSSM certification examination:

- AORN's Guidelines for Perioperative Practice (most current edition)

One of the following perioperative nursing textbooks:

- Rothrock, J.C. (Ed.). (2015). *Alexander's care of the patient in surgery* (15th ed.). St. Louis, MO: Mosby Elsevier

Or...

- Phillips, N. (2017). *Berry and Kohn's operating room technique* (13th ed.). St. Louis, MO: Mosby Elsevier.

Management Textbooks:

- Penner, S.J. (2013). *Economics and financial management for nurses and nurse leaders*, (2nd ed.). New York: Springer Publishing Company.
- Kay, A., Fox, C., & Urman, R. (2012). *Operating room leadership and management*. New York: Cambridge University Press.

Additional [test preparation resources](#) listed by subject area are available on the CCI website.

Complimentary CCI Exam Preparation Resources

A study plan and webinars are available [online](#).

Other Materials and Courses

Other companies provide a variety of tools to aid in preparation, including flash cards, practice tests, and preparation courses. Before purchasing a non-CCI product, compare the content to the CSSM task and knowledge statements in the back of this Handbook (see Appendix B) and verify that all references are current.

How Long Should I Study for the Exam?

The recommended study period to successfully pass the CSSM certification exam is three months. Reviewing the task and knowledge statements for each subject will aid in identifying areas of strengths and possible weaknesses. Keep in mind how many questions or what percentage of the exam is contained within each of the subject areas being studied. Be realistic about the time commitment. Use experiences at work to gain additional knowledge and skills in unfamiliar areas. Using a variety of preparation aids, studying in 20 to 45-minute segments, and frequent review have been found to increase comprehension and retention of information.

Taking the CSSM Exam

How Many Questions are on the Exam?

The CSSM exam consists of 180 multiple-choice questions. Of the 180 questions, 150 questions are used to calculate your test score. The remaining 30 questions serve as pre-test questions, and do not affect your score. Pre-test questions are dispersed throughout the exam and cannot be identified. Sample questions can be found in Appendix C.

How Much Time Do I Have to Complete the Exam?

The CSSM exam is a timed test and must be completed in 3 hours and 45 minutes. The computer used to take the exam will keep the official time.

How Much Computer Experience Do I Need to Take the Test?

The computerized format of the exam requires no previous computer experience. An optional pre-exam tutorial will provide instructions on how to take the exam on the computer. It will also provide examples on how to select answers, and how to mark any questions you may want to return to and review before finishing the exam. The time allotted for completing the tutorial is separate from the actual exam time.

How Do I Schedule My Exam Appointment?

Once CCI has reviewed and approved your application, you will receive an email notification of approval and instructions on how to schedule your test. These instructions will include contact information for Prometric, the testing agency CCI has contracted with to administer the CSSM exam. Testing centers are located throughout the U.S. and internationally. You will contact Prometric directly at [schedule](#) for the testing date, time, and location most convenient for you.

Are There Testing Center Guidelines I Should Know?

There are extensive security measures at the testing site. Take the time to watch the video “What to Expect on Test Day” and review [prepare for test day](#) to understand all day-of-testing requirements.

Monitoring

Several security measures will be enforced during the exam administration. Be aware that you will be observed at all times while taking the exam. This observation may include direct observation by test center staff, as well as video recording of your testing session.

Exams cannot be viewed, copied, or studied by any individuals. Copying or retaining test questions or transmitting the test questions in any form to other individuals, organizations, or study groups will result in forfeiting your right to have your exam scored and may result in civil prosecution and disciplinary action by CCI.

Personal Belongings

Personal belongings are not permitted in the testing room, except for the pencils and scratch paper provided by the test center administrator. A small, secure locker located outside the testing room will be provided for personal items. You may request ear plugs from the test center administrator; personal ear plugs are not permitted. You may not eat, drink, or use tobacco in the testing room. Please visit [regulations](#) for additional test center regulations.

Dismissal from a Test Session

The test center administrator is authorized to dismiss a candidate from a test session, including but not limited to:

- Failure to follow the test center administrator’s directions;
- Creating a disturbance of any kind;
- Giving or receiving assistance of any kind;
- Using prohibited aids, such as reference materials, mechanical listening devices, and recording or photographic devices;
- Removing or attempting to remove test questions and/or responses (in any format) from the testing room;
- Removing or attempting to remove scratch paper from the test center;
- Attempting to take the test for someone else;

- Sharing information about the test and test questions with any unauthorized person(s);
- Attempting to tamper with the operation of the computer;
- Leaving the testing room without permission;
- Leaving the test center/building at any time;
- Using electronic communications or recording equipment such as cellular phones and like devices;
- Using notes, books, or other aids;
- Bringing any materials to the test center that may compromise the administration of the exam;

If a proctor witnesses what he believes to be a security breach, the exam is stopped immediately; all related materials are retained, and an incident report is generated and routed to Prometric. The Prometric Security Office makes a copy of the video and reviews it for quality, and to determine if there was any inappropriate action requiring follow-up with the test center personnel. The copy of the video and any related materials are forwarded to Prometric, which would then be delivered to CCI.

If it is believed that an applicant or certificant violates the Misconduct Policy, breaches security, or fails to follow test center directions, CCI may render sanctions against the individual which may include but not be limited to:

- Suspension from the exam for an indefinite or specified period
- At the discretion of the CCI Board of Directors, notify the State Board of Nursing, employer, insurance company, or other public health agency

What Happens If I Don't Schedule My Exam?

If you fail to schedule a testing appointment, your entire testing fee is forfeited. To re-apply, current eligibility criteria must be met and the fee applicable at that time must be paid.

What If I Am Late or Miss My Exam Appointment?

If you are late for your test appointment by more than 15 minutes, or miss your scheduled appointment time, you will be considered a no-show applicant. Your entire testing fee is forfeited.

When Do I Receive My Exam Results?

Applicants will receive notification of their exam results prior to leaving the testing center. Applicants will receive a link from Prometric to access the score report. Scores will not be reported if the confidentiality of the exam is broken or misconduct at the testing center is reported.

What is the Passing Score?

Your score on the exam is the total number of questions you answer correctly. Candidates should answer all questions on the exam as any question not answered may count against the final score.

For the CSSM certification exam, there is one reported pass/fail decision score. You need a total test scale score of at least 620 to pass this examination. Scores are determined by converting the number of questions answered correctly to a scale score that ranges from 200 to 800.

A scale score is transformed from the raw test score (the number of test questions answered correctly). The process is something like transforming height (your test performance) from centimeters (your raw score) into inches (your scale score). To interpret any test score, a uniform frame of reference is required. Scale scores provide that frame of reference based on the standard adopted by CCI of the amount of knowledge necessary to pass without regard to the specific test form or version taken. A scale score of at least 620 is required to pass.

**Please note that a scale score is neither the number of questions you answered correctly nor the percentage of questions you answered correctly.*

How Soon Can I Schedule to Take an Exam for the Second Time?

Subsequent exam applications cannot be submitted in the same testing window as an unsuccessful exam attempt. The full exam price must be paid for each testing attempt.

If I Retake the Exam, Will I Take the Same Test?

No. Because of CCI's commitment to quality and test security, there are multiple versions of the CSSM exam.

Rescheduling the Exam

You may withdraw/cancel your application to test, reschedule your exam date or time within your original three-month testing window, or transfer your exam to another three-month testing window. Please see the table below for additional information.

Definitions of Terms

Withdraw/cancel:

You are removing your application to test. You are not planning on sitting for the CSSM exam now.

Changing the date for a previously scheduled exam:

You have applied for and set a day/time for your exam and now want to move the testing date to another day within the same testing window.

Transferring a previously scheduled exam to another testing window:

You have applied for and set a day/time for your exam and now want to move the testing date to another day in the next testing window. NOTE: You may only transfer twice within an application.

Please see the table below for additional information.

TIME FRAME	30 DAYS PRIOR TO END OF TESTING WINDOW OR SCHEDULED TEST DATE	BETWEEN 29 AND 6 DAYS PRIOR TO END OF TESTING WINDOW OR SCHEDULED TEST DATE	5 OR FEWER DAYS PRIOR TO END OF TESTING WINDOW OR SCHEDULED TEST DATE
WITHDRAW/CANCEL AN EXAM APPT. (not available if paying with Voucher)	<ol style="list-style-type: none"> 1. Contact Prometric and cancel your appointment. 2. Log into CCI account and complete the withdrawal request. \$75 of application fee is non-refundable. 	<ol style="list-style-type: none"> 1. Contact Prometric and cancel your appointment. A \$50 fee will be charged. 2. Log into CCI account and complete the withdrawal request. \$75 of application fee is non-refundable. 	<p>You are unable to withdraw/cancel your exam appointment. You must sit for the exam or all fees will be forfeited.</p>
TO RESCHEDULE AN EXAM DATE WITHIN THE SAME TEST WINDOW	<ol style="list-style-type: none"> 1. Contact Prometric to cancel your original exam date and reschedule the exam date within the 90-day test window for no fee. 	<ol style="list-style-type: none"> 1. Contact Prometric to cancel your original exam date and to reschedule the new exam date within the 90-day test window. A \$50 fee will be charged every time you reschedule your test date. 	<p>You are unable to change or cancel the date for your exam appointment. You must sit for the exam or all fees will be forfeited.</p>
TO TRANSFER AN EXAM DATE OUTSIDE ORIGINAL TEST WINDOW	<ol style="list-style-type: none"> 1. Contact Prometric and cancel your original appointment. 2. Log into your CCI account and complete the transfer request. A \$75 fee will be charged. <p>NOTE: You can only transfer twice within a single application.</p>	<ol style="list-style-type: none"> 1. Contact Prometric to cancel your original exam date and to reschedule the exam date within the 90-day test window. A \$50 fee will be charged every time you reschedule your test date. 2. Log into your CCI account and complete the transfer request. A \$75 fee will be charged. 	<p>You are unable to transfer to a new testing window for your exam. You must sit for the exam or all fees will be forfeited.</p>

Using the CSSM Credential

CSSM is the official designation recognizing the nurse who has been certified in surgical services management. The CSSM certification documents the validation of the professional achievement of identified standards of practice by a registered nurse working in a leadership/management role in the perioperative setting.

Who Can Use the Credential?

The CSSM mark is federally registered with the U.S. Patent and Trademark Office and may only be used in accordance with CCI policy by those who have achieved and actively maintain the credential.

How Long is My Credential Active?

Certification status is granted for a period of 3 years. Your certification will expire on December 31st of the third year of the recertification cycle unless you complete one of the recertification methods in effect at that time. When the credential lapses, the nurse may no longer use the CSSM designation in his/her credentials.

When Can I Begin Using My Credential?

Certificants will receive a paper certificate in the mail within three weeks of passing the exam. The CSSM credential may be used as soon as it can be confirmed at [verification of credential](#).

How Do I Display My Name and Credential?

In writing, proper usage is as follows: Jane A. Doe, BSN, RN, CSSM

General Information

How Is My Confidentiality Maintained?

A system of safeguarding confidential information provided by certification applicants will be maintained. No outside agency or persons shall have access to individual certification records unless the records are required to be provided under applicable law, or in conjunction with regulatory investigations.

Publicity

CCI reserves the right to designate and approve national publicity concerning the certification program.

- National publicity may be authorized by CCI for purposes of marketing the program
- AORN Headquarters, AORN chapters, and the *AORN Journal* may appropriately recognize AORN members who become certified

Certification Policies

CCI reserves the right to establish, review, and revise policies and procedures for certification/recertification as deemed appropriate.

Does CCI Provide ADA Accommodations at its Testing Centers?

ADA Requirements

The Competency & Credentialing Institute (CCI) is committed to providing reasonable accommodations in its exam processes to otherwise qualified individuals with physical or mental disabilities in accordance with the Americans with Disabilities Act (ADA).

Under the ADA, persons with disabilities may be entitled to accommodations if they have a physical or mental impairment (i) that substantially limits a major life activity (such as hearing, seeing, learning, reading, or concentrating), or (ii) a major bodily function (such as the neurological, endocrine, or digestive system). However, CCI is not obligated to provide accommodations that would fundamentally alter the measurement of the skills or knowledge the exam is intended to test, or that would impose an undue burden on CCI.

How to Apply for Accommodations

Candidates with disabilities who believe they need accommodations must notify CCI in writing of the type of accommodation requested, in addition to providing current and appropriate documentation of the disability. Because the provision of accommodations is based upon an assessment of the current impact of the individual's disabilities, the candidate must provide documentation based on an evaluation within the past five years.

The documentation provided should include correspondence from a healthcare provider who has first-hand knowledge of the disability, that describes the nature of the disability, and specific recommendations regarding the type of accommodation required to address the disability. The letter should be on that professional's letterhead stationery and include his or her title, address, phone number, and original signature. Examples of requests for special testing accommodations that may be granted include, but are not limited to, modification of seating or other physical arrangements in the exam facility, providing for the exam to be taken in an accessible location, or providing for a reasonable extension of testing time. Examples of requests for special testing accommodations that may be denied include modification of the content of an objective multiple-choice exam, providing for unlimited testing time, or permitting a reader to paraphrase test material or translate the material into another language.

Requests and supporting documentation must be received at least 90 days prior to the date scheduled for testing. All accommodation determinations will be made by CCI in its sole discretion.

What Is a Group Testing Irregularity?

Unlike cases of individual candidate misconduct, occasionally testing irregularities occur that affect a group of test takers. Such problems include, without limitation, administrative errors, defective equipment or materials, improper access to test content and/or the unauthorized general availability of test content, as well as other disruptions of test administrations (e.g. natural disasters and other emergencies).

When group testing irregularities occur, Prometric will conduct an investigation to provide information to CCI. Based on this information, CCI may direct Prometric either not to score the test or to cancel the test score. When it is appropriate to do so, the Board will arrange with Prometric to give affected test takers the opportunity to take the test again as soon as possible, without charge. Affected test takers will be notified of the reasons for the cancellation and their options for retaking the test. The appeal process does not apply to group testing irregularities.

What Happens If I Misuse or Misrepresent the Credential?

Any misuse or misrepresentation of the CSSM credential by those not currently holding the credential shall be subject to legal action by CCI. This includes use of the CSSM credential once the credential has lapsed. CCI may render sanctions against the individual which may include, but not be limited to:

- Suspension from the exam for an indefinite or specified period of time
- At the discretion of the CCI Board of Directors, notify the respective state board of nursing, employer, insurance company, or other public health agency

Can My Credential Be Revoked?

CCI may deny, suspend or revoke certification. Certification can be denied, suspended or revoked for cause, including but not limited to the following:

- Failing to complete or provide evidence of completion of the requirements for initial certification, certification renewal or reactivation of certification;
- Failure to maintain the required professional licensure;
- Determination that initial certification or certification renewal was improperly granted or that certification was improperly reactivated;
- Falsification or misstatement of information on any certification-related document;
- Providing false or misleading information;
- Misrepresentation regarding credentialing status;
- Cheating or assisting others to cheat;
- Causing, creating or participating in an examination irregularity;
- Assisting others to wrongfully obtain initial certification or to renew or reactivate certification;
- Failure to comply with the scope and standards of practice in an area in which the certification is held;
- Misuse of or misrepresentation with respect to the CCI credential;
- Commission of a crime or gross negligence in the practice of nursing;
- Violation of CCI policy or procedure;
- Failure of audit processes;
- Failure to comply with the American Nurses Association's Code of Ethics for Nurses with Interpretive Statements;
- Conduct unbecoming of the nursing profession; and
- Has not paid all outstanding debts to CCI

**Certified nurses will be informed by letter of CCI's decision to revoke the CSSM status. There will be no refund if, for any reason, the CSSM status is revoked.*

Does CCI Have an Appeals Process?

There shall be an external board of appeals available to a CSSM candidate seeking appeal of decisions made by CCI. Such board of appeals will be appointed as needed and will be composed of six past board members of CCI (three members and three alternates). A written request for review by the board of appeals and supporting documentation must be submitted by the candidate, within 30 days after receipt by the candidate of CCI's initial decision. Decisions of the external board of appeals shall be final and binding. All requests for amendment or appeal will be heard in accordance with the CCI policies in effect at the time.

Because the testing center verifies CCI test results for accuracy, hand-scoring of the CSSM test is only available by request and for a nominal fee. Please contact CCI for additional information.

The appeals process does not apply to group testing irregularity issues at the testing center.

Introduction to Recertification

What is Recertification?

The continued documented validation of the professional achievement of identified standards of practice by an individual registered nurse working in the surgical services management role.

What are the Purposes of Recertification?

- Recognizes the individual surgical services manager who is proficient in practice in a management/leadership role in the perioperative setting
- Supports the development of theoretical constructs which strengthen perioperative management practice
- Enhances professional growth through continued learning that results in acquisition of current information to expand management skill sets

Why Should I Recertify?

The rapid pace of change and the prevalence of technology in the modern perioperative setting require a conscious effort to maintain competency. Certification is recognized for a period of 3 years, with recertification required at the conclusion of that 3-year period. The required CSSM recertification activities flow from and are consistent with the task and knowledge statements of the most current Job Analysis for the CSSM role. CCI conducts a CSSM job analysis at a minimum of every 3 years to ensure that the certification program reflects current best practices.

The recertification requirements guide professional development activities in providing parameters for acceptable practice and in maintaining a link to the most current body of knowledge. Linking the certification period to the Job Analysis cycle ensures that certificants are engaged in activities pertinent to their professional development.

Competency is the actual performance in a situation, and consists of three components: knowledge, skills and attitude. Each of these components is a necessary element. The CSSM recertification process acknowledges the need for active work in the maintenance of continuing competency by directly addressing 2 of the 3 components. The practice and professional activities facilitate the maintenance of current skills and acquisition of new skills through exposure to the practice setting. Other professional development activities e.g., continuing education and/or formal education, facilitate the acquisition of knowledge, which is the second essential component of competency. Although difficult to measure, it is assumed that ongoing professional development and engagement guided by the recertification process will affect positive change in the certificant's attitude towards practice, the third component of competency.

Initial Recertification Cycle

For the first recertification cycle, the amount of professional development activities needed for recertification will be guided by the knowledge levels as demonstrated on the certification examination. The amount of points for the first recertification period will be linked to the individual's performance on the CSSM certification examination. The certificant will be sent a score report after the examination in an email. The score report will detail the competency levels for each of the domains (subject areas). The scored competency levels determine the points required for the next subsequent recertification cycle. See Appendix E for more information.

Subsequent Recertification Cycle

For the second and subsequent recertification cycles, the amount and type of professional development activities will be determined by the results of a Self-Assessment based on the CSSM domains.

The CSSM Recertification Self-Assessment is not an exam; it will determine the points for your next recertification cycle. There is nothing you need to do to prepare for the approximately one-hour Self-Assessment, and there is no charge for the Self-Assessment. Once your professional activities from your application are approved, you will receive an email with instructions on scheduling the Self-Assessment. Schedule and take your Self-Assessment at the Prometric Testing Center nearest you by December 15th of the year you are due to recertify. Failure to take the Assessment by December 15th will result in forfeiture of your CSSM credential. The results of the Self-Assessment will not be received until the recertification process is complete and payment is made.

CSSM Recertification – Maintaining Your Credential

When Do I Recertify?

The certified status of an individual RN is conferred by CCI for a period of 3 years, at which time a CSSM may seek recertification. The recertification process requires a CSSM to choose a method of recertification, complete recertification activities during the accrual period, and meet recertification eligibility requirements.

What Must I Do to Recertify?

1. To recertify your credential, you must:
2. Meet the recertification eligibility requirements (these differ from requirements for first-time certification)
3. Complete professional development points activities
4. Complete CCI's recertification [application](#) for CSSM
5. Schedule and take the CSSM recertification self-assessment at a Prometric testing center

What Are the Eligibility Requirements to Recertify?

All the following requirements must be met at the time of application for CSSM recertification:

1. Be currently licensed, without provision or condition, as a registered nurse in the country where currently practicing
2. Be CSSM certified
3. Be currently employed in perioperative nursing in the area of surgical services management. The management role may be overseeing personnel, a budget or a program. Employment as a consultant or interim staff will meet this requirement. Work experience in a non-paid, volunteer capacity is acceptable
4. Have worked minimum of 1,500 hours in surgical services management within the three-year recertification cycle

In addition to the above eligibility requirements all applicants must fulfill the requirements of the recertification method they choose.

The CSSM credential is not tied or linked to other CCI certifications. A nurse may hold both the CNOR and CSSM certifications but there are no requirement to do so.

The certifying organization does not discriminate among candidates as to age, sex, race, religion, national origin, ethnicity, disability, marital status, sexual orientation, and gender identity.

What Are the Fees for Recertification?

For a current list of exam fees and available discounts, please visit [CSSM recertification fees](#).

Please note: Applications cannot be processed without payment. All fees and/or outstanding debts to CCI must be paid by December 31 of your recertification year.

Recertification Accrual Period & Deadlines

What is An Accrual Period?

The accrual period is the time period in which the certificant must complete continuing education or professional development activities.

Year Certified	Recertification Year	Recertification Accrual Period	Recertification Applications Accepted	Recertification Application Deadline
2015	2018	Jan 1, 2015-Dec 31, 2017	Jan 1 – Dec 31, 2018	December 31, 2018
2016	2019	Jan 1, 2016-Dec 31, 2018	Jan 1 – Dec 31, 2019	December 31, 2019
2017	2020	Jan 1, 2017-Dec 31, 2019	Jan 1 - Dec 31, 2020	December 31, 2020

CSSM Recertification Methods

To recertify the credential, certificants choose a recertification method which includes a prescribed plan for continued professional development. Certificants have up to 3 years to complete their recertification activities and apply for recertification the following year.

What are the Recertification Methods?

There are two methods for recertification of the CSSM credential:

1. Taking the CSSM certification examination
2. The Professional Development Points Method

How Do I Submit My CSSM Recertification Application?

To submit your recertification application, select your method below and fulfill the requirements.

A complete application Includes:

- Application, including personal and work information
- Application fee
- Signed Statement of Understanding
- Mail or fax the completed CSSM Recertification application to: Competency and Credentialing Institute, 2170 South Parker Road, Suite 120 Denver, Colorado 8023, or fax to 303-695-8464. Please call CCI AT 888-257-2667 to confirm your application was received.

Recertification by Exam

Certificants may recertify by taking the CSSM examination. Certificants must take and pass the exam by December 31st of the final year of their certification or the CSSM credential will lapse. The final date to apply for recertification by exam is November 30 of the year that recertification is due. Please review the table below for testing windows. Note that applying for an exam in October or November results in a shortened testing window. **You will need your primary e-mail and password to log in to your account.** To sign in and access the application, go to your [CCI account](#).

Application Approved		Testing Months		Application Approved		Testing Months	
January	February, March, April	July	August, September, October	August	September, October, November	September	October, November, December
February	March, April, May	October	November, December	November	December		
March	April, May, June						
April	May, June, July						
May	June, July, August						

Recertification by Professional Points

To recertify by points, you are required to earn the points within your three-year accrual period. Appendix E outlines the specific requirements of recertification by points. You will find the requirements for points and associated categories in your CCI account.

- To begin your application, log all points into your CCI account. All logged activities will be reviewed prior to approval of application
- Submit [CSSM recertification application](#) and fee
- Schedule and take the Self-Assessment Exercise at a Prometric testing center no later than December 15th of the year you are due to recertify
- A recertification plan will be provided after completion of the SAE

What Happens If I Am Audited?

10% of recertification applications are randomly selected by CCI for audit. Additionally, if there is reason to believe there has been a breach in the integrity of the process by an individual seeking recertification, CCI may also select those individuals for audit.

Applicants selected for audit will be required to submit additional documentation (see Appendix F). Contact CCI for more information if verification of employment is required. An e-mail will be sent to the applicant detailing the results of the audit after the documents have been reviewed.

Alternatives to Recertification

My Credential Has Expired. How Do I Reactivate It?

A lapsed credential may be reactivated by applying online to retake the CSSM exam.

What Can I Do if I Am Not Eligible to Recertify?

You can file for an extension of your certification by applying for an Extension Year. If you complete the requirements for the Extension Year process your credential is still active until your new expiration date and gives you one additional year to earn the contact hours or complete the activities needed to recertify your credential. Please contact CCI's Credentialing Specialist at 1-888-257-2667 for more information.

How Does the Extension Year Process Work?

Some key points regarding the Extension Year process:

1. The process is only available once every 6 years or 2 recertification cycles for the CSSM certification
2. You must apply in the year that you are due to recertify
3. The Extension Year lasts one calendar year and there are no extensions to that time period

4. The accrual period to earn contact hours or complete professional development activities is extended by one additional year. The accrual period for contact hours / points activities is the original accrual period plus one year
5. Extension Year participants are subject to quality assurance audit processes just as other nurses who recertify their credentials

What is the Fee for Applying for the Extension Year?

The fee is \$195. No discounts apply. No refunds are given.

Do I Have the Option of Taking the CSSM Certification Exam to Recertify During the Extension Year?

Recertification by taking the certification examination while in Extension Year status is not permitted.

What Else Am I Required to Do to Fulfill the Requirements for the Extension Year?

All fields (e.g., contact information and place of employment) in the certificant’s account must be updated. To recertify your CSSM credential following your Extension Year, you must meet all the recertification requirements in effect at that time and pay the recertification fee.

When Can I Apply for Recertification Following My Extension Year?

You may apply for recertification at any time in the year following completion of the Extension Year. Please see the table below for revised accrual periods and recertification dates.

Date to Recertify	Last Date to File for Extension Year	Extension Year Accrual Period	Last Date to Recertify
2017	Dec. 31, 2017	Jan. 1, 2014-Dec. 31, 2017	Dec. 31, 2018
2018	Dec. 31, 2018	Jan. 1, 2015-Dec. 31, 2018	Dec. 31, 2019
2019	Dec. 31, 2019	Jan. 1, 2016-Dec. 31, 2019	Dec. 31, 2020
2020	Dec. 31, 2020	Jan. 1, 2017-Dec. 31, 2020	Dec. 31, 2021

Emeritus Status

CCI offers CSSMs who are retiring from professional perioperative nursing the option to maintain their credential in an Emeritus capacity with the CSSM Emeritus status or CSSM (E). CCI established the Emeritus status to recognize retired CSSMs’ service and commitment to the perioperative profession, as well as their achievement and maintenance of the CSSM credential. You **must** currently hold the CSSM credential in good standing to apply for CSSM Emeritus status. The CSSM Emeritus credential is not available if your CSSM credential has lapsed.

Emeritus candidates go to their [account](#) to apply online. The one-time fee for Emeritus status is \$125. Once your application and fee have been received, your Emeritus status certificate will be mailed to you within four to six weeks.

CSSM(E) members may be considered for CCI Board and committee appointments.

Appendix A – Test Development Committees

Test Development Committees

A certification examination is the product of a scientifically rigorous process based on industry standards. This process is subject to accreditation oversight and approval. The Competency and Credentialing Institute works with our testing partner Prometric to develop certification examinations. The testing agency is responsible for accomplishing the following functions: assist in developing the final form of the exam; assist in developing measurement tools; administer and score exams; report results in such exams; and maintain an item bank. Prometric is the agency currently under contract for these services.

In addition to the contributions of our testing partner the participation of those nurses providing clinical care is essential to maintain a certification examination. Nurses holding a certification may apply to serve on these test development committees. A short description of the test development committees follows below.

Job Analysis

A job analysis is designed to obtain descriptive information about the tasks performed in a job and the knowledge/skills needed to support the performance. The purpose of the job analysis is to review and revise the list of the tasks and knowledge related to work performed by perioperative registered nurses and to develop test specifications for the certification examination. The Job Analysis defines the major content areas along with the major tasks performed and the knowledge needed for competent performance. CCI conducts a CSSM job analysis at a minimum of every three (3) years to ensure the certification program reflects current best practices.

Item Writers

Item writers are responsible for constructing questions specific to each section of the test specifications. The testing agency furnishes each writer with instructions on how to write multiple choice questions along with a list of appropriate reference materials.

Item/Form Review Committee

The Item/Form Review Committee reviews all questions selected for the exam. Such matters as correctness of answers, prevention of geographic or gender bias, clarity of language, and appropriateness of items are considered during the item review process. The edited copy of the final form of each exam is reviewed and approved by the Item/Form Review Committee. The committee review constitutes a final check and balance system on the reliability of the exam.

PIN (Problem Identification Notification) Committee

The PIN Committee reviews pretest (non-scored) items for possible inclusion in future certification examinations. The performance of the item with test takers, the psychometric qualities of the items and the correctness of answers are all examined. If needed, this group will revise questions for further pre-test use as non-scored items.

Appendix B – Task & Knowledge Statements

Subject Area 1: Communication and Relationship Management

Knowledge Statements

1. Negotiation techniques (e.g., win-win, crucial conversations, building trust), age and culturally appropriate
2. Health assessment techniques.
3. Emotional intelligence
4. Effective and timely feedback
5. Listening skills
6. Techniques for conflict resolution
7. Verbal and non-verbal communication
8. Meeting facilitation techniques (e.g., agenda preparation, redirection, Roberts Rules of Order, follow-up, minutes)
9. Computer literacy and etiquette (e.g., use of email, word-processing and spreadsheet software, perioperative)
10. Informatics and reports
11. Team building strategies
12. What makes a culture safe (e.g., environment where it is safe to speak up)
13. How to communicate to individuals who may be different from you (e.g., culture diversity, educational level differences, generational differences, flattened hierarchy)
14. Mission, vision, values, goals and what they represent and how they relate to the perioperative setting
15. Organizational culture and political forces and how to identify stakeholders
16. Assessment/evaluation techniques (e.g., patient and/or family; multidisciplinary healthcare providers)

Tasks

1. Utilize negotiation skills in a multidisciplinary environment
2. Establish and foster a collaborative relationship while understanding the differences among the disciplines (e.g., vendors; ancillary and professional staff; nurses, physicians and surgeons; anesthesia providers; finance and senior management)
3. Encourage cooperation, teamwork and collaboration within the internal perioperative unit and its external partnerships
4. Evaluate the effectiveness of relationship management between perioperative units, both internally and
5. Facilitate the constructive resolution of conflict (e.g., handling disruptive behavior, lateral violence)
6. Communicate organizational mission, vision, values, and goals in a way that clearly links them to the work of perioperative service
7. Disseminate relevant information about decisions, plans, and activities to people who need the information
8. Create an environment that encourages a culture of safety, openness, and trust
9. Use technology communication tools effectively and appropriately (e.g., email, social media, texting, images)

Recommended Reading

1. Communication in Nursing, Julie Balzer Riley, 7th edition, Elsevier Mosby, 2012.
2. The Nurse's Communication Advantage: How Business Savvy Communication Can Advance Your Nursing Career, Kathleen D. Pagana, Renee Wilmeth, 2010.
3. The Leadership Experience, Richard Draft, 6th edition, Cengage Learning, 2015

Subject Area 2: Strategic Management

Knowledge Statements

1. Process improvement techniques and tools
2. Elements of a strategic plan (organizational level and perioperative level)
3. How to do a SWOT analysis (strengths, weaknesses, opportunities, and threats)
4. Project management techniques
5. Capital requirements long range forecasting
6. Master facility plan characteristics and requirements (e.g., AIA, OSHA, CMS)
7. Current and proposed federal and state legislation and regulations (e.g., Affordable Care Act (ACA), certificate of need, CMS, scope of practice, FDA, HIPAA)
8. Accreditation requirements (e.g., Joint Commission, DNV, AAAHC, AAAASF)
9. National advisory boards recommendations (e.g., Institute of Medicine [IOM], citizen's advisory council [CAC])
10. How to do a gap analysis
11. Succession planning tools and techniques
12. How to write an action plan (e.g., SMART goals)
13. Requirements to meet organizational plan for recognition (e.g., Baldrige Award, ANCC Magnet)
14. Technology impacts (e.g., EMR, hardware and software implications, employee preparation, readiness assessment, downtime procedures, system integration)
15. How and when to use data; how to retrieve specific data

Tasks

1. Plan and/or implement process improvement programs (e.g., lean, six-sigma)
2. Develop a strategic plan for the perioperative organization (e.g., growth initiative, capital requirements)
3. Conduct and/or manage a master perioperative facility plan (e.g., space, equipment)
4. Evaluate current and future care delivery processes based on organizational needs, federal and state regulations and/or accreditation requirements
5. Develop a strategic plan for recruitment, retention, and succession planning
6. Contribute to organization plan for special recognitions (e.g., Baldrige, centers of excellence, Magnet)
7. Perform a gap analysis of perioperative services to identify future needs
8. Develop action plans based on survey results for staff/physician engagement and patient satisfaction
9. Analyze and react to external forces that impact perioperative services (e.g., SCIP, Affordable Care Act, Medicare/Medicaid initiatives)
10. Contribute to, implement and manage organization's decisions related to technology decisions (e.g., EMR)

Recommended Reading

1. Today's Nursing Leader: Managing, Succeeding, Excelling, Marilyn Klainberg, Jones and Bartlett, 2010.
2. Risk Management Handbook for Health Care Organizations, American Society for Healthcare Risk Management, 6th edition, John Wiley & Sons, 2011.

Subject Area 3: Financial Management

Knowledge Statements

1. Elements of capital, operating, and staffing budgets and processes
2. Indicators to measure fiscal performance (e.g., efficiencies of operation)
3. Variance analysis (e.g., salary, temporary contract, non-salary)
4. Productivity (e.g., hours worked by staff compared to workload standard)

5. Cost concepts (e.g., direct, indirect; fixed, variable cost; procedure costing; allocated costs; overhead, depreciation)
6. Revenue concepts (e.g., return on investment (ROI), cashflow, margins)
7. Elements of and how to write a proforma
8. Inventory management, (e.g., markups, consignment, just in time, group purchasing organization, value analysis and standardization, implants)
9. Contracts and legal terms (e.g., standard business language, conflict of interest)
10. Techniques for environmental management (e.g., recycling, reprocessing, repurposing)
11. Benchmarks and key performance indicators (KPI)
12. Pay for performance (e.g., HCAHPS, value-based purchasing, readmissions, infections, serious reportable events)
13. Metric terminology and concepts (e.g., start time, turnover, block management, OR utilization)
14. Reimbursement codes (e.g., CPT, ICD)
15. Service line structure and management (e.g., cardiac, neurosurgery, gyn, plastic surgery)
16. Current healthcare bills/laws affecting the perioperative financial environment (e.g. Medicare reimbursement)

Tasks

1. Prepare and/or manage perioperative budgets (e.g., capital, operations, staffing)
2. Identify, develop and/or implement cost containment strategies
3. Develop and/or present perioperative financial reports
4. Analyze variances and outcomes and create action plans
5. Manage inventory requirements for the perioperative organization
6. Analyze per case margins considering costs and revenue (e.g., return on investment)
7. Audit and manage the revenue stream
8. Negotiate and/or manage contracts (e.g., vendors, supplies, staffing, inventory, outside services, insurance)
9. Compute cost-benefit ratios and develop proforma (e.g., new technology, new service lines, hybrid OR's).
10. Implement environmental actions (e.g., go green)
11. Establish performance indicators/efficiencies based on data (e.g., start times, turnover time, OR utilization, block management)

Recommended Reading

1. Health Care Finance: Basic Tools for Nonfinancial Managers, Judith Baker, 4th edition, Jones & Barlett Learning, 2014
2. Introduction to the Financial Management of Healthcare Organizations, Michael Nowicki, 6th edition, Health Administration Press, 2015
3. Economics and Financial Management for Nurses and Nurse Leaders, S. Penner, 2nd edition, Springer Publishing Company, 2013

Subject Area 4: Human Resource Management

Knowledge Statements

1. Concepts of staffing models and how to evaluate the current environment to determine the most appropriate care model (e.g., staff type and ratio, theoretical model)
2. Work scheduling process
3. staff competencies in relation to work scheduling (e.g., acuity of the case, experience, availability, staff licensing privileges)

4. Human resources procedures and processes (e.g., writing a job description; hiring; performance evaluation; staff retention; staff incentives including pay and promotion; performance documentation; disciplinary actions including termination; grievance process)
5. How to operate in a union environment
6. Hiring techniques (e.g., interviewing, skills testing, team and culture fit)
7. Federal and state regional laws and regulations pertaining to human resources (e.g., FMLA, FSLA, workers comp, ADA)
8. Staff development (e.g., staff orientation and training programs; educational opportunities, post-performance review goals and action plans)
9. Policies for vendors and contracted employees, (e.g., delivered equipment, product training, credentialing)
10. Benefits and compensation (e.g., EAP, grief counseling, substance abuse counseling, pay strategies such as pay for performance, piece work, clinical ladders)
11. How to coach and/or mentor
12. Job requirements (e.g., licensure, certification, delineation of privileges)
13. How to perform needs assessments for training purposes
14. How to identify and develop preceptors (e.g., skills required)
15. Adult learning theory

Tasks

1. Identify and continuously assess staffing model (e.g., number of techs, RNs, first assists)
2. Plan, schedule and assign work to staff per on-going needs, skill set and scope of practice
3. Describe and discuss with staff their job responsibilities, task objectives, priorities, deadlines, and performance expectations
4. Recruit, hire, and retain perioperative personnel
5. Evaluate the performance of staff working within perioperative services and establish goals and/or development plan
6. Contribute to the evaluation of adjunct support staff not directly within the perioperative services. (e.g., contract staff, vendors, radiology, lab/pathology)
7. Recognize effective performance and demonstrated competence (e.g., reward, recognition, "employee of the month", pay increases, promotion)
8. Assign personnel and resources effectively to accomplish a special task or project
9. Assess staffing adequacy in relation to work load and manage changes required
10. Provide career counseling and facilitate staff's development and career advancement
11. Establish and maintain appropriate job descriptions, evaluation tools, and/or core competencies
12. Develop and oversee training and/or orientation process and programs tailored to individual needs assessment. (e.g., residency, job-shadowing, on-boarding)
13. Mentor, counsel, and coach individual staff members
14. Develop a succession plan for key positions within the perioperative organization
15. Address performance using organizational progressive disciplinary process
16. Track individual certifications/ licenses and delineation of privileges required and ensure that they are current (e.g., RN, BLS, ACLS, physician credentialing)

Recommended Reading

1. Human Resources Management in Health Care: Principles and Practices, L Fleming Fallon, 2nd edition, Jones and Bartlett Learning, 2014.
2. Human Resources Management for Health Care Organizations: A Strategic Approach, Donald Lombardi, 1st edition, Jossey-Bass, 2012.

Subject Area 5: Operational Management

Knowledge Statements

1. Risk management and interpretation of legalities (e.g., informed consent, HIPAA, minors, next of kin, durable power of attorney, emancipated minor)
2. Documentation requirements for report submission (e.g., compilation of data, SCIP measures, performance improvement, NSQIP, sentinel events, root cause analysis)
3. How to extract, interpret, and use data
4. Facility policies, procedures, and documentation for patient flow (throughput)
5. Environmental care requirements (e.g., temperature, humidity, air flow, HVAC, OSHA, EPA, traffic patterns)
6. Infection prevention (e.g., sterilization, hand hygiene, attire, isolation, appropriate preps, cleaning, MDRO's,)
7. Central-sterile processing guidelines (e.g., AAMI, decontamination and sterilization of instruments, immediate use sterilization, biological and chemical indicators)
8. Equipment management (e.g., preventative maintenance, consignment, loaner instrumentation, rental)
9. Laser, radiation, magnet safety (e.g., ANSI, state requirements, OSHA)
10. Standards and recommended practices related to the perioperative environment (e.g., AORN, ASPAN, SGNA)
11. Environmental safety (e.g., shut off valves, anesthesia, trace gas)
12. Emergency management plans (e.g., hurricane, fire, internal and external disaster; emergency power, what to unplug; who can call for an evacuation)
13. Inventory management concepts (e.g., expired items, par levels, rotation of stock; process for physical inventory; asset management)
14. Preference card management
15. Patient care across the continuum (e.g., flow of patient, needs of the patient, family issues, pre- and post-op planning)
16. Concepts of perioperative research and evidence-based practice
17. Federal, state, regional laws pertaining to compliance, accreditation, and regulatory standards
18. How to write policies/procedures

Tasks

1. Continuously assess and maintain safe conditions affecting patient care and the workplace environment (e.g., temperature, humidity, air flow, fall prevention, infection control, isolation)
2. Define and integrate departmental processes for emergency management with organizational processes (e.g., fire drills, malignant hyperthermia, hurricanes, fires)
3. Supervise equipment maintenance including preventive maintenance and ensure appropriate usage, per manufacturer recommendations
4. Coordinate resources to match the OR schedule (e.g., equipment conflict resolution)
5. Coordinate materials management (e.g., par levels, stock on hand, order and inventory process, charge capture process)
6. Establish and maintain a preference card process
7. Facilitate periodic physical inventory
8. Manage perioperative patient care coordination across the health care continuum (e.g., patient information, pre-op testing and post-op care)
9. Submit reports, track trends and evaluate findings (e.g., unusual occurrences; patient and personnel safety issues; environmental safety, metrics)
10. Maintain compliance with requirements of regulatory and accreditation agencies (e.g., Joint Commission, FDA, OSHA)

11. Create, maintain, and enforce policies and procedures appropriate to perioperative services based on current evidenced based practice
12. Monitor performance indicators/efficiencies and make corrections as needed (e.g., productivity, cancellation rates, delays)
13. Provide oversight to and/or collaborate with the central/sterile processing department
14. Conduct risk assessments (e.g., root cause analysis, failure mode and effects analysis (FMEA), safety surveys)

Recommended Reading

1. Operating Room Leadership and Management (Cambridge Medicine), Alan Kaye, Cambridge University Press
2. Transforming Health Care: Virginia Mason Medical Center's Pursuit of the Perfect Patient Experience, Charles Kenney, Productivity Press, 2011

Subject Area 6: Leadership

Knowledge Statements

1. Service leadership
2. Group dynamics
3. Setting and implementing goals and evaluating goal achievements
4. Problem identification and resolution/ crisis management
5. Appropriate delegation (e.g., what can be delegated; to whom it can be delegated)
6. Organizational structure and chain of command
7. Dependency and interdependency among perioperative nurse, surgeon, and anesthesia provider
8. Motivational techniques
9. Change management process and techniques
10. Coordination of ancillary support staff and equipment
11. Components and resources of professional development (e.g., certification, organization practices and resources)
12. Committee charters and objectives
13. Advocacy for staff, patients, physicians, union, other departments (e.g., when to intervene)
14. elements of an environmental scan and how to use the information

Tasks

1. Serve as a leader and role model
2. Provide direction to staff on how to accomplish the work, including appropriate delegation
3. Act decisively to implement solutions and resolve crises
4. Use motivational techniques that appeal to reason, values, or emotion to generate enthusiasm for the work, commitment to task objectives and/or compliance with orders and requests
5. Maintain leadership position on organizational or facility level committees
6. Coordinate perioperative workflow/processes across multidisciplinary health care providers
7. Use change management processes to promote innovation and implement strategic initiatives
8. Perform an ongoing environmental scan of the perioperative environment, including current research
9. Promote and encourage professional development (e.g., encourage certification, advanced degree)
10. Integrate dependency and interdependency into the leadership model (e.g., nursing, anesthesia, surgeon)
11. Prepare for and conduct meetings

Recommended Reading

1. Nursing Leadership & Management, Patricia Kelly, 3rd edition, Cengage Learning, 2012
2. Effective Leadership and Management in Nursing, Eleanor J. Sullivan, 8th edition, Prentice Hall, 2012
3. Management and Leadership for Nurse Administrators, Linda Roussel, 6th edition, Jones and Bartlett, 2013

Subject Area 7: Professionalism

Knowledge Statements

1. Application of evidence-based practice
2. AORN Explications for Perioperative Nurses, ASPAN professional guidelines, state Nurse Practice Act, ANA Code of Ethics, Code of Conduct (e.g., respect for co-workers, managers, patients, and families)
3. Basic elements of scope of practice and standards for all disciplines in a perioperative setting (e.g., CST, CRNA, RNFA, CSFT, AA, RN, physician extenders)
4. Professional organizations appropriate to the perioperative environment (e.g., local, national)
5. Organizational ethics practices and applications (e.g., committees, DNR)
6. Volunteerism

Tasks

1. Uphold and act upon ethical and professional standards
2. Conduct a self-assessment and pursue professional development opportunities
3. Maintain active involvement in professional organizations including leadership positions
4. Demonstrate accountability for decisions made and actions taken
5. Perform duties within the respective scopes of practice

Recommended Reading

1. Leadership Roles and Management Functions in Nursing: Theory and Application, Bessie Marquis, 8th edition, Lippincott Williams & Wilkins, 2014
2. Leading and Managing in Nursing, Patricia S. Yoder-Wise, 5th edition, Elsevier, Mosby, 2011

Appendix C – Sample Exam Questions

The following sample questions are representative of actual test content and question format. An answer key is provided below.

1. The use of evidence-based practice to guide patient outcomes in the operating room:
 - A. Is an expectation of the healthcare consumer.
 - B. Relies on clinical judgment.
 - C. Involves only surgeons.
 - D. Improves processes such as on-time starts.

2. Which organization has advocated for the inclusion of informatics as a core competency for nursing?
 - A. American Nurses Association (ANA).
 - B. Association of periOperative Registered Nurses (AORN).
 - C. Institute of Medicine (IOM).
 - D. Centers for Medicare and Medicaid (CMS).

3. Which of the following seeks to improve health by increasing insurance coverage?
 - A. Consolidated Omnibus Budget Reconciliation Act (COBRA)
 - B. Patient Protection and Affordable Care Act
 - C. Medicare
 - D. Medicaid

4. How is shelf life calculated for sterile packages?
 - A. 30 days after date of processing.
 - B. Based on type of wrapping material.
 - C. Based on type of sterilant.
 - D. Practices that alter integrity of the package.

5. The main goal in LEAN manufacturing is to:
 - A. Measure effectiveness of a system.
 - B. Reduce errors.
 - C. Remove waste.
 - D. Improve performance.

Answer Key:

1. The correct answer is A. Rationale: The public increasingly wants to know what is best and what is improved regarding their care. Reference: Zalon, M.L. (2015). Translating research into practice. In P.S. Yoder-Wise (Ed.). *Leading and Managing in Nursing* (p. 386). St. Louis MO: Elsevier.
2. The correct answer is C. Rationale: The IOM has strongly emphasized that informatics is a core competency required of healthcare professions, including nursing. McHaney, D.F., & Sackey, E. (2013). Information management and technology. In L. Roussel (Ed.). *Management and Leadership for Nurse Administrators* (p. 503). Burlington, MA: Jones and Bartlett Learning.
3. The correct answer is B. Rationale: The Patient Protection and Affordable Care Act seeks to improve the health of the nation by mandating adequate insurance coverage or else pay a fine. Reference: Miller, T.S.W., Maloney, P., & Maloney, J. (2012). Politics and consumer partnerships. In P. Kelly (Ed.). *Nursing leadership and management* (p. 224). Clifton Park, NY: Delmar.
4. The correct answer is D. Rationale: The sterility of an item is not affected by the passage of time, but may be affected by an event, such as the amount of handling or humidity levels, that could compromise the integrity of the wrapper. Reference: AORN. (2017). Packaging systems. In *Guidelines for Perioperative Practice* (p.854). Denver, CO: Author.
5. The correct answer is C. Rationale: The main focus in Lean Manufacturing is the removal of waste from a value stream. Reference: Marquis, B.L., & Huston, C.J. Quality control. In *Leadership roles and management functions in nursing: Theory and application* (p. 634). Philadelphia, PA: Wolters Kluwer.

Appendix D – Contact Hour Requirements

Accredited, Approved Providers

Contact hours approved by any of the following groups are acceptable:

- A. American Nurses Credentialing Center (ANCC)
- B. An agency, organization, or educational institution accredited by ANCC
- C. Any State Board of Nursing
- D. Any state nurses' association
- E. Association of periOperative Registered Nurses (AORN)
- F. American Association of Critical-Care Nurses (AACN)
- G. American Association of Neuroscience Nurses (AANN)
- H. American Association of Nurse Anesthetists (AANA)
- I. Association of Women's Health, Obstetric, and Neonatal Nurses (AWHONN, formerly NAACOG)
- J. American Academy of Family Practitioners (AAFP)
- K. American Academy of Nurse Practitioners (AANP)
- L. American Academy of Physicians Assistants (AAPA)
- M. American College of Nurse Midwives (ACNM)
- N. National Association of Nurse Practitioners in Women's Health (NPWH)
- O. National Association of Pediatric Nurse Associates and Practitioners (NAPNAP)

Certificates from other groups deemed equivalent to those listed above may be accepted. This decision will be approved by the CEO in consultation with the Credentialing Manager.

Approved Topics

To ensure the validity of this credential and its consistency with industry standards, CCI requires contact hours earned for CSSM certification to be related to the specialty of surgical services management. Although the following is not an all-inclusive list, it provides a broad range of perioperative-related subjects.

- A. Anatomy and Physiology
- B. Critical thinking skills
- C. Communication
- D. Disease management (HIV, hepatitis, diabetes, etc.)
- E. Discharge planning
- F. Ethics
- G. Infection control
- H. Leadership/supervisory skills
- I. Legal issues
- J. Nursing process
- K. Pain management
- L. Perioperative scope of practice
- M. Pharmacology
- N. Pre-, intra-, and postoperative patient care (patient assessment)
- O. Precepting
- P. Professional development
- Q. Professional guidelines
- R. Research posters
- S. Surgical procedures
- T. Technology
- U. Research

- V. Evidence-Based Practice
- W. Quality Improvement/Quality Assurance

The candidate must maintain a copy of the certificate of attendance for each approved program attended and submit if audited. Every certificate of attendance must have an accreditation statement and/or provider number. The certificant is responsible for providing the certificates of attendance.

It is the responsibility of the applicant to provide documentation of the applicability of the CE material to the CSSM domains.

The following **DO NOT** meet the criteria for contact hours, and are therefore, not acceptable.

- A. Handwritten accreditation statements or provider numbers.
- B. Certificates of attendance without an appropriate accreditation statement and/or acceptable provider number.
- C. Provider numbers that do not state *Board of Registered Nursing*.

The table below provides information on accrual windows for contact hours needed for certification and recertification.

Contact Hours Required for Certification	Contact Hours Used Under Professional Points Method
If hold CNOR: 30 contact hours accrued in 2 years prior to application	Must be accrued in 3-year recertification window
If do not hold CNOR: 50 contact hours accrued in 2 years prior to application	

Appendix E - Recertification by Points

Points for CSSM recertification may be acquired through any of the following:

1. Continuing Education through Contact Hours
2. Academic Study
3. Teaching in Academic Setting
4. Publishing
5. Presentations
6. Service on a Board or Committee
7. Precepting/Mentoring
8. Volunteer on a CCI Test Development Committee
9. Earning another accredited perioperative certification
10. Clinical Inquiry (Research, Evidence-based practice, Quality Assurance/Quality Improvement)
11. Professional perioperative-related volunteer service

A maximum number of points are allowed for each activity except for the Academic Study category, in which an unlimited number of points may be earned. All activities must be completed within the 3-year accrual cycle. The number of points for the first recertification period is linked to an individual's performance on the CSSM certification examination. Each certificant is given a link to a score report upon completion of the certification examination which details competency levels for each of the seven subject areas. The scores for the subject areas will be expressed as categories of Below Competency, At Competency and Above Competency. The points required are as follows. See Appendix F for required documents if audited.

Initial Recertification

Performance Level	Points Required
At or Above Competency in 7 subject areas	200
At or Above Competency in 5-6 subject areas	250
At or Above Competency in 4 or less subject areas	300

If the applicant scores At or Above Competency in 6 or fewer domains, then a minimum of one half of the required professional development points must be earned in the categories in which the applicant was Below Competency. The following is an example of a score report with the corresponding competency level.

Sample Score Report

Subject Areas	Competency Level
1. Communication and Relationship Management	At Competency
2. Strategic Management	Above Competency
3. Financial Management	Below Competency
4. Human Resource Management	Above Competency
5. Operational Management	Above Competency
6. Leadership	At Competency
7. Professionalism	Above Competency

Subsequent recertification

The CSSM Recertification Self-Assessment is not an exam; it will determine the points for your next recertification cycle.

- There is nothing you need to do to prepare for the approximately one-hour Assessment, and there is no charge for the Assessment
- Once your professional activities and your application are approved, you will receive an email with instructions on scheduling the Self-Assessment. Schedule and take your Self-Assessment at the Prometric Testing Center nearest you by December 15, 2018
- Failure to take the assessment by 12/15/18 will result in forfeiture of your CSSM credential. Alternatively, you may file for a CSSM Extension Year or pass the exam by 12/31/18

For recertification, completion of a self-assessment at a Prometric testing center is required. The results of the self-assessment will determine your recertification plan and points requirements.

Explanation of Score Report Recertification Requirement

In the example of the passing score report presented above, the certificant:

Has scored At Competency or Above Competency in 5 subject areas. The certificant must earn 250 professional development points to recertify by this method

In addition, the certificant also:

- Has scored at the Below Competency level in 2 areas: Financial Management and Operational Management. The certificant must earn 125 of the required 250 professional development points needed for recertification in the areas of Financial Management and Operational Management. The points requirement will be split evenly between the Below Competency domains
- Has scored in the At Competency level in 2 areas; Communication and Relationship Management and Leadership. There is no requirement to earn professional development points in these areas.
- Has scored in the Above Competency level in 3 areas; Strategic Management, Human Resources Management and Professionalism. There is no requirement to earn professional development points in these areas

Professional Activities

Continuing Education

A maximum of 100 points (50 contact hours) may be earned from Continuing Education activities through an approved provider.

1 contact hour = 2 points

1 CME Category 1 credit = 1 contact hour = 2 points. A maximum of 25 CMEs (50 points) may be submitted.

Academic Study

Unlimited points may be earned in the Academic Study category. The course must be part of a degree completion program, such as a healthcare degree (BSN, MSN, DNP, etc.), or a degree where the knowledge attained is used to advance your perioperative nursing career (including MBA).

1 semester hour/credit = 15 points

1 quarter hour = 10 points

Teaching a Perioperative–Related Course for College Credit

A maximum of 150 points is allowed in the Teaching category. Each perioperative class taught = 30 points

Publishing

A maximum of 150 points may be earned in the Publishing category.

Material	Point Value
Doctoral Dissertation	100 points
DNP Capstone Project	75 points
Primary Author, Book Chapter	50 points
Guest Editor, Peer-Reviewed Journal Issue	50 points
Primary Author, Peer-Reviewed Journal Article	50 points
Secondary Author, Book Chapter	30 points
Editorial, Peer-Reviewed Journal	30 points
Secondary Author, Peer-Reviewed Journal Article	30 points
Subject Matter Expert (SME) or Reviewer for Journal Article or Book Chapter	20 points
Author, Book Review	20 points
Developer/Author of a Patient Education or Healthcare Professional Resource	20 points
Poster Presentation at a Professional Meeting	20 points

Presentations

A maximum of 150 points may be earned in the Presentation category. Each 60 minutes of presentation time = 10 points

Service as a Board or Committee Member

A maximum of 150 points may be earned in the Service as a Board or Committee Member category.

- International, National or State Board Member = 30 points per year
- Local or facility level = 15 points per year

Precepting/Mentoring

A maximum of 100 points may be earned in the Precepting/Mentoring Category. Examples include mentoring and/or orienting a new employee. A maximum of four (4) different employees is allowed. Each precepted employee = 25 points

Volunteer, CCI Test Development Committee

A maximum of 100 points may be earned for serving as a volunteer for a CCI test development committee. A CSSM who serves as a subject matter expert for CCI exam test development committees may earn points for recertification.

Committee	Point Value
Job Analysis	40 points/appointment
Item Writer	30 points/appointment
Cut Score/Standard Setting	30 points/appointment
Item Review	20 points/appointment
Form Review	15 points/appointment
Problem Identification Notification (PIN)	15 points/appointment
Other: Ad Hoc Committee (specify)	15 points/appointment

Attain/Maintain Perioperative-Related Certification

A maximum of 100 points may be earned for earning an accredited perioperative-related certification or completing the recertification process for an accredited perioperative-related certification. Examples of accredited perioperative-related certifications include CAPA, CPAN, CRCST, or ABCGN. Accreditation by ANSI, ABSNC, or NCCA will meet these criteria.

This list is not intended to be all-inclusive. Other accredited certification deemed equivalent by the CEO of CCI in consultation with the Credentialing Manager may be accepted.

Attain/Maintain an Accredited Perioperative Certification	
Initial Certification	30 points
Completion of Certification	20 points

Clinical Inquiry

A maximum of 100 points may be earned in the Clinical Inquiry category. Quality Improvement (QI), Quality Assurance (QA), Evidence-Based Practice (EBP) and Research projects are accepted under this heading. To receive points under this heading you must have primary responsibility for developing, implementing, and/or evaluating projects in these categories. The activity must show evidence of the participation in or application of clinical inquiry that improves current practice and/or patient outcomes.

Role	Point Value
Primary Investigator or Primary Project Leader	50 points/project
Co-Investigator or Project Lead	30 points/project

Professional perioperative-related volunteer service

A maximum of 100 points may be earned for medically-related volunteer service activities. Examples include surgical mission trips and service at medically underserved clinics.

Role	Point Value
Professional Perioperative-Related Volunteer Service	20 points/year of service or project

Appendix F – Recertification Audit Documentation

A percentage of recertification applications will be randomly selected for audit. If you are selected, you will be notified after you have submitted your recertification application. Applicants chosen for audit will be required to submit copies of specific documentation, as outlined below.

- A. CONTINUING EDUCATION
 - 1. Copies of certificate(s) of attendance from an accepted provider
- B. ACADEMIC STUDY TOWARD HEALTHCARE-RELATED DEGREE COMPLETION
 - 1. Copy of unofficial transcript
- C. PUBLISHING
 - 1. Copy of the title page, table of contents, or abstract indicating you are the author, co-author or contributor
- D. SERVICE AS A BOARD OR COMMITTEE MEMBER
 - 1. Board summary, minutes, or committee report (minimum of four meetings per year required)
- E. PRESENTATIONS
 - 1. Program brochure, activity documentation form (ADF), or completed course evaluation. Each document must include title, presentation, date, and objectives of presentation
- F. TEACHING A PERIOPERATIVE-RELATED COURSE IN ACADEMIC SETTING
 - 1. Syllabus or course description.
- G. PRECEPTING / MENTORING IN THE PERIOPERATIVE NURSE ROLE
 - 1. Letter from applicant's supervisor confirming precepting/mentoring experience
- H. VOLUNTEER, CCI TEST DEVELOPMENT COMMITTEE
 - 1. Acceptance letter from CCI for each committee assignment
- I. ATTAIN/MAINTAIN PERIOPERATIVE-RELATED CERTIFICATION
 - 1. Copy of certificate or wallet card
- J. CLINICAL INQUIRY
 - 1. A final report which summarizes evidence of participation in a QA, QI, EBP, or research project, including its impact on current practice and/or patient outcomes
- K. PROFESSIONAL PERIOPERATIVE-RELATED VOLUNTEER SERVICE
 - 1. Letter from supervisor or mission director on organization letterhead attesting to dates and contributions of volunteer