



**CERTIFIED MEDICAID PLANNER™
GOVERNING BOARD**

CMP™

**CERTIFIED MEDICAID PLANNER™
PROGRAM POLICY MANUAL**

The policies contained in this program policy manual are effective as of September 9, 2012 and shall remain in effect until revision or amendment by the CMP™ Governing Board.

© 2012 The Wealth Preservation Institute – All rights reserved.

Rev. 3.0 9/9/12

Table of Contents

Topic	Page
Section 1. Introduction	3
Section 2. Mission Statement	3
Section 3. History of the CMP™ Governing Board	4
Section 5. CMP™ Governing Board Operations	4
Section 6. Non-Discrimination Policy	4
Section 7. ADA Accommodations Policy	6
Section 8. Certification Application Procedures	7
Section 9. Eligibility for Certification	7
Section 10. Examination Policy and Procedures	9
Section 11. Exam Results	10
Section 12. Appeals to the CMP™ Governing Board	11
Section 13. Confidentiality Policy	11
Section 14. CMP™ Ethics Council	12
Section 15. Receiving the CMP™ Designation	12
Section 16. Continuing Education Requirements	13
Section 17. CMP™ Certification Renewal	13
Section 18. Disciplinary Policy	14
Section 19. Use of Trademarks	15
Section 20. Fees	16

Section 1. Introduction

Welcome to the Certified Medicaid Planner™ program. The CMP™ program is designed to award the designation of Certified Medicaid Planner™ to qualified professionals in the field of Medicaid planning.

The program is run by the Certified Medicaid Planner™ Governing Board which is an autonomous division of the Wealth Preservation Institute.

This manual outlines the policies and procedures implemented by the CMP™ Governing Board for the operation and management of the certification program. This manual addresses the parameters and criteria for being awarded the CMP designation and for maintaining that designation, including the prerequisite experience and education, the administration of an examination to determine fluency in the principles of Medicaid Planning and the adherence to a core set of ethical principles.

By setting high standards for those who earn the CMP™ designation and promoting both the designation and those who are certified to use it, the greater public interest is served

Section 2. Mission Statement

With an aging population relying ever more heavily on the Medicaid program to finance long-term care, the purpose of the CMP™ certification program is to recognize individuals with a proficient understanding of the federal Medicaid long-term care program and who are qualified to assist persons seeking to achieve Medicaid eligibility for benefits under the program.

The goal of the CMP™ program is to promote high standards of care and ethical practices in the field of Medicaid Planning. To achieve that objective, the CMP™ certification program adopts and upholds standards of qualification, standards of practice, and administers a certification exam that assesses both the knowledge and skill underlying the performance of the tasks required by a professional in the practice of Medicaid planning.

In addition to individual recognition, the CMP™ certification provides a mechanism to recognize individuals who continue to demonstrate their qualifications through adherence to the standards of professional behavior and compliance with the CMP™ continuing education requirements.

The CMP™ certification program awards the designation “Certified Medicaid Planner™” and its acronym “CMP™” to those individuals who successfully meet the educational, experience, ethical and examination requirements for professional certification.

Section 3. History of the CMP™ Governing Board

The CMP™ Governing Board was established as an autonomous subsidiary of the Wealth Preservation Institute (WPI) in 2010 to oversee the development and implementation of the Certified Medicaid

Planner™ program. The program's purpose is to serve the public by providing a recognized standard of knowledge and proficiency among those who provide services relating to Medicaid eligibility planning.

With the growth in the aging population of the United States and the increased reliance on the Medicaid system as the single largest source of funding for long-term care expenses, it was the consensus of a great number of practitioners in the Medicaid Planning field that a set of Medicaid Planning standards be established and a system be developed for the recognition of competency in Medicaid Planning.

The CMP™ Governing Board operates under a set of by-laws which form the operating structure for the Board and forms the foundational basis upon which all other policies and procedures are implemented.

Section 4. CMP™ Governing Board Composition

THE CMP™ Governing Board is comprised of five members. Each member serves three-year term. A nominating committee is appointed at the expiration of a member's term to recommend potential replacements.

The composition of the Board's membership is designed to provide representation of the Medicaid Planning community and the public:

- Four of the members are professionals chosen from the field of Medicaid Planning for their great understanding and proficiency in Medicaid Planning and related issues.
- One member is chosen representing the community serviced by Medicaid Planners.

Section 5. CMP Governing Board Operations

The CMP™ Governing Board is responsible for governing the operations of the CMP™ program. The Board sets the mission of the program, establishes the policies by which the program is operated and directs the staff to implement programs consistent with those policies.

Additionally the CMP™ Governing Board has numerous committees. The committees serve a variety of purposes including the nomination of replacement board members, budgeting, and the formulation of ethical standards and discipline.

Section 6. Non-Discrimination Policy

The CMP™ Governing Board is committed to the principle that all persons shall have equal access to programs, facilities, services, and employment without regard to personal characteristics not related to ability, performance, or qualifications as determined by CMP™ Governing Board policy and/or applicable laws.

The CMP™ Governing Board prohibits discrimination, harassment and bullying against any person because of age, ancestry, color, disability or handicap, national origin, race, religion, gender, sexual or affectional orientation, gender identity, appearance, matriculation, political affiliation, marital status, veteran status or any other characteristic protected by law. The CMP™ Governing Board expects that its employees, volunteers, members, and other constituents of the CMP™ Governing Board, when and where ever those individuals are conducting CMP™ Governing Board business or participating in CMP™-related events or activities, shall maintain an environment free of discrimination, including harassment, bullying, or retaliation.

This policy expressly applies to all applicants for certification under the CMP™ program and any applicant who later achieves or maintains certification through the CMP™ program.

Definitions:

Discrimination is defined as treating people differently, either preferentially or with adverse impact, because they have similar characteristics or because they are from specific groups, unless differential treatment is reasonable, essential and directly related to conducting CMP™-related business.

Harassment is one form of discrimination. Harassment is defined as conduct that has the purpose or effect of unreasonably interfering with an individual's participation in CMP™-related activities or creating an intimidating, hostile or offensive environment. Harassment occurs when submission to or rejection of such conduct is made either explicitly or implicitly a term or condition of an individual's participation in CMP™-related activities or used as a basis for decisions affecting that individual's relationship to the CMP™ Governing Board.

Bullying is one form of harassment. Bullying consists of waging an ongoing and systematic campaign of interpersonal destruction against an individual or group of individuals that a reasonable person would find hostile, offensive and unrelated to a CMP™ Governing Board's legitimate business interests on the basis of one of the protected classes above. It tends to be an accumulation of many incidences over a long period of time, including treatment which persistently provokes, pressures, frightens, intimidates or otherwise discomforts another person.

Retaliation is defined as punitive actions taken against persons for exercising their employee or other rights under the laws in good faith, reporting violations of the laws to the proper authorities (i.e. "whistle-blowing") and/or participating in administrative or legal proceedings as a plaintiff, complainant or witness.

The CMP™ Governing Board shall have the primary responsibility for oversight of this policy including resolving complaints of discrimination, harassment, bullying, and retaliation. Any person who believes that he or she has been the victim of illegal discrimination or harassment should contact the CMP™ Governing Board Chairman. If the complaint is against the CMP™ Governing Board Chairman then any other CMP™ Governing Board Member may be informed. All reports of unethical conduct concerning applicants or certificants will be handled according to the CMP™ Governing Board's disciplinary policy and may be referred to the CMP™ Ethics Council for adjudication.

The CMP™ Governing Board prohibits retaliation and discourages any behavior that might be perceived as retaliatory in nature. Retaliation shall constitute a separate violation and may result in a disciplinary sanction independent of the outcome of a complaint.

Section 7. ADA Accommodations Policy

The CMP™ Governing Board is committed to meeting its objectives by providing reasonable accommodations appropriate to a disabled person's need. The CMP™ Governing Board's accommodations policy is to be included in the Candidate Handbook and shall be closely adhered to by staff in carrying out the Board's activities.

TESTING ACCOMODATIONS:

The current mode of testing applicants for the CMP™ designation is by online computer-generated test that can be taken at any computer terminal with internet access. As the program evolves, plans are in place to expand the test to testing centers and further testing accommodations may be necessary.

If an applicant is currently are entitled receive accommodations due to a professionally diagnosed and documented disability, the applicant may submit documentation to support a request for one of the following:

- **Additional Time:** Extended testing time (50% time extension).
- **Additional Testing Accommodations:** For applicants who are unable to use our online portal to take their examination, the test administrators will make arrangements to accommodate the test-taker, including without limitation providing a reader.

There is no additional fee for applicants who require accommodations. The Certified Medicaid Planner™ application materials and examination are offered only in English. Accommodations (including extended time) are not available solely on the basis of limited English proficiency.

The CMP™ Governing Board will treat all information provided by the applicant to support the applicant's request as confidential and will use it solely to determine your eligibility for accommodations. Details about the applicant's test accommodations will be shared only with the testing staff and will not be released to anyone else unless so authorized by the applicant.

To Support Requests for Test Accommodations

The timely submission of proper documentation will help avoid delays in decisions related to providing accommodations and other services for candidates with disabilities.

Written requests for accommodations will be initially reviewed by CMP™ Governing Board staff. If a staff member determines that some or all of the documentation is missing or inadequate, additional information will be requested. The request may be approved or referred to a specialist for additional guidance.

Section 8. Certification Application Procedures

A prospective applicant must complete a CMP™ Application Form which is found in the Candidate Handbook. The completed application must be sent to the CMP™ Governing Board's office along with supporting documentation.

Additional information or documentation, including proof of education or experience may be submitted along with the application or may be forwarded after the application is submitted. The applicant will not be scheduled to take the CMP™ certification exam until all required educational documentation is provided.

An applicant who has not completed the prerequisite experience requirement may, however, be allowed to take the exam. Any applicant taking the exam without fully fulfilling the experience requirement will be awarded the CMP™ designation only after the experience requirement is met, provided that it is met within 6 months immediately after the date of successfully passing the certification exam. Anyone seeking to take the test under these circumstances must request an experience waiver at the time of application and verify that the candidate is likely to fulfill the experience component within 6 months after taking the examination.

Acceptable forms of proof of experience and education are discussed more fully below.

Section 9. Eligibility for Certification

The CMP™ Governing Board has established eligibility standards for an applicant which include both an education requirement and an experience requirement:

Education Requirement:

An applicant can complete the education coursework requirement for CMP™ certification through one of the following methods:

- Completing a CMP™ Governing Board-registered Program;
- Completing courses addressing all required major Medicaid planning areas at multiple CMP™ Governing Board-registered Programs;
- Completing courses addressing all required major Medicaid planning areas at one or more recognized programs not registered by the CMP™ Governing Board (e.g., continuing education classes which meet the required major Medicaid planning areas ; or
- Review of the applicant's transcript.

Major Medicaid Planning Areas:

- Medicaid Structure – laws, rules, and procedures;

- Trusts – creation, implementation, use and taxation;
- Financial Services – Annuities and life insurance; and
- Medicaid Advocacy – Fair Hearings, Administrative Appeals, Courts.

Education and Transcript Review:

The CMP™ program staff shall be responsible for reviewing all educational equivalencies to determine if the applicant has met the required educational pre-requisites.

This may include a review of any programs which the candidate has taken. If the educational program is on the list of pre-approved programs recognized by the CMP™ Governing Board, then the staff member shall automatically consider the applicant as meeting the educational criteria.

Any program listed as satisfying the education requirement that is not on the list of pre-approved programs recognized by the CMP™ Governing Board will require additional information by the applicant. If the applicant wishes the program to be considered towards the educational requirement, the applicant must supply the name of the program, the contact information for the program's administrator and a syllabus of the program's content.

The staff shall conduct a review to determine if the program is an equivalent of the educational requirements under this policy and sufficient for approval the educational requirement. Any decisions concerning equivalencies may be submitted to the CMP™ Governing Board for review or appeal.

For those applicants who seek to meet the education requirement by the submission of college transcripts, the applicant should send a copy of the transcript along with the application. Upon request of the CMP™ staff, the candidate may be requested to have the school, college or university send a certified copy of the transcript directly to the program.

The education requirement shall be considered by the staff to be automatically satisfied if the candidate provides proof of the following:

- Completion of a Juris Doctorate or its equivalent from a recognized law school;
- Completion of a Masters Degree in Accounting/Accountancy; or
- Completion of a Masters Degree in Health Financing.

All other sources of education shall be reviewed by the staff for equivalency.

Experience Requirement:

To be a qualified applicant, the applicant must have been working in one of the following fields for two years prior to eligibility for certification:

- Law or its equivalent (e.g., lawyer, paralegal, etc.).
- Finance or its equivalent (e.g., financial advisor, banker, stock broker, insurance agent or marketer, funeral counselor, etc.).
- Accountant or its equivalent (e.g., Certified Public Accountant, Enrolled Agent, accountant, etc.).
- Care management or its equivalent (e.g., geriatric care management, Medicaid specialist, health care financing, long-term care underwriter, etc.)

The experience requirement need not be met before the certification examination, but in the event it is not met by the time the examination is successfully passed, then the CMP will not be awarded until such time as the person has fully complied with this requirement.

Proof of experience in each of these areas listed above shall be considered upon staff review as automatic fulfillment of the experience requirement. Proof of experience in a field that may be directly or indirectly related to Medicaid Planning may be sufficient to meet this standard, but will not be automatically considered as such.

Any applicant whose work experience does not automatically qualify as fulfillment under this requirement may wish to have his or her work experience reviewed for equivalency fulfillment. The staff is required to review the proof of work experience and make a determination. Any decisions concerning experience equivalencies may be submitted to the CMP™ Governing Board for review or appeal.

Section 10. Examination Policies and Procedures

Once the application, the application fee, and sufficient proof of the educational and experience standards have been met (or an experience waiver is granted), the applicant will be given instructions on taking the CMP™ certification examination.

The Certification Exam:

The CMP™ examination is a 160-question test covering a broad number of Medicaid Planning topics. The test type is multiple choice.

The test is administered online and is an open-book test. The test is provided in English.

Test takers have 3 hours to complete the test unless additional accommodations have been made.

When an applicant has been accepted for testing, the staff will contact the applicant with the site and the user-specific code for taking the exam.

All applicants taking the exam must certify that the applicant will be the person taking the exam. Nobody is allowed to take the exam for the applicant. If this rule is violated, the examination is considered void and the applicant subjected to discipline by the Board, including being suspended from

being able to hold the CMP™ designation. However, if the applicant is unable to use the internet because of a disability, the CMP™ Governing Board will make arrangements to assist the applicant accordingly.

Areas Tested:

The CMP™ certification exam is extensive. Even with an open-book policy, the passage rate has been consistently around 55%. The following is a list of topics covered under the exam:

CMP™ Examination Subject Matter
Medicaid Planning Background/Rationale
Medicaid Eligibility Assessment and Planning
General Asset-Eligibility Rules
Community Spouse Asset Rules
Asset-Eligibility Strategies
Divestments
Trusts
Annuities and Promissory Notes
Income Eligibility
Homestead and the Family Farm
Veterans (VA) Benefits
Applying for Medicaid
Post-Eligibility Issues
Estate Recovery
Advocacy Opportunities

The CMP™ Governing Board has employed the use of consultants to draft the examination and review the examination results to make certain that the examination continues to adequately test the material. As the need for the examination grows, the CMP™ Governing Board has created a test review committee to modify the exam and create new versions of the exam for future examinees. The committee is instructed to follow all current and relevant psychometric principles when drafting new items to be included in the exam.

Section 11. Exam Results

Upon completion of the online certification exam, the computer will immediately report your score.

A passing score is positively passing sixty-five (65%) of the test questions accurately, that is a score of 104 or above.

If you fail the examination, you will have one additional opportunity to take the examination which must be done within six (6) weeks of failing the exam. Otherwise, you must wait six months from the date of your last failed examination and re-apply to take the exam.

Section 12. Appeals to the CMP™ Governing Board

Any decision concerning candidate eligibility (i.e., education or experience sufficiency or equivalency) can be appealed to the CMP™ Governing Board.

Additionally, any concerns regarding a failing examination score can also be addressed to the CMP™ Governing Board. The examination questions are multiple choice and computer scored so as to eliminate any discretion or bias in the administration of the exam. However, the CMP™ Governing Board may grant extensions of time in which to take the re-test if a candidate fails based upon the applicant's extenuating circumstances.

Section 13. Confidentiality Policy

Candidates for the CMP™ designation are required to submit an application and supporting documentation which contain personal information. Extensive physical, electronic and managerial procedures have been employed to safeguard the security and integrity of personal information. Personal information is accessible only by staff and the CMP™ Governing Board. All CMP™ Governing Board agents, consultants and contractors with access to personal information are also bound to adhere to this policy.

Once an applicant has passed the CMP™ certification exam and has complied with all other application criteria, the applicant receives the Certified Medicaid Planner™ designation. During the duration of the retention of that designation (and thereafter) the CMP™ Governing Board may provide some of the applicant's information either displayed on its website in printed directories or otherwise communicated:

- Whether the applicant/certificant has ever been certified by CMP™ Governing Board, the date of that certification, and, if not currently certified, the date on which certification lapsed or was otherwise terminated.
- Any past and/or current public disciplinary actions against the applicant/certificant by CMP™ Governing Board.
- The business name, address and phone number, fax number, email addresses and websites of the certificant.
- The date the certificant's current CMP™ certification is up for renewal.

From time to time CMP™ Governing Board may provide information other than that listed above, including but not limited to social security numbers, to government and self-regulatory organizations, to allow for the proper identification of person(s) associated with the requesting agency. However, the CMP™ Governing Board reserves the right to deny any requests for information.

The CMP™ Governing Board may release information on the rare occasions when we are required to do so by law, are involved in a lawsuit or in order to enforce agreements. The CMP™ Governing Board reserves the right, at any time, to add to, change, update, or modify this policy and may require CMP™ certificants to consent to those changes.

Section 14. CMP™ Ethics Council

The CMP™ Governing Board believes in upholding the highest of ethical principles in the field of Medicaid Planning. To achieve this objective the CMP™ Governing Board has created the CMP™ Ethics Council.

The CMP™ Ethics Council has two major functions:

- The development and review of the CMP™ Ethical Principles, a doctrine of ethics that everyone in the Medicaid Planning field should follow and uphold and which all Certified Medicaid Planners vow to follow and uphold as part of becoming a CMP; and
- The adjudication of all grievances brought against a CMP™ on the grounds of breach of the CMP™ Ethical Principles.

All applicants, as part of the application, must agree to abide by and uphold the highest ethical standards (as articulated in the CMP™ Ethical Principles) as a requirement for certification eligibility and certification maintenance. Any breach of the ethical standards can also lead to discipline and may involve the revocation of a certificant's CMP™ designation.

Additionally, to ensure the ongoing commitment to the high standards of ethics set out for CMP™ certificants, each certificant is required to attend 20 hours of continuing education ever two years, including two hours on the ethics of Medicaid Planning. The CMP Governing Board pre-approves courses for this requirement based upon whether the courses articulate the tenants of the CMP™ Ethical Principles.

To enforce this policy, the CMP™ Governing Board has a grievance process that is available to the general public relating to unethical conduct (i.e., a violation of the CMP™ Ethics Principles) that can be demonstrably proven. Grievances filed against a certificant are carefully considered since the outcome could have a significant negative affect on the certificant's career and could lead to disciplinary actions.

Section 15. Receiving the CMP™ Designation

All applicants who have done the following will be awarded the CMP™ Designation:

- Filed an application and all supporting material;
- Paid the application fee (See Fees below);
- Met the education requirement;
- Met the experience requirement;
- Signed the vow (on the application) swearing to uphold the CMP Ethical Principles; and
- Taken the CMP Examination and received a passing score of 104 or more correct (i.e., 65%).

The initial designation will lapse in 2 years unless renewed (See below: "Section 15. CMP™ Certification Renewal"). During that time that the certificant holds the CMP designation, the certificant shall comply with all rules and policies as enacted by the CMP™ Governing Board and uphold the CMP™ Ethical Standards.

The certificant will be able to call themselves a Certified Medicaid Planner or CMP and may use the term Certified Medicaid Planner or CMP on their marketing materials and curriculum vitae, subject to certain restrictions (See below: “ Section Use of Indicias”).

Section 16. Continuing Education Requirements

The CMP™ Governing Board’s goal is to ensure the public that anyone who has become a CMP has continued to stay abreast of the changes in Medicaid Planning law. Because the subject matter in this area is constantly evolving, continuing education requirements ensure that a CMP™ will maintain the high standards that were demonstrated at the time of application and initial certification.

Each CMP™ is required to do twenty hours of continuing education every two years on Medicaid Planning-related subjects. The CMP™ Governing Board recognizes various training and educational courses as qualifying towards the continuing education requirement and periodically posts that list or makes that list available to certificants.

Any company or agency that offers training or education can request to have its program certified by the CMP™ Governing Board for recognition towards the CMP™ continuing education requirement. Additionally, any CMP™ who receives related training for a different reason or another license or certification’s continuing education course can seek to have that course also count towards the 20-hour requirement for the CMP™. The course name, course provider’s name and contact information, and a course syllabus or copies of the course materials must be submitted to the staff to determine if they are substantially similar to or equivalent to the courses authorized by the CMP™ Governing Board. Any decisions concerning continuing education equivalencies may be submitted to the CMP™ Governing Board for review or appeal.

Notices will be sent to each CMP™ six months before the deadline to complete the continuing education requirements.

Section 17. CMP™ Certification Renewal

Once an applicant has been certified as a CMP™, the certificant must meet the CMP™ Governing Board’s renewal standards to maintain that certification and hold himself or herself out the public as a CMP™.

The renewal requirements include:

- Paying the annual certification fee;
- Submit a properly completed application for re-certification (every 2 years); and
- Complete 20 hours of continuing education accepted by the CMP™ Governing Board, including 18 hours in the Major Medicaid Planning areas and 2 hours of Medicaid Planning Ethics.

The CMP™ Governing Board will send all certificants a notice six months prior to the deadline for filing the re-certification application. The notice will include the total amount of hours on record at that time for approved continuing education. Your renewal deadline will coincide with the date you successfully passed the CMP™ examination.

Section 18. Disciplinary Policy

The CMP™ Governing Board make take disciplinary actions against any certificant awarded the CMP™ designation for a violation of the CMP™ Ethical Principles as laid out by the CMP™ Ethics Council. The CMP™ Governing Board disciplinary policy includes the following steps for the investigation and resolution of any ethical complaint against a certificant:

- **Filing a Grievance.** Anyone may file a grievance against a certificant; however the grievance must be strictly limited to ethical violations by the certificant. We recognize that not every planner will handle every situation the same way, nor do we feel that the grievance process is a way to complain about things which are outside of the planner's control or which are better resolved in other forums. The use of the grievance process is to expose and address flagrant violations of the CMP™ Ethical Principles. This allows the CMP Governing Board to adequately ensure the compliance by a CMP of high ethical standards and demonstrates to the public that a CMP is held to the high standards in a meaningful way.
- **Investigation.** A staff investigation will be initiated by the filing of any grievance and the staff will report the findings of the investigation to the CMP™ Ethics Council. The investigation will provide an opportunity for the certificant to answer and rebut the charges.
 - The staff will send a notice to the certificant by certified mail which includes a copy of the complaint and provide the certificant with 28 days to reply to the notice with a response.
 - The response is then shared with the person filing the grievance to see if the response adequately addresses the issue or if they wish to pursue the grievance.
 - If the person chooses to not pursue the grievance, then the staff prepares a report for the CMP™ Ethics Council and places a copy of the report in the certificant's file.
 - If the person filing the grievance wishes to pursue the grievance and there appears to be sufficient probable cause that the CMP has breached the CMP™ Ethical Principles, then the matter is reported to the CMP™ Ethics Council for adjudication.
- **Referral to CMP™ Ethics Council.** Any grievance found to have sufficient evidence to establish that there is probable cause that a certificant has breached the CMP™ Ethical Principles shall be referred to the CMP™ Ethics Council for adjudication.
- **Hearing.** The CMP™ Ethics Council is authorized to conduct a hearing of the grievance and weigh the evidence. The hearing committee is required to make a finding and report it finding to the CMP™ Ethics Council.

- **CMP™ Ethics Council Recommendation.** If the hearing committee that has heard the grievance decides that there is clear and convincing evidence that a violation of the CMP™ Ethical Principles have been breached by the certificant, then the Ethics Council shall make a recommendation to the CMP™ Governing Board concerning what disciplinary action should be taken against the certificant.
- **Final Disposition.** The CMP™ Governing Board has the authority for the final disposition and implementation of any disciplinary action against a certificant. Depending on the severity of the breach of the CMP™ Ethical Principles, the disciplinary action may include but is not limited to a temporary suspension of the CMP™ designation, requirement for additional continuing education, fines, and/or full revocation of the designation.
- **Reinstatement.** Anyone having their CMP designation:
 - suspended for a limited amount of time will have their designation automatically reinstated after the suspension period has elapsed;
 - suspended for a limited amount of time with a condition precedent (e.g., the completion of additional continuing education classes) will have their designation reinstated after demonstration that the condition precedent has been met; or
 - fully revoked cannot re-apply to regain the designation for six years from the date of revocation and any such application will only be considered after a review of the candidate's situation and a positive recommendation for admittance by the CMP™ Ethics Council.

The CMP™ Governing Board holds the final authority on all decisions concerning discipline and reinstatement.

Section 19. Use of Trademarks

Anyone who has successfully been awarded the Certified Medicaid Planner™ designation can use the trademarks:

CMP™

- The CMP™ mark can be utilized as a suffix such as: Jane Smith, CMP™
- Always capitalize the “C”, “M”, and “P” without the use of periods between the letters.
- Always use the ™ symbol adjacent to the letters.
- This mark is only used by certificants who are certified by the CMP™ Governing Board.

Certified Medicaid Planner™

- The CMP™ mark can be utilized as a suffix identifier as: Jane Smith, Certified Medicaid Planner™
- Always capitalize the “C”, “M”, and “P”; all other letters can be capitalized or not.
- Always use the ™ symbol adjacent to the “r” in Planner.
- This mark is only used by certificants who are certified by the CMP™ Governing Board.

Section 20. Fees

The CMP™ Governing Board charges fees for the application and recertification. The fees are subject to change. These fees help support the operations of the CMP™ program by providing revenue to cover the cost of staff, training, program development, and examination expenses.

The current non-refundable application fee is: \$795.

The current non-refundable annual fee for certificants is: \$225.