



# Examination for Board Certified Patient Advocate (BCPA) Candidate Handbook

<p><b>2018</b></p> <p><b>Testing Period (2)</b></p> <p>Application Deadline: <del>August 15, 2018</del> <b>Extended to August 22, 2018</b></p> <p>Testing Begins: September 15, 2018</p> <p>Testing Ends: September 29, 2018</p>	<p><b>2019</b></p> <p><b>Testing Period (1)</b></p> <p>Application Deadline: February 15, 2019</p> <p>Testing Begins: March 16, 2019</p> <p>Testing Ends: March 30, 2019</p>	<p><b>2019</b></p> <p><b>Testing Period (2)</b></p> <p>Application Deadline: August 15, 2019</p> <p>Testing Begins: September 14, 2019</p> <p>Testing Ends: September 28, 2019</p>
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With Examination Administration by:



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This Handbook contains critical candidate information for the examination for Board Certified Patient Advocate (BCPA) credential. Candidates are responsible for reading and complying with this information. Content is subject to change.  
Retain this Handbook for future reference.

The most recent version of this Handbook is housed online at  
<https://pacboard.org/documents/BCPAExamHandbook-PACB.pdf>

• **Contact Information**

<p><b>Professional Testing Corporation (PTC*)</b></p> <p><b>(212) 356-0660</b></p> <p><a href="http://www.ptcnyc.com/clients/pacb">http://www.ptcnyc.com/clients/pacb</a></p> <p><i>To resolve most application and scheduling issues, please contact PTC first.</i></p>	<p><b>All questions regarding this examination should be directed to the PTC.</b></p> <ul style="list-style-type: none"> <li>• Online application process</li> <li>• General application policy and procedures</li> <li>• Testing policies and procedures</li> <li>• All scheduling questions or issues</li> <li>• Request for Special Accommodations</li> <li>• Request for Hand Score/Examination Feedback</li> <li>• Miscellaneous inquiries</li> </ul>
<p><b>PSI*</b></p> <p><b>Computer Testing Centers</b></p> <p><b>(800) 733-9267</b></p> <p><a href="https://candidate.psiexams.com">https://candidate.psiexams.com</a></p>	<ul style="list-style-type: none"> <li>• Schedule test appointment</li> <li>• Reschedule test appointment (within a testing period)</li> <li>• Cancel test appointment</li> <li>• Directions to test site</li> <li>• Valid identification questions</li> <li>• Questions regarding item storage during exam</li> </ul>
<p><b>Patient Advocate Certification Board (PACB)</b></p> <p><a href="https://pacboard.org/">https://pacboard.org/</a></p>	<ul style="list-style-type: none"> <li>• Certified Patient Advocate Ethical Standards</li> <li>• Competencies and Best Practices</li> <li>• Exam study materials</li> <li>• All questions related to the certification itself</li> </ul>

\* **PLEASE NOTE:** PSI Computer Testing Center, abbreviated as PSI throughout this Handbook, is a different and separate company from Professional Testing Corporation, abbreviated as PTC throughout this Handbook.

## • Purpose of Certification

The Patient Advocate Certification Board (PACB) endorses the concept of voluntary-certification by examination for all individuals in the field of patient advocacy. Certification is one-part of a process called, “credentialing.” It focuses specifically on the individual and is an indication of current competence in the specialized area of patient advocacy practice. Passing the examination for Board Certified Patient Advocate creates and promotes competence and professionalism in the field of patient advocacy, provides formal recognition on behalf of practicing patient advocates and enhances consumer safety, ensuring patients have a voice in their care. Patient Advocates work together with the patient, the family and the healthcare team.

These objectives are achieved by:

1. Establishing and measuring the level of knowledge required to improve patient outcomes;
2. Providing a standard of knowledge requisite for certification, thereby assisting employers, state agencies, the public, and members of the health professions in the retention and inclusion of a patient advocate as an extension of the patient;
3. Recognizing formally those individuals who meet all the eligibility requirements of the Patient Advocate Certification Board (PACB) and pass the examination for Board Certified Patient Advocate; and
4. Encouraging continued personal and professional growth in the practice of patient advocacy.

## • Eligibility Requirements

<b>Education Requirement</b>	For the first four (4) testing cycles (approximately two (2) years), there are no education requirements for eligibility to sit for the examination. During the exam application process, PACB will collect education and experience data from applicants through a survey process. The data from the first four exams will be analyzed to identify any correlation(s) between education and passing the exam. Education requirements may change in the future should such correlation(s) exist.
<b>Experience Requirement</b>	For the first four (4) testing cycles (approximately two (2) years) proof of prior experience in patient advocacy is not required to sit for the examination.  During the exam application process, PACB will collect experience data from applicants through a survey process. The data from the first four exams will be analyzed to identify any correlation(s) between experience and passing the exam. Experience requirements may change in the future should such correlation(s) exist.

<b>Additional, Relevant and / or Complementary License or Certification Requirement</b>	<p>For the first four (4) testing cycles (approximately two [2] years), there are no existing certification or license requirements for eligibility to sit for the examination. During the exam application process, PACB will collect experience data from applicants through a survey process. The data from the first four exams will be analyzed to identify any correlation(s) between licensing in complementary fields and passing the exam. Licensing requirements may change in the future should such correlation(s) exist.</p>
<b>Citizenship Requirement</b>	<p>No citizenship or “country of origin” requirements exist to sit for the examination. However, the current exam is based on United States (U.S.) patient advocacy best practices and standards that have emerged over time. The Patient Advocate Certification Board is considering the need to develop a version of the examination for patient advocates who work outside of the United States that represents global patient advocacy practices.</p>
<b>Criminal Background Check Requirement</b>	<p>No criminal background check will be required to sit for or following the examination. The PACB emphatically recommends all current and aspiring patient advocates voluntarily undergo a background check and release results to the public. This engenders trust among potential patient / family</p>
<b>Proof of Ability to Conduct the Essential Tasks of the Profession</b>	<p>Successful completion of the examination assesses a candidate’s ability to conduct the essential tasks of the patient advocacy profession. Examination questions are based on the documents published at <a href="https://pacboard.org">https://pacboard.org</a>. These include:</p> <ul style="list-style-type: none"> <li>• Ethical Standards;</li> <li>• Competencies and Best Practices; and</li> <li>• Glossary of Terms</li> </ul>

The PACB reserves the right to amend the above described eligibility requirements at any time. The Board will review tracked results at the completion of the first four (4) testing cycles, and may modify any or all of these requirements, based upon results or change in the practice, or the healthcare industry.

## • Certification and Use of “BCPA”

Eligible candidates who pass the examination for Board Certified Patient Advocate will receive a certificate verifying satisfaction of all specified requirements and the successful completion of the exam from the PACB. This, and only this, enables a practicing patient advocate to use the designation, “BCPA,” following the patient advocate’s name, in all methods of representation. Use of the BCPA certification under any other circumstances is specifically prohibited and subjects the user to legal action.

## • Exam Application Procedure (Chart)

Find expanded information about each of these steps on subsequent pages of this Handbook.

Steps	Notes	Additional Hints / Troubleshooting
<b>Apply for the Exam</b>	<p><a href="http://www.ptcny.com/clients/pacb">http://www.ptcny.com/clients/pacb</a></p> <p>Click on “Apply Online” in the upper right hand corner.</p> <p>Learn more on page 6 of this Handbook.</p>	Your choices of exam date and location will be made during the Scheduling period. See the Scheduling Authorization step below.
<b>Pay the Fees</b>	<p>A master list of fees is available on page 10 of this Handbook.</p> <p><b>Important:</b> The deadline for fee payment is the same as the application deadline.</p>	If you prefer to pay by check, see instructions on page 10 of this Handbook.
<b>Receive your notice of Eligibility.</b>	<p>Within 15 days of receipt of your application, you will be notified by email of your eligibility to take the exam.</p>	If you have not received this notice within 15 days of your application, contact PTC at 212-356-0660.
<b>Receive your Scheduling Authorization by email.</b>	<p>You will receive a Scheduling Authorization that will provide the information you need to choose your exam date and location for taking the exam within the two week period the exam is offered.</p> <p>Once you have completed your scheduling, you will receive a confirmation from PSI.</p> <p><b>Important:</b> scheduling is first come-first served, so you’ll want to take care of this step immediately upon receipt of the Authorization.</p> <p>Learn more on page 7 of this Handbook.</p>	<p>If you apply more than 5 weeks prior to the exam, you will not receive your Scheduling Authorization right away. You will receive that information between 5 weeks and 3 weeks prior to the exam.</p> <p>If you apply for the exam within 5 weeks of the exam, please allow at least 2 business days for receipt of your Scheduling Authorization.</p> <p>If you are within 3 weeks of your exam, and you have not received your Scheduling Authorization, please contact the PTC at</p>
<b>Be familiar with the rules and expectations for exam takers.</b>	<p>Find the rules and expectations on page 11 of this Handbook.</p>	The rules include information about the ID you will need to present to take the exam. Without this ID, you will be barred from taking the exam.

## • Exam Application Procedure Outline

Find a chart describing this information on page 6 of this Handbook.

Read and follow the directions found on the Application and in this Handbook. All Applications must be completed online at Professional Testing Corporation's website,

<http://www.ptcny.com/clients/pacb>

Click on "Apply Online" in the upper right hand corner.

The online Application, and specified examination fees must be received on or before the respective application deadline listed in this Handbook.

Candidates must complete the examination Application in full, using their name exactly as it appears on a current approved government-issued photo ID. Approved government-issued photo identification includes a state-issued driver's license, a state-issued non-driver's license photo identification, U.S. military ID, or U.S. passport.

The completed Application, plus all required documentation and fees, must be submitted and will be processed online by PTC. (If you prefer to mail a check, please see Fees and Refunds on page 10 of this Handbook for instructions.)

Once all items have been received and eligibility has been verified, email confirmation will be sent to the email address provided on the Application. Eligibility status emails are generally sent within 10 business days of application. If you have not received this email within 15-days following online Application submission should contact PTC at 212-356-0660 to confirm the status of the Application.

Failure to comply with all of the procedures will result in being prohibited from sitting for the exam, and your registration fees will be forfeited.

## • Scheduling Your Exam

All examinations are scheduled and taken in-person at an approved testing site daily over a two-week period of time.

Prior to scheduling, candidates may access a master list of all testing sites, located at [www.ptcny.com/cbt/sites.htm](http://www.ptcny.com/cbt/sites.htm).

Scheduling takes place beginning five weeks prior to the chosen examination dates (chosen as part of the application process) and is handled by PSI, the computer testing group. At that time, approved candidates\* will receive a *Scheduling Authorization* which will provide all scheduling links and instructions. Scheduling is done on a first-come, first-served basis.

**Example:** If you register for the March exam, you will receive your Scheduling Authorization sometime in February, no matter how early before March you register. If you register for the September exam, you will not receive your Scheduling Authorization until sometime in August, no matter how much before August you actually registered.



If you have not received your *Scheduling Authorization* three weeks prior to the beginning of the testing period, or if the name on the *Scheduling Authorization* does not exactly match the name on the candidate's current driver's license, passport, or US military ID, then please contact Professional Testing Corporation at 212-356-0660.

*\*Approved candidates are those who meet the eligibility requirements, complete the applicant application, and pay the required fees by the application deadline.*

Should you register within the five weeks prior to the exam, please allow at least two business days to pass before you expect to receive your scheduling authorization.

Once you have received your PTC Scheduling Authorization email, contact PSI (computer testing centers) for appointment scheduling. PSI manages the computerized Testing Centers and schedules examination appointments. Questions regarding Testing Centers and scheduling can be answered by calling PSI at 800-733-9267.

The PTC Scheduling Authorization will specify how to schedule the examination appointment, as well as the dates of the testing period. Schedule your appointment through PSI online or over the phone at 800-733-9267.

Appointment times are first-come, first-served. As a result, it is important to request testing date, time, and location as soon as possible following receipt of the PTC Scheduling Authorization.

PSI will respond with a confirmation email. While every effort will be made to accommodate first choices of date / time / location, it is not always possible to do so. Therefore, it is imperative the PSI-generated confirmation email be reviewed carefully for scheduled date / time / location. Contact PSI at 800-733-9267 if this email confirmation is not received within 24-hours of appointment scheduling or if a change to the requested testing date / time / location is impossible to accommodate.

**Be advised:** A candidate **MUST present** an approved government-issued photo identification (state-issued driver's license, U.S. military ID, or U.S. passport) when reporting to the Testing Center in order to gain admission. Temporary, paper driver's licenses are unacceptable. The name on the Scheduling Authorization must exactly match the name on the government-issued photo identification. It is the candidate's responsibility to check that the name on the Scheduling Authorization matches the approved government-issued photo identification. If the name on the Scheduling Authorization does not exactly match the name on the government-issued photo identification, the candidate will be refused admission to the Testing Center and will forfeit any paid fees.

## • Locations / Testing Centers

There are several hundred PSI-managed computer-based Testing Centers in the United States and Canada. Testing Centers are open Monday through Saturday, excluding holidays. Hours and days of availability vary at each Testing Center.

To identify the closest Testing Center, visit [www.ptcny.com/cbt/sites.htm](http://www.ptcny.com/cbt/sites.htm) or call PSI at 800-733-9267. PTC will identify and arrange a computer-based examination location following receipt of all required fees and completed forms.



## • International Candidates

Candidates outside of the United States and Canada are required to complete and submit the *Request for International Special Testing Center Form* found at [http://www.ptcny.com/PDF/PTC\\_SpecialAccommodationRequestForm.pdf](http://www.ptcny.com/PDF/PTC_SpecialAccommodationRequestForm.pdf). This form must be uploaded to the Supporting Documents section of the *Application* no later than 8-weeks prior to the start of the requested testing period.

A **SUPPLEMENTARY fee of \$100.00** will be charged for taking the exam at an international computer Testing Center found outside of the United States or Canada. This fee will be added to the examination fee. PTC will identify and arrange a computer-based examination location following receipt of all required fees and completed forms.

Please note that the current PACB examination is based on United States (U.S.) patient advocacy best practices and standards that have emerged over time. Residents outside of the United States are encouraged to take the examination and will be held to the same standards. Please note further that all examinations are administered in English.

## • Special Needs

PACB and PTC support the intent of and actively comply with the Americans with Disabilities Act (ADA). PTC will take steps reasonably necessary to accommodate the needs of persons with disabilities, as covered under the ADA.

Special testing arrangements may be made upon receipt of the Application, examination fee, and a completed and signed Request for Special Needs Accommodations Form, available at [http://www.ptcny.com/PDF/PTC\\_SpecialTestCenterRequestForm.pdf](http://www.ptcny.com/PDF/PTC_SpecialTestCenterRequestForm.pdf) or by calling PTC at 212-356-0660. This form must be completed by both the candidate as well as an appropriate healthcare provider. In lieu of a healthcare provider filling out the Request for Special Accommodations form, the form may be accompanied by a healthcare provider-generated explanation of the required need, generated on the doctor's letterhead uploaded to the Application. In the absence of such documentation, the Request for Special Needs Accommodations Form will not be reviewed and no accommodations will be considered or offered.

This form must be uploaded to the Supporting Documents section of the Application at least 8-weeks prior to the requested testing period. Only those requests made and received on the official Request for Special Needs Accommodations Form will be reviewed for accommodations. Information supplied will be kept confidential and used solely to determine need for accommodations.

## • Changing Your Examination Appointment

If the specified examination appointment needs to be cancelled or rescheduled to a different date within the same 2-week testing period, contact PSI at 800-733-9267 no later than 12 noon, Eastern Standard Time, of the second business day PRIOR to the scheduled appointment. **PSI does not have the authority to authorize refunds or transfers to another testing period.**

If you must change your testing date to a new exam period, please see our transfer policy on page 10 of this Handbook.

## • Fees, Payments, and Transfers

### Fees are non-refundable.

Application fee for the Board Certified Patient Advocate examination .....	\$375.00
International candidates (outside US and Canada) —Supplemental Fee .....	\$100.00
Transfer Fee (See Transfer Policy Below)* .....	\$250.00

### Important:

- Fees are non-transferrable from one testing period to another.
- Fees are non-transferrable from one candidate to another.
- A change in testing period / cycle will result in forfeiture of any already paid fees.

### \*Transfer Policy:

Candidates who are unable to take the examination on their scheduled testing date/time due to an emergency, may request a ONE-TIME transfer to the next testing period. To do this, a transfer fee of \$250.00 is assessed.

Any subsequent requests to transfer will require the full registration fee.

### Please plan for your test carefully.

Any requests for an emergency one-time transfer of the testing date / time must be received within 30 days of your original testing date. To arrange for the transfer call Professional Testing Corporation at 212-356-0660

## Making Payment

Payments may be made by:

- Visa, MasterCard, and American Express. Complete and authorize the credit card payment section of the online application as directed.
- Check or money order payable to Professional Testing Corporation. Follow the instructions on the Application, Pay by Check Tab, and mail payment and form to Professional Testing Corporation.

To make payment by check or money order, the online Application must be completed first, followed by submission of the mailed payment to:

PACB Examination  
Professional Testing Corporation  
1350 Broadway, 17th Floor  
New York, NY 10018

**DO NOT SEND CASH.** Mailed payments must specify current approved government-issued photo ID candidate name and requested examination / testing period on the face of the check or money order.

## • Examination Rules

1. Candidates must present a government-issued photo identification (current driver's license, passport or U.S. military ID) at the time of the scheduled appointment. Temporary paper IDs will not be accepted. Candidates without valid government-issued photo identification will NOT be permitted to sit for the test.
2. The following items are not allowed while taking the examination - bulky clothing such as sweatshirts, hoodies, jackets, coats and hats, excluding head gear worn for religious reasons.
3. Electronic devices used to record, transmit, receive, or play back audio, photographic, text, or video content, including but not limited to, cell phones, laptop computers, tablets, Bluetooth devices, wearable technology such as smart watches, MP3 players such as iPods, pagers, cameras and voice recorders are not permitted in the examination room.

All such items should be left in a locked vehicle or in a Testing Center locker, should such be available. It is STRONGLY recommended such items remain safely at home. PTC, PSI and PACB are NOT RESPONSIBLE for any personal possession losses occurring at the Testing Center, in a vehicle parked at the Testing Center or on the grounds of the Testing Center.

4. No watches or "Fitbit" type devices can be worn during the examination. It is STRONGLY recommended such items remain safely at home.
5. No papers, books, or reference materials may be taken into or removed from the testing room.
6. Test directions will be provided on the computer screen at the beginning of the examination session.
7. No questions concerning content of the examination may be asked during the examination session.
8. Candidates may not leave the testing room while the examination is in session, with the sole exception of a requested / approved restroom visit.

Violation of any of the rules listed above may lead to forfeiture of fees, dismissal from the testing room, and / or cancellation of completed test responses.

## • Candidate Responsibilities

- Contacting PSI to schedule the examination appointment;
- Familiarity with the Testing Center location prior to the scheduled test date; and
- Arrival at the Testing Center at the appointed time, with a current, state issued driver's license or non-driver's photo identification, current passport or current U.S. military ID. Temporary paper copies of driver's licenses will not be accepted. Anticipate weather, traffic, parking, and any security requirements specific to the Testing Center.
- Late arrival may prevent testing. Failure to arrive at the Testing Center for the exam or cancellation without the required notice will result in forfeiture of any paid fees.

## • Testing Software Demo

A testing tutorial document can be viewed online, free of charge, and features online testing information. Please visit [www.ptcny.com/cbt/demo.htm](http://www.ptcny.com/cbt/demo.htm).

The Patient Advocate Certification Board website at <https://pacboard.org/exam/> details a list of sources including published books, authoritative websites and scholarly articles available as study materials.

## • Examination Content

1. The examination for Board Certified Patient Advocate credential is a computer-based examination composed of a maximum of **125** multiple-choice questions answered within a maximum allocated testing time of three (**3**) hours.
2. The passing score for this examination is **100 of the 125 questions**.
3. The content measured by the examination is based on three key documents, each of which has been approved for usage by the PACB following rigorous public comment solicitation and review. Each of these documents is available at <https://pacboard.org>
  - **Ethical Standards;**
  - **Competencies and Best Practices;** and
  - **Glossary of Terms.**
4. The current examination is based on United States (U.S.) patient advocacy best practices and standards that have emerged over time. Residents outside of the United States are encouraged to take the examination and will be held to the same standards.
5. Exam questions were authored by volunteer patient advocate advisors in partnership with the Patient Advocate Certification Board and Professional Testing Corporation.
6. Examination questions have been vetted for clarity, thoroughness, and recognized source documentation by individuals with expertise in patient advocacy specialties.
7. Examination questions have been reviewed for construction, accuracy, and appropriateness to the practice of patient advocacy by the PACB.
8. The examination for Board Certified Patient Advocate credential is weighted as follows, based on task, importance and frequency:

I.	<b>Scope of Practice and Transparency</b>	10%
II.	<b>Empowerment, Autonomy, Rights, and Equity</b>	15%
III.	<b>Communication and Interpersonal Relationships</b>	19%
IV.	<b>Healthcare Access, Finance, and Management</b>	16%
V.	<b>Medical Knowledge and the Healthcare System</b>	10%
VI.	<b>Professionalism, Professional Development, and Practice</b>	5%
VII.	<b>Ethical, Legal, and Practice Standards</b>	25%
	TOTAL	100%

Further description and more information about each of these domains of practice can be found on the PACBoard website at: <https://pacboard.org>

## • Scoring Procedure

The passing score for the examination was established using recognized psychometric practices. The passing score represents the number of correct test answers determined necessary for the candidate to demonstrate the level of knowledge required for the delivery of quality patient care.

In order to protect the security and integrity of the certification examination, neither PACB nor the Professional Testing Corporation will release examination items, candidate responses, or keys to any candidate, agency, academic / learning institution or medical practice.

## • Results Reporting

Computerized scoring will be utilized to determine examination results. Candidates will be notified of passing or failing status by postal mail within 4-weeks following the close of the testing period. Both section and total examination scores will be reported. Successful candidates will receive a paper certificate from the PACB within 4-weeks from the date of results reporting.

Candidates may request a follow-up examination hand scoring once emailed results have been received. A hand score may be performed to verify the accuracy of the computerized examination scoring as well as to confirm any question marked as incorrect was, in fact, incorrect. PTC requires a non-refundable fee of \$25 to hand score an examination, irrespective of the hand scoring results. All requests for a hand score of the examination should be submitted directly to PTC on the *Request for Hand Scoring Form*, accompanied by the required fee for a hand score. The *Request for Hand Scoring Form* can be found here: [http://www.ptcny.com/PDF/PTC\\_Handscore\\_Request\\_Form.pdf](http://www.ptcny.com/PDF/PTC_Handscore_Request_Form.pdf).

## • Reexamination

The examination for the Board Certified Patient Advocate credential may be retaken up to three times. Each test attempt requires completion of an application and payment of the required fee. If a candidate fails a third time, he or she must wait at least one full year before taking the test again.

## • Confidentiality

Individual test scores will ONLY be released to the candidate sitting for the examination. No exceptions will be made for examination result receipt.

All questions concerning test results should be documented and forwarded by email to PTC at [ptcny@ptcny.com](mailto:ptcny@ptcny.com).

## • **Period of Certification and Recertification**

The BCPA credential is recognized for a period of three (3) years. Due to the constantly changing nature of the medical and patient advocacy fields, all BCPA recipients are required to renew their certification every three years in order to continue legal use of the BCPA designation.

Two options for renewal exist:

- Retest and pass the current BCPA exam; or
- Provide documented proof the candidate has met the continuing education requirements (CEUs) of 30 contact hours, 8-hours of which must be satisfied in the Ethics domain.
- CEUs are available through a number of organizations and are approved by the PACB for recertification purposes. Find more information about CEUs on the website at [www.PACBoard.org](http://www.PACBoard.org)

## • **Certification Revocation**

Certification may be revoked for any of the following reasons:

- Falsification of application;
- Falsification of any material(s) submitted to PACB;
- Misrepresentation of BCPA credentialing; and / or
- Any additional relevant reason(s) identified, and explained, by the Patient Advocate Certification Board including violation of the ethical principles and other patient advocacy practices included in the practice as outlined in this handbook.

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This Handbook will be updated on occasion, usually after each exam period as its information may change before the next exam period.

The most recent version will be found at the PACB website: [www.PACBoard.org](http://www.PACBoard.org)

Should you have questions not answered here, please refer to the Contact information on page 3 to determine where to get your answers.