

Patient Advocate Certification Board

Definitions

The following definitions are used to support all other documents developed by the PACB as they regard development of the BCPA credential. This document may be updated from time to time as needed to communicate clearly.

BCPA - Board Certified Patient Advocate: this is the name of the credential being developed.

Client: A client is the patient on whose behalf the patient advocate provides services.

Guarantor: A guarantor is the person or entity who has financial responsibility to compensate the patient advocate.

PACB Board Certified Patient Advocate (BCPA): A PACB Board Certified Patient Advocate has met all conditions established by the PACB for the BCPA credential and agrees to practice in accordance with the PACB Competencies for Certification and to the PACB Ethical Standards.

Patient advocate: A patient advocate is a professional who provides services to patients and those supporting them who are navigating the complex healthcare continuum. Advocates work directly with clients (or with their legal representatives) to ensure they have a voice in their care and information to promote informed decision making. Advocates may work independently or in medical or other organizational settings. They serve individuals, communities, disease-specific populations, and family caregivers.

Professional patient advocacy relationship: There are two categories of professional relationships for patient advocates.

Independent Patient Advocate: Independent advocates work directly for a client and are engaged by that client or by a guarantor (family, lawyer, etc.) on behalf of that client. A professional patient advocacy relationship in this category exists when there is a service agreement or contract that defines the responsibilities of each party.

Institutional Patient Advocate: Institutional advocates are hired by an institution, organization or corporation (hospital, managed care company, cancer center, social service agency, labor union, etc.) to advocate and navigate for clients served by that entity. A professional patient advocacy relationship in this category exists when a client agrees to be assisted by the patient advocate.

Any time there is a potential **conflict of interest** in the structure of a professional patient advocacy relationship – e.g. when the client is not the guarantor, or when an advocate is paid by an institution, rather than the client – advocates must take extra care in clarifying their professional and ethical responsibilities. In such cases, patient advocacy contracts or agreements should be used to clearly establish the rights, roles, and responsibilities of all involved parties.

Surrogate: A person who has been expressly appointed by a patient, or by a medical provider if the patient has not done so, to make healthcare decisions for the patient. Synonyms may include healthcare proxy, agent, and power of attorney.