



Board Certified Patient Advocate (BCPA) Renewal Handbook

Continuing Education and
Recertification Requirements

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Board Certified Patient Advocate Renewal Handbook

Introduction

The Patient Advocate Certification Board (PACB) is a 501(c) 3 non-profit organization focused on development and maintenance of certification for the professional practice of patient advocacy. Patient Advocates are invited to visit the website, www.pacboard.org, for essential information about the organization, certification, and opportunities for professional development.

The Patient Advocate Certification Board (PACB) presents this handbook to stipulate the Continuing Education and Certification Renewal Requirements for the Board Certified Patient Advocate (BCPA) credential. Certification renewal is essential to ensure that Board Certified Patient Advocates keep current with the best practices, continuing education, emerging trends and policy changes that relate to the ethical and professional practice of patient advocacy.

In March 2018, PACB issued the first exam for the BCPA credential. All Board Certified Patient Advocates will be certified by passing the certification examination. Subsequent certification renewals may be achieved through either reexamination or through submission of the required amount of continuing education credits. Details for both options are outlined below.

(Information for prospective providers of PACB approved continuing education is found on page 8 of this handbook.)

Importance of Certification Renewal

Healthcare is a rapidly changing industry, especially with regard to technology and healthcare policy. Patient advocates must remain well informed on the dynamic changes in health care issues, policies, laws, and practices that affect the healthcare consumers and the clients they serve.

Certification is a symbol of validation to the public and to other professionals that the Board Certified Patient Advocate is highly committed to these professional and ethical responsibilities to act consistently within the best practices and standards in the patient advocacy field. Given the rapid change in the healthcare industry, PACB has a three (3) year renewal cycle for certification. Renewing the Board Certified Patient Advocate certification is required to continue use of the BCPA credential. If you choose not to renew your certification, then you must cease using the BCPA credential after the expiration date of your certification.

Use of Certification Credential

Certification is granted to individuals who have successfully demonstrated skill and competency in their knowledge as patient advocates. Only after receiving official written confirmation indicating a passing score on the BCPA examination or renewal of certification will an individual be allowed to use the "BCPA" designation following his/her name. The BCPA designation stands for "Board Certified Patient Advocate."

Note: There are no periods punctuating the BCPA designation. An example of proper use of the BCPA credential is as shown:

Mary M. Brown, MSW, BCPA

Renewal of Certification

Certification renewal can be achieved through two ways which are outlined in this guide.

The cost for recertification by continuing Education (CE) units is \$275 for recertification within the 6 months prior and up to the expiration date of the BCPA certification.

Recertification requests sought after the expiration date noted on the advocate's certificate are subject to the conditions noted in the section on Lapsed or Expired Certification.

Certification may be renewed in one of two ways:

- a. Professional Board Certified Advocates may choose to renew their certification by taking the certification exam and passing the exam with the accepted passing score
- b. BCPA individuals may choose to renew their certification by completing 30 clock hours of continuing education (CE) units over the three-year period prior to the expiration of their certification. These 30 CE units must be PACB approved units in order to qualify toward recertification.

NOTE: At least six (6) of these 30 required units (6 clock hours) must be dedicated toward the Ethics domain.

Expired or Lapsed Certification

If your BCPA certification has expired or lapsed, advocates may still submit 30 CE credits if they have not exceeded 6 months past the expiration date. A penalty of \$350 as a late fee will be charged for processing the CE renewal.

If renewal materials are submitted more than 6 months and less than 12 months past the advocate’s expiration date, a late fee of \$450 will incur for CE renewal.

If more than 12 months has elapsed since the expiration of the BCPA certification, the advocate will need to take the exam to become certified once again.

Renewal Fee	Late Fee	Total Fee of Renewal
\$275	\$0 within three (3) years; prior to expiration date.	\$275
\$275	\$350 expired less than six (6) months.	\$625
\$275	\$450 expired more than six (6) months, but less than one (1) year.	\$723
Cost of Exam	Expired over one (1) year.	Cost of exam

NOTE: The renewal options for Board Certified Advocates are listed here for your review. The preferable option is to renew your Board Certification within your three-year period prior to the expiration date. If you are unable to renew prior to your expiration date, then you may consider the post-expiration options, or you may retake the certification examination.

Continuing Education Credit

- a. Continuing education (CE) must be directly related to one of the six domains outlined on “Competencies and Best Practices required for a Board Certified Patient Advocate (BCPA)” document or to the “Ethical Standards for a Board Certified Patient Advocate (BCPA).” (See Appendix 1, pages 12 - 15)
- b. CE credits must be completed as defined by the Renewal of Certification Policy. All activities must be completed prior to the application deadline and prior to submitting the application. Renewal applications may begin as early as six (6) months prior to your current expiration date.
- c. CE activities for BCPA recertification **must be approved by the Patient Advocate Certification Board.** See approval criteria for additional information.

Continuing Education Credit (Cont.)

- d. One clock-hour (60 minutes) equals one CE credit. Breaks, meals, and social hours where instruction is not taking place do not count toward the 60-minute clock hour.
- e. If CEs are pre-approved, there is no cost.
- f. Non-approved CEs can be submitted after-the-fact to ensure they meet criteria as set by the PACB. A post renewal fee will apply.
- g. The cost of post-approval for CE hours is \$15 per program.
- h. Academic Coursework from a university, college, or other educational institution can be converted to contact hours.

1 semester credit = 15 contact hours

1 quarter credit = 12.5 contact hours

- Repeat courses are not eligible to count toward certification.
- Courses must be related to understanding, practicing and/or advancing patient advocacy.
- Some course topics might include:

Health Communication	Healthcare Policy
Health Psychology	Professional Ethics
Culturally Competent Health Care	Health Advocacy
Sociology of Health	US Healthcare System
Medical Aspects of Chronic Illness and Disability	Psychosocial Aspects of Disease and Disability
Case Management	Motivational Interviewing
Evidence Based Medicine	Medical Ethics
Behavioral Health Navigation	Substance Misuse and Addiction

Note: If uncertain as to whether a university or college course would qualify for certification, PACB recommends submitting the course description and/or syllabus for pre-approval before enrolling.

Organizations who wish to have their course(s) pre-approved by PACB, may submit the course description and/or syllabus for review.

Additional Activities that MAY count toward continuing education include:

- National Conferences
- Online programs
- Telephone or video conference programs
- Seminars
- Webinars
- Presentations by the certified advocate

Activities that DO NOT count toward continuing education include:

- Volunteer activities
- Poster presentations
- Serving on boards or elected offices in organizations
- Serving as a preceptor
- Other certifications
- Research hours
- Blog entries

See Table 1, Appendix 1 for Documentation and Submission Requirements

Submitting Continuing Education Hours

Continuing education hours can be submitted beginning six months prior to the expiration of the certification (i.e., if the certification period ends March 31, 2021, then CE hours can be submitted beginning October 1, 2020). The PACB website will have updated information on how to submit CE hours and pay for recertification. PACB recommends that all Board Certified Patient Advocates maintain careful records of all continuing education so that they will have the necessary information at the time of recertification. PACB board-certified patient advocates may be asked to submit this documentation by PACB as part of regularly scheduled random audits of transcripts or upon the submission of a late renewal request or late renewal appeal.

Submitting Continuing Education Hours (Cont.)

The cost for recertification by CE hours is \$275 for recertification within the 6 months prior and up to the expiration date of the BCPA certification. Recertifications received after the expiration date noted on the advocate's certificate are subject to late fees as stipulated in the section on Lapsed or Expired Certification (page 5).

Criteria for Post-Approval of Continuing Education

In the event that you have taken a CE course that has not been PACB Pre-approved, but that you believe meets the standards for PACB continuing education, you may submit materials for post-approval review of the course. There will be a \$15 non-refundable fee at the time of submission for each post-approved course submitted.

You must submit the following for review:

- The title of the course.
- The date and the location of where the course was offered.
- The number of credit hours requested.
- The name and curriculum vita or the qualifications of the instructor of the course or the course syllabus.
- A description of the activity you completed and to which of the *Competencies and Best Practices for the BCPA or the Ethical Standards* for a BCPA it best relates.
- The learning objectives or outcomes from the activity.
- The assessment materials used for the course.

Securing Pre-Approval for Continuing Education at a College or University

Not all programs, courses, or offerings are appropriate for BCPA certification. Since college or university courses are often a long-term and more costly commitment, advocates may seek pre-approval for a college or university course they may wish to take prior to enrolling in said course in order to be certain that the course meets the PACB guidelines for continuing education and certification. You will be charged a non-refundable fee of \$25 for course review and pre-approval.

Securing Pre-Approval for Continuing Education at a College or University (Cont.)

You must submit the following for university course pre-approval:

- The institution where the course is being taught.
- The term the course is being taught.
- The title of the course, course number, course description, and number of credits hours.
- The name and contact information of the instructor of the course.
- A description of how the course is related to the Competencies and Best Practices for the BCPA or the Ethical Standards for a BCPA and your work as a patient advocate.
- The learning objectives or outcomes for the course.
- A copy of the course syllabus.

Withdrawals and Refunds

Once applications for renewal of certification by continuing education have been submitted to PACB, they may not be withdrawn. **Re-Certification by CE fees are nonrefundable.**

Rejected Applications for Recertification of the BCPA Credential

PACB may reject applications for recertification for any of the following reasons:

- The application is incomplete or not completed properly
- PACB determines the applicant did not meet the eligibility requirement for recertification.
- The application materials and/or the fee were not submitted by the designated deadline.

In the event that an application is rejected for one of the above stated reasons, the application fee, less a \$125 processing fee, will be refunded.

Appeals

The PACB appeals process is available to any individual who believes that the PACB has unfairly or inaccurately applied the recertification criteria to an individual's application. The appeals process is designed to a.) provide an opportunity to fully review the facts of the issue raised, b.) provide a second evaluation by a different set of evaluators of the materials presented to PACB as meeting the criteria for eligibility for recertification of the BCPA credential, c.) provide due process for all parties, and d.) consistently apply the criteria for renewal of certification as set out in the BCPA Renewal Handbook.

A copy of the appeals procedure will be sent by mail with the notice of ineligibility. If an individual decides to file an appeal, the details of the process will be clearly outlined. Appeals are only available to individuals whose applications are rejected for ineligibility. Applications rejected for being incomplete, completed incorrectly, submitted late, or any other reason cannot be appealed.

Applying to Become an Approved Continuing Education Provider

Those academic institutions; professional organizations or providers of continuing education interested in having a course or activity pre-approved by the Patient Advocate Certification Board may submit materials to do so. Pre-approved courses will be listed on the PACB website to support recertification efforts and opportunities.

Criteria for Pre-Approval for Continuing Education

- To be pre-approved, programs must be submitted at least 45 days in advance of the activity along with a \$75 non-refundable pre-approval fee.
- If submitted less than 45 days before the delivery date, the fee will be \$75 plus a late fee of \$100 (for a total of \$175). The CE activity should be at least one hour in length. Programs will not be accepted within 10 days or less from scheduled date of delivery.
- The CE activity should have clearly defined learning objectives and expected outcomes for the activity.
- The CE program/activity must be related to at least one of the BCPA domains of practice as outlined on the Competencies and Best Practices for the BCPA or the Ethical Standards for a BCPA. (See <https://pacboard.org/documents/PACB-Competencies-final-10.10.17.pdf> and <https://pacboard.org/documents/PACB-Ethics.pdf>)
- The speaker must have expertise in the area of practice being presented as demonstrated in their CV/BIO.
- The course/activity must be held in an accessible, barrier-free location (in accordance with section 504, Rehabilitation Act of 1973) so as to not exclude any participants with a disability.

Materials to Submit for Pre-Approval

- An overview of the program and how it relates to the Competencies and Best Practices for the BCPA or the Ethical Standards for a BCPA (see . (See <https://pacboard.org/documents/PACB-Competencies-final-10.10.17.pdf> and <https://pacboard.org/documents/PACB-Ethics.pdf>).
- Curriculum Vitae or Resume of the speaker(s).
- Minimum of three learning objectives for a one contact hour program.
- Agenda or schedule of the activity, including any breaks.
- A program evaluation to assess effectiveness of the course/activity.
- The certification of completion that will be awarded at the program completion with the following language included: "This is a PACB approved program. The approval number is _____. This program has been approved for _____ contact hours to meet the BCPA Certification."
- Submit the meeting notice and/or website link that announces the proposed course. Pre-approved courses must include the following wording on the course/program announcement or weblink that verifies approval (Please see the samples located in the appendix): "*This is a PACB approved program. This program has been approved for _____ contact hours to meet the BCPA Certification.*"

TABLE 1

APPENDIX 1		CONTINUING EDUCATION ACTIVITIES AND REQUIREMENTS	
Category	Category Hour Definition	Requirements	Documentation Required
Approved CE from organizations offering continuing education	<ul style="list-style-type: none"> •60 minutes (without breaks) = 1 CE hour 	<ul style="list-style-type: none"> •must be related to BCPA as outlined in this manual •may not be repeated for credit 	<ul style="list-style-type: none"> •Documentation of course and content, including sponsoring organizations, learning objectives, hours of activity, date, instructor, Instructor CV, relationship to Domains and Ethics
Academic Coursework		<ul style="list-style-type: none"> •Offered through an accredited college or university •content must be related to BCPA as outlined in this manual •repeat courses are not accepted for certification 	<ul style="list-style-type: none"> •Supporting documents such as a transcript(s) showing the institution, course, number of credits, etc. •Evidence that clearly shows content is relevant to PACB Domains and Ethics •Course syllabus
Publications	<ul style="list-style-type: none"> •One (1) peer-reviewed publication = 1 – 2 hours of continuing education activity hours •Five (5) different articles related to patient advocacy in a non-peer-reviewed journal and/or newsletter 	<ul style="list-style-type: none"> •Primary author •One peer-reviewed article or book chapter related to patient advocacy •4,000 words -10,000 words = 1 CE •10,000 words or more = 2 CEs 	<ul style="list-style-type: none"> •Supporting documents, such as cover page that includes author's name, abstract or copy of the article or chapter, information showing peer review, publication, date of publication
Presentations	<ul style="list-style-type: none"> •One (1) presentation = 1 hours of continuing education activity hours 	<ul style="list-style-type: none"> •Primary presenter •Content must be directly related to patient advocacy •Delivered in a structured teaching/learning environment (conference, webinar, seminar) where CE credits are awarded to attendees or at an academic conference. •At least 45 minutes in length •Repeated or modified previous presentations cannot be counted •Poster presentations are excluded 	<ul style="list-style-type: none"> •Supporting documents including abstract, objectives, course contents, evidence of presentation of the material

TABLE 1 CONTINUING EDUCATION ACTIVITIES AND REQUIREMENTS

APPENDIX 1	CONTINUING EDUCATION ACTIVITIES AND REQUIREMENTS		
Category	Category Hour Definition	Requirements	Documentation Required
Webinars, Video or Audio Presentations	<ul style="list-style-type: none"> • See requirements for Presentations 	<ul style="list-style-type: none"> • See requirements for Presentations 	<ul style="list-style-type: none"> • See requirements for Presentations. Recordings of the event or links to the recorded event may also be used as sup-
Independent Study	<ul style="list-style-type: none"> • Must be approved by PACB as acceptable Independent Study. • One independent study option will count as 1 CE hour. 	<ul style="list-style-type: none"> • Must be one of the PACB Approved Independent Study options • Independent Study options will be posted on the PACB website at www.PACBOARD.org if and as they become available 	<ul style="list-style-type: none"> • Supporting documents located on the PACB website that accompany the Independent Study options that has been selected. Instructions and materials are specific to each Independent Study opportunity

Appendix 1

PACB Rules and Procedures

Nondiscrimination Policy

PACB does not and shall not discriminate on the basis of race, color, religion, gender, gender expression, age, national origin, disability, marital status, sexual orientation, or military status, in any of its activities or operations. These activities include, but are not limited to, hiring and firing of staff, selection of volunteers and vendors, and provision of services. We are committed to providing an inclusive and welcoming environment for all members of our staff, clients, volunteers, sub-contractors, vendors, and clients.

Confidentiality Policy

Information submitted as part of the application, certification, and certification renewal processes becomes the property of the Commission and will not be released to outside parties unless authorized by the individual or unless required by law. Individual score reports are released to the candidate and are not released to any institution or employer. For research and statistical purposes only, data resulting from the certification or certification renewal process may be used in an anonymous, aggregate manner only. Board Certified Patient Advocates will be listed on the Patient Advocate Certification Board website unless they explicitly express a desire to not be listed.

Disciplinary Policy

The Patient Advocate Certification Board may deny, suspend or revoke BCPA Certification for reasons including, but not limited to the following:

- a. failure to complete or provide evidence of completion of the requirements for initial certification, certification renewal or reactivation of certification;
- b. determination that initial certification or certification renewal was improperly granted or that certification was improperly reactivated;
- c. falsification or misstatement of information on any certification-related document;
- d. providing false or misleading information;
- e. misrepresentation;
- f. cheating or assisting others to cheat;
- g. causing, creating or participating in an examination irregularity;

Disciplinary Policy (cont.)

- h. assisting others to wrongfully obtain initial certification or to renew or reactivate certification;
- i. failure to comply with the scope and standards of practice in an area in which BCPA certification is held;
- j. failure to comply with the Ethical Standards for Patient Advocates as set forth by the Patient Certification Board in the Ethical Standards for a Board Certified Patient Advocate document; and
- k. conduct unbecoming of the Patient Advocacy profession.

Audit Policy

PACB requires BCPA certified advocates to maintain documentation of participation in all continuing education activities submitted for renewal. These files should be maintained by all PACB board-certified advocates for ONE YEAR PAST THE "VALID THROUGH" DATE on their current certificate. PACB board-certified patient advocates may be asked to submit this documentation by PACB as part of regularly scheduled random audits of transcripts or upon the submission of a late renewal request or late renewal appeal (as described later in this manual).

Appendix 2

Locating Continuing Education Activities/Courses for BCPA Certification

Advocates may find continuing education opportunities through institutions of higher education, and a number of recognized continuing education providers, including but not limited to the following list. (**Please note: The CE activity must be PACB approved**).

Patient Advocacy Organizations

1. National Association Healthcare Advocacy Consultants (NAHAC)
2. Alliance Professional Health Advocates (APHA)
3. The Washington State Health Advocacy Association (WASHAA)
4. Professional Patient Advocate Institute (PPAI)
5. Case Management Society of America (CMSA)
6. American Case Management Association (ACMA)
7. Beryl Institute
8. Institute for Healthcare Improvement (IHI)
9. National Patient Safety Council (NPSC)

National Organizations

- [American Association of Diabetes Educators \(AADE\)](#)
- [Accreditation Council for Pharmacy Education \(ACPE\) Accredited or Approved Providers](#)
- [Accreditation Council for Continuing Medical Education \(ACCME-AMA\) Accredited or Approved Providers](#)
- [American Nurses Credentialing Center \(ANCC\) Accredited or Approved Providers](#)
- [American Academy of Family Physicians \(AAFP\)](#)
- [American Association of Nurse Practitioners \(AANP\)](#)
- [American Academy of Physician Assistants \(AAPA\)](#)
- [American Medical Association \(AMA\)](#)
- [American Nurses Association \(ANA\)](#)
- [American Psychological Association \(APA\)](#)
- [Council on Continuing Medical Education \(CCME-AOA\) Approved Sponsors](#)
- [National Association of Clinical Nurse Specialists \(NACNS\)](#)
- [National Association of Social Workers \(NASW\)](#)
- [National Commission for Health Education Credentialing \(NCHEC\) Designated Providers](#)

Note: This list is NOT all-inclusive. Additionally, not every course offered by these organizations will be appropriate for the BCPA certification.

Appendix 3

Sample CE Announcement - The following is one example of an acceptable format continuing education providers may use when submitting a program for review to the Patient Advocate Certification Board.



The Importance of Communication in Interprofessional Teams

Presented by: Christine L. North, PhD, MPH, BCPA
Professor of Communication and Public Health, Local University

DATE of Program: Month 01, 2018
TIME: 1:00pm-2:30pm EST
LOCATION: City Hospital Conference Room A

Objectives:

1. Recognize the significance of poor communication as a contributor to medical errors.
2. Identify the similarities between the airline industry and the medical field with regard to high risk, high stakes practices.
3. Identify the elements of effective teams that lead to enhanced performance and patient safety.
4. Identify common communication challenges to effective team work.

This is a PACB approved program. The approval number is CE00118. This program has been approved for 1.5 contact hours to meet the BCPA Certification.

The above statement should be added once approval is received for the program. This allows attendees to know that the program is pre-approved by the Patient Advocate Certification Board.