Board Certified Patient Advocate (BCPA) Renewal Handbook

Continuing Education and Recertification Requirements
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.

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. Advocates who choose not to renew the certification, must cease using the BCPA credential after the certification expiration date.

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:

- Professional Board Certified Advocates may choose to renew their certification by taking the certification exam and passing the exam with the accepted passing score.
- 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.

<table>
<thead>
<tr>
<th>Renewal Fee</th>
<th>Late Fee</th>
<th>Total Fee of Renewal</th>
</tr>
</thead>
<tbody>
<tr>
<td>$275</td>
<td>$0 within three (3) years; prior to expiration date.</td>
<td>$275</td>
</tr>
<tr>
<td>$275</td>
<td>$350 expired less than six (6) months.</td>
<td>$625</td>
</tr>
<tr>
<td>$275</td>
<td>$450 expired more than six (6) months, but less than one (1) year.</td>
<td>$723</td>
</tr>
</tbody>
</table>

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

- 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).”
- 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.
- CE activities for BCPA recertification must be approved by the Patient Advocate Certification Board. See approval criteria for additional information.
- 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.
- If CEs are pre-approved, there is no cost.
- CEs that are not pre-approved may be submitted after-the-fact to ensure they meet criteria as set by the PACB. A post review fee will apply.
- The cost of post-approval for CE hours is $15 per program.
- Academic Coursework from a university, college, or other educational institution can be converted to contact hours.

| 1 semester credit = 5 contact hours | 1 quarter credit = 4 contact hours |

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

<table>
<thead>
<tr>
<th>Health Communication</th>
<th>Healthcare Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Psychology</td>
<td>Professional Ethics</td>
</tr>
<tr>
<td>Culturally Competent Health Care</td>
<td>Health Advocacy</td>
</tr>
<tr>
<td>Sociology of Health</td>
<td>US Healthcare System</td>
</tr>
<tr>
<td>Medical Aspects of Chronic Illness and Disability</td>
<td>Psychosocial Aspects of Disease and Disability</td>
</tr>
<tr>
<td>Case Management</td>
<td>Motivational Interviewing</td>
</tr>
<tr>
<td>Evidence Based Medicine</td>
<td>Medical Ethics</td>
</tr>
<tr>
<td>Behavioral Health Navigation</td>
<td>Substance Misuse and Addiction</td>
</tr>
</tbody>
</table>

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.
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 (Page 17-18)

Submitting Continuing Education Hours

Recertification can begin six months prior to the expiration of the certification (i.e., if the certification period ends March 31, 2021, then application for renewal by continuing education 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.

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 4).
Criteria for Post-Approval of Continuing Education

Advocates who have taken a CE course that has not been PACB Pre-approved, may be submitted for post-approval review of the course. There is a $15 non-refundable fee due at the time of submission for each post-approved course submitted.

Items to submit for Post-Approval 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 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. A non-refundable fee of $25 is due at the time of submission for college/university course review and pre-approval.

Items to submit for college/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 the work of 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 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.

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 or Courses for BCPA Certification

Advocates may find pre-approved continuing education opportunities on the PACB website at:

http://pacboard.org/continuing-education/

And 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)
10. RN Patient Advocates (iRNPA)

National Organizations

- Aging Life Care
- American Association of Diabetes Educators (AADE)
- Accreditation Council for Pharmacy Education (ACPE) Accredited or Approved Providers
- Accreditation Council for Continuing Medical Education
- 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
- Society of Certified Senior Advisors

Note: This list is NOT all-inclusive. Additionally, not every course offered by these organizations will be appropriate for the BCPA certification.
<table>
<thead>
<tr>
<th>Category</th>
<th>Category Hour Definition</th>
<th>Requirements</th>
<th>Documentation Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved CE from organizations offering continuing education</td>
<td>• 60 minutes (without breaks) = 1 CE hour</td>
<td>• Must be related to BCPA as outlined in this manual</td>
<td>• Documentation of course and content, including sponsoring organizations, learning objectives, hours of activity, date, instructor, Instructor CV, relationship to Domains and Ethics</td>
</tr>
<tr>
<td>Academic Coursework</td>
<td>• 1 semester credit = 5 contact hours</td>
<td>• Offered through an accredited college or university</td>
<td>• Supporting documents such as a transcript(s) showing the institution, course, number of credits, etc.</td>
</tr>
<tr>
<td></td>
<td>• 1 quarter credit = 4 contact hours</td>
<td>• Content must be related to BCPA as outlined in this manual</td>
<td>• Evidence that clearly shows content is relevant to PACB Domains and Ethics</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Repeat courses are not accepted for certification</td>
<td>• Course syllabus</td>
</tr>
<tr>
<td>Authoring Publications</td>
<td>• One (1) peer-reviewed publication = 1 – 2 hours of continuing education activity hours</td>
<td>• Primary author</td>
<td>• 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.</td>
</tr>
<tr>
<td></td>
<td>• Five (5) different articles related to patient advocacy in a non-peer-reviewed journal and/or newsletter</td>
<td>• One peer-reviewed article or book chapter related to patient advocacy</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 4,000 words -10,000 words = 1 CE</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 10,000 words or more = 2 CEs</td>
<td></td>
</tr>
<tr>
<td>Delivering Presentations</td>
<td>• One (1) presentation = 1 hours of continuing education activity hours</td>
<td>• Primary presenter</td>
<td>• Supporting documents including abstract, objectives, course contents, evidence of presentation of the material.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Content must be directly related to patient advocacy</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Delivered in a structured teaching/learning environment (conference, webinar, seminar) where CE credits are awarded to attendees or at an academic conference.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• At least 45 minutes in length</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Repeated or modified previous presentations cannot be counted</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Poster presentations are excluded</td>
<td></td>
</tr>
<tr>
<td>Delivering Webinars, Video or Audio Presentations</td>
<td>• See requirements for Presentations</td>
<td>• See requirements for Presentations</td>
<td>• See requirements for Presentations. Recordings of the event or links to the recorded event may also be used as supporting documentation.</td>
</tr>
<tr>
<td>Category</td>
<td>Category Hour Definition</td>
<td>Requirements</td>
<td>Documentation Required</td>
</tr>
<tr>
<td>------------------</td>
<td>------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Independent Study</td>
<td>• Must be approved by PACB as acceptable Independent Study.</td>
<td>• Must be one of the PACB Approved Independent Study options</td>
<td>• 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.</td>
</tr>
<tr>
<td></td>
<td>• One independent study option will count as 1 CE hour.</td>
<td>• Independent Study options will be posted on the <a href="http://www.pacb.org">PACB website</a> on the website if and as they become available.</td>
<td></td>
</tr>
</tbody>
</table>