CE Guide For Providers of Continuing Education
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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. Organizations providing continuing education are invited to visit the website, www.pacboard.org, for essential information about the organization, certification, and opportunities for professional development.

PACB believes that Board Certified Patient Advocates (BCPA) should continue to expand their skills in order to enhance the quality of the services they provide. PACB’s certification renewal requirements are designed to encourage board certified patient advocates to seek professional education through ongoing continuing education, which should enhance knowledge beyond that which is required for initial certification.

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.

Renewal

Certification may be renewed in one of two ways:

1. Professional Board Certified Advocates may choose to renew their certification by taking the certification exam and passing the exam with the accepted passing score.
2. 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.

In support of quality continuing education, the Patient Advocate Certification Board has established a pre-approval process for providers of CEs. PACB encourages providers of continuing education to seek pre-approval of their programs. This guide is designed to describe both the process as well as the requirements for submission of continuing education programs for pre-approval.

Note: Educational programs may not be promoted as pre-approved until the provider has received a formal "Notice of Continuing Education Approval" statement with approval number.

Application Categories

The Patient Advocate Certification Board supports two types of applications for continuing education pre-approval.

1. Regular Continuing Education
2. In Service Continuing Education
All continuing education providers may use the Regular application. CE providers using the Regular application:

- Must submit one application for each program
- Pay one fee per application.
- Approval, once granted, is for one year, beginning on the first date of the program.
- Activities, once approved, may be offered an unlimited number of times (in the same format) within the specified approval period.
- No retroactive approvals are granted for any program at any time.

In-Service Applications:

- The In-Service application category is provided for employers offering in-service continuing education to their employees at no charge. (Example: a hospital offering employees access to seminars free of charge.)
- In-Service applicants must submit one program per application.
- Approval, once granted, is for one year, beginning on the approved first date of the program.
- Activities, once approved, may be offered an unlimited amount of times within the specified approval period.
- No retroactive approvals are granted for any program at any time.

Approval Requirements

Regardless of the category under which an organization applies, the following requirements must be met. The minimum CE amount that can be submitted for approval is 1.0 CE, or sixty (60) minutes in duration. Thereafter, only quarter hour increments will be accepted. (example: .40 would not be acceptable, while .45 would be.) 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. PACB also accepts applications for college and university program pre-approval. Pre-approved CEs are issued as follows:

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

The purpose of the program must be clearly defined in terms of expected learning outcomes. And, the purpose of the program must be to improve the participant’s knowledge of or skill in the practice of professional patient advocacy. To be approved, a program must clearly meet at least one of the domain focus areas for continuing education, as described in the Competencies and Best Practices or Ethical Standards for Board Certified Patient Advocates.

The program must include an evaluation which at minimum, provides a mechanism for participants to determine how well the program met each of the stated learning objectives.

PACB supports the intent of and actively encourages compliance with the Americans with Disabilities Act (ADA). PACB encourages all CE providers to take steps reasonably necessary to accommodate the needs of persons with disabilities, as covered under the ADA. Live programs 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.
Application for Ethics CEs

Board certified Patient Advocates are required to earn at least 6 CEs (clock hours) in the area of Ethics. Continuing Education providers seeking to offer Ethics CEs must demonstrate the content of the program supports the Ethical Standards for Board Certified Patient Advocates. In particular, the application should include a properly cited reference to the BCPA Ethical Standards within the content of the program and/or a written explanation as to how the program will address the Ethical Standards.

Important Note: If Ethics CEs are part of a larger program that also includes Regular CEs, you must indicate so on the application. The Certificate of Completion should include PACB Ethics approval statement:

This program has been pre-approved by The Patient Advocate Certification Board to provide continuing education credit to Board Certified Patient Advocates (BCPA). The course has been approved for a total of XX CE contact hour(s), of which XX are in the area of Ethics.

Approval Number: xxxxxxx

Pending Statements

When referencing the Ethical Standards for Board Certified Patient Advocates, use the following statement in promotional materials. “Board Certified Patient Advocate Ethics credit is pending approval”

Click here to submit a Regular CE Application
Click here to submit an In-Service CE Application

Documentation

Attachments to be submitted in the “Uploads” section of the Application

1. Program Overview:
   - Session descriptions with at least 3 learning objectives
   - Agenda or schedule of activity including non-educational breaks
   - Speaker information including bios, resume or CV

2. Certificate of Completion: The certificate of completion that you provide to your participants must include:
   - Participant's name
   - Name and date of the course
   - Number of credits awarded
   - Provider organization name
   - Title, name and signature of an authorized representative from your organization
   - The PACB approval statement with approval number and CE count.
   - Retention statement, which indicates to the participants how long they must keep the certificate in case of audit. PACB's retention statement policy is that documents must be retained for at least one year past the participant's BCPA's renewal date.
3. Program Evaluation: Provide a copy of the evaluation your participants will be required to complete at the end of the activity in order to receive credit. You may use any evaluation method that is appropriate for your organization or program.

4. Program Promotional Materials Demonstrate how the information about your program is being marketed and should include:
   - Name of organization
   - Title of program
   - Outline and/or agenda for the program
   - Program goal(s)
   - Learning outcomes
   - CE information - When creating and submitting your promotional materials you may add, “This program has been submitted to The Patient Advocate Certification Board for approval to provide board certified patient advocates with XX clock hour(s).

Payment Methods

Credit Card - The preferred method of payment is by credit card. The PACB accepts MasterCard, Visa, and American Express. All credit card payments are processed securely. When paying by credit card, be sure to enter your information as requested on the payment portion of the application. You will be able to print your receipts after the payment section in the application.

Check - You also have the option of paying by check. Checks must be made payable to the Patient Advocate Certification Board. A service fee of $35 will be assessed for checks returned for insufficient funds or for charges made to closed accounts.

Make checks payable to:

Patient Advocate Certification Board
2300 Wildwood Ave
#6771
Sherwood, AR 72120

Continuing Education Pre-Approval Fee Schedule

<table>
<thead>
<tr>
<th>Category of Application</th>
<th>Fee*</th>
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<tbody>
<tr>
<td>Standard Approval Category</td>
<td>$100 per program</td>
</tr>
<tr>
<td>Employers Providing In-Service Education</td>
<td>$25 per program</td>
</tr>
<tr>
<td>Priority Late Fee**</td>
<td>$100 per program</td>
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*All fees are non-refundable.

**An additional fee of $100 is charged to all organizations requesting rush processing of their application; this applies to any application submitted less than 30 days prior to the first event date. Applications submitted less than 10 business days in advance of the activity date will not be accepted. No retroactive approvals will be issued at any time.
PACB will communicate with you via the email address you provide on your application. Please be sure to add admin@pacboard.org to your safe senders' list to ensure you receive all communication.

PACB reserves the right to monitor the programs and activities for which it has granted approval and to withdraw its approval from any program or activity that is offered or presented in a manner that is inconsistent with approval requirements.

Record Retention Policy

All organizations approved by the Patient Advocate Certification Board to offer BCPA CEs must maintain the following records, for each approved activity, for a period of five (5) years.

- Course outline (including all dates and locations given, or time period(s) offered online)
- Resume, CVs or biographical information for all presenters and/or authors
- Participant list
- Completed Evaluations
- Record of certificates issued

Guidelines for CE Offered Solely through Written Means

Follow the guidelines listed below for continuing education offered solely through written means (e.g., home study courses, books) where the course/article should meet the minimum number of words/questions in order to obtain the stated number of hours.

<table>
<thead>
<tr>
<th>Number of Words</th>
<th>Number of Multiple-Choice Questions</th>
<th>Number of Hours Approved</th>
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<tbody>
<tr>
<td>Up to 10,000</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>10,000 – 20,000</td>
<td>15</td>
<td>4</td>
</tr>
<tr>
<td>20,000 – 30,000</td>
<td>20</td>
<td>6</td>
</tr>
<tr>
<td>Every 10,000 thereafter</td>
<td>5 Additional Questions</td>
<td>2 Additional Hours</td>
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Activities that will NOT be approved

- General orientation programs designed to familiarize employees with the organizations policies and procedures
- Program that are product-based
- Vendor fairs/exhibitor booths
- Any courses designed to prepare individuals to take the BCPA exam
- Incomplete applications
- Applications received without payment
- Retroactive courses
- Applications received less than 10 business days (two calendar weeks) before start date
- Poster presentations
- Blog entries
Domain Focus Areas for Continuing Education

The CE program/activity must be related to at least one of the BCPA domains of practice as outlined in the Competencies and Best Practices for the Board Certified Patient Advocate or the Ethical Standards for a BCPA.

Frequently Asked Questions for Providers of CEs

Q. How can I get my organization's program approved for Board Certified Patient Advocates (BCPA)?

A. Apply with payment at least 30 days before the program is scheduled to be offered.

Q. What is the criteria required to get my Ethics course pre-approved?

A. The content of the program must show evidence that the PACB Ethical Standards for Patient Advocates is referenced and properly cited within the presentation.

Q. How much does it cost to get my organization's programming pre-approved?

A. The fee for regular CE submissions is $100. An additional priority processing fee of $100 is required for applications submitted less than 30 days from the start of the program. In-service program pre-approval is $25.

Q. What is the difference between a Regular CE Application and an In-Service Application?

A. The In-Service application is used only for CE activities offered by an employer to employees at no charge. All other submissions use the Regular application.

Q. What is the approval period?

A. Programs are approved for 12 months, beginning on the start date of program.

Q. I forgot to submit my organization's program for approval and the activity has already taken place. What can I do?

A. Unfortunately, the Patient Advocate Certification Board will not approve any program retroactively.

Q. How far in advance of the activity should an application be submitted?

A. Applications must be submitted at least 30 days in advance of the program date. Applications submitted less than 30 days must also include the priority processing fee of $100.

Q. How long will it take to receive a decision on my application?

A. The PACB may require up to 30 days to review submissions, depending on volume of applications. In general, however, submissions are usually reviewed within 1-2 weeks.
Q. How do I know if my program is approved?

A. Once reviewed, a “Notice of Continuing Education Approval or Rejection” will be emailed to the contact person on the application. The notice for approved programs will include pertinent information including approval number and statement which must be included on the certificate of completion and any marketing materials.

Q. Our company does not have any marketing material for the program we would like to have approved?

A. You will need to supply evidence of the way the program is promoted to its intended audience. Promotional materials can include website copy, email copy, brochures, posters or similar methods.

Q. I have not received my approval yet.

A. If you have not received notice from the Patient Advocate Certification Board within 30 days of your application submission, contact help@pacboard.org or call the customer support desk at 929-430-7222.