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Purpose
This Guide is primarily intended to provide instruction for the following activities:

- How to submit Pre-Approved Continuing Education
- How to submit Post-Approved Continuing Education
- How to Recertify with Continuing Education

For detailed information about Continuing Education and Recertification Requirements and Policies, refer to the Board Certified Patient Advocate Renewal Handbook. For detailed information regarding application to sit for the BCPA examination (First-time, Repeater Candidates and those seeking to Recertify by Examination), see the Board Certified Patient Advocate Candidate Handbook.

With special thanks to Board Certified Patient Advocate, Adrian Robinson who works as a Recovery Care Coordinator with USSOCOM Warrior Care Program–West, for his assistance with testing and training materials related to the new CE Management and Recertification System.
Types of CE Submissions

Pre-Approved CE Programs

• Are submitted by the sponsoring organization for review and awarded a unique approval code for a specified number of CEs.
• There is no additional cost to submit the certificate of completion for Pre-Approved CEs; however, CE sponsors may charge a registration fee to access courses that have been ‘pre-approved’ by PACB.
• Pre-Approved submission requirements – Certificate of attendance from the sponsoring organization that includes the participants name and the approval code.

Post-Approved CE Programs

• 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.
• Examples of a ‘program’ could include: a one hour webinar, a self-paced online course offering 5 CEs, a virtual or in-person conference offering 6 CEs, and many other options.
• Post-Approved submission requirements:
  1. The title of the course.
  2. The date and the location of where the course was offered.
  3. The number of credit hours requested.
  4. The name and brief bio or qualifications of the instructor.
  5. 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.
  6. The learning objectives or outcomes from the activity.
  7. The assessment materials used for the course.
  8.

Quick Tips

Visit [https://www.pacboard.org/post-approved-ce/](https://www.pacboard.org/post-approved-ce/) for a sample Post-Approved Submission.

Academic Coursework

• Academic Coursework from a university, college, or other educational institution must be submitted in advance of enrollment to ensure approval.
• Submit all academic coursework using the Post-Approved application. Only academic coursework that has been submitted, reviewed, and approved will be considered.
• For complete details related to academic coursework, see the Board Certified Patient Advocate (BCPA) Continuing Education and Recertification Handbook.
How to Upload Pre–Approved CEs to the Patient Advocate Certification Board CE Manager

Login Option 1

Step 1: Open your browser to www.pacboard.org/

Step 2: From the Home Page click on Login from the menu bar as shown below.

Option 2 – Alternately, start with the searchable CE list to find specific approval numbers.

Step 1: Open your browser to page: www.pacboard.org/celist/

Step 2: Click on Login to Claim Pre–Approved CEs.
Step 3: Arrive at BCPA Portal (Hosted by Prolydian).

Step 4: Click on Log In.

**NOTE:** All current BCPAs have a profile based on your PACBoard primary email. If you are unable to login, use the password reset feature. **DO NOT select ‘Create Account.’**

**Step 5**

1. Enter your email associated with your PACBOARD account.
2. Enter your PACBOARD password.
3. Click Log In.
Step 6: When the page opens, click on the small triangle and then on ‘View details.’

Alternately, click on Credentials and then click on Certifications.
This is your dashboard:
1. Your current Board Certified Patient Advocate (BCPA) certification start and expiration dates.
2. The number of credits needed to fulfill your renewal requirement.
3. The number of CEs already earned.

Step 7: To submit a new CE certificate, click Apply for CEC Credits.
Step 8: Find the date the CE was issued (on the certificate) and enter. If you are unable to find a date, estimate the approximate month and day.

Step 9: Select the button next to ‘I have a Preapproval Code (or want to look it up).’

Step 10: Enter the code from your certificate here, the code will automatically populate the name of the course.

Step 11: If you cannot locate the Preapproval code click ‘Advanced Search.’
Step 12: If needed, use the search filters to locate your Pre-Approved CE session. Alternately, refer to the list at [https://pacboard.org/celist/](https://pacboard.org/celist/).

Step 13: Once you locate the course, click Choose.

How to Locate the Approval Code

The approved code should be located on the certificate you received after completing your CE training. Look for a 5-digit code beginning with the digits 18.

Certificate of Continuing Education

This is to certify that

**Adrian Robinson**

has completed the following Continuing Education Course:

**Families in Disaster Recovery: Coordinating Support at the Installation Level**

Webinar Presenters: Jessica Kozel & Ed Helphinsline

On March 17, 2021

The California Certification Board to provide continuing education credit to Board Certified Patient Advocates (BCPA). The Course has been approved by the Board as follows:

Approval Number: 18095

It is the policy of the Board that documents must be retained for at least one year past the participant's BCPA's renewal date.
Step 14: You are now back on your dashboard page with the course information populated under the Preapproval selection. Now, click choose files under Documentation. This is where you will upload the certificate of completion received from the sponsor of the CE program.

Step 15: Depending on your computer operating system, some form of File Upload option will appear. You may need to click Allow if your system does not immediately access your local files.

Step 16: Navigate to the location where you save your CE certificates as demonstrated in the example below.
Step 17: Click once on the file that represents the certificate that you need and then click open.

Step 18: You may (or may not) see the ‘File Upload in Progress’ box. When the upload is complete you will be directed back to the main dashboard.

Step 19: Once back on your dashboard verify that the file has uploaded.
Step 20: Scroll to the bottom of the screen and click Submit.

With that, the CE has been submitted. The submission will be reviewed. If all the documentation is correct, the session will be approved, and the CE will be added to your journal. If anything is missing, you will receive an email requesting additional information.

How to Upload Post-Approved CEs to the Patient Advocate Certification Board CE Manager

Refer to page 2 of this Guide and prepare each of the required items. You may prepare a single document, or you may submit multiple documents. Acceptable document formats include:

- MS Word
- Adobe PDF
- JPG or JPEG image

For Post-Approved CE submission: (See image–next page)

Step 1 – Follow the instructions for Pre-Approved CE submission through page 11 of this guide.

Step 2 – For Post-Approved CEs, select the second radio button – ‘I want to enter the details of the activity.’

Step 3 – For Category – Select General or Ethics.

Step 4 – For Activity – Select the most appropriate option from the drop-down list.

Step 5 – Give the entry a name.

Step 6 – Provide a brief description.

Step 7 – Indicate the number of CEs requested (numbers only).
Following the procedure outlined on pages 9–11. Upload the required documentation. ‘Choose files’ will allow for multiple uploads. Do not click submit until all items have been uploaded successfully.

Verify uploads, scroll down, and click submit.

Your session will be reviewed. If it is approved, you will receive an electronic invoice for the $15 Post-Approval fee. Once paid, the session will be applied to your journal.

If the session is not approved, or information is missing, you will receive email notification.

Academic Courses
For submission of academic coursework, follow the same process outlined for Post-Approved CEs. Be sure to refer to the Board Certified Patient Advocate (BCPA) Renewal Handbook for the complete list of required items and policy details.
General vs Ethics Approvals

Board Certified Patient Advocates must earn thirty (30) hours of approved continuing education over the three-year term of their certification. Of the thirty (30) hours, six (6) must be dedicated to Ethics. If a single program offers both General and Ethics CEs, they must be submitted as separate entries.

For example:

- **APHA program:** ‘Pandemic! Serve Clients, Preserve and Grow Your Practice’ was approved for two (2) general and one half (0.5) ethics CE. Approval code: 18056 and 18056–Eth.
  
  1. To claim this General CE, use the Pre-Approved pathway and enter 18056. The session will populate and add two (2) general CEs. Upload the certificate and submit.
  2. To claim the Ethics, use the Pre-Approved pathway and enter 18056–Eth. The session will populate and add one-half (0.5) Ethics CEs. Upload the certificate once again and submit.

- Your journal will be updated to reflect both general and ethics CEs.

**Multi-Session CE Programs Offering Both Live (Virtual) and Recorded Sessions**

The recent shift from face-to-face events to virtual events significantly impacts how organizations like PACB approve and issue continuing education as well as how it must be tracked. Event organizers are now offering hybrid versions of their workshops and conferences. The hybrid event usually features a live–virtually delivered version of the program. The CE sponsor may also record all or parts of the event for viewing as ‘On-Demand’ sessions after the event concludes. While there is obvious benefit to both the attendee and the sponsoring organization, tracking participation over multiple formats gets complicated. The complete list of Pre-Approved CEs makes up a ‘database,’ and everything in a database must have a unique identifier. To simplify the process as much as possible, PACB created the following naming convention to make finding and selecting the proper approval code(s) as easy as possible.

Consider the following example:

HealthAdvocateX – (Previously known as WASHAA) held a Virtual Conference in November 2020. The full conference offered ten (10) general and one (1) ethics CE.

Sample scenarios:

1. Sharna Cain – attends the full conference including the live networking session. She watches breakout ‘B’ during the conference, and later watches the other four breakout sessions. Sharna makes two entries into her journal. One for approval code 18086 and a separate entry for 18086.3A–ETH. Her journal is credited for ten (10) general and one (1) Ethics CE.

2. Rohan Dale – attends part of the virtual conference including the live networking session and breakout C but does not follow-up by watching the other four (4) breakout sessions. In total, Rohan participates in 4 of the 11 sessions. He must make four (4) entries to claim each of the four (4) sessions he attended.
Note: This example represents the most complex scenario. In most instances you will not need to make more than two entries.

<table>
<thead>
<tr>
<th>Participant Entries</th>
<th>Approval Code</th>
<th>Session</th>
<th>General CEs</th>
<th>Ethics CE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sharna Cain</td>
<td>18086</td>
<td>WASHAA Conference – Full Conference General</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td></td>
<td>18086.3A-ETH</td>
<td>WASHAA Conference – Full Conference General</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Rohan Dale</td>
<td>18086.1</td>
<td>The Dynamic Field of Health Advocacy</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Rohan Dale</td>
<td>18086.2</td>
<td>National Networking Event (only counts for live attendees)</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Rohan Dale</td>
<td>18086.3A</td>
<td>Addiction: The Hidden Prevalence and Practical Tips for Change</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>18086.3B</td>
<td>When the Diagnosis is Dementia: Understanding and Action</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>18086.3C</td>
<td>Food and Mood: Scientific Strategies and Clinical Applications</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>18086.3D</td>
<td>Mind Body Approaches to Mental Health</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>18086.3E</td>
<td>How Nature Heals</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Rohan Dale</td>
<td>18086.4</td>
<td>Trauma Informed Care</td>
<td>1</td>
<td>0</td>
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<tr>
<td></td>
<td>18086.5</td>
<td>Integrating Mental Health into Primary Care: Research and Reality</td>
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<td>0</td>
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<tr>
<td></td>
<td>18086.6</td>
<td>Integrating Mental Health: System Barriers &amp; Solutions</td>
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<td>0</td>
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<tr>
<td></td>
<td>18086.7</td>
<td>Tools for Health, Wellbeing, and Resilience: Before, During and After COVID-19</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

How to access your official BCPA Certificate

Follow the same login process outlined earlier in this guide to arrive at your Dashboard. Click on the small triangle and then on 'Download Certificate.'
Public Registry

From the Dashboard, you can also add or remove yourself from the ‘Public Registry.’ The Public Registry is a database of all Board Certified Patient Advocates in good standing. Consumers, employers, or others who wish to verify the status of a BCPA can access the Public Registry. By default, you ARE NOT listed in the Public Registry. Please login and add yourself if you wish to be listed.

Note: The Public Registry is not a Directory. For full featured Directory Listings, we encourage you to visit the following resources:

Greater National Advocates – https://www.gnanow.org/advocates
The Alliance of Professional Health Advocates – https://www.aphadvocates.org/directory/
HealthAdvocateX (formerly known as WASHAA) – https://www.healthadvocatex.org/

Recertification

Certificants must recertify every three years to maintain active BCPA status. Recertification requires:

- Continued agreement and compliance with the Code of Professional Responsibility.
- Submission of thirty (30) hours of approved Continuing Education (including six (6) hours of Ethics).
- Payment of $275 recertification fees.

Certification may be renewed in one of two ways:

1. Board Certified Advocates may choose to renew their certification by taking and passing the certification exam.
2. Board Certified Advocates may choose to renew their certification by completing thirty (30) clock hours of Continuing Education (CE) units over the three-year period prior to their renewal date.

These thirty (30) CE units must be PACB approved units in order to qualify toward recertification. NOTE: At least six (6) of these thirty (30) required units (6 clock hours) must be dedicated toward the Ethics domain.

For complete details and terms for late renewal, see the Board Certified Patient Advocate Renewal Handbook.

Recertification with Continuing Education

BCPAs in good standing will receive automatic reminders beginning six (6) months prior to expiration of certification.

Follow the log in procedures outlined earlier in this guide to access your Dashboard.

Follow progress towards recertification via your Dashboard. Once you have satisfied the criteria for renewal, an ‘Apply for Renewal’ button will activate. Simply click the button and complete the application along with the renewal fee of $275.
Recertification by examination

From your Dashboard click Applications << Apply Now << BCPA Recertification by Examination Application.

Complete the application along with the fee. Once approved, you will receive a scheduling authorization for the next available exam cycle.

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