



Patient Advocate Certification Board

Technical Instruction Manual for Submission of Continuing Education and Recertification

Updated June, 2023



Online



Board Certified Patient Advocate (BCPA) Technical Handbook for Submission of Certification Renewal and Continuing Education

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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
- How to Apply for Retired Status
- How to Apply for Inactive Status

For detailed information about Continuing Education and Recertification Requirements and Policies, refer to the [Certification Renewal and Continuing Education Handbook](#). For detailed information regarding the 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](#).

Renewal of Certification Through Continuing Education Requirements

1. Continuing Education (CE) must be directly related to one of the six domains outlined in the [Competencies and Best Practices required for a Board Certified Patient Advocate](#) document or to the [Ethical Standards for a Board Certified Patient Advocate](#).
2. Continued agreement and compliance with the [Code of Professional Responsibility](#).
3. Submission of thirty (30) hours of approved Continuing Education (including six (6) hours of ethics) and three (3) hours in the area of Justice, Equity, Diversity, and Inclusion¹.

Pre-approved programs are pre-populated in the Prolydian database and will auto-fill when the correct approval code is entered. Post-approved CEs or University courses require additional information. See the following sections for more information about the submission of Post-Approved CEs or College and University courses.

CE credits must be completed as defined by the Renewal of Certification Criteria. All activities must be completed before the application deadline and before submitting the renewal application. Renewal applications may be submitted six (6) months before the certification expiration date.

¹ Beginning with 2025 Renewals, at least three (3) of the 24 general CEs must be J.E.D.I. related.

Criteria

The Patient Advocate Certification Board must approve CE activities for BCPA recertification. Criteria for approved continuing education (both pre-approved and post-approved):

- The program must be at least 60 minutes in length. 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.
- The session must be provided in a manner that allows for individuals with a disability to participate
- The session must include an evaluation
- The purpose of the program must be defined in terms of learning objectives
- The program must be designed to increase the participant's knowledge or skill with regard to one of the domains of practice for patient and health care advocates.
- The program must take place within the current 3-year renewal cycle.

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 participant's name and the approval statement, including the approval code.

Post-Approved CE Programs

- CEs that are not pre-approved may be submitted after the fact to ensure they meet the criteria 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 BestPractices 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 (when available).



Visit <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.

Your BCPA Access Portal

As a certifying body, PACB partners with trusted third-party organizations to deliver the BCPA examination and provide support to our certificants. Currently, Prolydian, LLC serves as the primary partner for application processing and maintenance of the BCPA database.

Both Candidate and Certificant Applications are available on the BCPA online portal (hosted by Prolydian) as outlined below.

- First-Time Candidate - Examination for Board Certified Patient Advocate Application: Candidates applying to sit for the examination for the first time submit this application which requires documentation of eligibility.
- Repeat Candidate - Examination for Board Certified Patient Advocate Application: Candidates who previously tested but did not achieve a passing score submit this application to retest at a discounted fee.
- Certification – BCPA Continuing Education Credit Request: BCPAs select this application to submit continuing education (either preapproved or post-approved).

- Certification – Board Certified Patient Advocate Renewal Application: BCPAs who have reached their date of renewal and have submitted the requisite number of CEs, submit this application.
- BCPA Recertification by Examination Application: BCPAs who **have not** submitted the requisite number of CEs, or who wish to retest as the mechanism for recertification submit this application.

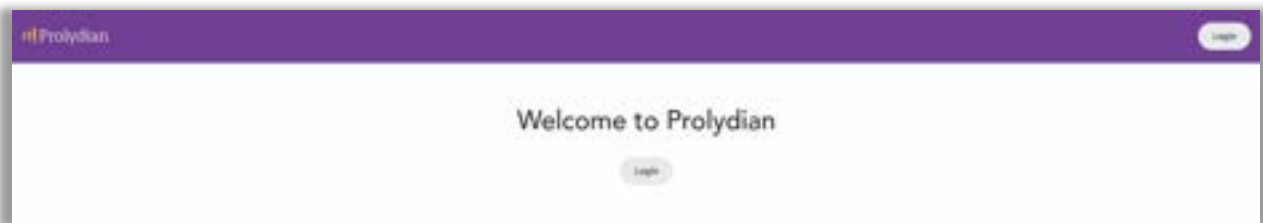
How to Upload Pre-Approved CEs to the Patient Advocate Certification Board CE Manager

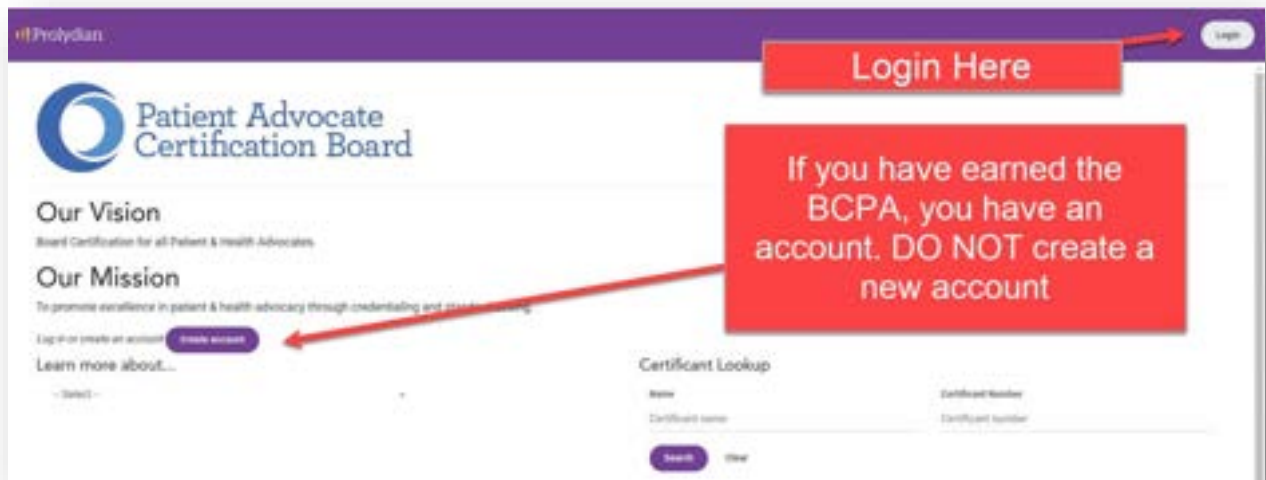
All BCPAs have an account in our online portal (hosted by Prolydian). Access to the online portal becomes available on the first day after certification is conferred. Submission of all continuing education and the renewal process takes place within the online portal.

Step 1: Log in to your BCPA Access Portal – Click the Portal Login button.

Step 2: Alternatively, bookmark the direct link to the login page:

<https://app.prolydian.com/organizations/PACB>

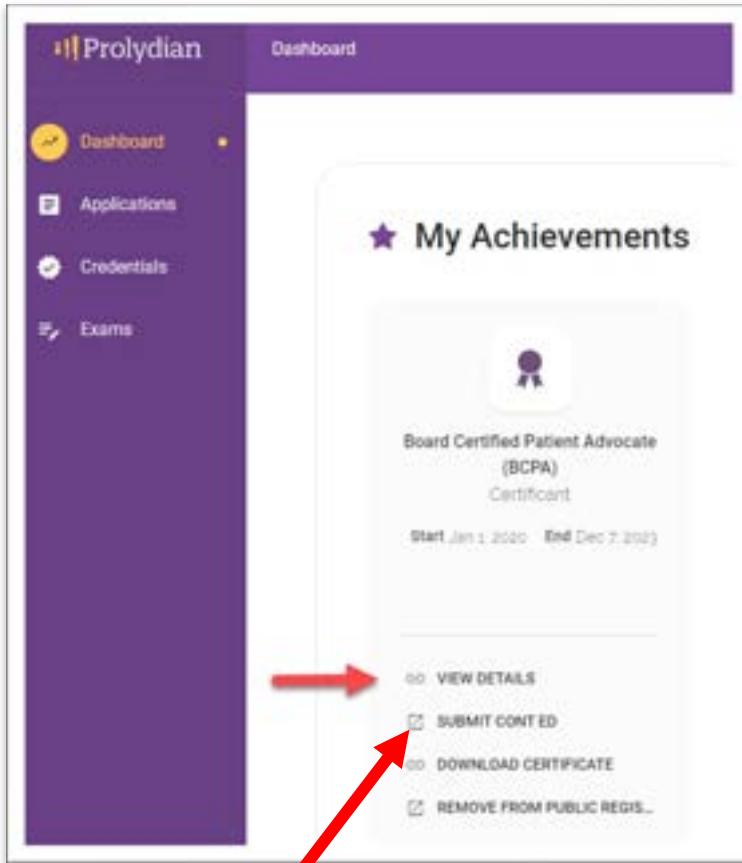




NOTE: All current BCPAs have a profile based on your PACB primary email. If you are unable to log in use the password reset feature or contact support+pacb@prolydian.com.

DO NOT select 'Create Account.'

A screenshot of the 'Log In' form. It features a title 'Log In' at the top. Below the title are two input fields: 'Username or email' and 'Password', each with a small eye icon for visibility. Below the 'Username or email' field is a checkbox labeled 'Remember me'. To the right of the checkbox is a link labeled 'Forgot Password?'. At the bottom of the form is a large, dark 'Log In' button.

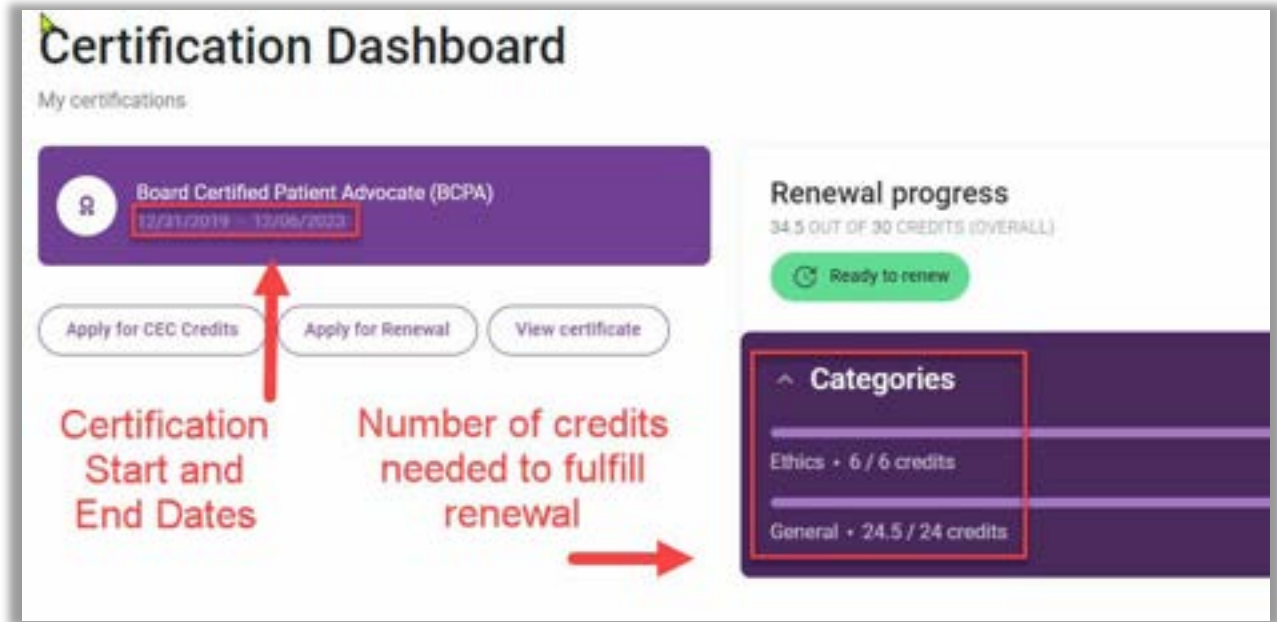


This is the dashboard of the BCPA Access Portal



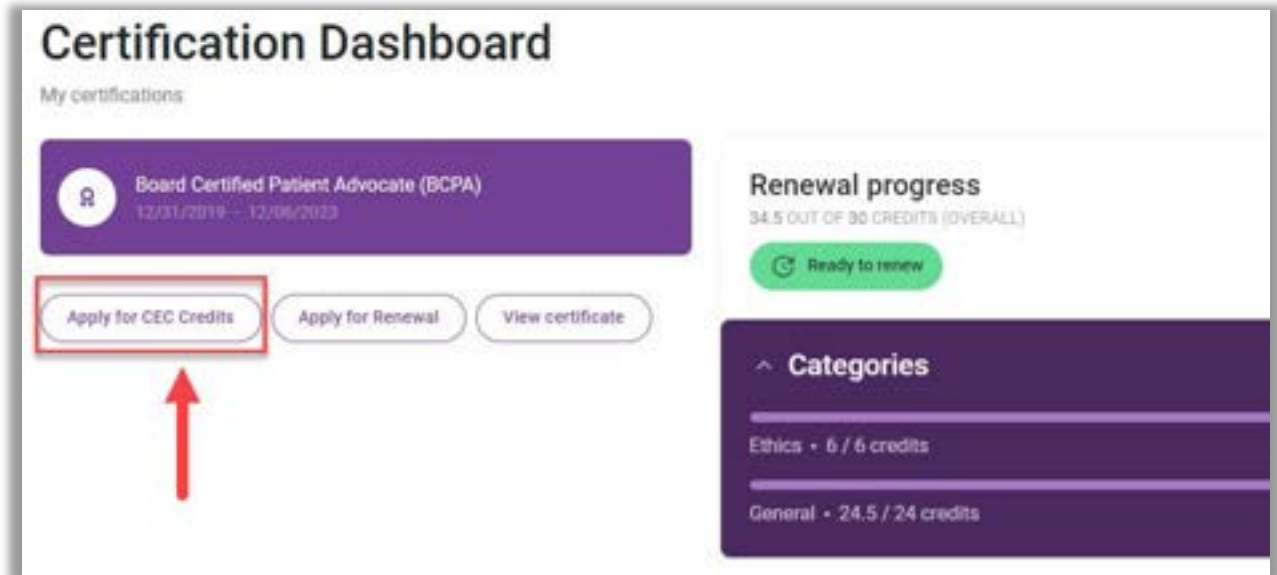
Note: Clicking on '[Submit Cont Ed](#)' would seem like the obvious next step. However, that option bypasses the auto-fill feature for pre-approved CE. Instead, click on '[View Details](#)' for the easiest and most efficient method to upload your CEs

This is your dashboard



Left – Your current Board Certified Patient Advocate (BCPA) certification start and expiration dates.

Right – The number of credits needed to fulfill your renewal requirements.



Step 3 – Click on Apply for CEC Credits to enter either Pre-Approved or Post-Approved CEs.

Pre-Approved CE Submission

Applying for
Certification - BCPA Continuing Education Credit Request - Continuing education for Board Certified Patient Advocate (BCPA)

Status: In progress ← **Status of the application**

Post Save **Submit**

Continuing Education Activity

Request for Continuing Education Credit

BCPA accepts both Pre-Approved CE submissions and Post-Approved CE submissions. Before proceeding check to determine if your submission is preapproved here.

Preapproved CE submission requirements: Date, Approval Code and Certificate of Attendance
Post approved CE submission requirements: Date, General/Ethics type, Activity format, Program Title and Sponsor, Program Description, Learning Objectives, Presenter Name and brief Bio. Match to at least one BCPA Competency or Ethical Standard.

Note the Continuing Education Handbooks are available at: <https://www.pactboard.org/ceactivityfield/>

CE Activity Form

Renewal progress 28 OUT OF 30 CREDITS OVERALL 12/01/2023
GENERAL ADOPT

✓ 2.00 more CEs for renewal ← **Status towards renewal**

Categories	93%
Ethics + 1 / 5 credits	15.57%
General + 23 / 24 credits	95.82%

Start date of activity*

Enter a start date ← **Start here**

Step 4 – Enter the date you completed the continuing education program. The date must fall during the term of your 3-year certification.



Entering the date triggers the auto-fill features associated with the submission of pre-approved CEs.

Start date of activity*

11/01/2022

I have a Preapproval Code (or want to look one up)

I want to enter the details of the activity

Preapproval selection

Preapproval code

18128

Vaccines and Infectious Disease
18128

Inputting a date launches the auto-fill database for pre-approved CEs and opens the option to input the approval code.

Adding the approval code will pull up the corresponding program.

Step 5 – enter the approval code for the program. Click on the corresponding program title until it populates the window.

I have a Preapproval Code (or want to look one up)

I want to enter the details of the activity

Preapproval selection

Vaccines and Infectious Disease
18128

Change Preapproval Code Remove

Activity units

1.5 Hour(s)

Your activity units will be automatically converted to 1.5 CECs
(Note: Estimate only. This number may be lowered upon approval based on per-year or per-cycle maximums for this activity type)

Input the actual number of units based on your participation.
Maximum allowed for this preapproval is 1.5

Documentation

Choose Files

Click on the name of the program until it populates the window

Upload the certificate of attendance

Step 6 – Upload the certificate of attendance.

Step 7 – Click the box designating the session as preapproved and then click on Submit.

This request is for a Pre-Approved activity and I confirm that I completed this activity

Select the applicable competency/ethical standard. Further information regarding PACB Competencies may be found at <https://pacboard.org/> Information regarding PACB Ethical Standards may be found at <https://www.pacboard.org/wp-content/uploads/20191115PACB-Ethics.pdf>. Beginning with individuals who earned the BCPA in 2022, Board Certified Patient Advocates will be required to demonstrate completion of the Equity Diversity, and Inclusion. Both pre-approved and post-approved submissions will be accepted. Pre-approved programs will continue to certificate of attendance.

BCPAs submitting post-approved applications in the JEDI category will be required to indicate which of the core areas are supported.

Submit

Select the Pre-Approval box and click submit

The submission will be reviewed, approved and the corresponding CE credits will be added towards your renewal requirements.

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

Submission of Post-Approved continuing education follows a similar process but requires the certificant to provide additional information. Certifying bodies are required to ensure continuing education programs directly support the domains of practice that underly the profession. PACB actively pursues providers of pre-approved CEs to support both quality content and ease of access. However, PACB recognizes patient and health care advocates come from very diverse backgrounds and serve equally diverse populations. With that in mind, the post-approval category provides a mechanism for advocates to submit educational programming offered by other entities.

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

Step 1: Follow the instructions for Pre-Approved CE submission through step 4 on page 9 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, Ethics, or J.E.D.I.

Step 4: For Activity – Select the most appropriate option from the drop-down list, i.e., webinar, live in-person conference, Home Study, etc.

Screen shots depicting steps 2-4 for Post-Approved CE Submissions

Categories

Ethics • 1 / 6 credits

General • 24.5 / 24 credits

Start date of activity *

01/06/2023

I have a Preapproval Code (or want to look one up)

I want to enter the details of the activity

Category

Ethics

Activity

Recorded Conference or Workshop

These are drop-down boxes. Make a selection.

Name

Sample Workshop

Enter an identifying title for this activity. For a course or sponsored activity, enter the official title.

Enter a short description of the activity

This is where you will provide a brief description of the program.

Be careful to enter your actual units of activity and NOT your desired continuing education credit units. Note that an activity unit of "Occurrences" means you enter 1 for every time you did that activity. For e...

Activity units

5 Add the requested CE count Hour(s)

Input the actual number of units based on your participation.

Documentation

Choose files Upload the certification of attendance

For Post-Approved submissions, complete the remainder of the form as indicated.

Step 5: Give the entry a name.

Step 6: Provide a brief description.

Step 7: Indicate the number of CEs requested (numbers only).

Step 8: Enter the name of the program sponsor.

Step 9: Enter the description of the program and the learning objectives as provided by the sponsor.

This request is for a Pre-Approved activity and I confirm that I completed this activity

Enter the name of the CE program. • **Do Not check this box for post-approved submissions**

My Sample Workshop

Enter the name of the sponsoring organization. •

XYZ organization

Provide the official description of this program. •

Provide a more detailed description of the program

Provide the learning objectives for this program. •

Provide the learning objectives of the program

The image shows a screenshot of a web form for submitting CE programs. At the top, there is a checkbox labeled "This request is for a Pre-Approved activity and I confirm that I completed this activity". A red arrow points to this checkbox from a red text box that says "Do Not check this box for post-approved submissions". Below this, there are four input fields, each with a red border: 1. "Enter the name of the CE program. •" with the text "My Sample Workshop". 2. "Enter the name of the sponsoring organization. •" with the text "XYZ organization". 3. "Provide the official description of this program. •" with the text "Provide a more detailed description of the program". 4. "Provide the learning objectives for this program. •" with the text "Provide the learning objectives of the program".

Step 10: Select area that the content supports. Continuing Education (CE) must be directly related to one of the six domains outlined in the [Competencies and Best Practices required for a Board Certified Patient Advocate](#) document or to the [Ethical Standards for a Board Certified Patient Advocate](#).

Note clicking on the Ethical Standards Box expands to include each area and also includes the support documentation for J.E.D.I. CE.

- 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.



How to Locate the Approval Code

The approval 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.

Academic Courses

For submission of academic coursework, follow the same process outlined for Post-Approved CEs. Be sure to refer to the [BCPA Certification Renewal and Continuing Education Handbook](#) for the complete list of required items and policy details.

General vs Ethics Approvals vs J.E.D.I.

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 and three (3) related to Justice, Equity, Diversity and Inclusion.² The requirement for J.E.D.I. CEs begins with advocates earning the credential in 2022. Individuals with renewal dates in 2023 and 2024 may submit J.E.D.I.-related CEs but are not required to do so. Thereafter, all renewals will require a minimum of three (3) J.E.D.I.-related CEs for renewal.

IMPORTANT: J.E.D.I. CEs are a subset of Ethics CEs. The concepts supporting Justice, Equity, Diversity, and Inclusion are incorporated into the Ethical Standards for a Board Certified Patient Advocate. Programs that support elements of Justice, Equity, Diversity, and Inclusion may also be submitted as an Ethics CE. However, sessions approved only for ethics are not interchangeable with the J.E.D.I. category.

If a single program offers both General and Ethics (or J.E.D.I.) 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 click submit.

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

² Beginning with 2025 Renewals, at least three (3) of the 24 general CEs must be J.E.D.I. related.

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 can 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-in person, or 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:

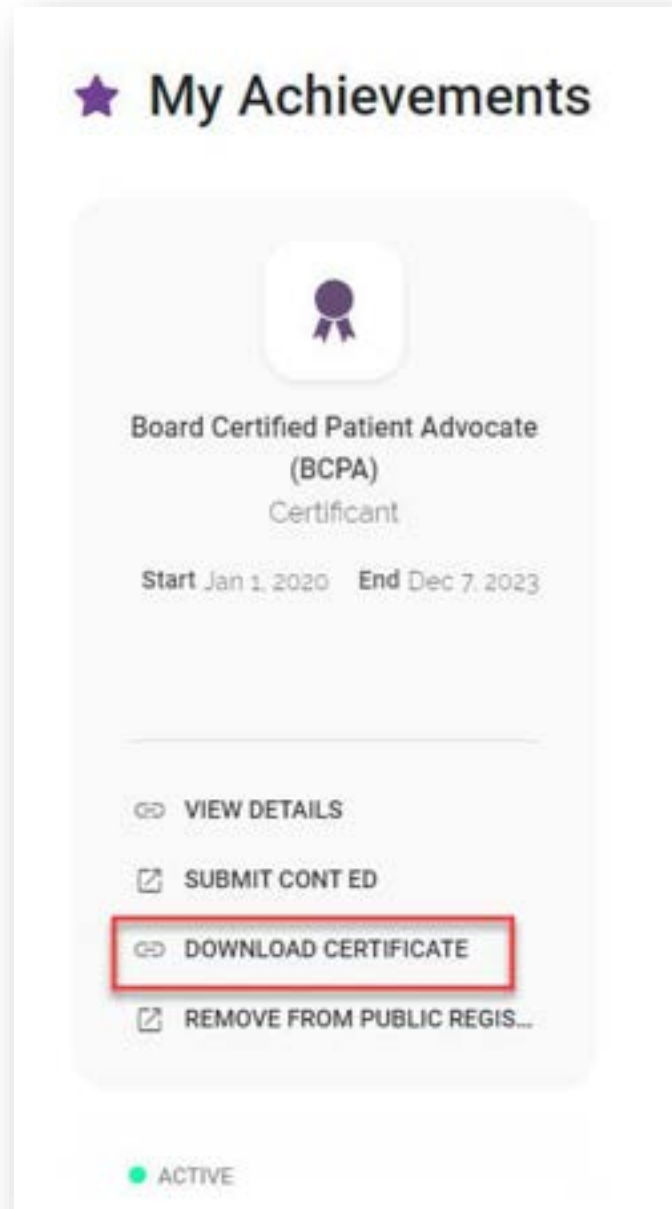
1. Sharna Cain – attends the full conference, including the virtual-live networking session. She watches breakout ‘B’ during the conference and later watches the other four breakout sessions. Sharna makes two entries in her journal. One for approval code 18086 and a separate entry for 18086.3A-ETH. Her 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. See illustration, next page.

This example represents a complex scenario. In most instances, you will not need to make more than two entries.

Participant Entries	Approval Code	Session	General CE	Ethics CE
Sharna Cain	18086	WASHAA Conference – Full Conference General	10	0
Sharna Cain	18086.3A-ETH	WASHAA Conference Ethics	0	1
Rohan Dale	18086.1	The Dynamic Field of Health Advocacy	1	0
Rohan Dale	18086.2	National Networking Event (only counts for live attendees)	1	0
Rohan Dale	18086.3A	Addiction: The Hidden Prevalence and Practical Tips for Change	0	1
	18086.3B	When the Diagnosis is Dementia: Understanding and Action	1	0
	18086.3C	Food and Mood: Scientific Strategies and Clinical Implications	1	0
	18086.3D	Mind Body Approaches to Mental Health	1	0
	18086.3E	How Nature Heals	1	0
Rohan Dale	18086.4	Trauma Informed Care	1	0
	18186.5	Integrating Mental Health Into Primary Care: Research and Reality	1	0
	18086.6	Integrating Mental Health: System Barriers & Solutions	1	0
	18086.7	Tools for Health, Wellbeing and Resilience: Before, During and After COVID-19	1	0

How to access your official BCPA Certificate

Follow the same login process outlined earlier in this guide to arrive at your Dashboard. Click 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/>
- The National Association of Healthcare Advocacy - <https://www.nahac.com/>
- 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 and three (3) hours related to J.E.D.I.
- Payment of \$195 recertification fees³.

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.

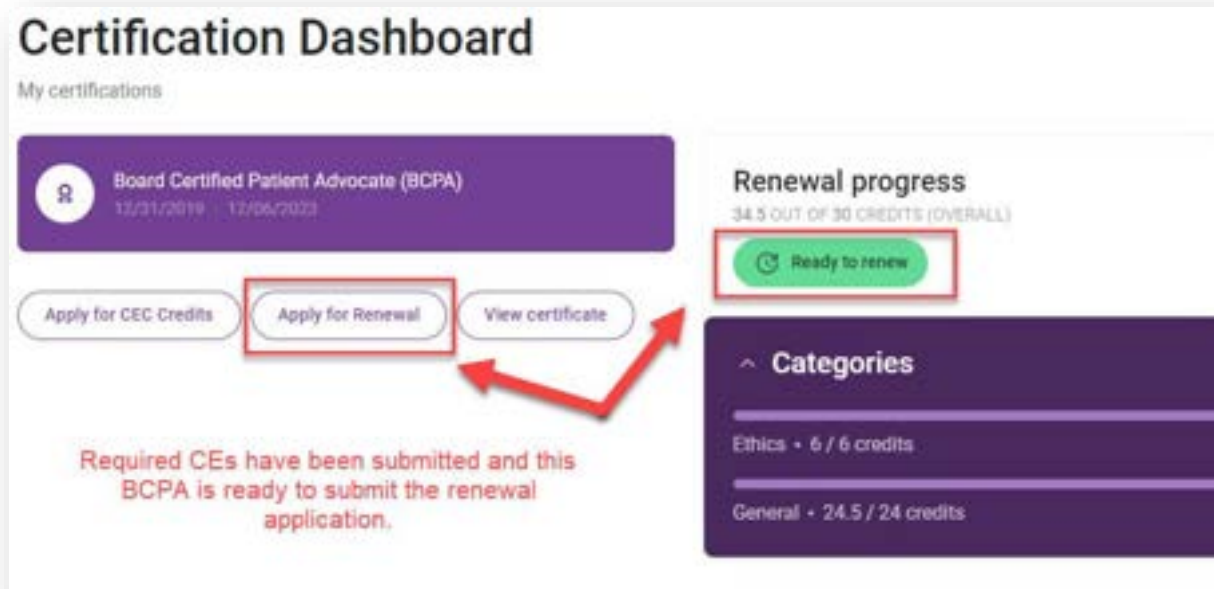
These thirty (30) CE units must be PACB-approved units in order to qualify for recertification. NOTE: At least six (6) of these thirty (30) required units (6 clock hours) must be dedicated toward the Ethics domain.

For complete details and terms for late renewal, see the [BCPA Renewal and Continuing Education Handbook](#).

³ Revised from \$275 effective with renewals due in 2023.

Recertification with Continuing Education

- BCPAs in good standing will receive automatic reminders beginning six (6) months prior to the expiration of certification.
- Follow the log in procedures outlined earlier in this guide to access your Dashboard.



Submitting the Renewal Application

Select 'Apply for Renewal.' Before submitting:

Step 1 – Review the listing of Continuing Education and ensure there are at least 6 Ethics hours and at least 24 hours in the General or J.E.D.I. categories.⁴

Step 2 – Review the listing to ensure there are no duplicates. PACB conducts random audits as required for accreditation.

Step 3 – Do not submit payment until the above two conditions are met.

Step 4 – Complete the application, including payment of the renewal fee and click SUBMIT.

The application will be reviewed within three (3) business days. Candidates are notified by email of successful certification renewal. Candidates are also notified if there are issues related to continuing education or payment of fees with instructions for remediation.

⁴ Beginning with 2025 Renewals, a minimum of three (3) J.E.D.I. related CEs will be required in addition to the six (6) Ethics.

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.

Filing a Reinstatement Request

Refer to the [BCPA Renewal and Continuing Education Handbook](#) for complete details regarding the eligibility and policies surrounding filing a Reinstatement application.

Reinstatement Policies and Procedures

Individuals seeking reinstatement of the BCPA must:

- Provide evidence of professional development activities that support the Scope of Practice for patient and health care advocates as outlined in the six domains of Competency and Ethical Standards.
- Eligible CEs must have been earned no more than 3 years prior to submitting the application for reinstatement.
- If applying for reinstatement within 1 year of expiration, provide evidence of 10 CEs earned no more than 12 months prior to application.
- Submit a reinstatement application and fee \$195.00; and
- Late fee – up to \$120 (May be prorated at \$10.00 per month for lapses of less than a year).

Reinstatement Application Instructions

Individuals seeking reinstatement of the BCPA certification must complete and submit all of the following items:

- Complete the online [Reinstatement Application](#).
- Evidence of continuing education activities based on the number of years not currently certified (i.e., 1 year=10 hours of CE; 2 years=20 hours; 3 or more years=30 hours).
- List professional development activities on the online application and include the (a) title of the course/activity, (b) name of sponsoring course provider, (c) date of completion, and (d) the number of hours earned.

Applying for Retired Status

Refer to the [BCPA Renewal and Continuing Education Handbook](#) for the policies surrounding application of BCPA-Retired status.

Fees

- The initial application fee for Retired Status is \$45.00. Attestation of retiree status is required annually, but no additional fees apply.
- [Application for Retired Status](#)
- To reactivate from Retired Status to Active Status, contact support@pacboard.org for details.

Applying for Inactive Status

Refer to the [BCPA Renewal and Continuing Education Handbook](#) for the policies surrounding application of BCPA-Inactive status.

Eligibility:

- Applicants must hold a current BCPA certification or one that has expired within the previous 12 months.
- Current BCPAs may submit the application at any time.
- Applicants with an expired certification must submit the application for inactive status no later than 90 days before the end of 12-month expiration period. For example, a certificant whose cycle ends June 30, 2022, must apply for inactive status no later than March 1, 2023.

Reactivation:

To reactivate the credential, a certificant holding inactive status must submit thirty eligible continuing education credits* and a completed reactivation application and reactivation fee. Criteria for reactivation must be accrued within the 3-year period immediately preceding reactivation. If approved, the new certification period will become effective for three years from the time of recertification.

Fees:

- \$50 one-time fee
- [Application for Inactive Status](#)