



Self-Assessment Readiness Quiz for the Board Certified Patient Advocate Examination

PACB is testing this quiz to determine if it can be used as part of the application/eligibility process. We invite you to participate and provide feedback. Your score on the quiz will not affect your eligibility status. However, we are asking all exam candidates to complete the self-assessment in order to collect data. The statements generally reflect the core knowledge skills and abilities of a practicing patient advocate. **Use your score only as a tool to identify areas in which you may require additional study.** The content of this quiz is intended to support and reflect the core PACB documents, [Competencies and Best Practices of a Patient Advocate](#) and the [Ethical Standards for Board Certified Patient Advocate](#).

The Readiness Quiz represents a high-level summary of the core tasks, knowledge, skills, and abilities required of an entry level patient advocate that are currently being validated through a Job Task Analysis study. Although applicants will not be deemed ineligible to test based on score, completion of the Readiness Quiz is a required element of the application process. **Note this tool is still in beta.** Results and feedback will be monitored. Submit any comments or feedback related to the Quiz using this [form](#).

Using the scale provided, please rate your familiarity with the following knowledge, skills, and abilities of the professional patient advocate.

1. Basic knowledge of financial resources (e.g., insurance limitations, employer benefits, VA, short-term disability, long-term disability, waiver programs, and legal alternatives)

Extremely familiar (4points)
Very familiar (3 points)
Moderately familiar (2 points)
Slightly familiar (1 point)
Not at all familiar (0 points)

Q-1 Points Scored _____

2. Knowledge of healthcare delivery systems

Extremely familiar (4points)
Very familiar (3 points)
Moderately familiar (2 points)
Slightly familiar (1 point)
Not at all familiar (0 points)

Q-2 Points Scored _____

3. Knowledge of hospice, palliative, and end of life care

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-3 Points Scored _____

4. Knowledge of insurance principles (e.g., health, disability, long term care)

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-4 Points Scored _____

5. Knowledge regarding levels of care and care settings

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-5 Points Scored _____

6. Knowledge of managed care concepts

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-6 Points Scored _____

7. Knowledge regarding management of clients with acute and chronic illness(es)

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-7 Points Scored _____

8. Knowledge regarding management of clients with disability(ies)

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-8 Points Scored _____

9. Knowledge of medication safety, reconciliation, and management

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-9 Points Scored _____

10. Knowledge of population health concepts

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-10 Points Scored _____

11. Knowledge of negotiation techniques

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-11 Points Scored _____

12. Knowledge regarding physical functioning and behavioral health assessment

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-12 Points Scored _____

13. Understanding of private benefit programs (e.g., pharmacy benefits management, indemnity, employer-sponsored health coverage, individually purchased insurance, home care benefits, COBRA)

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-13 Points Scored _____

14. Understanding of public benefit programs (e.g., SSI, SSDI, Medicare, Medicaid)

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-14 Points Scored _____

15. Basic knowledge of reimbursement and payment methodologies (e.g., bundled payment, case rate, prospective payment systems, value-based purchasing, financial risk models) *

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-15 Points Scored _____

16. Knowledge of transitions of care principles

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-16 Points Scored _____

17. Knowledge of utilization management principles

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-17 Points Scored _____

18. Knowledge of alternative care options (e.g., telehealth, virtual care)

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-18 Points Scored _____

19. Basic proficiency with federal, state, and governing agency regulations for homecare and hospice

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-19 Points Scored _____

20. Basic proficiency in negotiating rates to optimize the utilization of available resources and/or benefits to meet the client's health care needs

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-20 Points Scored _____

21. Basic proficiency in organizing, submitting, tracking, and negotiating claims, appealing denials, and filing appeals

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-21 Points Scored _____

22. Recognition of types of abuse and neglect (e.g., emotional, psychological, physical, financial)

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-22 Points Scored _____

23. Familiarity with behavioral health concepts and symptoms (e.g., diagnosis, dual diagnoses, co-occurring disorders, substance use)

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-23 Points Scored _____

24. Knowledge of client empowerment concepts and techniques

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-24 Points Scored _____

25. Knowledge of client engagement concepts and techniques

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-25 Points Scored _____

26. Knowledge of client self-care e.g., self-advocacy, self-directed care, informed decision making, shared decision making, health education)

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-26 Points Scored _____

27. Awareness of community resources (e.g., elder care services, transportation, fraternal/religious organizations, meal delivery services, pharmacy assistance programs)

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-27 Points Scored _____

28. Understanding of conflict resolution strategies

- Extremely familiar **(4points)**
- Very familiar **(3 points)**
- Moderately familiar **(2 points)**
- Slightly familiar **(1 point)**
- Not at all familiar **(0 points)**

Q-28 Points Scored _____

29. Familiarity with crisis intervention strategies

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-29 Points Scored _____

30. Understanding of health literacy

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-30 Points Scored _____

31. Knowledge of interpersonal communication skills (e.g., group dynamics, relationship building)

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-31 Points Scored _____

32. Familiarity with interview tools and techniques such as motivational interviewing

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-32 Points Scored _____

33. Awareness of multicultural, spiritual, and religious factors that may affect the client's health

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-33 Points Scored _____

34. Understanding of psychosocial aspects of chronic illness and disability

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-34 Points Scored _____

35. Familiarity with resources for the uninsured or underinsured

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-35 Points Scored _____

36. Awareness of supportive care programs such as support groups, pastoral counseling, disease-based organizations

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-36 Points Scored _____

37. Awareness of wellness and illness prevention programs, concepts, and strategies

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-37 Points Scored _____

38. Knowledge of social determinants of health

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-38 Points Scored _____

39. Ability to use appropriate judgment and critical thinking in decisions that require consideration of regulatory compliance, customer service, and client/patient welfare

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-39 Points Scored _____

40. Familiarity with adaptive technologies (e.g., text telephone device, teletypewriter, telecommunication device for the deaf, orientation and mobility services)

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-40 Points Scored _____

41. Familiarity with life care planning concepts

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-41 Points Scored _____

42. Familiarity with rehabilitation service delivery systems

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-42 Points Scored _____

43. Comprehension of ethics related to professional practice including cultural and linguistic sensitivity, code of professional conduct that govern patient advocacy practice

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-43 Points Scored _____

44. Ethics related to delivery of care including, experimental treatments, end of life, advance directives, refusal of treatment/services

- Extremely familiar (4points)
- Very familiar (3 points)
- Moderately familiar (2 points)
- Slightly familiar (1 point)
- Not at all familiar (0 points)

Q-44 Points Scored _____

45. Knowledge of health care and disability related legislation including the Americans with Disabilities Act, Health Insurance Portability and Accountability Act, Affordable Care Act, HITECH Act)

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-45 Points Scored _____

46. Knowledge of legal and regulatory requirements applicable to the practice of patient advocacy

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-46 Points Scored _____

47. Understanding of and adherence to privacy and confidentiality requirements

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-47 Points Scored _____

48. Ability to effectively communicate and establish collaborative relationships with physicians, clients/patients, clinical and administrative staff, and the public

Extremely familiar (4points)

Very familiar (3 points)

Moderately familiar (2 points)

Slightly familiar (1 point)

Not at all familiar (0 points)

Q-48 Points Scored _____

49. Ability to establish and maintain professional relationships with clients, families, peers, and other members of the health care team

Extremely familiar (**4points**)

Very familiar (**3 points**)

Moderately familiar (**2 points**)

Slightly familiar (**1 point**)

Not at all familiar (**0 points**)

Q-49 Points Scored _____

50. Knowledge of the Patient Bill of Rights

Extremely familiar (**4points**)

Very familiar (**3 points**)

Moderately familiar (**2 points**)

Slightly familiar (**1 point**)

Not at all familiar (**0 points**)

Q-50 Points Scored _____

###