



**PATIENT EXPERIENCE**  
I N S T I T U T E



# **Certified Patient Experience Professional (CPXP) Handbook 2018**

## **EXAMINATION DATES**

**APRIL 1-30 - APPLY BY FEBRUARY 19**

**OCTOBER 1-31 - APPLY BY AUGUST 19**



## TABLE OF CONTENTS

INTRODUCTION.....	3
ELIGIBILITY REQUIREMENTS.....	4
EXAMINATION DATES AND APPLICATION DEADLINES.....	4
LATE APPLICATIONS .....	4
APPLICATION PROCESS.....	5
PREPARATION AND REVIEW .....	5
REGISTRATION PROCESS .....	5
REASONABLE ACCOMMODATIONS .....	6
EXAMINATION SCHEDULING.....	7
NOTICE TO SCHEDULE THE EXAMINATION .....	7
CONFIRMATION NOTICE.....	7
RESCHEDULING .....	7
CANCELLATIONS .....	7
INCLEMENT WEATHER.....	8
HOLIDAYS .....	8
EXAMINATION DAY.....	9
ARRIVING AT THE TEST CENTER.....	9
EXAMINATION RULES.....	9
RETAKE THE EXAMINATION.....	10
AFTER THE EXAMINATION.....	10
EXAMINATION SCORING.....	10
NOTIFICATION OF RESULTS.....	10
DESIGNATION AND CERTIFICATE.....	10
CERTIFICATION RENEWAL.....	11
CERTIFICATION DENIAL OR REVOCATION .....	11
EXAMINATION BACKGROUND.....	12
DEVELOPMENT.....	12
FORMAT .....	12
CONTENT .....	12
PATIENT EXPERIENCE PROFESSIONAL DOMAINS AND JOB TASKS .....	13
EXAMINATION PREPARATION .....	14
APPENDIX A: PRIVACY STATEMENT.....	15
APPENDIX B: CERTIFIED PATIENT EXPERIENCE PROFESSIONAL CLASSIFICATION SYSTEM .....	16
APPENDIX C: CPXP POLICIES AND PROCEDURE AGREEMENT .....	20

## INTRODUCTION

The Patient Experience Institute (PXI) is an independent, non-profit, committed to the improvement of patient experience through evidence-based research, continuing education and professional certification. It offers the opportunity to acquire the professional designation of Certified Patient Experience Professional.

The Certified Patient Experience Professional (CPXP) is a formal or informal leader who influences the systems, processes, and behaviors that cultivate consistently positive experiences as defined by the patient, resident, and family in settings across the continuum of care.

Certification is intended for healthcare professionals or other individuals with a commitment and interest in patient experience improvement. Applicants should have a minimum 3 years of professional experience in a patient experience related role or experience in engaging in patient experience efforts from various perspectives, be they as a healthcare professional, consultant or patient and family member committed to experience excellence.

A CPXP demonstrates clear qualifications to senior leaders, colleagues and the industry. In addition, achievement of certification highlights a commitment to the profession and to maintaining current skills and knowledge in supporting and expanding the field of patient experience.

The purpose of the CPXP examination is to assess whether a candidate has the knowledge necessary for competent practice as a certified patient experience professional, as defined by the Patient Experience Institute.

The CPXP designation is achieved by completing and passing the online CPXP examination.

## ELIGIBILITY REQUIREMENTS

To qualify to sit for the CPXP examination, applicants must meet a defined set of eligibility criteria including:

- ▶ Minimum 3 years of professional experience in a patient experience related role or experience in engaging in patient experience efforts from various perspectives, be they a healthcare professional, consultant or patient and family member committed to experience excellence.
- ▶ If less than 3 years of professional experience: Completion of 30 Patient Experience Continuing Education Credits (PXE) prior to submitting application for certification, which could include up to 10 hours of relevant CEs such as related CNE or CME approved courses

Upon review of the application, candidates will be notified directly from PXI whether it was accepted or if it did not meet requirements. This communication will precede any ability to schedule the CPXP Exam.

## EXAMINATION DATES AND APPLICATION DEADLINES

PXI has partnered with Castle Worldwide, Inc. for testing services. Founded in 1987, Castle Worldwide, Inc. is one of the nation’s leading certification testing companies. Once notified of exam eligibility, candidates will communicate directly with Castle Worldwide, Inc. to schedule testing appointments.

The CPXP examination will be offered through Castle Worldwide, Inc.’s computer-based testing network of more than 585 domestic (U.S. and Canada) test centers as well as more than 225 international testing centers.

Applications must be received on the dates below to be eligible for the corresponding testing windows.

Testing Window	Application Deadline	Late Application Deadline	Fees
April 1-30	February 19	February 28	\$475.00
October 1-31	August 19	August 31	\$50 late application fee

Note for International Applicants: At this time Castle Worldwide charges a \$150 (US) surcharge for international testing sites (non US/Canada) to accommodate for global testing logistics. This is applied after acceptance of application and is charged directly to the candidate at the time of test scheduling.

### LATE APPLICATIONS

Late applications are accepted for **10 days** following the application deadline for each window. Candidates applying late are required to include a \$50.00 late fee with their applications. Be aware that candidates applying late may not receive their first choice of testing dates, locations, and/or times.

## APPLICATION PROCESS

To qualify to sit for the CPXP examination, individuals must complete a comprehensive application process. Applications are reviewed to ensure candidates meet all requirements necessary to qualify for the exam. The application review process takes approximately 30 days until formal notification. Completing the application does not guarantee individuals will be approved to sit for the CPXP exam. Sitting for the CPXP exam also does not guarantee an individual will achieve certification.

The PXI does not discriminate among applicants on the basis of age, gender, race, religion, national origin, disability, marital status, or sexual orientation.

## PREPARATION AND REVIEW

Review the candidate handbook prior to completing the application. Follow the instructions given, and address any questions to [info@pxiinstitute.org](mailto:info@pxiinstitute.org). Failure to follow the instructions can lead to the denial of an application.

Review the eligibility requirements. It is important not to submit an application before all eligibility requirements are satisfied. You can see the full [overview of exam preparation](#) on the PXI site.

Completing an application does not guarantee you will be approved to take the examination.

## REGISTRATION PROCESS

### STEP 1

Register using the [online application process](#) offered through the PXI website. It is recommended you submit the application as early as possible to allow for the review process.

### STEP 2

Complete all sections of the application including eligibility requirements, acknowledgment of policy's and procedures, submission of resume or CV and optional demographic information.

### STEP 3

Review and finalize the application and submit payment as directed.

**Please Note:** PXI will send an email notification to eligible candidates after a complete application review, typically in 30 days from application submission. **Please be aware that some e-mail programs have spam filters that may intercept e-mail from an unknown address.** In order to receive important emails regarding the status of your application please ensure that your email program will accept emails from PXI

### **Policy Notes** (see Appendix C for full policies and procedures)

There is a nonrefundable processing fee of \$100.00 applied towards any incomplete application or if the specified requirements to sit for the exam are not met.

## REASONABLE ACCOMMODATIONS

**Reasonable Accommodations:** Reasonable accommodations provide disabled candidates with a fair and equal opportunity to demonstrate their knowledge and skill in the essential functions being measured by the examination. Reasonable accommodations are decided upon based on the individual's specific request, disability, documentation submitted, and the appropriateness of the request. The most frequent requests involve providing the candidate with extended time, a reader, a writer, and/or a separate room. Reasonable accommodations do not include steps that fundamentally alter the purpose or nature of the examination. No additional cost or burden is placed on the candidate to discourage access to the examination.

**Qualified Individual with a Disability:** A disabled candidate is one who has a physical or mental impairment that substantially limits that person in one or more major life activities (e.g., walking, talking, hearing, performing manual tasks); has a record of such physical or mental impairment, or is regarded as having such a physical or mental impairment. A "qualified individual with a disability" is one who has a disability and satisfies the requisite skill, experience, education and other requirements of the service, program, or activity of which he or she is being measured; and, with or without accommodations, can perform the essential functions of the service, program, or activity. An essential function is one that individuals are required to perform, and removing that function would fundamentally change the service, program, or activity. A person must be a "qualified individual with a disability" to be protected under the ADA.

**Proper Documentation:** Candidates with disabilities must submit documentation provided by an appropriate licensed professional or certified specialist who diagnosed the disability and is recommending reasonable accommodations. The documentation must be on the professional's letterhead. It must provide a diagnosis of the disability and the tests used to determine the disability. The candidate may also provide evidence of receiving reasonable accommodations during school on the school's letterhead. This may include an individualized education plan (IEP). The confidentiality of all documentation submitted by the disabled candidate is protected.

## EXAMINATION SCHEDULING

### NOTICE TO SCHEDULE THE EXAMINATION

Castle Worldwide, Inc. will notify applicant of their ability to schedule the exam via a direct email approximately 3-4 weeks prior to the beginning of the testing window depending on the date of application. The notice will provide a unique username, password and the URL address to access Castle Worldwide, Inc.'s online test scheduling system to select a testing session, based on seating availability within Castle Worldwide, Inc.'s network of US and international test sites. Candidates will select from a listing of available testing centers by geographical location and test date. Castle Worldwide offers close to 1,000 test center locations in over 700 cities in over 70 countries. [See the full list of testing locations.](#)

Most test sites will have morning and afternoon testing sessions available. Castle Worldwide, Inc. will do its best to accommodate the requested test site and date. Seats are filled on a first-come, first-served basis, based on test center availability.

It is strongly recommended that applicants schedule their test session **within two weeks** of receiving notification from Castle Worldwide, Inc. to have the best opportunity to secure the test site and date of preference. Late applicants should apply as soon as possible upon receipt of notification recognizing options within the testing windows may be limited.

### CONFIRMATION NOTICE

Upon completion of scheduling the examination, the candidate will receive an email confirmation notice from Castle Worldwide, Inc., which will include the test location, date, and reporting time as well as a list of items that you should and should not bring to the testing center.

Please note: The email confirmation notice must be printed by the candidate and taken to the test site on the scheduled test date.

In addition, the confirmation notice will provide information regarding a free online tutorial, which candidates may access to become completely familiar with the testing system's features and functions prior to the testing appointment.

### RESCHEDULING

You may reschedule a testing session up to four (4) business days before your testing appointment through Castle Worldwide, Inc.'s online scheduling system. A \$50 nonrefundable fee payable directly to Castle Worldwide, Inc. will apply.

If you do not appear for your testing appointment or reschedule your exam less than four (4) business days before your testing appointment, you will be considered a no-show candidate and your testing fee will be forfeited. If you wish to move to a future testing window, you must work directly with the team at PXI for approval. A \$150 administrative fee will be required to be rescheduled to a future testing window.

If you choose to reschedule to a later testing window after receiving notification from Castle Worldwide, Inc., but PRIOR to formally scheduling your test, you may request a change of testing window directly from PXI. A \$50 administration fee will apply and will be required in order to be added to the future testing window.

## **CANCELLATIONS**

Testing appointments can be canceled; however, candidates will not receive a refund for the canceled testing appointment. Candidates who are unable to test during their scheduled testing appointment should follow the rescheduling rules.

### **EMERGENCY CANCELLATIONS - NO SHOW**

Patient Experience Institute and Castle Worldwide will consider certain exceptions if a candidate does not show up for a scheduled exam session or cancels inside the required notification window. Exceptions will be considered for the following types of personal emergencies, as long as proper documentation is provided within 10 days of the scheduled exam date. Failure to do so will lead to a forfeiture of application fees and the need to reapply for a future test window. They include:

- Medical emergency
- Death in the family
- Military call up
- Court appearance

### **INCLEMENT WEATHER**

If your examination site has closed or is delayed due to inclement weather or other emergency, you will receive an email notification. If there is inclement weather in your area, please check your email before traveling to the examination site and visit [http://www.castleworldwide.com/mainsite/ibtsites/site\\_closings.aspx](http://www.castleworldwide.com/mainsite/ibtsites/site_closings.aspx) for information regarding site closures or delays.

### **HOLIDAYS**

Testing windows may be impacted by holidays or closures specific to individual testing centers.



## EXAMINATION DAY

### ARRIVING AT THE TEST CENTER

Please plan to arrive at the testing center at least 15 minutes prior to the start of the testing session. Those who arrive late for testing sessions may not be permitted to test.

You must bring email confirmation received from Castle Worldwide, Inc. and photo identification with signature to the test site. Acceptable forms of identification include driver's licenses, passports, and government-issued identification cards. Unacceptable forms of identification include gym memberships, warehouse memberships, school identification cards, credit cards, and identification with signature only (no photo).

You will be given three (3) hours to complete the 150-question examination.

### EXAMINATION RULES

The following industry standard testing rules will apply.

#### **Prohibited Items**

Candidates are expressly prohibited from bringing the following items to the test site:

- ▶ Cameras, cell phones, optical readers, or other electronic devices that include the ability to photograph, photocopy, or otherwise copy test materials
- ▶ Notes, books, dictionaries, or language dictionaries
- ▶ Book bags or luggage
- ▶ iPods, mp3 players, headphones, or pagers
- ▶ Calculators, computers, PDAs, or other electronic devices with one or more memories
- ▶ Personal writing utensils (i.e., pencils, pens, and highlighters)
- ▶ Watches
- ▶ Food and beverage
- ▶ Hats, hoods, or other headgear

If Castle Worldwide, Inc. testing personnel determine that you have brought any such items to the test site; they may be demanded and held for an indefinite period of time by testing personnel. Castle Worldwide, Inc. reserves the right to review the memory of any electronic device that may be in your possession at the testing center to determine whether any test materials have been photographed or otherwise copied.

By bringing any such device into the test site in contravention of the policies, you expressly waive any confidentiality or other similar rights with respect to your device, Castle Worldwide, Inc.'s review of the memory of your device and/or the deletion of any materials. Castle Worldwide, Inc., the examination site, and the test administration staff are not liable for lost or damaged items brought to the examination site.

## **RETAKE THE EXAMINATION**

Candidates failing to pass the CPXP examination may retake the examination up to 12 months from their originally scheduled exam date (i.e., next two testing windows). Interested candidates must notify PXI of their interest by completing a re-examination application form via the CPXP application portal. In order to schedule a retake of the examination, this form must be completed along with a re-examination fee of \$325.00.

## **AFTER THE EXAMINATION**

### **EXAMINATION SCORING**

The CPXP is an objectively scored multiple-choice examination consisting of 150 items. Each multiple-choice question has four response options with one pre-determined correct answer. Each item counts equally as one point. No partial credit is given. There is no penalty for incorrect answers. Of the 150 items on the examination, 135 items will be scored. Only the 135 scored items contribute to the final score that determines if the candidate has met the passing criteria. The additional items are included on the examination in order to determine their statistical appropriateness to be included on a future test form. All items were written, reviewed, and validated by experts in patient experience.

### **NOTIFICATION OF RESULTS**

Upon completion of the examination, candidates will receive a simple completion message.

Pass/fail scores will be issued following final analysis and verification within four weeks of the close of the testing window.

### **DESIGNATION AND CERTIFICATE**

Passing the certification exam results in the individual being recognized as a Certified Patient Experience Professional (CPXP)

## CERTIFICATION RENEWAL

CPXP Certification is valid for three years from the most recent date of passing the examination.

- ▶ April CPXPs must renew by April 30th, three years from examination window.
- ▶ October CPXPs must renew by October 30th, three years from examination window.

To recertify as a CPXP, professionals must complete 30 PXEs, which could include up to 10 hours of relevant CEs such as related CNE or CME approved courses, in a three-year period from most recent date of certification. If less than 30 PXEs are completed, reexamination will be required. Qualifying activities and guidelines for PXEs can be found on the [PXE Qualifying Activities](#) page on the PXI site.

In addition, professionals must complete the recertification application and submit recertification fee of \$275.00. A late fee will be applied to renewal application starting 30 days after renewal date.

- ▶ A \$50.00 late fee will be applied in addition to the renewal application fee if expiration date is 30 days to 6 months after recertification renewal date.
- ▶ A \$100.00 late fee will be applied in addition to the renewal application fee if expiration date is 6 to 12 months after recertification renewal date.

After 1 year of expiration, a full application must be submitted and successful completion of the CPXP Certification Exam is required for recertification. Current published fees will apply.

## CERTIFICATION DENIAL OR REVOCATION

Under the rare circumstance, certification may be denied or revoked for the following reasons.

- ▶ **Falsification of an application.** Providing purposefully false information on an application.
- ▶ **Misrepresentation.** Attempting to have someone else take the examination or complete any part of the certification/recertification process as you.
- ▶ **Violation of testing procedures.** Non-compliance with the testing requirements as outlined above.

## EXAMINATION BACKGROUND

### DEVELOPMENT

The development of the Certified Patient Experience Professional examination has been a community driven process. The effort has been informed by the work started in 2012 to frame the Patient Experience Body of Knowledge by our sister organization, The Beryl Institute.

Certification development has followed a rigorous and standardized process, engaging the voices of over a thousand members of the patient experience community around the world, involving input from subject matter experts, and validated and maintained by psychometric testing and continuous review and evaluation. The process adheres to the *Standards for Education and Psychological Testing* (AERA, APA, & NCME, 2014) and *Standards for the Accreditation of Certification Programs* (NCCA, 2014).

### FORMAT

The CPXP examination is administered online in a one-month test window. The CPXP examination will not be administered outside the test window.

### CONTENT

The examination content is based upon test blueprints that were derived from a job analysis. This job analysis determined the major responsibility areas, called domains, and job tasks required for performance as a Patient Experience Professional. These domains and job tasks were first developed by a panel of healthcare professionals who represented a variety of practice settings and experience levels in addressing the patient, resident, and family experience across the continuum of care. The job tasks were validated through an extensive international survey of individuals in the field. The classification system will reviewed and updated as needed.

As CPXP is an international designation and the CPXP Examination is designed with a global perspective, please note the exam will include a minimal number of questions pertaining to policies relevant to patient experience in the United States that have a significant impact on healthcare and are influencing decisions in global policy efforts.

The full Classification system can be found in Appendix B.

## PATIENT EXPERIENCE PROFESSIONAL DOMAINS AND JOB TASKS

<b>Domain I: Partnership and Advocacy</b>
Task 1: Engage patients, residents, and family to reinforce their role as critical partners in the overall healthcare experience.
Task 2: Advocate for and drive implementation of patient, resident, and family engagement policies and practices to advance a culture of patient, resident, and family partnership.
Task 3: Ensure that patient, resident, and family concerns and complaints are heard, understood, and addressed.
<b>Domain II: Measurement and Analysis</b>
Task 1: Gather data on patient, resident, and family experience through various collection methods.
Task 2: Analyze, interpret, and integrate data on patient, resident, and family experience from various sources to identify trends, strengths, and opportunities for improvement.
Task 3: Communicate data and feedback to stakeholders to inform, motivate, inspire, encourage, and support action that improves the patient, resident, and family experience.
<b>Domain III: Design and Innovation</b>
Task 1: Champion the creation of an ideal patient, resident, and family experience through anticipating needs and a focus on increasing value.
Task 2: Drive innovation and change to influence the design, processes, and systems affecting the patient, resident, and family experience.
Task 3: Encourage and contribute to continuous improvement efforts focused on driving performance excellence, organizational efficiency, and positive experience outcomes.
<b>Domain IV: Organizational Culture and Leadership</b>
Task 1: Translate experience strategy into measurable action plans, reinforcing shared accountability and supporting effective implementation, in collaboration with various stakeholder groups.
Task 2: Promote employee engagement practices and processes to encourage and support an organization culture of caring and connection to purpose.
Task 3: Support the development of stakeholders to enhance individual and organizational competency and to achieve consistency in delivering an optimal experience.

## EXAMINATION PREPARATION

Preparing for the CPXP Examination is important and recommended. The examination measures the knowledge necessary for competent practice as a certified patient experience professional, as defined by the Patient Experience Institute. While no exam preparation process can guarantee an individual will pass the certification exam, certain pathways are available for preparation. The following suggestions are provided and may be helpful in preparing as you consider your own preparation strategy. In addition, an overview of suggested preparation methods can be reviewed on the PXI site.

1. A complete review the Full Classification System that can be found in the appendix
2. A full understanding of the scope of knowledge encompassed by the Patient Experience Body of Knowledge
3. An understanding of the testing environment. Castle Worldwide, Inc. offers a free online tutorial and demo test to familiarize candidates with the computer-based testing environment. The online demonstration and tutorial are accessible at any time through any computer with Internet access. Candidates may access the tutorial and demo on Castle Worldwide, Inc.'s Web site at <https://www.castleworldwide.com/cww/take-a-sample-test/>. The demo is not intended to be a review of the examination content

## **APPENDIX A: PRIVACY STATEMENT**

### **INFORMATION COLLECTION, USE, AND SHARING**

The information collected during the CPXP registration process is used to assist in

- ▶ Determining eligibility to take the CPXP Certification examination
- ▶ Determining completion of continuing education
- ▶ Administering disciplinary proceedings
- ▶ Helping us to design, or improve, the certification process so we can provide you with quality programs and services
- ▶ Assisting us in the research and development of programs and standards of practice as a patient experience professional.

We are the sole owners of the information collected on this site. We only have access to/collect information that you voluntarily provide us. We will not sell or rent this information to anyone and we will not share your information with any third party outside of our organization, other than as necessary to fulfill your request, e.g. scheduling of CPXP examination.

Unless you ask us not to, we may contact you via email in the future to tell you about new products or services, or changes to this and other policies.

### **MAINTENANCE OF ACCURATE INFORMATION**

We ensure that private information is as accurate and complete as possible. Please let us know immediately if you believe our records are inaccurate or if anything changes, such as your name, address, email, etc

### **LIMITATIONS ON ACCESS TO INFORMATION**

Access to personal information is limited to those with a reason to know such information for PXI administrative purposes or to assist you in some way, such as in answering your questions.

## APPENDIX B: CERTIFIED PATIENT EXPERIENCE PROFESSIONAL CLASSIFICATION SYSTEM

### DOMAIN I: PARTNERSHIP AND ADVOCACY

**TASK 1: Engage patients, residents, and family to reinforce their role as critical partners in the overall healthcare experience.**

Knowledge of:

- a. Patient rights and responsibilities
- b. Cultural competency/diversity
- c. Effective boundaries

Skill in:

- a. Communicating effectively
- b. Demonstrating ability to modify approaches (agility)
- c. Anticipating needs and goals
- d. Demonstrating empathy and understanding
- e. Collaborating with patients, residents, and families

**Task 2: Advocate for and drive implementation of patient, resident, and family engagement policies and practices to advance a culture of patient, resident, and family partnership.**

Knowledge of:

- a. Patient, resident, and family engagement practices and strategies
- b. Patient, resident, and family rights and responsibilities
- c. Cultural competency/diversity

Skill in:

- a. Communicating effectively
- b. Demonstrating ability to modify approaches (agility)
- c. Anticipating needs and goals
- d. Collaborating with appropriate stakeholders

**Task 3: Ensure that patient, resident, and family concerns and complaints are heard, understood, and addressed.**

Knowledge of:

- a. Complaints and grievance management process and policies
- b. Service recovery principles and models
- c. Risk management process
- d. Patient rights and responsibilities
- e. Cultural competency/diversity
- f. Ethical theories

Skill in:

- a. Communicating effectively
- b. Demonstrating ability to modify approaches (agility)
- c. Anticipating needs and goals
- d. Demonstrating empathy and understanding
- e. Collaborating with appropriate stakeholders
- f. Applying ethical theory/ethical analysis
- g. Identifying gaps in service performance against the standards

### DOMAIN II: MEASUREMENT AND ANALYSIS

**Task 1: Gather data on patient, resident, and family experience through various collection methods.**

Knowledge of:

- a. Feedback collection processes or mechanisms
- b. Benefits and limitations of data collection methods
- c. Applicable regulatory requirements

Skill in:

- a. Communicating regulatory requirements
- b. Selecting appropriate feedback method(s) aligned with goal(s)
- c. Collaborating with appropriate stakeholders in gathering data



**Task 2: Analyze, interpret, and integrate data on patient, resident, and family experience from various sources to identify trends, strengths, and opportunities for improvement.**

Knowledge of:

- a. Descriptive statistics
- b. Measurement terminology
- c. Qualitative and quantitative feedback
- d. Data analysis and reporting methods and formats

Skill in:

- a. Conducting customized analysis
- b. Applying descriptive statistics to analyze data
- c. Identifying data trends, themes, strengths, and opportunities
- d. Integrating qualitative and quantitative feedback

**Task 3: Communicate data and feedback to stakeholders to inform, motivate, inspire, encourage, and support action that improves the patient, resident, and family experience.**

Knowledge of:

- a. Feedback collection processes
- b. Measurement terminology
- c. Stakeholder learning level
- d. Organizational vision, mission, values, and strategy to connect data and feedback to the shared purpose
- e. Communication strategies, processes, and formats

Skill in:

- a. Interpreting, explaining, and presenting analysis findings
- b. Using data and feedback to create, collaborate, or facilitate the creation of action plans
- c. Customizing and adapting communication to the different stakeholders

**DOMAIN III: DESIGN AND INNOVATION**

**Task 1: Champion the creation of an ideal patient, resident, and family experience through anticipating needs and a focus on increasing value.**

Knowledge of:

- a. Process improvement methods
- b. Experience design and mapping
- c. Healthcare management and operations
- d. Best practices inside and outside the healthcare environment

Skill in:

- a. Demonstrating empathy and understanding
- b. Convening diverse stakeholders and cross functional teams
- c. Thinking beyond the current state and scope
- d. Observing behavior
- e. Thinking critically
- f. Understanding the organization's current culture

**Task 2: Drive innovation and change to influence the design, processes, and systems affecting the patient, resident, and family experience.**

Knowledge of:

- a. Advancements in service excellence
- b. Change leadership/management principles
- c. Collaboration practices that engage appropriate stakeholders and patients, residents, and families

Skill in:

- a. Making recommendations on the use of technology and information solutions
- b. Challenging the status quo
- c. Mobilizing commitment and building excitement
- d. Asking questions to promote insights and possibilities
- e. Managing resistance
- f. Utilizing tact and diplomacy
- g. Communicating effectively
- h. Building consensus
- i. Understanding and overcoming resistance

**Task 3: Encourage and contribute to continuous improvement efforts focused on driving performance excellence, organizational efficiency, and positive experience outcomes.**

Knowledge of:

- a. Process improvement methods
- b. Healthcare management and operations

Skill in:

- a. Influencing and communication
- b. Facilitating
- c. Understanding and overcoming resistance
- d. Mobilizing commitment and building excitement

## DOMAIN IV: ORGANIZATIONAL CULTURE AND LEADERSHIP

**Task 1: Translate experience strategy into measurable action plans, reinforcing shared accountability and supporting effective implementation, in collaboration with various stakeholder groups.**

Knowledge of:

- a. Organizational goals, strategy, and objectives
- b. Current organizational state (history, culture, operations, data, process, and organization structure)

- c. Resources needed and currently available to execute the action plan
- d. Existing and potential tools, methods, and framework for project management, change management, and process improvement
- e. Principles and practices of service excellence
- f. Ethical theories

Skill in:

- a. Leading and facilitating groups and teams
- b. Applying analytical and critical thinking to a broad range of situations
- c. Applying process improvement methods
- d. Communicating effectively
- e. Applying ethical theory/ethical analysis

**Task 2: Promote employee engagement practices and processes to encourage and support an organization culture of caring and connection to purpose.**

Knowledge of:

- a. Organizational goals, strategy, and objectives
- b. Current organizational state (history, culture, operations, data, process, and organization structure)
- c. Awareness or understanding of resources needed and currently available to execute plans
- d. Existing and potential tools for rewards, recognition, and employee engagement
- e. Evidence of how the patient experience impacts various stakeholders

Skill in:

- a. Communicating effectively
- b. Building effective relationships
- c. Using influence and persuasion skills to establish credibility and effect positive change
- d. Articulating a compelling business case for improving the patient, resident, and family experience

**Task 3: Support the development of stakeholders to enhance individual and organizational competency and to achieve consistency in delivering an optimal experience.**

Knowledge of:

- a. Principles and methods of coaching and process improvement
- b. Resource availability internally and externally to support learning and growth
- c. Various methods for giving feedback (including courageous or crucial conversations)
- d. Personal leadership styles and how they impact coaching relationships
- e. Internal and external best practices
- f. Standards, principles, and practices of service excellence
- g. The importance and use of recognition in shaping individual behavior

Skill in:

- a. Observing individuals performing service encounters
- b. Understanding the current state in order to conduct a gap analysis
- c. Identifying gaps in service performance against the standards
- d. Providing pertinent feedback including recognition
- e. Fostering transformation, learning, and growth

## APPENDIX C: CPXP POLICIES AND PROCEDURE AGREEMENT

To be considered for certification and to complete the application process you must agree to the following policies and procedures.

- ▶ I have read the CPXP Handbook.
- ▶ I certify that I comply with all the eligibility requirements.
- ▶ I certify/declare that the information provided and the enclosed documents are true and accurate to the best of my knowledge.
- ▶ I understand if the information I have provided to PXI is incomplete and not accurate (or misrepresentation/or incorrect) my application may be rejected and disciplinary action(s) including suspension, rejection, or revocation of my eligibility application.
- ▶ I understand there is a nonrefundable processing fee of \$100.00 applied towards any incomplete application or if I do not meet the specified requirements.
- ▶ I understand that I am responsible to notify the PXI of any changes in my personal information including email address to receive official notification regarding the status of passing the CPXP examination. The PXI shall not be responsible for non-receipt of notices due to my failure to notify of current email address.
- ▶ I have verified that the name and address information listed in "My Account" matches the name and address information listed on my identification. I understand that if there are any changes that will need to be made to this information, after submitting my application, there may be a \$50 fee for processing this change.
- ▶ I understand I am allowed to change exam windows ONE time after my application has been submitted, with a fee.
- ▶ I understand that once my application is submitted to PXI, there will be a \$50 fee to change my exam window.
- ▶ I understand that once my exam date is scheduled, if I do not sit for the exam, or do not cancel within 4 business days of my scheduled date, there will be \$150 fee to change exam windows.
- ▶ I understand that if my CPXP Packet is undeliverable due to an incorrect address, there will be a \$10 processing fee to have it reshipped.
- ▶ I understand that my approval is good for 1 year from the date my application was submitted. If I fail to sit for the exam, I understand that I will forfeit all application fees as well as approval.
- ▶ I have reviewed and understand all the policies and procedures in the CPXP Handbook.
- ▶ I understand that I may be selected for audit at any time.

### CPXP POLICY LISTING

You can review a full listing of the [CPXP Policies & FAQs on the PX Institute site](#).



