



PATIENT EXPERIENCE
I N S T I T U T E



Certified Patient Experience Professional (CPXP) Handbook 2020

EXAMINATION DATES

APRIL 1-30 - APPLY BY FEBRUARY 19

OCTOBER 1-31 - APPLY BY AUGUST 19



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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 Scantron for testing services. Scantron is one of the nation’s leading certification testing companies. Once notified of exam eligibility, candidates will communicate directly with Scantron to schedule testing appointments.

The CPXP examination will be offered through Scantron’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 29	August 29	\$50 late application fee

Note for International Applicants: There is no longer a candidate surcharge for international testing sites (non US/Canada) to accommodate for global testing logistics. This fee will now be covered directly by PXI as part of your application.

LATE APPLICATIONS

We have waived the late fee and extended the application deadline for the October 2020 testing window. 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.

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@pxinstitute.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

SPECIAL NOTE. Effective August 1, 2020, PXI will begin offering Live Online Proctoring (LOP) starting with the October 2020 testing window. For more information on LOP please see special addendum at end of Handbook

Scantron 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 Scantron's online test scheduling system to select a testing session, based on seating availability within Scantron's network of US and international test sites. Candidates will select from a listing of available testing centers by geographical location and test date. Scantron 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. Scantron 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 Scantron 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 Scantron, 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 two (2) business days before your testing appointment through Scantron's online scheduling system. A \$50 nonrefundable fee payable directly to Scantron will apply.

If you do not appear for your testing appointment or reschedule your exam less than two (2) 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 Scantron, 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 Scantron 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 <https://www.scantron.com/site-closures-delays/> 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 Scantron 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 Scantron 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. Scantron 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, Scantron's review of the memory of your device and/or the deletion of any materials. Scantron, 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

Domain I: Partnership and Advocacy
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.
Domain II: Measurement and Analysis
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.
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.
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.
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.
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. Scantron 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 Scantron's Web site at <https://www.scantron.com/preparing-for-your-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](#).

SPECIAL ADDENDUM: LIVE ONLINE PROCTORING (LOP)

(August 1, 2020)

In consideration of the current environment and acknowledging the increasing interest in achieving the CPXP designation, PXI will be adding a Live Online Proctoring (LOP) option immediately which will be available as a testing option for the October 2020 testing window.

LOP allows candidates to complete the examination from their own computer via an internet connection at a time and place of their choosing during the testing window. The candidate's computer must have webcam capability and speakers, and the environment should be quiet to avoid distractions and to ensure that the online proctor can hear everything at the candidate's location. There also are technical requirements, such as an adequate internet connection, to ensure the proctor has access to the candidate's computer and the session can proceed without internet disruption. Candidates will be informed of the computer specifications in advance of the testing session.

Candidates will not need to do anything different during the application process. The new option for LOP will be offered along with in-person testing options when receiving information on exam scheduling from our testing partner Scantron, approximately 4-weeks prior to the testing window.

OVERVIEW OF LIVE ONLINE PROCTORING (LOP)

TEST SCHEDULING, SYSTEM CHECK and CONFIRMATION EMAIL

Following receipt of candidate eligibility data, Scantron will send a notice to schedule (NTS) email to candidates with instructions on accessing Scantron's online test scheduling system as well as information regarding the computer specifications required for LOP testing. The NTS email will provide candidates with a username and password (generated by Scantron), which will allow them to access Scantron's online test scheduling system. Candidates who chose to test via LOP will be passed to the online Examity portal to schedule an LOP session. The candidate will schedule the testing session during a specific time period for live online proctoring. Candidates can schedule to take the examination at any time 24/7.

Scheduled candidates will be sent confirmation emails of their testing session from both Examity and Scantron, which will include the test date and time, a URL link to the online-proctoring launch page, instructions associated with LOP testing, and information regarding Scantron's online tutorial for candidates. Candidates will be able to perform a system check during the scheduling process, and Scantron encourages candidates to perform the system check at this time. Candidates whose PC/laptops fail the system check will receive feedback on the hardware or software updates that are required to support the LOP testing session.

A candidate may cancel or reschedule the LOP testing session up to 24 hours prior to the scheduled testing appointment. The candidate must cancel or reschedule the testing session by accessing the Examity online system. A candidate who does not show up for the testing appointment and/or does not test within his/her selected test window will be considered a no-show, and current fees will be charged to move to the next testing window.

LIVE ONLINE PROCTORS

Scantron provides highly qualified individuals who have considerable experience in LOP test administration. Proctors receive extensive, world-class training on all aspects of live online proctored test administration cycle, from customer service, to detecting aberrant behavior, to the operation of the PASS system. Proctors are instructed on procedures for candidate admission, security, time allocation, and other aspects of the administration of each certification examination. Throughout the testing process, proctors maintain tight security of the examination through constant observation.

TESTING PROCEDURES

Upon the candidate's initiation of the testing session, the proctor will connect with the candidate, verify the system requirements, and begin proctoring the examination within 10 minutes. The candidate will initiate the testing session using the link provided in his/her confirmation email, which will direct the candidate to Scantron's live online proctoring launch site. The candidate will access a system check and instructions for commencing the testing session. If a candidate's computer fails the system check, he/she will be required to correct/update the issue or obtain another computer to complete the testing session. All candidates are required to pass the system check prior to testing.

The proctor then verifies the identity of the candidate by examining (and capturing via video) the candidate's government issued ID. The candidate may communicate with the proctor via chat features available within the site. If directed by the proctor, or in case of technical difficulties, the candidate may contact the proctor by telephone. When the proctor has completed the necessary steps to ensure monitoring, the candidate will click a link to launch the examination.

Proctors closely monitor candidates during testing in order to detect and report any examination malfeasance or suspicious candidate behavior. The proctor will have complete access to the candidate's computer to monitor for unauthorized activities such as accessing other software applications, using multiple monitors, or having someone else taking the test remotely. The proctor will be able to see the candidate's desktop and everything he/she is doing to monitor for unauthorized activities. The candidate will also show the proctor a 360-degree view of his/her environment, including the desk, by holding and moving the webcam/laptop as directed by the proctor. The proctor will watch the candidate on a webcam and record the video and audio throughout the testing session, and the recording will be retained for 30 days.

Any unusual activity by a candidate is immediately addressed by a proctor. These situations include, but are not limited to, attempting to take screenshots of an examination item, attempting unauthorized movements in the testing environment, unprofessional conduct toward the proctor, talking to others during testing, and attempting to access unauthorized materials or equipment.

The proctor can terminate the testing session for integrity reasons at any time. Candidates who clearly violate testing procedures will be removed from the test, and their examinations will be terminated, deemed spoiled, and not scored. Information on these situations, including the candidate's name, identification number, examination form name, examination type, and test date, as well as a summary of the incident, will be communicated as soon as possible to PXI.

SYSTEM REQUIREMENTS TO RUN SCANTRON PASS™ FOR LOP TEST ADMINISTRATION**Hardware**

- 2 GHz or faster 32-bit (x86) or 64-bit (x64) processor
- 2 GB RAM (32-bit) or 2 GB RAM (64-bit)
- 16 GB available disk space (32-bit) or 20 GB (64-bit) -- just for the OS, not applications or data files
- Audio output capability (if the examination being delivered includes audio components)
- Webcam and microphone
- Screen resolution:
 - For best experience, use 1920 x 1080 or higher
 - Minimum acceptable is 1024 x 768
- Optional: Printer (to print candidate score reports)

Software

- Minimum Windows 7 or Mac OS X v10.6
- Latest version of mainstream web browser: i.e., Microsoft Internet Explorer (version 11), Microsoft Edge (latest available versions), Mozilla Firefox (latest available versions), or Google Chrome (latest available versions)
 - NOTE: Internet Explorer 10 is no longer supported by Microsoft after January 31, 2020. Customers are advised to move to another supported browser to avoid any potential testing difficulties.

Telecommunications

- High-speed Internet connection (approximately 2 MB/s upload and download per candidate)
 - Minimum: ISDN connection
 - Preferred: T-1 connection (or greater)
- Browser must:
 - accept cookies from Scantron's site
 - allow popup windows
 - support JavaScript and have it enabled
- Browser must be able to load the following:
 - jQuery, a javascript library (ajax.googleapis.com)
 - AJAX Content (ajax.aspnetcdn.com)
 - MathJax (cdn.mathjax.org)
 - CDN (castlecdn.blob.core.windows.net)
- www.scantronassessment.com should be made a trusted site on all computers used for testing. A trusted site is a Web site that you trust not to damage your computer.

For additional questions on LOP option please contact PXI directly at info@pxinstitute.org

