Abstract

This handbook provides important information about Preceptor Specialist Certifications—Preceptor Basic Level 1 Green (P-PC), Preceptor Intermediate Level 2 Blue (P-PCI), and Preceptor Advanced Level 3 Gold (P-PCA), AAPA processes, and BadgeCert digital credentials.
Preceptor Certification Portfolio Handbook

“Caring for others moves us quickly beyond the practical. When a care provider crosses the threshold of a patient and family’s door, he or she crosses a border, moving from the world of practical reparation into that of a personal healing relationship in which everything he or she does is in service to the patient. This border crossing brings care providers into the patient’s and family’s world—a world about which they know little—and within which they must tread with great humility.” - Jayne Felgen

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About this Handbook

This handbook provides important information about the American Academy for Preceptor Advancement (AAPA) Preceptor Certification Portfolios, Preceptor Basic Level 1 Green (Preceptor-Portfolio Certified, P-PC), Preceptor Intermediate Level 2 Blue (P-PCI), and Preceptor Advanced Level 3 Gold (P-PCA). It addresses policies, procedures, and processes for Preceptors interested in receiving a certification from AAPA, and an overview of the process for renewing certification through portfolio development and assessment (Appendix A). More specific information can be obtained by contacting AAPA at http://www.preceptoracademy.com/.

What is a Competency-Based Preceptor Certification Portfolio?

The Preceptor Certification Portfolio (PCP) is a collection of all the materials you select or develop as you grow in your Preceptor Specialty roles and accountabilities. It includes information and examples of your education, experiences, and teaching and preceptoring activities relevant to demonstrating your mastery of preceptoring at one of three Preceptor Certification Levels.

Evidence of competency and proficiency are not limited solely to preceptoring done in a program, during orientation, or in transitioning an employee to a new role. Certification based on a PCP is evidence of competence and proficiency in the specialization of preceptoring, not how or where you developed it. Simple completion of a course or passing a test alone is not a strong enough evidence of mastery for certification. Portfolio development and evidences of mastery of core competencies in preceptoring provide a more complete assessment of achievement for certification at each Level of advancement.

To be successful in your application or renewal, consider the following suggestions:

- Select your examples from your Preceptor training, teaching, and preceptorships to meet the criteria for the certification Level you seek.
- Follow the guidelines for organizing the contents of your portfolio reviewed in this handbook and in the AAPA web pages where you record your information for certification.
- Be concise and provide the information required for each category in your identified Level.
- Consult this handbook to help you collect and record your evidences of Preceptor activities.

Essays, projects, any of your assignments, special projects completed at your workplace, or evidence (work produced) of knowledge acquired as a result of attending a conference or workshop in your specialty area of preceptoring are appropriate for certification.

Some questions to consider when creating your Preceptor Certification Portfolio include:

- Do the items in my Portfolio work together to provide a comprehensive and coherent picture of my preceptoring abilities and activities?
- Do the items I selected demonstrate my personal and professional development as a Preceptor?
- Do my examples meet the assessment criteria for each category for the Level of certification I seek?
- Do my teaching and learning activities meet the content and time criteria for the related categories in the Workforce Development section of the application for certification?
What is Certification?

Certification is the process by which a nongovernmental agency or an association grants recognition to an individual who has met certain predetermined qualifications. Certification can be used for employment, validation of competence, recognition of excellence, and/or for regulation of preceptorships. Certification can be mandatory or voluntary. Certification validates an individual’s knowledge, skills, and attitudes in a defined role, area of practice, and level of advancement based on predetermined standards.

Certificate vs. Certification

Another criterion applied to determine what is added to this list is the distinction between a professional certification and a certificate program as defined by the ANSI/NOCA Standard 1100:

**Distinctions between assessment-based certificates and professional or personnel certification programs**

Professional or personnel certification is a voluntary process by which a non-governmental body grants time-limited recognition and use of a credential to individuals who demonstrate they have met predetermined and standardized criteria for required knowledge, skills, or competencies

- To retain the credential, certificants must meet requirements for renewal
- Credential awarded by certifier denotes participant possesses specific knowledge, skills, or competencies
- Primary focus of an assessment-based certificate program is on provision of education/training, with assessment(s) to confirm participants have achieved intended learning outcomes; the primary focus of professional or personnel certification is on assessment.
- Moreover, the assessment conducted by a certification program is independent of a specific class, course, or other education/training program and also independent of any provider of classes, courses, or programs.
- The assessments are NOT designed to evaluate accomplishment of intended learning outcomes of a specific class, course, or other education/training program or event, and certifier is NOT the sole provider of any education or training that may be required for certification.


**CHOOSING YOUR LEVEL FOR PRECEPTOR CERTIFICATION**

Which Level for Preceptor Certification does your portfolio support? The decision to apply for a particular Level of certification will depend on each applicant’s demonstration of the requirements defined for each Level and documented in a portfolio. An applicant can be certified at any Level. This is not dependent on a progression through levels, i.e., Level 1 (Basic) to Level 2 (Intermediate) to Level 3 (Advanced). **As long as the applicant meets the criteria and demonstrates the requirements, he or she may be certified at any Level of Preceptor Certification.**
<table>
<thead>
<tr>
<th>Preceptor Competency Level</th>
<th>Description of Preceptor Activities</th>
<th>Category 1</th>
<th>Category 2</th>
<th>Category 3</th>
<th>Category 4</th>
<th>Category 5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LEVEL 1</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>GREEN (Basic)</td>
<td>Focus of Activities: Introduce environment; <em>i.e.</em>, orient new employees and/or students approaching graduation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>P-PC</td>
<td>Primary Target of Preceptoring</td>
<td>40</td>
<td>20</td>
<td></td>
<td>240</td>
<td></td>
</tr>
<tr>
<td>(Preceptor-Portfolio Certified)</td>
<td>- tasks</td>
<td></td>
<td></td>
<td>At least 1 publication</td>
<td></td>
<td>At least 1 year of continuous service</td>
</tr>
<tr>
<td></td>
<td>- primary activity: coaching</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>- basic competencies, <em>i.e.</em>, new employee orientation, new graduate transition</td>
<td></td>
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<td></td>
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<td></td>
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<tr>
<td><strong>LEVEL 2</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>BLUE (Intermediate)</td>
<td>Focus of Activities: Transition into service; <em>i.e.</em>, able to understand specific departmental functions</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>P-PCI</td>
<td>Primary Target of Preceptoring</td>
<td>60</td>
<td>25</td>
<td></td>
<td>360</td>
<td></td>
</tr>
<tr>
<td>(Preceptor-Portfolio Certified Intermediate)</td>
<td>- critical thinking</td>
<td></td>
<td></td>
<td>At least 1 publication</td>
<td></td>
<td>At least 1 year of continuous service</td>
</tr>
<tr>
<td></td>
<td>- primary activities: coach and mentor in balanced approaches</td>
<td></td>
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<tr>
<td></td>
<td>- service-specific competencies, <em>i.e.</em>, service culture, role development and transitions</td>
<td></td>
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<tr>
<td><strong>LEVEL 3</strong></td>
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<tr>
<td>GOLD (Advanced)</td>
<td>Focus of Activities: Navigating organization; <em>i.e.</em>, promotions, networks, and career paths; align within the organizational culture</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>P-PCA</td>
<td>Primary Target of Preceptoring</td>
<td>80</td>
<td>40</td>
<td></td>
<td>600</td>
<td></td>
</tr>
<tr>
<td>(Preceptor-Portfolio Certified Advanced)</td>
<td>- clinical judgment</td>
<td></td>
<td></td>
<td>At least 1 publication</td>
<td></td>
<td>2 years of continuous service</td>
</tr>
<tr>
<td></td>
<td>- autonomous practice</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- primary activities: mentor leadership</td>
<td></td>
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<tr>
<td></td>
<td>- professional competencies, <em>i.e.</em>,</td>
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</table>
### Key to Competency Levels

- **Category 1. Education**: Continuing education in academic and training contact hours
- **Category 2. Presentations**: Teaching—presentations and in-services clock hours
- **Category 3. Preceptorships**: Preceptoring practice hours (include actual hours of preparation and preceptoring activities)
- **Category 4. Publications**: Options for publication, e.g., newsletters, journals
- **Category 5. Service**: Continuous community or professional service in each certification cycle

### How Long is a Term of Certification?

All certifications are effective for three (3) years. **Initial Certification**: applicant may use data and preceptoring activities completed during the preceding three years prior to first certification at any level.

### Certifications and Membership: How Much Do They Cost?

Certification fees (initial and renewal) may include the annual membership fee for the calendar year in which certification is initiated or renewed. If you have already paid for a membership in the American Academy for Preceptor Advancement for the year you are certifying/renewing, the cost of membership will be deducted from your payment for certification or renewal.

Fees for certifications and for AAPA membership are nonrefundable and subject to change without notice. (See the AAPA website at [http://www.preceptoracademy.com/](http://www.preceptoracademy.com/) for more details on fee schedules.)

*You may become an AAPA member with or without certification.* While we are eager to have you join us, you may also become certified *without* becoming an AAPA member.

### Initial Certification and Renewal Fees

<table>
<thead>
<tr>
<th>Preceptor Level</th>
<th>Level 1 Basic - Green (P-PC)</th>
<th>Level 2 Intermediate - Blue (P-PCI)</th>
<th>Level 3 Advanced - Gold (P-PCA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Certification/Renewal</td>
<td>$110.00</td>
<td>$135.00</td>
<td>$160.00</td>
</tr>
<tr>
<td>Annual Membership Fee</td>
<td>$65.00</td>
<td>$65.00</td>
<td>$65.00</td>
</tr>
<tr>
<td>Total Fees (w/ membership)</td>
<td>$175.00</td>
<td>$200.00</td>
<td>$225.00</td>
</tr>
</tbody>
</table>
How are Portfolios developed?

Preceptor certification portfolios are developed consistent with the technical guidelines recommended by the American Academy for Preceptor Advancement. Each component of the portfolio is identified by AAPA in cooperation with a variety of Subject Matter Experts (SMEs) composed of carefully selected experienced thought leaders from a diverse field of experts in healthcare, leadership, education, coaching, mentoring, and preceptoring. They analyze preceptoring knowledge, skills, and abilities from role delineation studies and trends, organizational needs assessments, and field experience.

How are Portfolios assessed?

Preceptor certification portfolios are managed by software that accepts and secures applicant information entered for all fields that pertain to the specified level for certification. The applicant maintains a Preceptor certification portfolio and completes an attestation statement of verification for all data entered. The online application is carefully reviewed by AAPA Preceptor Specialists. Once criteria for categories are met, BadgeCerts are created and can be placed in applicant BadgeCert Portfolios, which are created when applicants earn their first digital badges. **NOTE:** Microcredentials for each category--education, presentations, publications, preceptorships, and service--are available for a nominal fee. There are no additional fees for certification and membership badges.

AAPA in partnership with BadgeCert™ has digitized Preceptor Specialist credentials and streamlined the portfolio assessment process using BadgeCert’s enterprise class hosted software platform to assess and manage Preceptor Specialty applications and credentialing processes and AAPA memberships. These 100% verifiable badges are embedded with qualifying information that details the accomplishments and competencies of a Preceptor Specialist applicant and are made available to the earners (applicants and/or AAPA members). Once received, badges are portable and may be shared by the earners.

Each AAPA BadgeCert is a dynamic portable icon verifying the applicant’s competencies, experiences, and credentials. Each icon is embedded with metadata showing expiration settings and evidence of how and where it was earned, a detailed description of the competencies met, and is accessible with a single click. This allows AAPA to assess and manage applicant portfolios quickly and securely. AAPA BadgeCerts serve as authenticated online certificates earners store in their own BadgeCert portfolios and can share with employers, licensing boards, and colleagues, or post them on employer databases, online resumes, email signatures, career sites, and social media sites.

What are Preceptor Certification Badges?

**AAPA BadgeCert Portfolio: Competency, Certification, and Membership Badges**

Nearly everything in today’s complex healthcare environment is digital and online. Paper credentials and certificates no longer provide the same levels of service or value. The American Academy for Preceptor Advancement (AAPA) has partnered with BadgeCert™ to digitize Preceptor Specialist credentials and streamline our professional recognition process by introducing digital credentials (*badges* or *BadgeCerts*).
BadgeCerts are a means to reliably recognize achievements such as skills, continuing education, competencies, and certifications. Receiving a digital credential from AAPA is a huge benefit to earners that allows them 24/7 access to a verifiable and current record of accomplishment and certification that can be shared electronically through social networks, resumes, email signatures, and licensing or professional websites. Benefits include:

- Digital credentials, or badges, are 100% verified current and authenticated
- Badges will be accessible in the “cloud” with the metadata embedded in them
- Badges track and recognize the categories of Preceptor skills and expertise
- Each badge is embedded with evidence of where, when, how, and why it was earned
- Online portfolio for managing badges and microcredentials
- Badges can be integrated with other technology systems
- Badges can be shared as an email or on email signatures, digital resumes, employer and career databases, and social media outlets
- Once shared, digital badges can be clicked to reveal data validating achievements and certification

Our AAPA BadgeCert Competency-Based Portfolio is a cutting edge approach for AAPA credential owners to promote professional achievements and certifications in Preceptor Specialty practice. The BadgeCert platform facilitates the secure recording, issuing, storing, and sharing of digital badges in an e-portfolio. These badges recognize, legitimize, and professionalize the achievement of earning an AAPA national or international certification by facilitating digital interaction with licensing boards, associations, colleagues, and employers. They are issued to recognize professional accomplishments and continuing education activities, AAPA membership, and your certification as a Preceptor Specialist.

An active AAPA Preceptor Specialist digital badge owner will be provided the ability to digitally deploy a badge for each category of competency criteria met and one for each certification received from AAPA. The digital badges may be embedded in virtual media, e.g., email signatures, web pages, LinkedIn and other social media profiles, digital resumes, and other electronic venues.

**CERTIFICATION BADGES**  **COMPETENCY CATEGORY MICROCREDSNTIAL BADGES**

<table>
<thead>
<tr>
<th>Preceptor-Portfolio Certified (P-PC)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CERTIFIED PRECEPTOR</strong></td>
</tr>
<tr>
<td><strong>GREEN LEVEL 1</strong></td>
</tr>
<tr>
<td><strong>BASIC</strong></td>
</tr>
</tbody>
</table>

### CERTIFICATION BADGES

- **Education**
- **Presentations**
- **Publications**
- **Preceptorships**
- **Service**
Directions for receiving your AAPA badges will be provided in your letter once you have earned them. Once you have earned your badge(s) and are ready to share them, be sure to review the easy-to-understand, step-by-step instructions provided in How do I share my badges? to take you through the process of deploying your AAPA digital badges. Please contact AAPA for any questions or assistance.

**How do I share my badges?**

After completing the criteria for each category and each category for a certification, AAPA will issue you a congratulatory email telling you your AAPA BadgeCert portfolio is ready. This will include a digital badge URL, your username, and a temporary password. Your BadgeCert portfolio username is the primary email address you included in your AAPA application for certification or AAPA membership. Your password can be reset anytime by clicking “forgot password.”

1. At the prompt, provide your AAPA primary email address and select “reset my password.”
2. Check your email and click on the link to change your password.
3. Proceed to login with your username and newly created password.

The URL can be included in your email signature or on social networking tools, such as the following:

**By a LINK.** When you are sent the email granting you your digital badge, it will include a personal URL. This URL can be sent to anyone you want to be able to view or verify your credential.

**By EMAIL.** Login to your BadgeCert account and select your badge. Click “Share,” type in the email address you would like to share to and click “Share” again.

**By your EMAIL SIGNATURE.** Copy your personal digital badge link (shared with you in the notification email) and paste the hyperlink for your AAPA certification after your name. For example, George Smith, P-PCA; the underlined P-PCA portion of this example will link to your verified digital badge page.

**By OUTLOOK EMAIL SIGNATURE.** You can create personalized signatures for your email messages that include an icon for viewers to see your BadgeCert portfolio. Your organization may already provide you with this signature icon or you may use “my BadgeCert portfolio.” When the message recipient clicks the icon in the signature, a new browser window opens and your BadgeCert appears.

1. To include your BadgeCert image in your Outlook email signature, right-click on the badge image you wish to share in your portfolio; then click *Save picture as*. Save the icon to your computer. You can also choose any other icon or picture as long as it is saved in your computer.
2. You can also use the AAPA logo image included in your email (or on the website, http://www.preceptoracademy.com) or the BadgeCert logo (http://badgecert.com/BadgeCert-sig2.jpg; http://badgecert.com/BadgeCert-sig.jpg) by clicking and saving to your computer.
3. Your organization may provide customized artwork for you to upload.
4. On the *Message* tab, in the *Include* group, click *Signature*, and then click *Signatures*. In more recent versions of Outlook, go to Options → Mail → Signature. On the Message tab, in the include group, click Signature, and then click Signatures.
5. Under *Choose default signature*, in the *Email account* list, click an email account with which you want to associate the signature.
6. If you want a signature to be included when you reply to or forward messages, in the *Replies/forwards* list, select the signature. Otherwise, click “none.”
7. Click the picture and browse for the icon you saved to your computer. Then click *reference*, to include your BadgeCert URL.

**By FACEBOOK.** You can display your BadgeCerts on your Facebook page from the Timeline tab in two ways: either as a *Life Event* or as a *Photo*. Login to your BadgeCert account and select your badge. Click “Share.” Click the icon to add your certification to your Facebook profile. Login to Facebook and edit your post as you choose.
Life Event
1. From your portfolio, right click on the badge image and choose save as a .png on your desktop. Make sure you name it “badge.png.”
2. Login to your Facebook account and from Timeline, click on Life Event.
3. From Life Event, click on Work & Education and choose “Create Your Own...” tab at the bottom of the menu.
4. Add a title on “Create Your Own...” page. Be sure to add a Title that tells your friends about your accomplishment, such as “I earned a new certification!”
5. Next, on the right side of the page, you can click on “Upload Photos” and choose the .png of the badge image that you saved from step 1.
6. Next, under the Story tab, add the link to your live portfolio by typing the words “Follow this link to see my credential” and insert your portfolio URL. Finally, choose the people you would like to share your accomplishment with (public, friends, only me) and click save.
7. Once saved, it will appear on your homepage for all to see and “Like!”

Post as a Photo
1. From your BadgeCert portfolio, right click on the badge image and choose save as a .png on your desktop. Make sure that you name it “badge.png.”
2. Login to your Facebook account and from Timeline, click on Photo and then on Upload Photo.
3. Once you click on Upload Photo, choose the .png of the BadgeCert that you saved from Step 1.
4. Next, when prompted to “write something about this photo,” write a phrase such as, “Check out my new BadgeCert” and add the URL to your BadgeCert portfolio.
5. Finally, click Post and it will appear on your homepage for all to see and “Like!”

By LINKEDIN. Login to your BadgeCert account and select your badge. Click “Share.” Click the icon to add your certification to your LinkedIn Profile:
1. Move cursor over Profile at the top of your LinkedIn homepage and select Edit Profile.
2. Click Edit Contact Info near the bottom right of the profile overview section. The profile overview section has your photo in it.
3. Click the Edit icon next to Websites.
4. Choose “other” from the dropdown list and type in the title “BadgeCert Portfolio.”
5. Copy and paste your unique BadgeCert portfolio URL into the URL field. This URL can be found in the “share link” from your BadgeCert portfolio page (it starts with “http://goo...).
6. Click Save. Your BadgeCert portfolio will be saved in the contact link of your LinkedIn portfolio.

LinkedIn Certifications:
1. Move cursor over Profile at the top of your LinkedIn homepage and select Edit Profile.
2. Scroll down to Certifications and click + Add.
3. Complete the prompted information and add the URL for your BadgeCert portfolio, which can be found in the “share link” from your BadgeCert portfolio page.
4. Click Save.
5. Your BadgeCert title and link will appear on your Certifications section of your LinkedIn Profile.

By TWITTER. Login to your BadgeCert account and select your badge. Click “Share”. Click the icon to add your certification to your Twitter profile. Login to Twitter and edit your post as you choose.
1. From your BadgeCert portfolio, right click on the badge image and choose save as a .png on your desktop. Make sure that you name it “badge.png.”
2. Login to your Twitter account and click Compose new Tweet on the right hand side of the menu.
3. In the Compose New Tweet box, create a message that tells your followers about your new BadgeCert, such as “I just received a new credential!”
4. Then, inform your followers that they should “Follow this link to view my credential: …” and add the link to your portfolio.
5. Click Add photo and upload the .png you saved from step 1.
6. Finally, click the Tweet button and publish your credential to your followers.

For more detailed instructions and updates, please see the BadgeCert Sharing Guide by clicking here or go directly to https://www.badgecert.com/c-review-guide.html for more information.

How do I add my digital badge to my resume or website or print my badges?

By nature, a digital badge is intended to be displayed on the Internet or via digital media. However, they can be added to other documents and printed.

On RESUMES or CURRICULUM VITAE (CVs). Save the image from the email, insert the picture into the document, right click the picture and select hyperlink. Add the URL address to the hyperlink. Even within a resume, CV, or PDF, the image can be designed to hyperlink to the badge URL. The badge URL is the bcert.com URL in the issuance email. If you do not have it, login and send yourself an email copy.

On WEBSITES. Websites use the same methodology as Outlook (see above or go to badge.com/sharing) or the resume information above. Simply upload the image and hyperlink the badge URL.

To PRINT. Open the badge and print the screen using “Print Screen” on the keyboard. You can manipulate the image in the paint program to clean it up.

For more detailed instructions and updates, please see the BadgeCert page for Frequently Asked Questions (FAQs) at https://www.badgecert.com/faq.html.

International Portfolios for Preceptor Certification

All AAPA computer-based Preceptor Certification Portfolios are available for domestic and international Preceptor applicants (initial application) and certificants (renewals). These digital badges and portfolios are developed to support the resources, preceptor programs, and courses, and the workforce development activities provided in your culture and country, wherever you may work in healthcare. Therefore, applicants and certificants in any country and healthcare organization serving in any role or service-line where Preceptors are important to the success of the organization can earn BadgeCerts (digital badges) and achieve certification at all three levels.

The eligibility requirements, registration and review process, and renewal process remain the same for international applicants and certificants. There are no additional fees for international memberships, initial certifications or renewal certifications.

Maintaining your Contact Information

Due to time differences, it is important that you provide a viable email address or other means of communication in your application in case AAPA needs to contact you regarding your application, BadgeCerts, or certification. It is your responsibility to keep your contact information up to date. Contact AAPA at http://www.preceptoracademy.com/ for more information.
Renewing your Certification

Certifications are renewed every three years. However, you can advance your certification level at any time after you meet the criteria for each category for that level. For example, if you are certified at Level 1 and find within a year that you have completed all the requirements to be certified at Level 2, you may do so. All fees apply.

As an AAPA certified Preceptor, you must meet specified requirements to maintain and renew your certification every three years. The purpose of certification renewal is to provide evidence that you have continued to expand your professional knowledge and to demonstrate evidence of continual competence in your Preceptoring certification specialty. It also allows you to continue to use your AAPA credentials and digital BadgeCerts. Renewal fees and any updates in requirements will be included in this handbook and available at http://www.preceptoracademy.com/.

- Levels 1, 2, and 3 are not sequential. You may certify at any level for which you qualify.
- Visit the AAPA website regularly to review the most current renewal requirements and download the most recent certification handbook.
- Certification renewal criteria can change to reflect changes in practice or regulatory requirements.
- Develop a plan to show evidence of meeting continual competence requirements for certification renewal and acquiring related BadgeCerts for each required category for your certification.
- Provide AAPA with any changes to your contact information including a preferred email address and any name change.

If your Preceptor certification has expired, there is no grace period and no backdating to renew. Certification renewal applications received after the certification expiration date will have a renewal period beginning with the date of approval and will therefore incur a gap in the certification dates. When there is a gap in certification dates, AAPA cannot backdate a certification renewal to meet regulatory, reimbursement, or other requirements for practice.

Denial, Suspension, and Revocation of Certification

Preceptor certification can be denied, suspended, or revoked for cause, including but not limited to the following:

1. Failing to complete or provide evidence of completion of the requirements in each category for initial certification or certification renewal
2. Determination of initial certification or certification renewal was improperly granted
3. Falsification or misstatement of information on any certification-related documentation
4. Failure to complete the attestation statement or any required sections of the online application
5. Providing false or misleading information
6. Misrepresentation
7. Assisting others to wrongfully obtain initial certification or to renew or reactivate certification
8. Failure to comply with the Preceptor scope and standards of practice (e.g., Scope and Standards of Practice for Preceptor Advancement)
9. Conduct unbecoming of a Preceptor in healthcare (e.g., unethical behavior, abuse of authority or preceptor relationship)
10. Upon written request by the applicant or certificant to suspend or cancel his or her application or certification for any reason or purpose
APPENDIX A: General Certification Requirements

THREE PRECEPTOR CERTIFICATIONS ARE AVAILABLE from the American Academy for Preceptor Advancement (AAPA). Please review the criteria in each category for certification to determine if you meet AAPA Preceptor Certification Portfolio requirements before proceeding.

You may begin this process at any time. **For initial certification**, document your activities for the preceding three years. Your certificate will be issued and your BadgeCert available to access after you have successfully met all criteria in each category and provided all required information. Your certification and BadgeCert information will be emailed to the address you provide with your certification or renewal.

- **Level 1 Basic Preceptor** – Green (P-PC)
- **Level 2 Intermediate Preceptor** – Blue (P-PCI)
- **Level 3 Advanced Preceptor** – Gold (P-PCA)

**PRECEPTOR CERTIFICATION PORTFOLIO**

- General information- all information provided is voluntary
- Voluntary demographic information- Providing this information is STRICTLY VOLUNTARY. It will be used for statistical purposes only. If you prefer NOT to answer, please skip this section of the application
- Descriptions of work, lists of programs and courses completed, and citations of publications as applicable to the selected level for certification

**PRECEPTOR CERTIFICATION PORTFOLIO TYPE: INITIAL OR RENEWAL**

- **Level 1 Basic – Green (P-PC)**
  Complete all of the following Workforce Development activities and collect your digital badges for:
  1. 40 continuing education in academic and/or training contact hours
  2. 20 teaching: presentations/in-services clock hours
  3. 240 preceptoring practice hours- include actual hours of preceptoring and preparation
  4. At least one (1) of the four (4) options for publication
  5. At least one (1) year of continuous community or professional service in each certification cycle (each certification cycle is 3 years)

- **Level 2 Intermediate – Blue (P-PCI)**
  Complete all of the following Workforce Development activities and collect your digital badges for:
  1. 60 continuing education in academic and/or training contact hours
  2. 25 teaching: presentations/in-services clock hours
  3. 360 preceptoring practice hours (include actual hours of preceptoring and preparation)
  4. At least one (1) of the four (4) options for publication
  5. At least one (1) year of continuous community or professional service in each certification cycle (each certification cycle is 3 years)

- **Level 3 Advanced – Gold (P-PCA)**
  Complete all of the following Workforce Development activities and collect your digital badges for:
  1. 80 continuing education in academic and/or training contact hours
  2. 40 teaching: presentations/in-services clock hours
  3. 600 preceptoring practice hours (include actual hours of preceptoring and preparation)
  4. At least one (1) of the four (4) options for publication
  5. At least two (2) years of continuous community or professional service in each certification cycle (each certification cycle is 3 years)
TRAINING AND EDUCATION INFORMATION

REQUIRED INFORMATION: Titles and descriptions of applicable training or courses for every program checked below as verification of your successful completion. (For more information, see the Definitions at end of this section.)

- Hospital-based program
- Work-based program
- Vendor program
- Academic program
- Continuing education program
- Residency or Internship
- Other (specify)

SAMPLE STATEMENT OF UNDERSTANDING

I hereby apply to receive my preceptor certification by the American Academy for Preceptor Advancement (AAPA). I have read the eligibility criteria for certification. I understand I am subject to all categorical requirements for certification as described in this application and in the Preceptor Certification Portfolio Handbook and my certification depends on my successfully completing specified requirements. When I am certified, my name will be included in the official listing of certified Preceptors and notification may be given by AAPA to requesting authorities or other third parties.

By completing this statement of understanding, I authorize AAPA staff to make whatever inquiries and investigations they, in their sole discretion, deem necessary to verify any information included in or necessary for review of this application.

I expressly acknowledge and agree that information accumulated by AAPA through the certification process may be used for statistical, research, and evaluation purposes and that AAPA may enter into agreements to release anonymous and aggregate data to schools, colleges, or external researchers. Otherwise, subject to the mailing list authorization, all information will be kept confidential and shall not be used for any other purposes without my written permission.

I hereby certify that the information provided on this application is true, complete, and correct. I further attest that I will continue my learning and work activities as a Preceptor Specialist throughout the entire certification period, including all renewal periods. I understand that any misstatement of material fact submitted on or in furtherance of this application for certification shall be sufficient cause for AAPA to withhold or deny this or other AAPA certifications.

(Note: Applications received without completing this attestation may incur a delay in processing, which may result in a delay, suspension, or denial of your application for initial or renewed certification.)

Jane Doe, PharmD, MSN, MBA, FAAN (etc.) Month day, year
Name, Credentials Date
**PRECEPTOR WORKFORCE DEVELOPMENT RECORD**

### EQUIVALENCIES FOR ALL CATEGORIES

<table>
<thead>
<tr>
<th>1 academic quarter credit</th>
<th>= 12.5 contact hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 contact hour</td>
<td>= 0.1 CEU (60 minutes)</td>
</tr>
<tr>
<td>1 CEU</td>
<td>= 10 contact hours (600 minutes)</td>
</tr>
<tr>
<td>1 academic semester hour</td>
<td>= 15 contact hours</td>
</tr>
<tr>
<td>1 CME</td>
<td>= 1 contact hour (60 minutes)</td>
</tr>
</tbody>
</table>

### Category 1. EDUCATION. Academic and Continuing Education Hours

Continuing education is about advancing the knowledge, skills, and abilities you receive from an academic or training program to help you grow and develop as a Preceptor Specialist.

These requirements differ for each certification level selected. Complete 40 contact hours (Level 1 Basic – Green), 60 contact hours (Level 2 Intermediate – Blue), or 80 contact hours (Level 3 Advanced – Gold) of continuing education in academic courses, training courses or programs, and/or related programs (see Equivalencies above for calculating your hours).

List presentations, in-services, academic credits, continuing education (i.e., CME, CPE, CNE) hours, independent study approved for continuing education in academic or training contact hours, and other continuing education related to Preceptor specialty practice.

For each activity, provide the following:

- Title and brief description of content if title is generic—**If any course or program title does not clearly reflect its relevance to your Preceptor practice, include a brief description of how the course or program relates to your Preceptor Specialist certification.**
- Date (month/day/year) completed
- Name of provider or institution providing the continuing education
- Preceptoring specialty focus, e.g., in a related topic such as communication, adult learning principles, categories of competency validation, feedback and evaluation
- Number of contact hours awarded based on equivalencies

### Category 2. PRESENTATIONS. Teaching Activities and In-Services

Presentations and in-services are about giving, about sharing your knowledge, skills, and abilities as you continue to grow and develop as a Preceptor Specialist.

Present a variety of lectures, presentations, and training in-services related to your Preceptor specialty that total the number of clock hours required for your level of certification:

<table>
<thead>
<tr>
<th>Level 1 Basic – Green</th>
<th>20 clock hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 2 Intermediate – Blue</td>
<td>25 clock hours</td>
</tr>
<tr>
<td>Level 3 Advanced – Gold</td>
<td>40 clock hours</td>
</tr>
</tbody>
</table>

Include the type of presentation (lecture, in-service, etc.), the title, subject, and a brief description of the content for each entry. **Do not include time you used for preparation of your presentation, lecture, or in-service. Only enter a presentation or in-service once, regardless of how often it is given during your certification period.** However, if you update your presentation or in-service and add new content, change the title to reflect this and then report the activity as a new program, which can then be entered as a separate presentation.

For each reported activity, provide the following:

- Type, subject, title and description (must be related to your Preceptor specialty and reflect its relevance to your Preceptor specialty practice, include a brief description of how the course or program relates to your Preceptor Specialist certification)
- Date course completed
- Name of provider or institution providing the presentation or in-service
- Audience (include participants and size of audience, e.g., nurses, physicians, social services, executives, administrative staff, ancillary staff, or a combination of participants)

**Category 3. PUBLICATIONS**

Complete at least one (1) of the four (4) options listed below. Please indicate which of the options related to your Preceptor specialty practice you have chosen.

1. One (1) article published in a peer-reviewed journal or a book chapter; you must be the author, co-author, editor, co-editor, or a peer reviewer
2. Three (3) different articles published in a non-peer-reviewed journal, newsletter or blog
3. Primary author of content used in e-learning, blogs or other such media
4. Primary author of content related to your Preceptor specialty practice used in an evidence-based practice guideline, presentation, or poster

Provide the following information for the option(s) you select:

- Option # (related to applicant level of certification/recertification)
- Subject/title and description of publication (must be related to your Preceptor specialty) with reference (author, date, publisher)
- Date of publication
- Name of publication, provider, or institution

**Category 4. PRECEPTORSHIPS**

Complete the minimum hours required for your certification level of direct preceptoring supervision of students, new graduates, new or transitioning role employees (preceptees):

- Level 1 Basic – Green 240 clock hours
- Level 2 Intermediate – Blue 360 clock hours
- Level 3 Advanced – Gold 600 clock hours

For your certification documentation, you must formally precept those in same or similar responsibilities and accountabilities, e.g., advanced practice nurses must precept advanced practice nurses; physicians preceptor physicians; pharmacists preceptor pharmacists; educators preceptor educators; and, those in leadership preceptor managers and leaders to successfully meet the criteria in this category.

- Location of preceptorship, work or school
- Type of preceptee (i.e., student, new staff member/employee, new graduate)
- Dates of preceptorships (from/to)
- Number of clock hours completed

**Category 5. SERVICE. Community and Professional Services**

Complete an appointment of one continuous year (Level 1 Basic Preceptor – Green and Level 2 Intermediate Preceptor – Blue) of service in your organization or community.

Complete an appointment of two or more continuous years (Level 3 Advanced Preceptor – Gold) of volunteer service during your Preceptor certification period with a local, national, and/or international healthcare-related organization in which your knowledge, skills, or abilities related to your Preceptor specialty.
Accepted volunteer activities include serving on boards of directors, committees, councils, editorial boards, review boards, task forces, and workgroups in your organization or community. Provide the following for the option(s) you select:

- Organization
- Type and description of service
- Dates of service

DEFINITIONS

- **AAPA certified image**: a logo created by AAPA to indicate the holder is AAPA certified, has completed the requirements for one or more categories for certification, or is a member of AAPA; the image is “grayed out” when a badge expires, for example:

![Current badge](image1.png) ![Expired badge](image2.png)

- **Artifacts**: embedded hyperlinks or documents in the metadata of each badge (e.g., hyperlink to the AAPA Preceptor Certification Handbook: Preceptor Certifications, Applications and Fees)
- **BadgeCert dashboard**: a secure portal (login required) to manage all AAPA earned digital badges and membership digital badge; from this dashboard, badge owners can create groups, share digital badges with easy-to-use links for email and social media
- **BadgeCert portfolio**: cutting edge technique for AAPA credential owners to promote professional achievements; BadgeCert platform facilitates recording, issuing, storing, and sharing digital badges; for more information, explore the following websites:
- **BadgeCert™**: a company founded by educators, technologists, and lifelong learners on the premise that recognizing effort, contribution, and achievement is important to motivate people to develop progress and achieve ([https://www.badgecert.com/index.html](https://www.badgecert.com/index.html))
- **Clock hours**: actual time served in providing lectures, presentations, or in-services
- **Continuing education contact hours**: contact hours are based on the amount of information provided in learning activities developed by accrediting or approved providers of accredited continuing education programs
- **Digital badges (BadgeCerts)**: visual symbols or icons that represent a competency, certification, or membership; they provide a vehicle for others to quickly ascertain the earner's competency and achievements
- **BadgeCert earner portfolio**: a universal web based portfolio to organize, manage, and share earned badges; integrated with popular social networking sites, LinkedIn, Facebook, and Twitter so earners can easily share their accomplishments directly from their portfolios with others
• **Embedded evidence**: BadgeCert allows AAPA to add unique detailed information (called metadata) to each badge that further qualifies the nature of the earned credential or microcredential

• **Microcredentials**: AAPA credentials for competencies and activities in required categories needed to level-up to a “Master” certification badge

• **Training and education information:**
  - **Hospital-based program**: programs developed by hospitals to prepare Preceptors to orient and transition students, new graduates, and/or employees within their organizations
  - **Work-based program**: programs developed by groups (e.g., educators, staff development specialists) to prepare Preceptors to orient and transition students, new graduates, and/or employees within their work areas or disciplines
  - **Vendor program**: programs developed by agencies or outside groups purchased by organizations and used to develop Preceptors to orient and transition new graduates and/or employees within their work areas, disciplines, or organizations
  - **Academic program**: programs developed by schools, colleges, or universities to prepare Preceptors to work with students, new graduates, or employees (e.g., residencies, internships, onboarding and transitioning employees)
  - **Continuing education program**: programs for Preceptors developed with continuing education contact hours (e.g., ACPE, ANCC, AMA CME, APA)
  - **Residency or Internship**: extended programs developed to prepare Preceptors within their organizations to transition employees, often in partnership with coaches and mentors (e.g., Preceptor train-the-trainer programs)
  - **Other (specify)**: programs related to Preceptoring developed to enhance or advance Preceptors (e.g., delegation, conflict management, working with mentors)

• **Training contact hours**: contact hours based on actual time served in providing preceptoring experiences during preceptorships, onboarding, and transitioning activities (e.g., during orientation, residencies, internships, student clinical activities)

• **URL sharing page**: a unique, dedicated URL created by BadgeCert that, when clicked, shows an entire AAPA digital badge e-portfolio to the viewer