

ACADEMY POLICY MANUAL

Table of Contents

Academy 2023 - 2025 Strategic Plan Vision, Mission, Goal	3
Academy Governing Authority	5
Academy Financial Management	9
Certification Exam Development	10
Global ACRP-CP Exam Committee Charge	13
Global CCRA Exam Committee Charge	16
Global CCRC Exam Committee Charge	19
Global CPI Exam Committee Charge	22
Impartiality Regarding Training	25
Examination and Materials Security	26
Academy Quality Assurance	29
Academy Records Retention	35
Eligibility for the ACRP-Certified Professional (ACRP-CP) Program.....	38
Eligibility for the Certified Clinical Research Associate (CCRA) Program	40
Eligibility for the Certified Clinical Research Coordinator (CCRC) Program	43
Eligibility for the Certified Principal Investigator (CPI) Program	45
Denial of Eligibility	48
Appeals	50
Transfers, Cancellations, No Shows, and Refunds	52
Name Change	55
Re-Examination	56
Special Accommodations	57
Testing Experience Issues	60
Release of Certificant Information	62
Continuing Competency and Maintenance for the CCRC, CCRA and ACRP-CP Program	64
Continuing Competency and Maintenance for the CPI Program	72
Maintenance for Global Exam Committee Members, Board Members and Certified Staff	80
Certification Reinstatement	81
Maintenance Verification	82
Disclosure and Management of Conflict of interest	84
Use of the Certification Mark	87
Confidentiality Agreement	90



Academy 2023 - 2025 Strategic Plan Vision, Mission, Goals

VISION

Clinical research is performed responsibly, ethically, and professionally worldwide.

MISSION

Promote and maintain high standards and best practices of clinical research by recognizing those professionals who demonstrate a well-defined competency through valid and reliable credentialing programs.

ORGANIZATIONAL VALUES

- *Professional Excellence*
We exemplify a commitment to ethical practice by conducting our activities in a transparent, professional and responsible manner that promotes workforce excellence.
- *Integrity*
We ensure fairness, accuracy, validity and reliability in the development and administration of the certification program to ensure it meets the highest standards as defined by experts in the field.
- *Service*
We expect excellence, innovation, continual organizational review and improvement in delivering our programs to meet and exceed expectations.
- *Community and Collaboration*
We work together with those whom we lead, serve, and partner with to promote competence and enhance the clinical research community.

STRATEGIC GOALS

The Academy will focus on maintaining the high standards of credentialing programs, enrich awareness of those programs, enhance competency for credentialed professionals in clinical research and sustain the organization's viability.

- Goal 1.** Continue to develop, maintain, and administer valid and reliable credentialing programs. **[focus on maintaining high standards]**
- Goal 2.** Promote greater recognition of the value of professionals credentialed by valid and reliable programs **[focus on enriching awareness]** to increase the reach of current certification offerings and expand the scope of credentialing programs for clinical research professionals **[focus on enhancing competency]**.



DATE ADOPTED BY ACADEMY BoT

May 13, 2014

DATES REVIEWED BY ACADEMY BoT

February 22, 2023

August 24, 2021

October 20, 2018

DATES MODIFIED BY ACADEMY BoT

August 24, 2021

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



Academy Governing Authority Policy

MISSION STATEMENT

The mission of Academy of Clinical Research Professionals (Academy) is to promote and maintain high standards and best practices of clinical research by recognizing those professionals who demonstrate a well-defined competency through valid and reliable credentialing programs.

PURPOSE

The Academy of Clinical Research Professionals (Academy) is the separately incorporated certifying body of the Association of Clinical Research Professionals (ACRP). These two bodies share the same initials, but only the Association of Clinical Research Professionals uses the ACRP acronym. The Academy of Clinical Research Professionals, as the governing body of the certification programs, is consistently referred to by its full name or by “Academy” to distinguish it from ACRP.

The Academy serves as an independent and autonomous body with respect to the development, maintenance, and oversight of all certification program policies and procedures. The Academy is solely responsible for all important aspects of the certification program, including, without limitation: policy decisions regarding eligibility for certification; certification maintenance (recertification) standards; development, maintenance, and administration of examinations and other assessment instruments; and program operations. All certification program policies and procedures are developed and approved by the Academy’s Board of Trustees and are reported for information to the ACRP Board.

The affairs of the Academy of Clinical Research Professionals shall be managed by its Board of Trustees (BOT). It shall be the Board of Trustees’ duty to carry out the objectives and purposes of the Academy; to this end, the BOT may exercise all powers of the Academy, including those in furtherance of the administration of the Academy’s certification programs, as described herein. Members of the Academy Board of Trustees (BOT) are selected to represent the diverse demographic characteristics, roles, and settings in which clinical research professionals practice.

The Academy works with contracted testing consultants to develop and administer the certification examinations. Testing consultants are selected for their extensive experience in the development and administration of professional certification examinations that comply with national accreditation standards for certification programs.

Development and maintenance of the Academy’s certification examinations are based on Job Analysis Studies that are designed to ascertain, directly from practicing professionals, the frequency with which prerequisite knowledge is applied in practice and the importance or criticality of this knowledge. Content is added to the examinations only after it has been identified through this process and accepted by subject matter experts as required by the examination development policies in this manual.

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



The Academy is solely responsible for essential decisions related to the development, administration, and ongoing maintenance of the certification programs. The Academy's Board of Trustees ensures that all application and eligibility requirements, examination development and administration, recertification requirements, and all certification program policies and procedures are directly related to the purpose of the certification programs.

STRUCTURE

The Academy of Clinical Research Professionals is a 501(c)(6) not for profit corporation pursuant to the provisions of the Virginia Nonstock Corporation Act. The Academy of Clinical Research Professionals (Academy) is an independent affiliate of the Association of Clinical Research Professionals (ACRP) responsible for administration of certification exams.

The Academy of Clinical Research Professionals is the credentialing agency for the Association of Clinical Research Professionals (ACRP). More than 13,000 members in over 70 countries globally are working in a variety of clinical research practice settings and have taken the Academy's examinations over the past several decades.

The Academy shall be and remains an independent and autonomous entity with respect to all essential professional certification decisions, including eligibility standards, the development, administration, and scoring of assessment instruments, selection of personnel, and operational procedures. The Academy shall conduct its activities in accordance with the Academy of Clinical Research Professionals bylaws, the Master Service Agreement between the Academy and ACRP, and the Academy Policies and Procedures Manual.

AUTHORITY

The Board of Trustees has established eligibility pathways for clinical research certifications in recognition of the diversity in education and experience of qualified applicants. The Academy was established to promote the highest standards for clinical research professionals through the development, implementation, coordination, and evaluation of all aspects of the certification and the maintenance of certification processes and to enhance public protection. The Academy is an independent and autonomous organization unit with the sole authority to develop, evaluate, and administer its certification programs.

Individual Trustees have no authority over certification program matters, except as authorized by action of the full Academy Board.

ROLES AND RESPONSIBILITIES

The Board of Trustees is solely responsible for all essential decisions related to the development, administration, scoring, and ongoing maintenance of the certification programs. While the BOT may delegate ongoing program operations to employees, and/or consultants, as needed, these areas of

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



policy level decision-making responsibility may not be subcontracted to any other organization or entity. The certification decisions for which the Board of Trustees is responsible include:

- A. Upholding the established mission and principles of the Academy's certification programs;
- B. Establishing the policies for granting certification;
- C. Establishing the policies for maintaining certification;
- D. Establishing policies for suspending or withdrawing certification;
- E. Developing, maintaining, administering, and scoring the certification examinations in consultation with a qualified testing consultant/qualified psychometrician and in a manner consistent with generally accepted psychometric practices to ensure that the examinations are both valid and reliable;
- F. Exercising fiduciary oversight to ensure the effective management of the certification program operations within the approved budget and financial policies;
- G. Providing oversight to examination development and other committees;
- H. Attending BOT meetings and serving on committees and/or in roles as requested by the BOT Chair;
- I. Monitoring, reviewing, and revising policies, procedures and corresponding materials related to the certification programs;
- J. Reviewing and/or approving certification examination detailed test plans, pass/fail standards, appeal dispositions, and other essential certification decisions based on determinations/recommendations from testing experts and/or committees; and

Annually, all Board of Trustees are required to sign a confidentiality/NDA agreement recognizing the roles and responsibilities for serving as a member of the Academy of Clinical Research Professionals.

LIMITATIONS

Authority

The authority of the Academy is limited to the authority granted in the Academy of Clinical Research Professionals bylaws, the Master Service Agreement between the Academy and ACRP, and the Academy Policies and Procedures Manual.

1. The Board of Trustees shall not develop, sponsor, accredit, approve, or endorse independent review courses or courses of study related to its certification examinations.
2. The Board of Trustees shall not create any new certification, terminate any existing credentials, or create any other business without the approval of the ACRP Board.
3. The Board of Trustees shall not take any action that may put the Academy at risk from legal action without prior full disclosure and the approval of the ACRP Board.

Compensation

Board of Trustees will serve without compensation or other remuneration. No Board of Trustee will derive any personal profit or gain from his or her participation in the Academy.

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every two years by the Academy Board of Trustees.

DATES REVIEWED BY THE ACADEMY BoT

June 18, 2018

December 14, 2021

DATES MODIFIED BY THE ACADEMY BoT

December 14, 2021

DATES APPROVED BY THE ACADEMY BoT

June 18, 2018

December 14, 2021

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



Academy Policy on Financial Management

RESOURCES

The Academy will have sufficient and adequate financial resources to conduct effective certification and recertification program activities. In order to fulfill the mission and objectives of the Academy in the most effective and efficient manner, a detailed Master of Services Agreement with the Association of Clinical Research Professionals has been established. The Academy will be charged for basic services including Accounting and Financial support, Marketing and Communications support, General Administration support, and overall Executive Management support.

EXPENSE REIMBURSEMENT

Board of Trustees and committee members will be reimbursed for reasonable travel expenses related to attendance at official, required meetings according to the ACRP Corporate Travel Policy which has been adopted by the Academy. This includes expenses such as coach class, roundtrip airfare (or mileage at the currently reimburse rate); ground transportation; lodging; parking; and reasonable meal expenses and gratuities for required meeting and other travel. Board of Trustees and committee members are expensed to utilize the lowest cost travel arrangements available within reasonable limits.

BUDGET

The ACRP Executive Director will prepare a draft budget for Board of Trustees review and approval that provides adequate financial resources to conduct effective certification and recertification activities.

The ACRP Executive Director will provide periodic financial reports to the Board of Trustees for the purpose of monitoring the budget and financial activities of the organization.

The fiscal year of the Academy is the same as the calendar year.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every two years by the Academy Board of Trustees.

DATES REVIEWED BY THE ACADEMY BoT

June 12, 2018

August 24, 2021

DATES MODIFIED BY THE ACADEMY BoT

DATES APPROVED BY THE ACADEMY BoT

June 12, 2018

August 24, 2021



Policy on Certification Exam Development

PURPOSE

To establish the procedures for developing and maintaining the certification examinations in a manner consistent with generally accepted psychometric principles to protect the integrity of the certification examinations.

SCOPE

The certification examinations are developed by the Global Examination Committees, one for each designation offered, with the oversight and approval of the Academy Board of Trustees and with qualified psychometric consultation. Subject Matter Experts (SMEs) drawn from a wide variety of practice backgrounds and geographical areas, are enlisted to write and review examination items. The Board of Trustees is ultimately responsible for determining the detailed content outline and the examination specifications, setting the passing score for successful achievement, and establishing eligibility requirements for taking the examination. The Board of Trustees also oversees selection of a testing vendor to provide examination development, analysis, item banking, and test delivery. The Global Exam Committees, in consult with testing vendor/psychometric consultant review and approve the exam items and assemble and approve each form of the exam.

JOB ANALYSIS

The Academy has determined, based on changes in the profession as reported by the Global Exam Committees and the Board, that a job analysis should be conducted every 5 - 7 years. The job analysis will be conducted in consultation with a qualified psychometrician and in a manner consistent with generally accepted psychometric standards. Exam Specifications are based on the documented findings of the job analysis.

EXAM SPECIFICATIONS

After completion of the job analysis, a report detailing the content of the proposed exam specifications, including the relative emphasis to be placed upon each content area and the total test length, will be developed with the test vendor/psychometric consultant. The final exam content outline will be approved by the Board and published and available to applicants and certificants.

QUALIFICATIONS FOR SUBJECT MATTER EXPERTS

Subject Matter Experts (SMEs) are drawn from a wide variety of practice backgrounds and geographical areas, are enlisted to serve as item writers and to participate on Global Exam Committees to review examination items and forms. All SMEs must be currently certified in the designation for which they are writing examination items. All SMEs must participate in item writing training. Refer to the Global Exam Committee charges for additional information on the qualifications for and selection of SMEs.

ITEM DEVELOPMENT AND MAINTENANCE

The Global Exam Committees will review all item and exam analysis reports and recommendations provided by the test vendor at least annually. Reports will include recommendations for resolving



any issues identified during the analysis.

The Global Exam Committees will conduct item writing workshops as needed to ensure sufficient item bank size for the development of new test forms. SMEs will receive item writer training before participating in item writing activities.

Before being administered in an exam, items will be reviewed by the appropriate Global Exam Committee for clarity, content accuracy, bias, and sensitivity. All items appearing on certification exams as scored items will first have been pre-tested.

The Global Exam Committees will work to maintain a sufficient number of usable items in the item bank to ensure that new exam forms can be created in accordance with this policy.

Retired items may be published as sample exam questions for candidates.

CREATION OF NEW EXAM FORMS

Multiple exam forms will be developed to ensure adequate exam security.

All exam forms will include a block of pre-test questions.

The following are the conditions which will determine when a new form of a particular exam is created:

1. Following a job analysis and creation of a new detailed content outline
2. Changes in the regulations/guidelines that govern the conduct of clinical trials
3. The volume of candidates warrants the creation of a new form according to the following schedule:
 - a. Over 100 candidates a new form is created for each offering
 - b. From 50 to 100 candidates in a given year, one new form each year
 - c. Under 50 candidates in a given year, the exact or modified form of the most recent form will be used
 - d. Under 50 candidates for a 5 year interval, one new form will be created

Exam forms will be approved by the appropriate Global Exam Committee before administration.

STANDARD SETTING

The Academy Board of Trustees will determine the examination passing point based on the recommendations of the test vendor/psychometric consultant, derived from an appropriate cut score study. The modified Angoff method is used for developing a passing point recommendation.

The Academy uses a criterion referenced passing point for all exams.

To ensure fairness for all exam applicants, consistency of the passing point between various forms of the exam will be assured through appropriate equating procedures.

Scores will be reported to candidates as a scaled score on a scale of 200 – 800. 600 will be the necessary scaled passing point.



MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Board.

DATES APPROVED BY THE ACADEMY BoT

August 12, 2014

March 5, 2017

August 24, 2021

DATES REVIEWED BY THE ACADEMY BoT

March 5, 2017

August 24, 2021



Global ACRP-CP Exam Committee Charge

All Committee charges are to be reviewed and updated annually.

MISSION

The mission of the Global ACRP-CP Exam Committee is to use psychometrically sound practices to develop Certified Professional (CP) examinations that meet the current test specifications as determined by the most recent Job Task Analysis (JTA).

GLOBAL GOALS AND OBJECTIVES

Committee members will provide content expertise to the ongoing development of the ACRP-Certified Professional (CP) certification examinations. The committee will:

- Maintain the confidentiality and integrity of the examination.
- Assure an adequate pool of exam items for potential inclusion on the written examination.
- Review and approve items, ensuring each item: tests appropriate skill level; topic found on the Detailed Content Outline (DCO); has a viable reference; is keyed correctly; is appropriate for all segments of the candidate population in terms of context, setting, language, descriptions and terminology; is free of bias or stereotyping.
- Identify, through review of the item bank by content area, topics in the DCO that are underrepresented in the item bank for future assignment to item writers.
- Review and approve exam forms for administration to the candidate population.
- Review, approve and retire items for the Exam Practice Exercise tool.
- Review, revise and evaluate draft items submitted by Item Writers/Subject Matter Experts for potential inclusion as pre-test items.
- Write items, as necessary, for the examination; provide item references or rationales; submit in a timely manner.
- Serve as a global ambassador to promote the profession and ACRP certification of CCRCs, CCRAs, CPIs, and ACRP-CPs as well as subspecialty designations.
- Serve as global ambassador of ACRP as the premier membership organization of clinical research and promote membership in ACRP.

AUTHORITY

The scope of the Global ACRP-CP Exam Committee is to develop and deliver psychometrically sound exams that will yield fair and balanced certification examinations for all stakeholders.

FUNCTION

It is critical that committee members devote sufficient time to participate in and contribute to committee activities.

COMMITTEE MEMBERS

- Consist of at least five but not more than eight members.
- Must hold current ACRP-CP certification.

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



- The demographic makeup of committee members will be based on the relative demographics of exam candidates and shall include proportionate representation from Academic institutions, private physician practice, hospital settings, and investigational drugs/biologics and devices; and geography. Multiple representations may be satisfied from one or more committee members.
- All members are chosen for their recognized expertise and are selected to fulfill the expertise needs as identified in the committee's annual survey.
- Leadership will entail a committee chair and a vice chair.

SKILLS AND EXPERTISE

- Committee members must keep current with changes and trends in clinical research.
- Committee members must be currently involved in clinical research (planning, conducting, overseeing).
- The Committee will define on an annual basis any additional skills and expertise areas required for service on the committee. Minimum expertise requirements will include:
 - Hold current ACRP-CP certification
 - Completion of item writing training and proven ability to write good test items
 - Demonstrate above-average familiarity with ICH GCPs and other applicable regulatory documents
 - Effective working in a team environment and independently
 - Ability to meet, face-to-face three times a year (February, June, September)
 - Ability to take the certification examination two times per year
 - Ability to solve problems and prioritize tasks
 - Demonstrate good oral and written communication skills.
- Additional skills and expertise may be determined annually by the Academy Board, committee chair and staff liaison.

ROLE OF CHAIR

The Committee Chair is responsible for leadership and facilitating the work of the committee.

ROLE OF VICE CHAIR

In the absence of the Chair, the Global CCRC Exam Committee Vice Chair is responsible for leadership and facilitating the work of the committee.

STAFF LIAISON (CERTIFICATION ASSOCIATE DIRECTOR)

The Staff Liaison provides all necessary support to the Chair, Vice Chair, and all the committee members to facilitate the work of the committee, including setting up meetings and helping to prepare the materials.

TERM LENGTH

- Committee members will serve one, three-year term with an option to serve one additional sequential term of three years.

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



- Members may return to serving the committee, per the needs of the committee, after a two-year break in service.
- If an individual has served two, three-year terms, he/she may be appointed for an additional one-year term at the discretion of the Academy Board Chair if it serves the best interest of the entire exam committee.

MEETING SCHEDULE

The Global ACRP-CP Exam Committee will meet face-to-face three times per year; dates and locations for the coming year will be determined at the September meeting each year. Teleconference calls may be conducted as necessary. All meetings will be supported financially by the Academy.

ACCOUNTABILITY

- Informal reporting about the committee's activities will occur quarterly to the Academy Board.
- An annual report will be submitted to the Academy Board.
- The committee's work will be aligned with the ACRP Strategic Plan.

ANNUAL GOALS

- Focus on recruiting committee members the first quarter
- Ensure an adequate number of items in the usable item bank by holding at least one (1) item writing training session at the Meeting & Expo and one (1) sponsored by a Chapter
- Add 100 pretest questions to the item bank
- Makes recommendation to the Academy Board for additional approved reference sources
- Approve two new forms of the exam for the Spring Exam Cycle
- Approve two new forms of the exam of the Fall Exam Cycle

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review **every year/annually** by the Academy Board of Trustees.

DATES REVIEWED BY THE ACADEMY BoT

DATES MODIFIED BY THE ACADEMY BoT

DATES APPROVED BY THE ACADEMY BoT

December 11, 2018



Global CCRA Exam Committee Charge

All Committee charges are to be reviewed and updated annually.

MISSION

The mission of the Global CCRA Exam Committee is to use psychometrically sound practices to develop Certified Clinical Research Associate (CCRA) examinations that meet the current test specifications as determined by the most recent Job Task Analysis (JTA).

GLOBAL GOALS AND OBJECTIVES

Committee members will provide content expertise to the ongoing development of the Certified Clinical Research Associate (CCRA) certification examinations. The committee will:

- Maintain the confidentiality and integrity of the examination.
- Assure an adequate pool of exam items for potential inclusion on the written (oral) examination.
- Review and approve items, ensuring each item: tests appropriate skill level; topic found on the Detailed Content Outline (DCO); has a viable reference; is keyed correctly; is appropriate for all segments of the candidate population in terms of context, setting, language, descriptions and terminology; is free of bias or stereotyping .
- Identify, through review of the item bank by content area, topics in the DCO that are underrepresented in the item bank for future assignment to item writers.
- Review and approve exam forms for administration to the candidate population.
- Review, approve and retire items for the Exam Practice Exercise tool.
- Review, revise and evaluate draft items submitted by Item Writers/Subject Matter Experts for potential inclusion as pre-test items.
- Write items, as necessary, for the examination; provide item references or rationales; submit in a timely manner.
- Serve as a global ambassador to promote the profession and ACRP certification of CCRCs, CCRA, CPIs, and ACRP-CPs, as well as subspecialty designations.
- Serve as global ambassador of ACRP as the premier membership organization of clinical research and promote membership in ACRP.

AUTHORITY

The scope of the Global CCRA Exam Committee is to develop and deliver psychometrically sound exams that will yield fair and balanced certification examinations for all stakeholders.

FUNCTION

It is critical that committee members devote sufficient time to participate in and contribute to committee activities.

COMMITTEE MEMBERS

- Consist of at least five but not more than eight members.
- Must hold current CCRA certification.

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



- The demographic makeup of committee members will be based on the relative demographics of exam candidates and shall include proportionate representation from CRO's and pharmaceutical companies; investigational drugs/biologics and devices; and geography. Multiple representations may be satisfied from one or more committee members.
- All members are chosen for their recognized expertise and are selected to fulfill the expertise needs as identified in the committee's annual survey.
- Leadership will entail a committee chair and a vice chair.

SKILLS AND EXPERTISE

- Committee members must keep current with changes and trends in clinical research.
- Committee members must be currently involved in the actual conduct of a clinical trial.
- The Committee will define on an annual basis any additional skills and expertise areas required for service on the committee. Minimum expertise requirements will include:
 - Currently hold CCRA certification
 - Completion of item writing training and proven ability to write good test items
 - Demonstrate above-average familiarity with ICH GCPs and other applicable regulatory documents
 - Effective working in a team environment and independently
 - Ability to meet, face-to-face three times a year (February, June, September)
 - Ability to take the certification examination two times per year
 - Ability to solve problems and prioritize tasks
 - Demonstrate good oral and written communication skills.
- Additional skills and expertise may be determined annually by the Academy Board, committee chair and staff liaison.

ROLE OF CHAIR

The Committee Chair is responsible for leadership and facilitating the work of the committee.

ROLE OF VICE CHAIR

In the absence of the Chair, the Global CCRA Exam Committee Vice Chair is responsible for leadership and facilitating the work of the committee.

STAFF LIAISON (CERTIFICATION ASSOCIATE DIRECTOR)

The Staff Liaison provides all necessary support to the Chair, Vice Chair, and all the committee members to facilitate the work of the committee, including setting up meetings and helping to prepare the materials.

TERM LENGTH

- Committee members will serve one, three-year term with an option to serve one additional sequential term of three years.
- Members may return to serving the committee, per the needs of the committee, after a two-year break in service.

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



- If an individual has served two, three-year terms, he/she may be appointed for an additional one-year term at the discretion of the Academy Board Chair if it serves the best interest of the entire exam committee.

MEETING SCHEDULE

The Global CCRA Exam Committee will meet face-to-face three times per year; dates and locations for the coming year will be determined at the September meeting each year. Teleconference calls may be conducted as necessary. All meetings will be supported financially by the Academy.

ACCOUNTABILITY

- Informal reporting about the committee's activities will occur quarterly to the Academy Board.
- An annual report will be submitted to the Academy Board.
- The committee's work will be aligned with the ACRP Strategic Plan.

ANNUAL GOALS

- Focus on recruitment for committee members the first quarter
- Ensure an adequate number of items in the usable item bank by holding at least one (1) item writing training session at the Meeting & Expo and one (1) sponsored by a Chapter
- Add 100 pretest questions to the item bank
- Make recommendation to the Academy Board for additional approved reference sources
- Approve two new forms of the exam for Spring Exam Cycle
- Approve two new forms of the exam for the Fall Exam Cycle

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review **every year/annually** by the Academy Board of Trustees.

DATES REVIEWED BY THE ACADEMY BoT

DATES MODIFIED BY THE ACADEMY BoT

December 11, 2018

DATES APPROVED BY THE ACADEMY BoT

October 15, 2017

December 11, 2018



Global CCRC Exam Committee Charge

All Committee charges are to be reviewed and updated annually.

MISSION

The mission of the Global CCRC Exam Committee is to use psychometrically sound practices to develop Certified Clinical Research Coordinator (CCRC) examinations that meet the current test specifications as determined by the most recent Job Task Analysis (JTA).

GLOBAL GOALS AND OBJECTIVES

Committee members will provide content expertise to the ongoing development of the Certified Clinical Research Coordinator (CCRC) certification examinations. The committee will:

- Maintain the confidentiality and integrity of the examination.
- Assure an adequate pool of exam items for potential inclusion on the written examination.
- Review and approve items, ensuring each item: tests appropriate skill level; topic found on the Detailed Content Outline (DCO); has a viable reference; is keyed correctly; is appropriate for all segments of the candidate population in terms of context, setting, language, descriptions and terminology; is free of bias or stereotyping.
- Identify, through review of the item bank by content area, topics in the DCO that are underrepresented in the item bank for future assignment to item writers.
- Review and approve exam forms for administration to the candidate population.
- Review, approve and retire items for the Exam Practice Exercise tool.
- Review, revise and evaluate draft items submitted by Item Writers/Subject Matter Experts for potential inclusion as pre-test items.
- Write items, as necessary, for the examination; provide item references or rationales; submit in a timely manner.
- Serve as a global ambassador to promote the profession and ACRP certification of CCRCs, CCRAs, CPIs, and ACRP-CPs as well as subspecialty designations.
- Serve as global ambassador of ACRP as the premier membership organization of clinical research and promote membership in ACRP.

AUTHORITY

The scope of the Global CCRC Exam Committee is to develop and deliver psychometrically sound exams that will yield fair and balanced certification examinations for all stakeholders.

FUNCTION

It is critical that committee members devote sufficient time to participate in and contribute to committee activities.

COMMITTEE MEMBERS

- Consist of at least five but not more than eight members.
- Must hold current CCRC certification.

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



- The demographic makeup of committee members will be based on the relative demographics of exam candidates and shall include proportionate representation from Academic institutions, private physician practice, hospital settings, and investigational drugs/biologics and devices; and geography. Multiple representations may be satisfied from one or more committee members.
- All members are chosen for their recognized expertise and are selected to fulfill the expertise needs as identified in the committee's annual survey.
- Leadership will entail a committee chair and a vice chair.

SKILLS AND EXPERTISE

- Committee members must keep current with changes and trends in clinical research.
- Committee members must be currently involved in the actual conduct of a clinical trial.
- The Committee will define on an annual basis any additional skills and expertise areas required for service on the committee. Minimum expertise requirements will include:
 - Currently hold CCRC certification
 - Completion of item writing training and proven ability to write good test items
 - Demonstrate above-average familiarity with ICH GCPs and other applicable regulatory documents
 - Effective working in a team environment and independently
 - Ability to meet, face-to-face three times a year (February, June, September)
 - Ability to take the certification examination two times per year
 - Ability to solve problems and prioritize tasks
 - Demonstrate good oral and written communication skills.
- Additional skills and expertise may be determined annually by the Academy Board, committee chair and staff liaison.

ROLE OF CHAIR

The Committee Chair is responsible for leadership and facilitating the work of the committee.

ROLE OF VICE CHAIR

In the absence of the Chair, the Global CCRC Exam Committee Vice Chair is responsible for leadership and facilitating the work of the committee.

STAFF LIAISON (CERTIFICATION ASSOCIATION DIRECTOR)

The Staff Liaison provides all necessary support to the Chair, Vice Chair, and all the committee members to facilitate the work of the committee, including setting up meetings and helping to prepare the materials.

TERM LENGTH

- Committee members will serve one, three-year term with an option to serve one additional sequential term of three years.
- Members may return to serving the committee, per the needs of the committee, after a two year break in service.

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



- If an individual has served two, three-year terms, he/she may be appointed for an additional one-year term at the discretion of the Academy Board Chair if it serves the best interest of the entire exam committee.

MEETING SCHEDULE

The Global CCRC Exam Committee will meet face-to-face three times per year; dates and locations for the coming year will be determined at the September meeting each year. Teleconference calls may be conducted as necessary. All meetings will be supported financially by the Academy.

ACCOUNTABILITY

- Informal reporting about the committee's activities will occur quarterly to the Academy Board.
- An annual report will be submitted to the Academy Board.
- The committee's work will be aligned with the ACRP Strategic Plan.

ANNUAL GOALS

- Focus on recruiting committee members the first of quarter
- Ensure an adequate number of items in the usable item bank by holding at least one (1) item writing training session at the Meeting & Expo and one (1) sponsored by a Chapter
- Add 100 pretest questions to the item bank
- Makes recommendation to the Academy Board for additional approved reference sources
- Approve two new forms of the exam for the Spring Exam Cycle
- Approve two new forms of the exam of the Fall Exam Cycle

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review **every year/annually** by the Academy Board of Trustees.

DATES REVIEWED BY THE ACADEMY BoT

DATES MODIFIED BY THE ACADEMY BoT

December 11, 2018

DATES APPROVED BY THE ACADEMY BoT

October 15, 2017

December 11, 2018



Global CPI Exam Committee Charge

All Committee charges are to be reviewed and updated annually.

MISSION

The mission of the Global CPI Exam Committee is to use psychometrically sound practices to develop Certified Principal Investigator (CPI) examinations that meet the current test specifications as determined by the most recent Job Task Analysis (JTA).

GLOBAL GOALS AND OBJECTIVES

Committee members will provide content expertise to the ongoing development of the Certified Principal Investigator (CPI) certification examinations. The committee will:

- Maintain the confidentiality and integrity of the examination.
- Assure an adequate pool of exam items for potential inclusion on the written examination.
- Review and approve items, ensuring each item: tests appropriate skill level; topic found on the Detailed Content Outline (DCO); has a viable reference; is keyed correctly; is appropriate for all segments of the candidate population in terms of context, setting, language, descriptions and terminology; is free of bias or stereotyping.
- Identify, through review of the item bank by content area, topics in the DCO that are underrepresented in the item bank for future assignment to item writers.
- Review and approve exam forms for administration to the candidate population.
- Review, approve and retire items for the Exam Practice Exercise tool.
- Review, revise and evaluate draft items submitted by Item Writers/Subject Matter Experts for potential inclusion as pre-test items.
- Write items, as necessary, for the examination; provide item references or rationales; submit in a timely manner.
- Serve as a global ambassador to promote the profession and ACRP certification of CCRCs, CCRAs, CPIs, and ACRP-CPs as well as subspecialty designations.
- Serve as global ambassador of ACRP as the premier membership organization of clinical research and promote membership in ACRP.

AUTHORITY

The scope of the Global CPI Exam Committee is to develop and deliver psychometrically sound exams that will yield fair and balanced certification examinations for all stakeholders.

FUNCTION

It is critical that committee members devote sufficient time to participate in and contribute to committee activities.

COMMITTEE MEMBERS

- Consist of at least five but not more than eight members.
- Must hold current CPI certification.

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- The demographic makeup of committee members will be based on the relative demographics of exam candidates and shall include proportionate representation from Academic institutions, private physician practice, hospital settings, and investigational drugs/biologics and devices; and geography. Multiple representations may be satisfied from one or more committee members.
- All members are chosen for their recognized expertise and are selected to fulfill the expertise needs as identified in the committee's annual survey.
- Leadership will entail a committee chair and a vice chair.

SKILLS AND EXPERTISE

- Committee members must keep current with changes and trends in clinical research.
- Committee members must be currently involved in the actual conduct of a clinical trial.
- The Committee will define on an annual basis any additional skills and expertise areas required for service on the committee. Minimum expertise requirements will include:
 - Currently hold CPI certification
 - Completion of item writing training and proven ability to write good test items
 - Demonstrate above-average familiarity with ICH GCPs and other applicable regulatory documents
 - Effective working in a team environment and independently
 - Ability to meet, face-to-face twice a year (February, September)
 - Ability to take the certification examination two times per year
 - Ability to solve problems and prioritize tasks
 - Demonstrate good oral and written communication skills.
- Additional skills and expertise may be determined annually by the Academy Board, committee chair and staff liaison.

ROLE OF CHAIR

The Committee Chair is responsible for leadership and facilitating the work of the committee.

ROLE OF VICE CHAIR

In the absence of the Chair, the Global CPI Exam Committee Vice Chair is responsible for leadership and facilitating the work of the committee.

STAFF LIAISON (CERTIFICATION DIRECTOR)

The Staff Liaison provides all necessary support to the Chair, Vice Chair, and all the committee members to facilitate the work of the committee, including setting up meetings and helping to prepare the materials.

TERM LENGTH

- Committee members will serve one, three-year term with an option to serve one additional sequential term of three years.
- Members may return to serving the committee, per the needs of the committee, after a two year break in service.

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OF CLINICAL RESEARCH PROFESSIONALS



- If an individual has served two, three-year terms, he/she may be appointed for an additional one-year term at the discretion of the Academy Board Chair if it serves the best interest of the entire exam committee.

MEETING SCHEDULE

The Global CPI Exam Committee will meet face-to-face once a year; dates and locations for the coming year will be determined at the September meeting each year. Teleconference calls may be conducted as necessary. All meetings will be supported financially by the Academy.

ACCOUNTABILITY

- Informal reporting about the committee's activities will occur quarterly to the Academy Board.
- An annual report will be submitted to the Academy Board.
- The committee's work will be aligned with the ACRP Strategic Plan.

ANNUAL GOALS

- Focus on recruiting committee members the first of quarter
- Ensure an adequate number of items in the usable item bank by holding at least one (1) item writing training session at the Meeting & Expo and one (1) sponsored by a Chapter
- Add 50 pretest questions to the item bank
- Makes recommendation to the Academy Board for additional approved reference sources
- Approve one new form of the exam for the Spring Exam Cycle
- Approve one new form of the exam of the Fall Exam Cycle

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review **every year/annually** by the Academy Board of Trustees.

DATES REVIEWED BY THE ACADEMY BoT

DATES MODIFIED BY THE ACADEMY BoT

December 11, 2018

DATES APPROVED BY THE ACADEMY BoT

October 15, 2017

December 11, 2018

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



Impartiality Regarding Training Policy

The Academy of Clinical Research Professionals role is in developing and administering certification examinations to determine the qualifications of candidates for certification. The Academy does not require, provide, or endorse any specific study guides, training or review courses.

The Academy, Board of Trustees, certification staff members, certification committee members, and certification subject matter experts will not:

- have involvement in the creation, development, or delivery of examination review courses, preparatory materials, educational programs, or training programs that prepare candidates for the certification examination;
- participate in the development or determination of educational standards, guidelines, or curriculum; and/or
- approve, accredit, endorse, or recommend educational programs designed to prepare individuals for certification.

During their term(s) of service, Board of Trustees will not participate in the development or delivery of any educational program or training designed or intended to prepare individuals to take the certification examinations offered by the Academy.

Board of Trustees who participate in creating and/or reviewing content for the examinations, including serving as item writers and/or item reviewers, may be subject to additional restrictions as established in these policies and procedures.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Academy Board of Trustees.

DATE REVIEWED BY THE ACADEMY BoT

April 30, 2018

August 24, 2021

DATES MODIFIED BY THE ACADEMY BoT

DATES APPROVED BY THE ACADEMY BoT

April 30, 2018

August 24, 2021

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



Policy on Examination and Materials Security

PURPOSE

The Academy's test security policy is in place to maintain the integrity of its certification program, and to adhere to security best practices, in line with accreditation standards. The Academy, any contracted vendor, test administrator, subject matter expert, candidate, and all testing personnel, are responsible for following procedures outlined in this policy. The Director of Certification is ultimately responsible for keeping the Academy's confidential material secure and ensuring adherence to the test security policy.

SCOPE

Confidential materials are defined as any information the Academy is required to keep confidential and includes: attorney-client communications and attorney work products; proprietary information such as raw or published results of the job analysis, test specifications; exam cut scores and cut score analyses; examination documents including all draft, active or retired items unless expressly removed from the item bank for other uses, draft exam forms, pre-test blocks and item analyses; applicant records including CVs and job descriptions submitted as part of their application, test scores; certificant records including maintenance application materials; disciplinary investigation materials; contracts and agreements; information discussed during executive session of the Board; and any other committee, board or working group, program-related materials not publicly released by the Academy Board of Trustees.

ACCESS CONTROL

All confidential materials will always be retained in a secure manner and disposed of in accordance with the Academy's record retention policy. Access to confidential materials will be limited to the applicant, ACRP staff assigned to work on behalf of the Academy, and volunteers who need to view the information. Academy volunteers are defined as Academy Board members, exam committee members, item writers, subject matter experts, cut score panelists, and any others who are provided with confidential information to review on behalf of the Academy. These individuals will sign a nondisclosure agreement affirming that they have read the Academy's confidentiality policy, before being granted access to any confidential information. Exam materials are held in a secure database, and backups are performed daily for electronically stored data by ACRP and the vendor.

Any information passed between the vendor and the Academy is transmitted using a secure file transfer protocol (SFTP) and passwords are always communicated separately from data transmission.

TEST ADMINISTRATORS

Test administrators or proctors must follow all directions and established procedures as outlined in the test requirement document. TA's will be trained in the proper procedures for administering exams and ensuring they meet all requirements outlined by the Academy. This includes candidate verification for exam entrance, monitoring the testing environment, and reporting any irregularities to the test sponsor.

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OF CLINICAL RESEARCH PROFESSIONALS



EDUCATORS

Employees and volunteers who have any responsibility for developing, updating, or evaluating educational programs that are intended to prepare candidates for certification are strictly prohibited to have any access to confidential examination materials.

IDENTIFICATION

Candidates are required to provide the test administrator with identification that is: valid, photo-bearing, unexpired, and government issued to verify their identity. Candidate's first and last name must be an exact match to what the test sponsor and the test administrator have for admission.

MULTIPLE EXAM SECTIONS

Academy exams are divided into three sections: tutorial, examination, and survey. Under no circumstance will a candidate be permitted to return to a section once they have left that section, whether it is complete or not.

SECURITY VIOLATIONS

The Academy ensures that the contracted testing vendor has measures in place to prevent unauthorized access, hacking, or cheating. The following violations may result in the immediate termination of your examination.

- Creating a disturbance
- Giving or receiving help; using notes, papers, or other aids
- Attempting to take the exam for someone else
- Looking somewhere else other than the computer screen. Exam candidates should remain facing toward and looking at the screen during the duration of your exam, so that the proctors can properly monitor your exam session. (For remote proctored exams)
- Possession of communication, surveillance or recording device, including but not limited to cell phones, tablets, smart glasses, smart watches, mobile devices, etc., during the exam administration
- Attempting to share test questions or answers or other information contained in the exam (as such are the confidential information of the Academy); including sharing test questions subsequent to the exam
- Leaving the testing area without authorization. (These individuals will not be allowed to return to the testing room), and
- Accessing items stored in the personal belongings area before the completion of the exam
- Any third-party captured by the Proctor, including children and pets (for remote proctored exams).
- Receiving repeated warnings from the test administrator
- Taking a break or leaving the camera view without a preapproved accommodation

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OF CLINICAL RESEARCH PROFESSIONALS



MONITORING AND SURVEILLANCE

The Academy will ensure that the testing vendor has measures in place to monitor the testing environment, including video surveillance (which shall be destroyed 90 days after the candidate has completed their exam).

- The Academy's examinations are reviewed annually by the Certification Director and vendor to address potential security threats.
- The Academy ensures that all technology partners have a procedure in place to address any breach of security. Any breach of security or violation will be reported to the Certification Director within two business days for investigation and/or correction as needed.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every two years by the Academy Board of Trustees.

DATES REVIEWED BY THE ACADEMY BoT

October 18, 2023

DATES MODIFIED BY THE ACADEMY BoT

DATES APPROVED BY THE ACADEMY BoT

October 18, 2023

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OF CLINICAL RESEARCH PROFESSIONALS



Academy Quality Assurance Policy

PURPOSE

The quality management policy is developed to improve overall certification program performance, promote continued quality monitoring and improvement, establish processes for identifying errors and initiating corrective and preventative actions, and to ensure preventive actions and other proactive measures.

POLICY DEVELOPMENT & MAINTENANCE

The Board of Trustees will regularly develop, evaluate, and update certification program policies in order to ensure relevance, accuracy, and ongoing conformity with accreditation requirements.

Changes to policies, including the addition or removal of policies, will be reviewed for compliance with relevant accreditation standards and generally accepted psychometric principles (if applicable) before the policy is approved. Any policy revisions, additions, or deletions identified as non-compliant will be subject to further review.

The Director of Certification is responsible for ensuring that the Board of Trustees develops, evaluates, revises, and updates policies and that all policies approved by the BOT are fully and consistently implemented.

The Director of Certification will notify the Board Chair regarding any required and/or recommended revisions to existing policies, the need to develop new policies, or the need to replace or remove existing policies.

PUBLISHED CANDIDATE INFORMATION

The Director of Certification will ensure the review, at least annually, of all published candidate information to confirm this information remains accurate, up-to-date, and consistent with Board of Trustee policies.

Published information includes, but is not limited to, candidate handbooks, recertification handbooks, application forms for certification and recertification, accommodation request forms, summary of certification activities (aggregate data), directory of certificants, and ACRP website content.

Findings of the review process will be presented to the respective departmental directors for corrective and preventative actions. A summary of the findings and corrective and preventative actions will be presented at the next regular meeting of the BOT.

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OF CLINICAL RESEARCH PROFESSIONALS



APPLICATION PROCESSING

Applications and corresponding documentation are reviewed in a timely manner by Academy certification staff to ensure all eligibility requirements are fulfilled for the candidate to sit for the respective certification examination.

Applications, corresponding documentation, and fees are only valid for one (1) year after receipt by the Academy.

EXAMINATION DEVELOPMENT

The Board of Trustees is committed to providing the clinical research profession with certification exams of the highest quality, relevance, and accuracy. This commitment requires that the exam development process be highly detailed, time consuming, participatory and consultative. The test development process employs many of the proven techniques considered as best practices in the industry.

The internal audit will focus on policies and procedures related to: conducting the job/practice task analysis (survey development, data analysis), item development and review, exam form assembly and review, standard setting, technical review, and score reporting.

TEST SECURITY

The Director of Certification will be responsible for ensuring that exam content remains secure at all times. Secure test administrations are contracted to testing agencies, however, the Academy retains oversight and the sole responsibility for all contracted services.

The Board of Trustees will develop, implement, and periodically evaluate a full security program to ensure that:

- Test security issues are prevented, as much as possible, rather than discovered after the fact.
- Test information and material is stored in secure areas, with access limited to authorized individuals.
- Test Administrators/proctors are trustworthy, qualified, trained, and selected from individuals who do not have a vested interest in the outcome of examination results.
- Examination content is protected at all times.
- Possible confidentiality/security violations are investigated, with action taken and corrective and preventative protocols implemented.
- An ongoing system is in place for the prevention, monitoring, and investigation of test irregularities which includes a plan of action in case of violation.

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OF CLINICAL RESEARCH PROFESSIONALS



TEST SECURITY INCIDENTS

The Director of Certification will ensure that Academy vendors/contractors consistently follow security protocols. As such, they will report any significant security incidents to the Board of Trustees in a timely manner for review, consideration, and corrective and preventable and action.

Annually, the Director of Certification will provide a summary report to the BOT of all security investigations, irregularities, corrective and preventable actions, and outcomes. This summary will be reviewed and explored for discernable patterns and opportunities to improve current processes.

The Board of Trustees requires all Academy applicants to sign a Non-Disclosure Agreement on the application forms and examination tutorial regarding the examination confidentiality policy and that that Academy reserves the right to make all final decisions about the validity of examination scores.

COMPLAINTS, DISCIPLINARY ACTIONS, & APPEALS

In addition to compliance with the disciplinary/complaints policy, the Director of Certification will present the Board of Trustees with an annual summary of disciplinary complaints, investigations, corrective and preventative actions, and outcomes. This summary will be reviewed and explored by the BOT, or a subcommittee of the BOT, for discernable patterns and opportunities to improve current processes.

RECORD RETENTION

The Director of Certification is responsible for ensuring records are maintained, stored, and disposed of in accordance with the BOT's Document Management Policy.

CONFIDENTIALITY & CONFLICT OF INTEREST

Ensure confidential information, as defined by Board of Trustees, is maintained appropriately. Individuals with access to confidential information must have current, signed agreements, as per the Confidentiality Policy requirements.

Ensure individuals bound by the conflict of interest policy must have current, signed agreements, as per the Conflict of Interest Policy requirements.

FINANCIAL

The Academy ensures a full audit every other year and a review on the off years of its financial position by independent accountants at an outside firm.

TRAINING

Training of BOT members, Academy certification staff, examination panels, committees/subject matter experts is integral to the BOT's efforts to consistently implement policies and procedures and prevent error.

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OF CLINICAL RESEARCH PROFESSIONALS



STANDARDS FOR CUSTOMER SERVICE

Customer service standards are an integral component of business that are usually defined in terms of accessibility, accuracy, appropriateness, excellence, and timeliness.

ACCESSIBILITY

- Applicants, candidates, and certificants should have easy access to Academy services.
- Documents may be submitted electronically or by mail.
- Inquiries may be submitted via telephone, email, or mail.
- Applicants have access to online certification program information.

ACCURACY

- The processes, policies, and service standards are clearly defined and will be accurately reflected in the content provided on the website and in the candidate handbook.
- Accurate information will be given, to the best of their ability, by certification program employees to potential applicants, candidates, and certificants in response to questions received via telephone, email, or mail.
- Certification program staff will develop tools to monitor and ensure the accuracy of candidates' and certificants' information in the database.

APPROPRIATENESS

- Certification program employees will work to ensure that the expectations of potential applicants, candidates, and certificants are met.
- Employees will uphold high quality standards as expected and set forth by the organization.
- Employees will maintain compliance with BOT policies and procedures.

TIMELINESS

- The Director of Certification will define and implement reasonable response times to certification inquiries and the processing of applications, notifications, and verifications.
- All applications for initial certification, recertification, and verification will be initially reviewed within a 14- business-day timeframe following receipt. Electronic submissions will be sent a receipt via email no later than five (5) business days.
- Any missing or incomplete information in applications for initial certification or renewal will be communicated to the applicant via email, telephone, or mail as soon as noted by certification program staff.
- Phone coverage will be during normal business hours of 9:00 AM – 5:00 PM (EST) Monday through Friday, except holidays.
- The Director of Certification and Certification Manager will work to resolve complaints within one (1) to two (2) weeks of receipt, except where other timelines are established by disciplinary, complaints, and request for reconsideration policies and procedures.

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OF CLINICAL RESEARCH PROFESSIONALS



- Certification program staff will acknowledge receipt of correspondence via email, fax, or mail within five (5) business days.

INTERNAL AUDIT

The Academy is committed to ongoing quality review and improvement in order to:

- Provide high quality services to Academy candidates and certificants;
- Promote public trust and confidence in the certification program;
- Maintain consistency with current national accreditation standards for certification programs;
- Ensure the success of the certification program; and
- Increase the legal defensibility of the certification program.

It is the responsibility of the Board of Trustees to establish policies and procedures for the certification programs, review, and update those policies and provide oversight to ensure the proper and consistent implementation of policies and procedures. The customer service standards, and performance against these standards, will be reviewed with employees on a regular basis.

QUALITY REVIEW COMMITTEE

The Quality Review Committee is composed of the Director of Certification, the BOT Chair, and an additional Board of Trustee appointed by the BOT Chair.

The Quality Review Committee will make recommendations for corrective actions and preventative actions. Corrective and preventable actions result from the identification of a policy or procedure that is not being properly or fully implemented, identification of required exam procedures that are not being properly implemented, or identification of other errors or serious incidents. When corrective and preventable actions are identified, action will be taken as quickly as possible to ensure ongoing compliance with the BOT's policies and procedures.

Preventative actions result from the identification of areas for improvement or increased efficiency and actions that will prevent the need for additional future corrective actions. Preventative actions will be implemented over a reasonable time period. When applicable, candidates/certificants will receive reasonable advance notice of changes to the certification program.

INTERNAL QUALITY REVIEW PROCEDURES

The Quality Review Committee is charged with monitoring compliance with the Quality Assurance policy and making recommendations to improve certification program operations. The Quality Review Committee ensures that policies and procedures are consistently implemented and identifies areas of needed programmatic change.

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OF CLINICAL RESEARCH PROFESSIONALS



- Recommendations developed by the Quality Review Committee regarding daily operations and administrative issues (such as customer service improvements) will be reported to the Executive Director for review and action as needed.
- Recommendations regarding changes to policies will be reported to the Board of Trustees for review and action as needed.
- The Quality Review Committee meets biannually. Minutes will be kept for all Quality Review Committee meetings.

ANNUAL INTERNAL REVIEW

The Quality Review Committee will conduct an Internal Quality Review on an annual basis. This review does not replace oversight responsibilities of the Board of Trustees but is designed to assist the BOT and Executive Director in identifying areas where corrective actions are needed and/or where preventative actions may improve overall quality. Areas of review include:

- Any identified test security issues or exam administration incidents;
- Candidate complaints, appeals, and/or requests for reconsideration (including feedback and complaints received regarding the certification program and/or examination administration and review of evaluation forms or feedback surveys);
- Compliance with customer service standards, including any internal customer services issues, as well as customer services issues related to any outsourced testing services;
- Implementation of policies and procedures to ensure that policies established by the BOT are consistently implemented and that recommendations for policy revisions are referred to the BOT for consideration as needed;
- Review of previously approved quality improvement recommendations to ensure that these corrective and/or preventative actions were properly implemented; and
- Suggestions for process improvement.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every two years by the Academy Board of Trustees.

DATE REVIEWED BY THE ACADEMY BoT

June 18, 2018

August 24, 2021

DATES MODIFIED BY THE ACADEMY BoT

DATES APPROVED BY THE ACADEMY BoT

June 18, 2018

August 24, 2021



Academy of Clinical Research Professionals Records Retention

PURPOSE:

To establish an appropriate scope and timeframe, consistent with the Virginia Public Records Act (VPRA), for the retention, disposal, and destruction of records and documents related to the certification program and the Academy of Clinical Research Professionals (Academy).

SCOPE:

This policy covers all records and documents related to the certification programs and the governance and administration of the Academy.

POLICY:

The Academy shall maintain the official records of all candidates and certificants, as well as all corporate records for the Academy. The Academy's testing vendor shall maintain copies of candidate examination results for a minimum of ten (10) years. In order to protect the applicant, candidate, certificant, as well as the Academy Board, no extraneous materials will be retained as part of candidate records. Any notations concerning a candidate's application are discoverable materials and shall be entered into the candidate's record in a formal manner (attached as a PDF or entered into the "Notes" section of the application review screen).

The Director of Certification shall be responsible for annually reviewing the record retention and disposal program. Records will be destroyed by appropriate means (deletion or shredding) after they have been retained until the end of the required retention period.

This policy shall cover the following records:

Corporate Records:

Incorporation documents and amendments, Bylaws, policies, other organizational documents, governing board and board committee minutes shall be retained permanently.

Tax Records:

Filed state and federal tax returns/reports and supporting records, tax exemption determination letter and related correspondence, files related to tax audits shall be retained permanently.

Financial Records:

Audited financial statements, attorney contingent liability letters shall be retained permanently.

Intellectual Property Records:

Copyright and trademark registrations and samples of protected works shall be retained permanently.



Insurance and Contract/License Records:

Vendor, hotel and service agreements, independent contractor agreements, consultant agreements, and all other agreements shall be retained during the term of the agreement and for three years after the termination, expiration, non-renewal of each agreement.

Exam Records:

Job analysis documents, test specifications, detailed content outlines, score results files, exam performance reports, eligibility policies shall be retained permanently.

Applicant Files:

Applicant records are stored electronically as part of the database. The applicant's contact details, actual application form, and any documents submitted in support of the application, correspondence with the applicant regarding any issues with the application and the response, official notifications of the applicant's status. Applicant files shall be retained for a minimum of five (5) years.

Candidate Files:

Applicant files become candidate files once the candidate has been notified of successful eligibility status. Candidate files are stored electronically as part of the database. In addition to the contents of the applicant file, candidate files include examination registrations and dates, pass/fail status, correspondence related to inability to test (no shows or transfers), and any requests and determination regarding Special Accommodations. Candidate files shall be retained permanently.

Certificant Files:

Candidate files become certificant files once an individual has successfully passed the exam and is granted certification status. In addition to the contents of candidate files, certificant files include the date certification became effective and when it expires. Certificant files shall also include applications for maintenance of certification and any subsequent approval or expiration dates. Certificant files shall be retained permanently.

Exceptions:

Any exceptions to this policy must be authorized by the Academy Board of Trustees and documented appropriately.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Board.

DATE APPROVED

September 9, 2009

October 15, 2017

August 24, 2021

October 19, 2023



DATES REVIEWED

October 15, 2017

August 24, 2021

October 19, 2023

DATES MODIFIED

August 12, 2014

October 15, 2023



Policy on Eligibility for the ACRP-Certified Professional (ACRP-CP) Program

POLICY

All applicants for the Certified Professional (ACRP-CP) program must meet all of the eligibility requirements stated in the *ACRP-CP Candidate Handbook* and on the application form itself in order to be approved to take the ACRP-CP examination.

Applicants are required to submit both

- 1) a copy of a current curriculum vitae (CV) or resume and
- 2) a copy of job descriptions for each of those positions used to demonstrate eligibility

with enough detail to sufficiently document and demonstrate achievement of the required minimum number of hours of employment performing the Eligibility Requirements of an ACRP-Certified Professional.

At least one of the ACRP-CP Eligibility Requirements as defined below, in addition to the Detailed Content Outline (DCO) must be met:

- **Planning** – protocol design, feasibility assessment, business operations (budgeting, contracting, billing compliance), site selection activities, regulatory document preparation, collection, and/or submission, site management activities, clinical operations role within site, academic medical centers or CROs.
- **Conducting** – conduct of clinical trials with participants.
- **Overseeing (Management, Administration)** – study site management (Site, CRO, Sponsor, monitoring activities (including in-house, central and remote monitoring), project management, quality control, quality assurance, data management, medical monitoring, safety monitoring (medical safety liaison, pharmacovigilance, IRB professional).

Applicants must document a cumulative, minimum of 3,000 hours of employment performing the eligibility requirement. If the applicant's experience is within 120 hours of the requirement, by the first day of the exam window, full consideration will be given toward eligibility.

Clinical Research Certifications

The Academy acknowledges that there is a shared knowledge base between CCRC, CCRA and CPI certificant holders and those who may seek the ACRP-CP designation. Any candidate for the ACRP-CP designation who has a current CCRC, CCRA or CPI designation will have achieved a valid substitute for 1,500 hours of the required professional experience performing the essential duties of a CP.

Academic Qualifications in Clinical Research

The Academy considers applicants who have completed a clinical research degree program that is accredited by the Council for Higher Education Accreditation to have achieved a valid substitution for 1,500 hours (1 year) of professional experience for the CP exam.



If an applicant submits an application using an educational program as a substitute for 1,500 hours of work experience performing the Essential Duties, then the following information must be included on the applicant's CV and a copy of the degree must also be submitted:

- Name of school
- City and country in which the school is located
- Program title
- Name of organization that accredits the institution providing the program
- Dates attended (From-To)

The Academy reserves the right to verify any and all employment information submitted on an applicant's CV or job description at any time during the process of certification or thereafter. If an applicant is found to have falsified or misrepresented his/her documentation, it is grounds for revocation of eligibility and/or certification status.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years.

DATE REVIEWED

April 11, 2017

December 14, 2021

DATE MODIFIED

December 14, 2021

DATE APPROVED

March 5, 2017

December 14, 2021



Policy on Eligibility for the Certified Clinical Research Associate (CCRA) Program

POLICY

All applicants for the Certified Clinical Research Associate (CCRA) program must meet all of the eligibility requirements stated in the *CCRA Candidate Handbook* and on the application form itself in order to be approved to take the CCRA examination.

Applicants are required to submit both

- 1) a copy of a current curriculum vitae (CV) or resume and
- 2) a copy of job descriptions for each of those positions used to demonstrate eligibility

with enough detail to sufficiently document and demonstrate achievement of the required minimum number of hours of employment performing the Essential Duties of a Certified Clinical Research Associate.

The CCRA Essential Duties are defined as:

- Verify that the research site investigator(s) and study personnel are conducting the study according to the clinical protocol, “Good Clinical Practices”, and regulatory requirements to ensure protection and ethical treatment of human subjects;
- Ensure identification and reporting of safety issues, when applicable, from research site staff to the sponsor and the IRB/IEC;
- Perform monitoring activities per the monitoring plan (e.g. verification of source documents and eCRF/CRFs, site communications, follow up on data anomalies, etc.)
- Review accuracy and completeness of site records (i.e., essential documents, query resolution, and other data collection tools);
- Ensure accountability of Investigational Product and related supplies are performed, when appropriate;
- Ensure complete reporting and proper documentation of monitoring activities;
- Conduct routine monitoring visits (on site or remotely) independently from the investigative site study staff;
- Ensure the site is identifying issues and implementing corrective and preventive actions to ensure inspection readiness.
- Current Detailed Content Outline (DCO)



Applicants must document a cumulative, minimum of 3,000 hours of employment performing the Essential Duties. If the applicant's experience is within 120 hours of the requirement, by the first day of the exam window, full consideration will be given toward eligibility.

Clinical Research Certifications

The Academy acknowledges that there is a shared knowledge base between CCRC, ACRP-CP and CPI certificant holders and those who may seek the CCRA designation. Any candidate for the CCRA designation who has a current CCRC, ACRP-CP or CPI designation will have achieved a valid substitute for 1,500 hours of the required professional experience performing the essential duties of a CRA.

Academic Qualifications in Clinical Research

The Academy considers applicants who have completed a clinical research degree program that is accredited by the Council for Higher Education Accreditation to have achieved a valid substitution for 1,500 hours (1 year) of professional experience for the CRA exam.

If an applicant submits an application using an educational program as a substitute for 1,500 hours of work experience performing the Essential Duties, then the following information must be included on the applicant's CV and a copy of the degree must also be submitted:

- **Name of school**
- **City and country in which the school is located**
- **Program title**
- **Name of organization that accredits the institution providing the program**
- **Dates attended (From-To)**

The Academy reserves the right to verify any and all employment information submitted on an applicant's CV or job description at any time during the process of certification or thereafter. If an applicant is found to have falsified or misrepresented his/her documentation, it is grounds for revocation of eligibility and/or certification status.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years.

DATE APPROVED

May 21, 2013
December 15, 2015
December 14, 2021

DATES REVIEWED

October 25, 2015
April 11, 2019
December 14, 2021



DATES MODIFIED

May 19, 2015

December 15, 2015

April 11, 2019

December 14, 2021



Policy on Eligibility for the Certified Clinical Research Coordinator (CCRC) Program

POLICY

All applicants for the Certified Clinical Research Coordinator (CCRC) program must meet all of the eligibility requirements stated in the *CCRC Candidate Handbook* and on the application form itself in order to be approved to take the CCRC examination.

Applicants are required to submit both

- 1) a copy of a current curriculum vitae (CV) or resume and
- 2) a copy of job descriptions for each of those positions used to demonstrate eligibility

with enough detail so as to sufficiently document and demonstrate achievement of the required minimum number of hours of employment performing the Essential Duties of a Certified Clinical Research Coordinator.

The CCRC Essential Duties are defined as:

- Report and document safety issues (e.g. adverse events;)
- Participate in the preparation or review of documents exchanged with the institutional review board (IRB);
- Participate in protocol review or study procedures planning;
- Participate in conducting subject visits;
- Collect accurate, verifiable data, source documents, and essential documents;
- Prepare for and participate in sponsor audits and/or regulatory inspections, if applicable;
- Participate in the informed consent process.
- Detailed Content Outline (DCO)

Applicants must document a cumulative, minimum of 3,000 hours of employment performing the Essential Duties. If the applicant's experience is within 120 hours of the requirement, by the first day of the exam window, full consideration will be given toward eligibility.

Clinical Research Certifications

The Academy acknowledges that there is a shared knowledge base between CCRA, ACRP-CP and CPI certificant holders and those who may seek the CCRC designation. Any candidate for the CCRC designation who has a current CCRA, ACRP-CP or CPI designation will have achieved a valid substitute for 1,500 hours of the required professional experience performing the essential duties of a CRC.

Academic Qualifications in Clinical Research

The Academy considers applicants who have completed a clinical research degree program that is accredited by the Council for Higher Education Accreditation to have achieved a valid substitution for 1,500 hours (1 year) of professional experience for the CRC exam.



If an applicant submits an application using an educational program as a substitute for 1,500 hours of work experience performing the Essential Duties, then the following information must be included on the applicant's CV and a copy of the degree must also be submitted:

- Name of school
- City and country in which the school is located
- Program title
- Name of organization that accredits the institution providing the program
- Dates attended (From-To)

The Academy reserves the right to verify any and all employment information submitted on an applicant's CV or job description at any time during the process of certification or thereafter. If an applicant is found to have falsified or misrepresented his/her documentation, it is grounds for revocation of eligibility and/or certification status.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years.

DATE APPROVED

May 21, 2013
December 15, 2015
April 11, 2019
December 14, 2021

DATES REVIEWED

October 25, 2015
April 11, 2019
December 14, 2021

DATES MODIFIED

November 9, 2015
April 11, 2019
December 14, 2021

Policy on Eligibility for the Certified Principal Investigator (CPI) Program

POLICY

All applicants for the Certified Principal Investigator (CPI) program must meet all of the eligibility requirements stated in the *CPI Candidate Handbook* and on the application form itself in order to be approved to take the CPI examination.

Applicants are required to submit documents, as outlined below, to demonstrate that he/she has served as a Principal Investigator for clinical trials for at least two (2) years of the past five (5) years with enough detail so as to sufficiently document and demonstrate achievement of the required minimum experience performing the Essential Duties of a Certified Principal Investigator.

The CPI Essential Duties are defined as:

- Responsible for the safe and ethical conduct of a clinical trial;
- Evaluates the study proposal and decides on participation;
- Facilitates or verifies formal approvals according to regulatory requirements and International Conference on Harmonisation (ICH) Good Clinical Practice (GCP);
- Ensures that all site initiation activities are performed to start and conduct the study;
- Participates in the selection of trial subjects according to the recruitment strategy;
- Performs or supervises the conduct of study-related procedures and monitors the safety of the trial subjects and investigational staff;
- Collects accurate and verifiable data and other essential study documents;
- Ensures compliance with regulatory requirements and ICH GCP, the protocol and the handling of the investigational product;
- Communicates with subjects, sponsor’s personnel, and Institutional Review Board
- Ensures adequate close-out of the study
- Detailed Content Outline (DCO)

Applicants must document his or her role as a Principal Investigator (PI) during at least two (2) out of the most recent five (5) years by submitting copies of at least one (1) of the following documents for each of those two (2) years.

Requirements	Documentation to be Submitted
Education	<ul style="list-style-type: none"> ▪ Doctorate level degree (DDS, MD or equivalent degree such as DO, MBBS or MBChB, PhD, PharmD, DNP) OR ▪ A licensed Physician’s Assistant or Nurse Practitioner or Sub-Investigator who has served in a PI role, as documented below;

	<p>current license required and must be submitted with application</p> <ul style="list-style-type: none"> ▪ CV must reflect name of educational institution, location (city, country), title of degree and date awarded
Experience	<p>For at least <u>TWO (2)</u> of the most recent five (5) years:</p> <ul style="list-style-type: none"> ▪ 1572 / PHS 398 / QIU (or equivalent) <u>OR</u> ▪ IRB/IEC approval letter to conduct the study <u>OR</u> ▪ Protocol approval letter for the study <u>OR</u> ▪ Signed copy of an investigator agreement/protocol signature page <u>OR</u> ▪ Other regulatory authority document verifying your role as a Principal Investigator on the clinical trial being submitted in support of eligibility <p><i>Any proprietary details may be blocked out.</i></p>

Clinical Research Certifications

The Academy acknowledges that there is a shared knowledge base between CCRC, ACRP-CP and CCRA certificant holders and those who may seek the CPI designation. Any candidate for the CPI designation who has a current CCRC, ACRP-CP or CCRA designation will have achieved a valid substitute for 1,500 hours of the required professional experience performing the essential duties of a CPI.

Academic Qualifications in Clinical Research

The Academy considers applicants who have completed a clinical research degree program that is accredited by the Council for Higher Education Accreditation to have achieved a valid substitution for 1,500 hours (1 year) of professional experience for the PI exam.

If an applicant submits an application using an educational program as a substitute for 1,500 hours of work experience performing the Essential Duties, then the following information must be included on the applicant's CV and a copy of the degree must also be submitted:

- Name of school
- City and country in which the school is located
- Program title
- Name of organization that accredits the institution providing the program
- Dates attended (From-To)

The Academy reserves the right to verify any and all employment information submitted on an applicant's CV or job description at any time during the process of certification or thereafter. If an applicant is found to have falsified or misrepresented his/her documentation, it is grounds for revocation of eligibility and/or certification status.



MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years.

DATE REVIEWED

October 25, 2015
April 11, 2019
December 14, 2021

DATE APPROVED

May 14, 2013
June 30, 2014
December 15, 2015
April 11, 2019
December 14, 2021

DATE MODIFIED

December 14, 2021



Policy on Denial of Eligibility

All applicants who seek eligibility to take one of the Academy's certification exams, the Certified Clinical Research Coordinator (CCRC®), Certified Clinical Research Associate (CCRA®), the Certified Principal Investigator (CPI®), or the ACRP – Certified Professional (ACRP-CP®) must satisfy the minimum eligibility requirements as outlined in the appropriate candidate handbook for each designation. Applicant eligibility is reviewed individually. Each applicant is automatically afforded review by three separate reviewers, if necessary, during the eligibility review process.

Eligibility for approval to take an Academy certification exam may be denied when any part of the application and/or disclosure statement is incomplete, illegible or does not contain the correct fees.

Eligibility for approval to take an Academy certification exam may also be denied when an application purporting to represent and demonstrate how the applicant meets the established eligibility requirements is found to be incomplete, and/or does not substantiate or properly demonstrate the applicant's achievement of the minimum eligibility requirements.

When any application for eligibility to take an Academy certification exam is denied, the applicant will be notified in writing, typically via email, and given seven (7) business days to correct and submit that which is necessary to properly complete the application process and verify minimum eligibility requirements as outlined in the Academy's certification handbooks.

If time permits and all documentation is in order, the candidate's application will be processed and eligibility granted for the examination window originally requested by the candidate. Should this process take the applicant within three (3) business days of the start of the examination window he/she requested, the candidate will be granted eligibility for the next available examination window.

Regardless of the items the candidate must supply, or the time line in which materials are submitted, the candidate's application may only be transferred forward to the next examination window once, based on the examination window for which the candidate originally applied.

If the applicant cannot supply appropriate and sufficient eligibility documentation or an eligible candidate does not take the examination by the start of the next examination window, he/she



will forfeit all fees. The applicant will need to reapply and submit all current fees in order to be considered again for eligibility.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Board of Trustees.

DATES REVIEWED BY THE BOARD

March 11, 2012
October 14, 2014
August 24, 2021

DATES MODIFIED BY THE BOARD

October 14, 2014

DATES APPROVED BY THE BOARD

October 14, 2014
August 24, 2021



Policy on Appeals

The Academy of Clinical Research Professionals (the Academy) makes every attempt to make fair and accurate decisions based on the information provided by the applicants and certificants. An appeal procedure is available to those who wish to contest any adverse decision affecting his or her application or certification status. Any individual who does not file a request for an appeal within the required time limit shall waive the right to appeal.

The Academy will review appeals of adverse certification decisions from Academy certified individuals (“certificants”) and applicants for Academy certification (“applicants”).

Candidates are permitted to appeal an adverse certification decision on the grounds that the Academy did not properly apply specified certification eligibility criteria or the decision was based on a factual error that affected the outcome. Adverse certification decisions include: denial of eligibility for initial certification, denial of maintenance of certification, suspension of certification or revocation of certification.

No appeal may be taken from an adverse decision based on an individual’s receipt of a failing score on an Academy certification examination absent extraordinary circumstances, as determined solely by the Academy. Individuals cannot appeal (1) the passing score or actions taken in setting a passing score; (2) establishment of eligibility criteria; (3) individual test items; and (4) test content validity.

Privileged Information, including the nature, format, content and results of examinations administered by the Academy are considered privileged information. Due to the importance of exam security and item banking, neither exam forms nor answer keys will be disclosed or made available for review by candidates or any other unauthorized third party.

Appeal Process

Upon receipt of the notice of an adverse decision, the applicant or certificant has the option to submit a written notice of appeal to the Academy no more than fifteen (15) days following notice of the adverse decision.

In the written appeal, the applicant or certificants shall detail the nature of the request for appeal and the specific facts and circumstances supporting the request, and, all reasons why the action or decision should be changed or modified. The applicant or certificant must provide additional written, factual documentation to support his/her appeal. The applicant shall bear



the burden of proving the adverse decision was based on erroneous factual determination. There is no appeal on the basis of an incomplete application.

Applicants or certificants submitting a request for review to the Academy shall receive notification of the results within fifteen (15) days of receipt of the request. Should the candidate not be satisfied with the decision rendered, the candidate may submit a written appeal to the Academy within fourteen (14) days.

The Academy will review the appeal submission and accompanying documents and make a determination. Candidates will be notified of the Academy's decision within forty five days (45) of receipt of the request. The Academy's decision is final.

This policy does not apply to certificants who have had their certification or recertification denied, suspended or revoked for fraud, misrepresentation, violation of testing procedures or other conduct in violation of the ACRP Uniform Code of Ethics and Professional Conduct. Such candidates may have their case processed through the appeal rights described in the Discipline and Complaints Policy.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Board of Trustees.

DATES REVIEWED BY THE BOARD

October 31, 2011 (as Policy on Appeal of Denial of Eligibility)

March 11, 2012 (as Policy on Appeal of Denial of Eligibility)

August 24, 2021

DATES MODIFIED BY THE BOARD

October 14, 2014

DATES APPROVED BY THE BOARD

October 14, 2014

August 24, 2021



Academy of Clinical Research Professionals
Policy on Transfers, Cancellation, No Shows, and Refunds

POLICY

When an applicant is granted eligibility to take an Academy certification exam, that eligibility is granted for the exam period for which application was made. All eligible candidates are expected to schedule an exam appointment for, and take the examination during, the exam period for which eligibility was granted. The Academy does recognize that occasionally circumstances may prevent a candidate from testing in the originally scheduled exam period. Under certain circumstances, the Academy will grant eligibility for one additional exam period beyond the original period for which the candidate has applied. Eligibility will not be granted for an additional exam period in the event that the certification program eligibility requirements have changed from the most recent application period.

Transfers

If a candidate is unable to test during the exam period for which he or she was originally approved, the candidate may request a one-time transfer to the next available exam period for a \$50 fee.

Transfer will only be made to the next available exam period. The transfer request can be made at any time between the time of initial approval and the last day of the exam period. The candidate must request a transfer by completing the Exam Transfer Request form. The candidate must cancel any previously scheduled appointments with the testing agency in order to take advantage of this option.

Candidates are allowed one transfer only. If a candidate has already transferred the exam one time, the candidate will not be able to do so again.

Transfer of eligibility and associated fees will be applied only to the original candidate and are not transferable to another person, even if paid for by a third party. Exam fees transferred may be used only toward the next exam and not toward other products or services.

No Testing Appointment Scheduled

If a candidate does not schedule an appointment for, or take, the exam in the original exam period for which he or she was approved, and the candidate does not request a transfer before the close of the original exam period for which he or she was approved, the candidate will not be refunded the exam fee.

Candidates will need to submit a new application, together with all current fees, to continue their pursuit of certification. Such reapplications will be subject to all eligibility criteria in effect at that time.

Exam Cancellations

Occasionally, a candidate intends to test but circumstances prevent him or her from doing so. Candidates are permitted to cancel a scheduled exam up to five (5) days *before* the scheduled appointment by contacting the testing agency directly. Based on how far in advance the candidate cancels the scheduled appointment, there may be fees associated with the appointment cancellation.



It is mandatory that the candidate cancel their exam with both the testing agency and with the Academy. Candidates are to contact the testing agency directly first and then must contact the Academy. Only the candidate may request a cancellation, regardless of whether the exam fee was paid by the candidate or another party.

Cancellation requests received fewer than five (5) calendar days prior to a scheduled exam appointment will not be honored. Once an exam appointment is cancelled, a candidate may be eligible to request a Transfer to the next exam period.

No Shows

If a candidate schedules an exam appointment and fails to take the exam, he or she forfeits all fees.

If a candidate arrives late for a scheduled exam appointment, entrance to the testing area is at the discretion of the Test Center Administrator. A candidate may not be allowed to test and will not be eligible for a refund.

Refunds will not be given for exams that are missed because a candidate was not able to locate the testing center or arrived late.

Emergencies

If a candidate is unable to keep his or her exam appointment due to an emergency situation that arises within the five (5) days prior to his or her exam appointment, the candidate is required to submit an Emergency Cancellation Form and official documentation to the Academy in order to avoid forfeiting fees. This information must be received by the Academy within seven (7) calendar days after the candidate's scheduled exam appointment. The following situations will be considered with documentation:

- Emergency room visit or hospitalization
- Severe medical condition requiring hospitalization (e.g., spouse, child/dependent, parent, grandparent, sibling)
- Death of an immediate family member (e.g., spouse, child/dependent, parent, grandparent, sibling)
- Jury duty
- Call to active military duty

Refunds

If a candidate must cancel an exam appointment and is eligible to transfer his or her eligibility to the next exam period, the candidate may instead elect to receive a refund of exam fees. The only portion of the total amount submitted that will be refunded is the exam fee, provided that the request for cancellation is received at least five (5) calendar days *prior* to a scheduled exam appointment and the exam appointment has been cancelled. Application fees are non-refundable. Refunds are not available to candidates who do not schedule an exam and fail to request a transfer, who cancel within five (5)



days of the exam and do not provide sufficient documentation of an acceptable emergency, or who fail to show up for a scheduled exam appointment. Refund requests will be considered only if made by the candidate.

Applicants who do not meet the eligibility requirements for the exam (i.e., those who are ineligible), or who are ineligible due to an incomplete application, will receive a refund of the exam fee only, within three weeks of the final ineligibility notification.

Refund requests can be made by the candidate only. Employers supporting a candidate's fees cannot request a refund for fees paid to the Academy. Any refund will be sent to the party who initially made payment to the Academy. If payment was made by credit card, that card will receive the credit. If the payment was made by check, the Academy will mail a refund check to the original payer.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Academy Board.

DATES REVIEWED BY THE ACADEMY BOARD

March 28, 2016
April 30, 2018
August 24, 2021

DATES MODIFIED BY THE ACADEMY BOARD

March 28, 2016

DATE APPROVED BY THE ACADEMY BOARD

December 17, 2013
May 17, 2016
April 30, 2018
August 24, 2021



Name Change Policy

In order to avoid the potential for confusion or misrepresentation, a certificant should apply for and hold certification in his/her legal name.

An individual wishing to change his/her name on their eligibility notice, certificate, or database record may do so with proper legal documentation.

The Academy will make a name change only if the individual provides the following:

- Written request for name change (via email or letter)
- Copy of the legal document showing the name change (marriage certificate, divorce decree, court order, etc.)
- Copy of a current government issued identification showing new or former name

The above named documents do not need to be notarized copies. Copies of these documents will be attached to the individual's electronic database record.

If a current certificant wishes a new certificate reflecting the name change, he/she must also submit the Duplicate Certificate Form and the appropriate fee.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Board of Trustees.

DATES REVIEWED BY THE BOARD

June 20, 2012
April 30, 2018
August 24, 2021

DATES MODIFIED BY THE BOARD

October 14, 2014

DATES APPROVED BY THE BOARD

June 20, 2012
October 14, 2014
April 30, 2018
August 24, 2021

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



Re-Examination Policy

The Academy offers its examinations each year during two testing windows, Spring and Fall. Candidates who do not achieve a passing score on the certification examination will only be allowed to re-take the exam during the next available examination period by submitting a re-examination fee.

If the candidate is not successful on this “re-take” examination, he or she will need to complete a new application and pay all fees in place at the time for any subsequent exams.

If a candidate chooses to transfer his or her first examination opportunity and, subsequently, does not pass, he or she will need to complete a new application, meet all eligibility criteria in effect at that time, and pay all fees in place at the time for any subsequent exams.

Candidates who do not achieve a passing score on their second attempt or who are unable to test again during the next examination period must submit a new application, together with all current fees, to continue their pursuit of certification. Such reapplications will be subject to all eligibility criteria in effect at that time.

This policy protects the security of the integrity of the examination by preventing item over-exposure. It is the Academy’s policy to maintain two unique tests forms and update test items yearly to reduce any possible over exposure by candidates by following the six-month waiting period. The time period between testing windows also provides a sufficient amount of time for candidates to increase the amount of study or change their method of test preparation.

Candidates will not be permitted to schedule an appointment outside of the testing windows under any circumstances.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Academy Board of Trustees.

DATE REVIEWED BY THE ACADEMY BoT

April 30, 2018

August 24, 2021

DATES MODIFIED BY THE ACADEMY BoT

DATES APPROVED BY THE ACADEMY BoT

April 30, 2018

August 24, 2021



Policy on Special Accommodations

The Academy is committed to ensuring that qualified candidates with a disability are not deprived of the opportunity to take an ACRP examination by providing reasonable accommodations in accordance with the Americans with Disabilities Act (ADA).

A candidate requesting special accommodation must do so in writing by completing the *Request for Special Accommodations Form – Parts 1 and 2*, and the request must accompany a completed application for certification. The request must include proper documentation from a licensed professional or certified specialist who diagnosed the disability condition AND the specific accommodations being requested. Accommodation, if approved, will be provided at no additional charge.

The decision as to whether a medical condition that is not covered by the ADA is a “qualifying medical condition” is at the sole discretion of The Academy.

All special accommodation forms and related documentation are confidential and will not be released without the written consent of the candidate.

Documentation Requirements

It is the responsibility of the candidate to ensure that all required forms and supporting documentation are submitted to the Academy. A request for special testing accommodations will not be reviewed until all documentation is received. Required documentation includes:

- A completed Request for Special Accommodations form. This form consists of two sections—one to be completed by the candidate, and one to be completed by the healthcare professional.
- Evaluation of the candidate’s disability, to be completed by the healthcare professional. Note: The healthcare professional must be a licensed or otherwise qualified practitioner whose credentials are appropriate to diagnose and evaluate the specific disability. Candidates requesting accommodations for learning disorders or mental disabilities must be diagnosed by a psychiatrist, psychologist, or other professional with a minimum of a Masters degree, with credentials recognized as competent to diagnose a mental disorder or learning disability.

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



Request for Special Accommodations Form - Part 1

Name: _____

Address: _____

City: _____ State: _____ Zip/Postal Code: _____

Country: _____

Phone: _____ Email Address: _____

Requests for Special Accommodations MUST be received WITH an application to take the exam – and no less than thirty days in advance of the candidate's requested test date.

Please describe your disability:

Date disability was diagnosed: _____

Please list any previous accommodations received:

Date	Type of Accommodation Received	Organization Providing Accommodation

I understand that the Academy of Clinical Research Professionals will use the information obtained by this authorization to determine eligibility for a reasonable accommodation for the CCRC, CCRA, CPI, ACRP-CP, ACRP-PM, or ACRP-MDP examination, by reason of my disability. I understand that the Academy reserves the right to make additional inquiries regarding my disability and previous accommodations before making a determination as to whether to provide the accommodations I have requested above. Under penalty of perjury, I declare that the foregoing statements, and those in any required accompanying documents or statements, are true. I understand that false information may be cause for denial or revocation of certification. I hereby certify that I personally completed the above form, and that I may be asked to verify this information at any time.

I hereby authorize and request the health care professional identified on **Request for Special Accommodations Form - Part 2** to release any information requested by the Academy relating to my disability and the appropriate accommodation.

Candidate Signature: _____ Date: _____

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



Request for Special Accommodations Form - Part 2

Dear Healthcare Professional:

The individual identified above is requesting accommodation to sit for a proctored, timed, computer-based, multiple-choice question examination. The Academy of Clinical Research Professionals policy requires that candidates requesting special testing accommodation submit current documentation of the disability from an individual qualified to assess the disability.

The individual listed above is requesting that you provide such documentation. The following must be completed by you:

- 1) An evaluation, on professional letterhead, that includes the following information (*if submitting an existing report, it must have been written within the past 4 years*):
 - a. Confirmation of diagnosis and functional impairment
 - Name and title of the professional
 - Date the individual was first and last seen
 - Diagnosis (please provide historic details on candidate's condition)
 - For learning disabilities or mental disorders, the DSM classification of the diagnosis (Diagnostic and Statistical Manual of Mental Disorders–IV TR). *Notes:* DSM classification does not guarantee classification as a disability under ADA, and therefore, does not guarantee accommodation by the Academy; the Academy will not accept a diagnosis of Learning Disorder that was made before the individual was 18 years old, if the last diagnosis date is more than 3 years old.
 - b. The healthcare provider's **recommendation** for accommodations that directly relates to the impairment and is supported by functional information in the evaluation. The file is considered incomplete if this specific recommendation is not included.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every two years by the Academy Board of Trustees.

DATE REVIEWED BY THE ACADEMY BOARD OF TRUSTEES

August 8, 2023

DATES MODIFIED BY THE ACADEMY BOARD OF TRUSTEES

August 8, 2023

DATES APPROVED BY THE ACADEMY BOARD OF TRUSTEES

August 8, 2023



Policy on Testing Experience Issues

POLICY

All of the Academy's certification exams are administered via a network of computer-based testing centers. These centers are administered by the Academy's contracted testing partner and administer a wide variety of tests. Very rarely do any issues arise at the test center that may be perceived as having a negative effect on a candidate's performance. However, the Academy takes these issues very seriously.

In order for the Academy to be able to investigate any problems thoroughly, all issues must be reported to the Testing Center Administrator (TCA) before leaving the test center. Issues can be reported on the exam exit survey but must be brought to the attention of the TCA during the exam/before leaving the test center. Problems reported later than the day of testing will not be considered.

Technical Issues

The Academy expects a candidate to be responsible for immediately notifying the proctor at the testing center should the candidate believe there to be a technical problem with the computer or related equipment during their exam. It may be possible for the TCA to resolve the program and restart the candidate's exam or reschedule the candidate for later the same day.

Any complaints regarding technical issues should be reported immediately and must be reported to the Testing Center Administrator (TCA) before leaving the testing center. The candidate must also report the issue to the Academy the same day. If it is over a weekend, a voice mail or email message must be sent to the Academy on same day the candidate tested.

The Academy will investigate all reported technical issues and report back to the candidate within two (2) weeks of receiving the report. Based on the results of the investigation of the reported issue, the Academy may choose to offer a subsequent opportunity to retest.

Disruptive Issues

Candidate should expect an environment suitable to testing but should also understand that they will be testing with other individuals who may be taking exams of varying length or requiring use of the keyboard. Noise cancelling headphones are available to each candidate, upon request, at the testing center.

Should there be a disruption that the candidate believes is affecting his or her performance on the exam, the situation should be reported to the TCA immediately. Should the candidate believe that his or her performance is hindered by the disruption, the candidate may choose to end the test and inform the TCA of the reason. The candidate must also report the issue to the Academy the same day. If it is over a weekend, a voice mail or email message must be sent to the Academy on same day the candidate tested.



The Academy will investigate all reported disruption issues and report back to the candidate within two (2) weeks of receiving the report. Based on the results of the investigation of the reported issue, the Academy may choose to offer a subsequent opportunity to retest.

Candidate requests for a review of the fairness or accuracy of an exam due to equipment or software failure, or disruptive conditions in a testing center, shall result in the Academy working with its testing vendor to review relevant incident or discrepancy reports, technical data and analyses.

Exam Content

Candidates who have an issue with a particular test question are welcome to put their concerns in writing to the Academy. Such information will be shared with the appropriate exam committee. However, given the security of the exam, the candidate will not receive any response regarding the content of the question, the correct answer, or the rationale for the item.

Candidates are permitted to appeal the appropriateness of content on the exam through its *Policy on the Appeal of Denial of Eligibility* but cannot be granted access to test questions or an answer key.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years.

DATE APPROVED

December 17, 2013

March 5, 2017

August 24, 2021

DATES REVIEWED

March 5, 2017

August 24, 2021

DATES MODIFIED



Policy on Release of Certificant Information

Certification is a voluntary credentialing process with the goal of protecting the public. The purpose of certification is to ensure the public that Academy certificants have met all eligibility criteria and mastered particular knowledge to provide so as to perform the duties essential to their role in clinical trials safely and effectively.

Names of individuals holding Academy certifications, which have not opted out, shall be available to the public via the Academy's online Certification Registry or inquiry to Academy staff. This publicly available information shall be limited to confirming an individual is "currently certified" or individual is "not certified". No contact information or employer details will be released.

Any further details regarding an individual's certification status will only be released upon receipt of a signed release signed by the individual about whom information is being sought. Upon receipt of the signed release the Academy will release the following information only:

- Name of the individual
- Name of the certification program
- Initial certification date
- Certification expiration date
- Certification number

Confidential information that will not be released, even if a signed release is provided, includes: names of candidates for certification; names of individuals who are not successful on the examination; and individual test scores.

Based on certification status, the following information will be released following receipt of a signed release form:

Never Certified:

"Individual is not currently certified."

Applicant/Candidate for Certification:

"Individual is not currently certified." No other information, including confirmation of the individual's status as an application or candidate, will be released.

Currently Certified:



Name of the certification program (CCRC, etc.) Initial certification date
Certification expiration date Certification number

Expired/Decertified

Name of the certification program (CCRC, etc.) Initial certification date
Certification expiration date

Certification number

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Board of Trustees.

DATES REVIEWED BY THE BOARD

March 11, 2012
April 30, 2018
August 24, 2021

DATES MODIFIED BY THE BOARD

October 14, 2014

DATES APPROVED BY THE BOARD

June 20, 2012
October 14, 2014
April 30, 2018
August 24, 2021



Academy Policy on Continuing Competency and Maintenance for the CCRC, CCRA and ACRP-CP Program

POLICY

The goal of the Certification process is to ensure, as much as possible, the continuing competence of each certificant and maintain the professional standard of those engaged in clinical research. There are a number of professional activities that can contribute to that goal.

The purposes of the Continuing Competency requirements established by the Academy are that CCRCs, CCRAAs, and CPs continue to:

- obtain current professional development information;
- explore new knowledge in specific content areas;
- master new clinical research-related skills and techniques;
- enhance approaches to effective clinical research, both within their specified job role and beyond;
- further develop professional judgment;
- conduct clinical research in a safe and ethical manner.

The Academy expects that clinical research professionals engage in lifelong development to maintain and improve knowledge and skills for competent practice. This includes continuous self-assessment to identify professional strengths and learning needs, establishment of short- and long-term goals for individual professional development, and selection of appropriate professional development to meet these goals.

Candidates for Maintenance should choose those professional development activities that provide them with the most benefit, keeping in mind that the length and rigor of a program contribute to its value. Advance planning for Professional Development enables candidates to choose more appropriate courses and also to control expenses more effectively. Professional development programs provide one of the main methods for keeping up with professional practice.

Maintenance of Certification is required every two (2) years. Each candidate for Maintenance must demonstrate that he/she meets the current requirements in order to successfully recertify and be permitted to continue to use the designation.

To successfully maintain Certification, each candidate must submit 24 points as part of the Maintenance application. At least twelve (12) of those 24 points must come from participation in research-related professional development programs.

REPORTING PERIOD FOR POINTS

Applicable activities to satisfy the Maintenance requirements must fall within the appropriate timeframe for a candidate’s maintenance period.

Certification Expiration Date	24 Month Reporting Period
May 31	June 1 (year 1) – May 15 (year 2)
November 30	December 1 (year 1) – November 15 (year 2)

PROFESSIONAL DEVELOPMENT PROGRAM TOPIC AREAS

Candidates for Maintenance can take professional development offerings in two (2) areas:

- Research Topics
- Disease/Bodily System/other Healthcare Topics

RESEARCH PROGRAM TOPICS

For Maintenance purposes, Research Topics are defined those that cover the actual “practice” of clinical research and follow topics covered on the Detailed Content Outline (DCO) for your designation. These topics should cover transferrable knowledge and skills, not those specific to your workplace, such as company SOPs or specific software. Examples of Research Topics include, but are not limited to:

- Trial Management
- Investigational Product Management
- Protocol Development
- Safety
- Human Subject Protection
- Document Management
- Trial Oversight
- Ethics
- Adverse Events
- Informed Consent
- Good Clinical Practice (GCP)
- ICH Guidelines
- Regulatory Issues
- Monitoring
- Statistics

DISEASE/BODILY SYSTEM/HEALTHCARE/OTHER PROGRAM TOPICS

Disease/Bodily System/Healthcare Topics are those that deal with the prevention, treatment, and management of illness and the preservation of physical well-being. Training to gain access or query a specific database or software, even if healthcare related, is not acceptable. Consideration is also given to specific skills that, while not clinical research or healthcare related, are acknowledged as



an advanced set of skills invaluable to the work of clinical research. These specifically include: project management, grant writing, medical writing, and soft skills.

Courses pertaining to a particular disease are generally considered to be Disease/Bodily System/Healthcare Topic hours. Examples include, but are not limited to:

- Pharmacology
- Medical devices
- Palliative / Hospice care
- Psychiatry
- Oncology
- Endocrinology
- Cystic Fibrosis
- Results of clinical trial studies
- Advanced Cardiac Life Support (ACLS)
- Project Management
- Soft Skills

For general participation in workshops, seminars, conferences and in-service trainings, points are awarded according to the actual amount of time spent under instruction at a ratio of 1:1. Forty-five (45) – sixty (60) minutes of instruction = one (1) education point; one (1) semester credit = fifteen (15) points.

Points are not awarded for sessions that are fewer than forty-five (45) minutes in length but can be pro-rated for sessions exceeding sixty (60) minutes (i.e., a session one hour and fifteen minutes in length = 1.25 points)

All web-based training to be applied to the requirements must result in a certificate that indicates the number of hours awarded for successful completion. The Academy cannot determine the number of points for web-based training for a candidate. The Academy reserves the right to request certificates of attendance and/or transcripts from any and all courses.

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OF CLINICAL RESEARCH PROFESSIONALS



Activity	Time Spent	Contact Hours	Points on <i>Maintenance Application</i>
Professional Development Session (<i>non-accredited programs</i>)	< 45 minutes	No points awarded	0 points
	45-60 minutes	1 contact hour	1 contact hour = 1 point
	90 minutes	1.5 contact hours	1.5 contact hour = 1.5 points
Activity Awarding CMEs	60 minutes	1 CME	1 CME = 1 point
Course Awarding CEUs	60 minutes	1 CEU	1 CEU = 1 point
University Course	1 semester	1 semester credit	1 semester credit = 15 points

ACCREDITED PROFESSIONAL DEVELOPMENT PROGRAMS

It is anticipated that the majority of programs that a candidate for Maintenance of Certification will submit in support of his/her application will come from programs that have some sort of accreditation. If the program does not have accreditation from a known accrediting body, the applicant should submit the program for approval prior to submitting it as part of the Maintenance Application process.

EXAMPLES OF ACCEPTABLE PROVIDERS OF ACCREDITED PROFESSIONAL DEVELOPMENT CONTACT HOURS:

- ACRP
- All state and national nursing associations (e.g. ANCC, CBRN)
- Accreditation Council for Pharmacy Education (ACPE)
- Accreditation Council for Continuing Medical Education (ACCME) (e.g. CME and AMA Category I credits)
- Other national healthcare-related associations offering professional development contact hours
- College/university courses in healthcare and clinical research
- Regulator-sponsored educational programs
- In-company training on research topics with specific learning objectives awarding a certificate/proof of attendance and specifying the number of hours (SOP training is not acceptable.)

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OF CLINICAL RESEARCH PROFESSIONALS



CONTINUING INVOLVEMENT

Continuing Involvement is another area in which a candidate for Maintenance can earn points toward the stated Maintenance requirements. These are activities other than attending a professional development educational activity.

Continuing Involvement Activities CCRC /CCRA/ ACRP-CP applicants may document up to 12 points in this category from activities listed below. These points DO NOT satisfy the required points form participation in research-related professional development programs				
Activity Name	Points per activity	Maximum times it can be claimed	Maximum Points for this activity	Examples of Documentation
Continuing Education developer or presenter in clinical research or related topic (to both research and non-research audiences)	2	4	8	Copy of program with speakers and objectives or presentation abstract including organization, location and dates (not required for ACRP Global Conference speakers)
Authorship of journal paper on clinical research (cannot be self-published)	2	4	8	Journal citation including authors
Participate in or present at investigator meeting (in-person or virtual)	2	2	4	Documentation of meeting date, time and proof of participation and/or presentation
Participate in a site initiation visit	2	2	4	Documentation of meeting date, time and proof of participation and/or presentation
Active participation in regulatory authority meeting (does not include an audit)	2	2	4	Proof of attendance
Involvement in a New Marketing Application process (specifically compiling a section or writing a clinical study report)	2	2	4	Supervisor documentation of specifically compiling a specific section or writing a clinical study report (signature page or supervisor letter confirming role)
Authorship of protocol	2	2	4	Supervisor documentation of role
Inclusion on a 1572 (or equivalent regulatory authority document) as active investigator or sub-I	2	2	4	Copy of 1572 (both sides) or equivalent regulatory authority document

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Service as a peer reviewer for scientific articles	4	per 12 months of service	8	Confirmation of appointment as peer reviewer that includes dates
Service as a peer reviewer of clinical research-related papers or clinical research grants	4	per 12 months of service	8	Confirmation of appointment as a peer reviewer that includes dates
Service on DSMB/IDMC or equivalent	4	per 12 months of service	8	Letter from DSMB/IDMC chair outlining level of participation and # of meetings attended
Volunteer service on IRB/IEC	4	per 12 months of service	8	Letter from IRB/IEC chair outlining level of participation and # of meetings attended
Service on healthcare-related exam committee	4	per 12 months of service	8	Copy of certificate/proof of participation
Service as a clinical research exam item writing writer	0.50	per question submitted	12	Proof of participation
Service on an association's clinical research-related committee (Editorial Advisory Board, Conference Session Review, Regulatory Affairs Committee permitted) (Membership, Nominating or General board service is not permitted)	4	per 12 months of service	8	Proof of participation
Planning (ACRP-CP Only) Examples include business operations, feasibility assessment, site selection activities, regulatory document participation	2	4	8	Letter/Email from management confirming participation
Overseeing (ACRP-CP Only) Examples include management and administration	2	4	8	Letter/Email from management confirming participation

- Other activities may be approved on a case-by-case basis by the Academy Board.
- Presentation Development and Delivery: A single presentation can be claimed only once per year. The same presentation can be counted a second time the following year only if the presentation required significant updates prior to being presented again.

- Certificants are permitted to include presentations they were paid to develop and present to the extent allowed by the above chart. Certificants cannot claim participation points for programs that they present.
- Authorship of an article pertaining to Clinical Research
 - Certificants are not required to be the primary author to be able to claim points for a published article.
 - Presentations and articles must be in clinical research-related topics in order to be considered for points.
 - An article must be published within the appropriate time frame for the current Maintenance cycle.

TAKING THE EXAM FOR MAINTENANCE

Taking and passing the current form of the exam for a specific designation's Maintenance is acceptable and satisfies all point requirements (all 24 points). The exam must be taken and passed BEFORE the candidate's Certification expires. A candidate must then submit a copy of their score report with their Maintenance application. This would include taking another Academy Certification exam to obtain an additional credential (i.e., a CCRC taking the CCRA exam in order to also achieve the CCRA designation.)

When being used for Maintenance, candidates are expected to apply for the exam, using the Examination for Maintenance Form in accordance with the regular exam window deadlines. Once they are successful on the exam, a candidate must then apply for Maintenance in accordance with the regular process and deadlines and submit a copy of his/her score report.

If a candidate wishes to use the exam for another Academy designation, as in the example above, for Maintenance he or she must still apply for and be deemed eligible for that program. In this instance, the Examination for Maintenance Form cannot be used.

If a candidate is unsuccessful on the examination, he or she may still submit the necessary 24 points to satisfy the Maintenance requirements.

NON-COMPLIANCE OF THE MAINTENANCE REQUIREMENTS

Candidates for Maintenance are expected to submit an application for Maintenance that fulfills all the necessary requirements no later than his/her certification expiration date. A candidate will be considered non-compliant if:

- no application for Maintenance was submitted;
- if the application submitted does not meet the stipulated requirements and the candidate has not rectified any deficiencies; or



- if randomly selected, the candidate has not satisfied the requirements of the Document Verification Process.

If compliance is not achieved within the stipulated timeframe, the candidate's certification will expire and the designation will be permanently removed from his/her record. The individual must stop using the designation and/or representing him or herself as certified.

Once a candidate's certification has been removed from his/her record, the only way to regain use of the credential is to apply to the program as a candidate for initial certification and to take and pass the current form of the examination.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years.

DATE APPROVED

July 08, 2013
April 11, 2019
August 9, 2022

DATES REVIEWED

April 11, 2019
August 9, 2022

DATES MODIFIED

July 15, 2015
April 11, 2019
August 9, 2022



Academy Policy on Continuing Competency and Maintenance for the CPI Program

POLICY

The goal of the Certification process is to ensure, as much as possible, the continuing competence of each certificant and maintain the professional standard of those engaged in clinical research. There are a number of professional activities that can contribute to that goal.

The purposes of the Continuing Competency requirements established by the Academy are that CPI's continue to:

- obtain current professional development information;
- explore new knowledge in specific content areas;
- master new clinical research-related skills and techniques;
- enhance approaches to effective clinical research, both within their specified job role and beyond;
- further develop professional judgment;
- conduct clinical research in a safe and ethical manner.

The Academy expects that clinical research professionals engage in lifelong development to maintain and improve knowledge and skills for competent practice. This includes continuous self-assessment to identify professional strengths and learning needs, establishment of short- and long-term goals for individual professional development, and selection of appropriate professional development to meet these goals.

Candidates for Maintenance should choose those professional development activities that provide them with the most benefit, keeping in mind that the length and rigor of a program contribute to its value. Advance planning for Professional Development enables candidates to choose more appropriate courses and also to control expenses more effectively. Professional development programs provide one of the main methods for keeping up with professional practice.

Maintenance of Certification is required every two (2) years. Each candidate for Maintenance must demonstrate that he/she meets the current requirements in order to successfully recertify and be permitted to continue to use the designation.

To successfully maintain Certification, each candidate for CPI Maintenance must submit 24 points as part of the Maintenance application. The point requirements are broken down below. At least eight (8) of those 24 points must come from participation in research-related professional development programs AND at least twelve (12) of those 24 points must come from Continuing Involvement activities.

REPORTING PERIOD FOR POINTS

Applicable activities to satisfy the Maintenance requirements must fall within the appropriate timeframe for a candidate’s maintenance period.

Certification Expiration Date	24 Month Reporting Period
May 31	June 1 (year 1) – May 15 (year 2)
November 30	December 1 (year 1) – November 15 (year 2)

PROFESSIONAL DEVELOPMENT PROGRAM TOPIC AREAS

Candidates for Maintenance can take professional development offerings in two (2) areas:

- Research Topics
- Disease/Bodily System/other Healthcare Topics

RESEARCH PROGRAM TOPICS

For Maintenance purposes, Research Topics are defined those that cover the actual “practice” of clinical research and follow topics covered on the Detailed Content Outline (DCO) for your designation. These topics should cover transferrable knowledge and skills, not those specific to your workplace, such as company SOPs or specific software. Examples of Research Topics include, but are not limited to:

- Trial Management
- Investigational Product Management
- Protocol Development
- Safety
- Human Subject Protection
- Document Management
- Trial Oversight
- Ethics
- Adverse Events
- Informed Consent
- Good Clinical Practice (GCP)
- ICH Guidelines
- Regulatory Issues
- Monitoring
- Statistics

DISEASE/BODILY SYSTEM/HEALTHCARE/OTHER PROGRAM TOPICS

Disease/Bodily System/Healthcare Topics are those that deal with the prevention, treatment, and management of illness and the preservation of physical well-being. Training to gain access or query a specific database or software, even if healthcare related, is not acceptable. Consideration is also given to specific skills that, while not clinical research or healthcare related, are acknowledged as



an advanced set of skills invaluable to the work of clinical research. These specifically include: project management, grant writing, medical writing, and soft skills.

Courses pertaining to a particular disease are generally considered to be Disease/Bodily System/Healthcare Topic hours. Examples include, but are not limited to:

- Pharmacology
- Medical devices
- Palliative / Hospice care
- Psychiatry
- Oncology
- Endocrinology
- Cystic Fibrosis
- Results of clinical trial studies
- Advanced Cardiac Life Support (ACLS)
- Project Management
- Soft Skills

For general participation in workshops, seminars, conferences and in-service trainings, points are awarded according to the actual amount of time spent under instruction at a ratio of 1:1. Forty-five (45) – sixty (60) minutes of instruction = one (1) education point; one (1) semester credit = fifteen (15) points.

Points are not awarded for sessions that are fewer than forty-five (45) minutes in length but can be pro-rated for sessions exceeding sixty (60) minutes (i.e., a session one hour and fifteen minutes in length = 1.25 points)

All web-based training to be applied to the requirements must result in a certificate that indicates the number of hours awarded for successful completion. The Academy cannot determine the number of points for web-based training for a candidate. The Academy reserves the right to request certificates of attendance and/or transcripts from any and all courses.

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Activity	Time Spent	Contact Hours	Points on <i>Maintenance Application</i>
Professional Development Session <i>(non-accredited programs)</i>	< 45 minutes	No points awarded	0 points
	45-60 minutes	1 contact hour	1 contact hour = 1 point
	90 minutes	1.5 contact hours	1.5 contact hour = 1.5 points
Activity Awarding CMEs	60 minutes	1 CME	1 CME = 1 point
Course Awarding CEUs	60 minutes	1 CEU	1 CEU = 1 point
University Course	1 semester	1 semester credit	1 semester credit = 15 points

ACCREDITED PROFESSIONAL DEVELOPMENT PROGRAMS

It is anticipated that the majority of programs that a candidate for Maintenance of Certification will submit in support of his/her application will come from programs that have some sort of accreditation. If the program does not have accreditation from a known accrediting body, the applicant should submit the program for approval prior to submitting it as part of the Maintenance Application process.

EXAMPLES OF ACCEPTABLE PROVIDERS OF ACCREDITED PROFESSIONAL DEVELOPMENT CONTACT HOURS:

- ACRP
- All state and national nursing associations (e.g. ANCC, CBRN)
- Accreditation Council for Pharmacy Education (ACPE)
- Accreditation Council for Continuing Medical Education (ACCME) (e.g. CME and AMA Category I credits)
- Other national healthcare-related associations offering professional development contact hours
- College/university courses in healthcare and clinical research
- Regulator-sponsored educational programs
- In-company training on research topics with specific learning objectives awarding a certificate/proof of attendance and specifying the number of hours (SOP training is not acceptable.)

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CONTINUING INVOLVEMENT

Continuing Involvement is another area in which a candidate for Maintenance can earn points toward the stated Maintenance requirements. These are activities other than attending a professional development educational activity.

Continuing Involvement Activities				
All applicants MUST document 12 points in this category from activities listed below				
Activity Name	Points per activity	Maximum times it can be claimed	Maximum points for this activity	Examples of Documentation
Continuing Education developer or presenter in clinical research or related topic (to both research and non-research audiences)	2	4	8	Copy of program with speakers and objectives or presentation abstract including organization, location and dates (not required for ACRP Global Conference speakers)
Participate in or present at investigator meeting (in-person or virtual)	2	2	4	Documentation of meeting date, time and proof of participation and/or presentation
Participate in a site initiation visit	2	2	4	Documentation of meeting date, time and proof of participation and/or presentation
Participate in close out visit	1	3	3	Report signature page
Active participation in regulatory authority meeting (does not include an audit)	2	2	4	Proof of attendance
Authorship of journal paper on clinical research (cannot be self-published)	2	4	8	Journal citation including authors
Authorship of journal paper on a therapeutic topic (cannot be self-published)	2	4	8	Journal citation including authors
Authorship of protocol	2	2	4	Supervisor documentation of role
Authorship/review of clinical study report (sole or co-authorship)	2	2	4	Report signature page that includes protocol # or study name
Inclusion on a 1572 (or equivalent regulatory authority document) as active investigator or sub-I	2	3	6	Copy of 1572 (both sides) or equivalent regulatory authority document
Medical Monitor for clinical research trial	1	3	3	Name listed on protocol title page (sponsor)

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OF CLINICAL RESEARCH PROFESSIONALS



Clinical research compliance officer for institution	12	1	12	Copy of appointment letter
Director of research center	12	1	12	Copy of appointment letter
Involvement in a New Marketing Application process (specifically compiling a section or writing a clinical study report)	2	2	4	Supervisor documentation of specifically compiling a specific section or writing a clinical study report (signature page or supervisor letter confirming role)
Investigational New Drug or Device Application/Clinical Trial Exemption Application	2	2	4	Supervisor documentation of authoring the application (signature page; supervisor letter confirming role)
Service as a peer reviewer for scientific articles	4	per 12 months of service	8	Confirmation of appointment as peer reviewer that includes dates
Service as a peer reviewer of clinical research-related papers or clinical research grants	4	per 12 months of service	8	Confirmation of appointment as a peer reviewer that includes dates
Service on DSMB/IDMC or equivalent	4	per 12 months of service	8	Letter from DSMB/IDMC chair outlining level of participation and # of meetings attended
Volunteer service on IRB/IEC	4	per 12 months of service	8	Letter from IRB/IEC chair outlining level of participation and # of meetings attended
Service on healthcare-related exam committee	4	per 12 months of service	8	Copy of certificate/proof of participation
Service as a clinical research exam item writing writer	0.50	per question submitted	12	Proof of participation
Service on an association's clinical research-related committee (Editorial Advisory Board, Conference Session Review, Regulatory Affairs Committee permitted) (Membership, Nominating or General board service is not permitted)	4	per 12 months of service	8	Proof of participation

- Other activities may be approved on a case-by-case basis by the Academy Board.
- Presentation Development and Delivery: A single presentation can be claimed only once per year. The same presentation can be counted a second time the following year only if

the presentation required significant updates prior to being presented again.

- Certificants are permitted to include presentations they were paid to develop and present to the extent allowed by the above chart. Certificants cannot claim participation points for programs that they present.
- Authorship of an article pertaining to Clinical Research
 - Certificants are not required to be the primary author to be able to claim points for a published article.
 - Presentations and articles must be in clinical research-related topics in order to be considered for points.
 - An article must be published within the appropriate time frame for the current Maintenance cycle.

TAKING THE EXAM FOR MAINTENANCE

Taking and passing the current form of the exam for a specific designation's Maintenance is acceptable and satisfies all point requirements (all 24 points). The exam must be taken and passed BEFORE the candidate's Certification expires. A candidate must then submit a copy of their score report with their Maintenance application. This would include taking another Academy Certification exam to obtain an additional credential (i.e., a CCRC taking the CCRA exam in order to also achieve the CCRA designation.)

When being used for Maintenance, candidates are expected to apply for the exam, using the Examination for Maintenance Form in accordance with the regular exam window deadlines. Once they are successful on the exam, a candidate must then apply for Maintenance in accordance with the regular process and deadlines and submit a copy of his/her score report.

If a candidate wishes to use the exam for another Academy designation, as in the example above, for Maintenance he or she must still apply for and be deemed eligible for that program. In this instance, the Examination for Maintenance Form cannot be used.

If a candidate is unsuccessful on the examination, he or she may still submit the necessary 24 points to satisfy the Maintenance requirements.

NON-COMPLIANCE OF THE MAINTENANCE REQUIREMENTS

Candidates for Maintenance are expected to submit an application for Maintenance that fulfills all the necessary requirements no later than his/her certification expiration date. A candidate will be considered non-compliant if:

- no application for Maintenance was submitted;
- if the application submitted does not meet the stipulated requirements and the



- candidate has not rectified any deficiencies; or
- if randomly selected, the candidate has not satisfied the requirements of the Document Verification Process.

If compliance is not achieved within the stipulated timeframe, the candidate's certification will expire and the designation will be permanently removed from his/her record. The individual must stop using the designation and/or representing him or herself as certified.

Once a candidate's certification has been removed from his/her record, the only way to regain use of the credential is to apply to the program as a candidate for initial certification and to take and pass the current form of the examination.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years.

DATE APPROVED

July 08, 2013
April 11, 2019
August 9, 2022

DATES REVIEWED

April 11, 2019
August 9, 2022

DATES MODIFIED

July 15, 2015
April 11, 2019
August 9, 2022



Policy on Maintenance Applications for Global Exam Committee Members, Board Members and Certified Staff

All members of the Academy's Global Exam Committees are required to hold a current Certification with the Academy. As part of the recognition of their service to the clinical research profession and the Academy through their service on a Global Exam Committee, members are awarded Continuing Education and Continuing Involvement points for participating in each meeting toward the fulfillment of their Certification Maintenance requirements.

In addition, the Academy also waives the Maintenance application fee for each Global Exam Committee member, Academy Board member, and certified ACRP staff members if that individual is due to maintain his/her Certification during a year of service on the Committee or employed as ACRP staff.

The Academy Board does require that each Committee, Board, and/or certified staff member apply for Maintenance of his/her Certification by the appropriate deadlines and demonstrate that he/she meets all necessary Maintenance requirements. Failure to properly maintain his/her designation by the required deadlines will result in expiration of the designation.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Board of Trustees.

DATE REVIEWED BY THE BOARD

June 20, 2012
August 9, 2022

DATES MODIFIED BY THE BOARD

October 14, 2014
April 30, 2018

DATES APPROVED BY THE BOARD

June 20, 2012
October 14, 2014
April 30, 2018
August 9, 2022



Academy Policy on Certification Reinstatement

POLICY

The goal of the maintenance of certification process is to ensure, as much as possible, the continuing competence of each certificant and maintain the professional standard of those engaged in clinical research. The Academy recognizes that circumstances may prevent one from meeting maintenance requirements. As such, an individual may submit an application for reinstatement.

An individual may request reinstatement of ACRP certification after voluntary relinquishment and/or failure to renew within two years of the most recent certification expiration date. A reinstatement application must be submitted with a non-refundable reinstatement fee.

An individual may reactivate a lapsed certification by fulfilling one of the following requirements.

Option 1

CCRA, CCRC, ACRP-CP:

24 hours of continuing education (minimum 12 research specific)

CPI:

24 hours of continuing education (minimum 4 research and 12 continuing involvement)

Option 2

Taking and passing the current form of the exam for a specific designation's reinstatement is acceptable and satisfies all point requirements (all 24 points).

If a candidate is unsuccessful on the examination, he or she must submit the necessary 24 points to satisfy the Reinstatement requirements.

Upon review of the application, the candidate will be notified of their status within two (2) weeks.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years.

DATE APPROVED

February 22, 2023

DATES REVIEWED

February 22, 2023

DATES MODIFIED



Maintenance Verification Policy

In order to maintain the integrity of the Maintenance program, and to ensure compliance when recertifying, the Academy will randomly select up to 5% of the applicants in each Maintenance cycle for verification.

Any individual that applies to maintain their designation is eligible for selection to verify their application submission. The selection process is randomly generated for each application period, Spring and Fall. Candidates selected for verification will be notified informing them that they have been selected and requesting that all required information be submitted by a specified deadline.

In order to comply with the verification, a selected candidate will need to supply documentation to support all continuing education hours and continuing involvement points submitted on his/her application for Maintenance. Documentation should: prove the applicability of the content of the activities; confirm the candidate's participation in the activity; validate the dates/times of participation; and prove the activity occurred within the specified Maintenance cycle. Examples of acceptable documents for each activity can be found in the Maintenance Handbook for each designation.

If submitted hours/points cannot be sufficiently verified, the candidate will have the opportunity to substitute another activity. Upon successful verification of all claimed hours/points, the candidate will be successfully recertified for two (2) years.

Failure to submit the necessary documentation to successfully complete the verification process within the stipulated timelines will result in denial of Maintenance of the candidate's Certification designation. In order to regain use of the credential, the candidate will have to reapply to take the exam as a candidate for initial Certification.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Board of Trustees.

DATES REVIEWED BY THE BOARD

June 20, 2012
April 30, 2018
August 9, 2022



DATES MODIFIED BY THE BOARD

October 14, 2014

DATES APPROVED BY THE BOARD

October 14, 2014

April 30, 2018

August 9, 2022



■ FOR LEARNING ■ FOR LISTENING ■ FOR LIFE

Association of Clinical Research Professionals Board of Trustees Policy 2.6

Disclosure and Management of Conflicts of Interest

PURPOSE

The Conflict of Interest Policy supports the expectation that volunteers and employees of the Association of Clinical Research Professionals (ACRP) and its affiliate organization —The Academy of Clinical Research Professionals (Academy) — must act at all times in the best interests of ACRP and not for personal or third-party gain or financial enrichment. Such personal or third-party gain is deemed a conflict of interest.

SCOPE

This policy applies to all volunteers and employees of ACRP and the Academy.

CONFLICT OF INTEREST DIRECTIVE

As an ACRP or Academy Volunteer or Employee, ACRP expects you will act as its fiduciary in all you do on its behalf, especially as to conflicts of interest that may arise during your tenure. To help you understand this fiduciary duty and to avoid even the appearance of any conflict of interest in your tenure with ACRP, we offer the following statement.

First and foremost, please understand that your fiduciary duty includes a duty of loyalty to ACRP/Academy and a duty to act with care in carrying out your ACRP responsibilities. This means that you cannot use your position to benefit yourself to the detriment of ACRP/Academy. You must set aside your personal interests and, as a Volunteer or Employee, act/make decisions on the basis of what's best for ACRP, not what's best for you. ACRP trusts you to do this. In practice, this means you must recognize when your personal/ professional interest and ACRP's interest are in conflict, advise the designated ACRP/Academy official(s) of that conflict, and abstain from voting or acting on the matter that involves the conflict.

You must also not take advantage of an opportunity that belongs to ACRP/Academy by exploiting it for yourself. And most importantly, you must never compete with ACRP/Academy, i.e., you must not take business or customers away from ACRP or take/use its trade secrets or other confidential information for your own personal/professional benefit.

In summary, as a Volunteer and Employee, keep ACRP's interests before your own, act and make decisions in good faith, i.e., fully informed, and with due consideration for the impact of the decision on ACRP/Academy. In doing so, you will likely avoid any difficulty with possible conflicts of interest.

DEFINITIONS

A Conflict of Interest is a transaction or relationship which presents or may present a conflict between a Board member's fiduciary obligation to ACRP/Academy and the Board member's personal, professional, business, or other interests.

Examples of Potential Conflicts of Interest (examples are not all inclusive):

- 1) You serve on either ACRP's or the Academy's Board of Trustees and also serve on the board of another organization that directly competes with ACRP in the areas of education, training, or certification.
- 2) You work or consult for a company engaged in the development of marketed educational/training materials or services that directly compete with ACRP.
- 3) You have a financial/personal interest in an organization with which ACRP/Academy does business and could, therefore, be perceived to be in a position to influence relevant business decisions.
- 4) ACRP is planning to engage a consultant and you lobby for your relative's company to be awarded the contract.
- 5) You serve on an advisory board or planning committee for an organization that holds conferences/training sessions that directly compete with ACRP.
- 6) You submit an abstract, conduct a workshop, or run a training session at a conference that directly competes with a scheduled ACRP event.
- 7) You present an invited lecture, workshop, or training session at a conference that directly competes with a scheduled ACRP event. Please discuss the specifics with the Executive Director prior to committing.

Finally, the existence of a conflict of interest may not prevent someone from participating in the Association's or its affiliates' programs. However, full disclosure of the relationship will openly identify any potential conflicts of interest which will require management as necessary.

CONFLICT OF INTEREST MANAGEMENT PROCESS

All ACRP/Academy Trustees, Committee Members, and Staff identified by the Executive Director must complete the Conflict of Interest Disclosure Form at the start of each calendar year. If a potential conflict of interest should arise after the disclosure form has been submitted, the Executive Director must be promptly notified (within 5 business days) and the nature/specifics of the conflict of interest should be submitted in writing within ten (10) business days.

When a potential conflict of interest is discovered or disclosed the following steps will be taken:

1. The Executive Director will refer it to the Governance Committee if an ACRP conflict or the Academy Board Chair if an Academy conflict.
2. The Governance Committee/Academy Board Chair will collect and consider facts and information surrounding the conflict of interest as needed.
3. After the Governance Committee/Academy Board Chair has fully reviewed and discussed the facts and information about the conflict of interest, it will provide a report and/or a recommended management plan to the ACRP or Academy Board of Trustees as appropriate unless the conflict of interest is determined to be inconsequential.
4. The ACRP or Academy Board of Trustees as appropriate must approve any management plan for the conflict of interest.
5. If time does not allow for the above steps, the Executive Director will share the conflict of interest

with the ACRP Board Chair and the Governance Committee Chair or the Academy Board Chair as appropriate to determine any immediate action that must be taken and report it to the appropriate Board of Trustees no later than their next meeting.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the ACRP Governance Committee and applicable Board of Trustees.

DATES REVIEWED BY COMMITTEE

November 16, 2018
September 23, 2020
October 7, 2020

DATES MODIFIED BY COMMITTEE

September 23, 2020
October 7, 2020

DATES APPROVED BY COMMITTEE

November 16, 2018
September 23, 2020
October 7, 2020

DATES REVIEWED BY ABOT

September 19, 2013
November 14, 2020
August 23, 2023

DATES MODIFIED BY ABOT

November 14, 2020
August 23, 2023

DATE APPROVED BY ABOT

September 19, 2013
November 14, 2020
August 23, 2023

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



Policy on Use of the Certification Mark

PURPOSE

The Academy will confer certification when a candidate has successfully completed all certification requirements, including passing the examination. The Academy will send an official certificate verifying certification status. Certificants are then authorized to use the credential on business cards, letterhead, directory listings, and other marketing materials (e.g. press releases). The Academy's credentials may be used as long as the certificant remains in good standing and keeps his or her certification valid through the maintenance of certification process.

The Academy of Clinical Research Professionals (Academy) offers the following four (6) programs to certify various job roles within the clinical research industry:

- Certified Clinical Research Associate (CCRA®)
- Certified Clinical Research Coordinator (CCRC®)
- Certified Physician Investigator (CPI®)
- ACRP-Certified Professional (ACRP-CP®)
- ACRP-Project Manager (ACRP-PM®)
- ACRP-Medical Device Professional (ACRP-MDP®)

PROPER USE OF CREDENTIALS

The Academy grants limited permission to individuals who have met all of the certification eligibility criteria, passed the applicable exam(s), maintained certification per the Academy's maintenance requirements, and received notification of certification from the Academy to use the CCRA®, CCRC®, ACRP-CP®, CPI®, ACRP-PM®, or ACRP-MDP® designations.

Proper uses of the designations include:

- Jane J. Smith, CCRA®
- John R. Smith, CCRC®
- Jane D. Doe, ACRP-CP®
- John Doe, CPI®
- John Doe, CCRC®, ACRP-PM®
- John Doe, CPI®, ACRP-MDP®

CERTIFICATES

A non-transferable certificate shall be issued only to individuals found to meet all certification requirements. Each Academy certificant receives a certificate that includes:

- the certificant's name
- certification type
- date of initial certification
- expiration date **or** statement that the certification must be renewed

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OF CLINICAL RESEARCH PROFESSIONALS



OWNERSHIP OF THE MARK AND LOGO

The certification mark and logo are the property of the Academy of Clinical Research Professionals. Permission to use the certification mark or logo is granted to credentialed persons at the discretion of the Board of Trustees, for permissible uses only. The CCRA[®], CCRC[®], ACRP-CP[®], CPI[®], ACRP-PM[®], or ACRP-MDP[®] designations are registered trademarks in the United States, Canada, and India (CPI[®] only) and their use is protected by applicable trademark law.

AUTHORIZED USE OF THE MARKS

Limited permission allows only individuals who are currently in good standing with the Academy to use the designations as part of one's professional title.

Use of the CCRA[®], CCRC[®], ACRP-CP[®], CPI[®], ACRP-PM[®], or ACRP-MDP[®] designations by individuals who are not currently in good standing with the Academy (e.g. have not been granted certification, have failed to properly maintain certification), is prohibited. Improper use of the designations or certification trademarks may result in disciplinary or legal action.

An Academy credential holder has the responsibility to report the unauthorized use, misuse, or other violation of this Policy to the Academy in a timely manner. This reporting responsibility includes any circumstance where the use of an Academy granted certification mark is related to an individual or organization that is not an Academy credential holder, or where a certification mark is used improperly by an Academy credential holder.

Suspected improper use of the CCRA[®], CCRC[®], ACRP-CP[®], CPI[®], ACRP-PM[®], or ACRP-MDP[®] designations should be reported in writing via e-mail to the Academy of Clinical Research Professionals at: certification@acrpnet.org. A report of improper use must include a copy of the materials showing the misuse (i.e., copy of a CV, email signature line, business card, online profile, etc.). The complainant must include his or her name and contact details when lodging a complaint. However, such information will be held as confidential.

Within seven (7) business days upon receipt of a report of suspected misuse, the Academy will verify the certification status of the individual reported to have been misusing the designation. If the individual is currently in good standing with the Academy, the complainant will be notified as such.

If the individual purportedly misusing the designation is not currently certified in good standing with the Academy, the Academy shall contact the individual through a written letter, via a traceable method.

The letter shall inquire regarding the use of credential and a request made that the respondent forward any evidence of current certification (copy of certificate or award of certification letter) to the Academy within 15 days of receipt of the notification. The respondent may also reply acknowledging the improper use with evidence that corrective action has been taken (i.e., removal of the designation from business cards, website, CV, etc.) or with an application to take the appropriate examination to achieve the designation

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



If no response is received within the stipulated time frame, the Academy shall then request legal counsel to send a cease and desist letter to the individual, demanding a response and applicable mandatory corrective action.

If the individual is a current ACRP member, a copy of the cease and desist letter shall be forwarded to the ACRP Ethics Committee for review regarding possible further action. The ACRP Ethics Committee will coordinate its review in accordance with the ACRP Discipline and Complaints Policy.

If the individual is not a current ACRP member and does not respond to the letter from legal counsel, the Board of Trustees shall receive notice of the failure to respond to legal counsel to determine what further action is warranted.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Academy Board of Trustees.

DATES REVIEWED BY THE ACADEMY BoT

October 15, 2013

April 30, 2018

DATES MODIFIED BY THE ACADEMY BoT

April 30, 2018

DATES APPROVED BY THE ACADEMY BoT

October 15, 2013

April 30, 2018

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



Academy Confidentiality Agreement

CONFIDENTIAL INFORMATION

The Academy of Clinical Research Professionals is committed to protecting confidential and/or proprietary information related to applicants; candidates; certificants; and the examination development, maintenance, and administration process. The confidentiality policy applies to all Academy employees, Board of Trustees, committee members, consultants, psychometric consultants, and other individuals who are permitted access to confidential information.

Confidential materials include but are not limited to: an individual's application status, personal applicant /certificant information, exam development documentation (including job analysis study reports, technical reports, and cut score studies), examination items, examination forms, and individual examination scores.

To ensure the security of the examination, all test materials are confidential and will not be released to any person or agency, except as required by these policies for the purpose of examination development and administration.

RELEASE OF INFORMATION

Information about a candidate/certificant will only be released to that candidate/ certificant unless release of the information is authorized in writing by the individual or is required by law. Personal information submitted by applicant /certificants with an application or recertification application, including results of any background check, is considered confidential. Personal information retained within the applicant /certificant database will be kept confidential.

All application information is confidential and will not be shared with any party other than the Academy's examination development or administration vendors for certification processing purposes.

Examination scores are only released to the examination candidate as required by law unless a signed release is provided in writing by the candidate or the candidate consents to a score release through the application process.

The Board of Trustees will not disclose confidential information related to or discussed during BOT meetings unless authorized by the Academy. This includes any verbal or written information identified as a confidential matter.

CERTIFICATION VERIFICATION

The Academy will provide confirmation of certification status to anyone who requests the information, and primary source verification will be accessible instantaneously online. Names of individuals holding Academy certifications, which have not opted out via the application process, shall be available to the public via ACRP's online Verify Certification registry.

Additional verification regarding an individual's certification status (e.g. Never Certified; Applicant/Candidate for Certification; Currently Certified; Expired/Decertified) will only be released with

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



a signed release by the individual about whom information is being sought. Upon receipt of the signed release, the Academy shall release the following information only:

Never Certified:	“Individual is not currently certified.”
Applicant/Candidate for Certification:	“Individual is not currently certified.”
Currently Certified:	Name of the certification program; Initial certification date; Certification expiration date; Certification number
Expired/Decertified:	Name of the certification program; Initial certification date; Certification expiration date; Certification number

AGGREGATE DATA

Aggregate examination statistics (including the number of exam candidates, pass/fail rates, and total number of certificants) will be publicly available and updated annually on the ACRP website. Aggregate examination statistics, studies, and reports concerning applicants/certificants will contain no information identifiable with any applicant/certificant.

CONFIDENTIALITY AGREEMENTS

APPLICANTS

Applicants for certification will be required to read and acknowledge a confidentiality statement as part of the application process.

BOARD OF TRUSTEES

Before beginning his or her term of office, and each year thereafter, each Board of Trustee will sign ACRP’s Confidentiality and Non-Disclosure Agreement (stating that he/she will not disclose any confidential information). If a question is raised as to the confidentiality of certain information, confidentiality will be determined by the BOT Chair.

STAFF

Before beginning his or her service, each staff member will sign ACRP’s Confidentiality and Non-Disclosure Agreement confidentiality agreement stating that he/she will not disclose any confidential information. If a question is raised as to the confidentiality of certain information, confidentiality will be determined by the Executive Director.

VOLUNTEERS

Individuals who participate in examination development activities (including, but not limited to, item writing, item review, exam form assembly, exam form review) will sign ACRP’s Confidentiality and Non-Disclosure Agreement prior to having access to any confidential examination materials. Confidentiality forms will be renewed prior to each examination development meeting for individuals who continue to participate in the Academy’s examination development activities.

CONFIDENTIAL MATERIALS

All confidential materials will be retained in a secure manner as required by the security and record retention policies. Board of Trustees will keep confidential and secure any confidential materials that are

ACADEMY

OF CLINICAL RESEARCH PROFESSIONALS



sent to them. These materials, whether printed or electronic, will be kept in a secure and private location at all times until they are returned to the Academy office or are destroyed as directed.

ACCESS TO CONFIDENTIAL INFORMATION

Access to confidential information will be limited to those individuals who require access in order to perform necessary work related to the certification program during the time frame for which access is required. Access will be granted in compliance with the provisions of the security policy.

The Board of Trustees, certification staff members, certification committee members, and certification subject matter experts with access to confidential examination content shall not be eligible to take the certification examination for initial certification or recertification until two years after service or employment.

The Board of Trustees, certification staff members, certification committee members, and certification subject matter experts with access to confidential examination will not participate in the development or delivery of any educational or training program designed or intended to prepare individuals to take the certification examinations offered by the Academy during their service or employment and for at least two years afterward.

MONITORING AND REVIEW SCHEDULE

Monitor as needed and review every three years by the Academy Board of Trustees.

DATE REVIEWED BY THE ACADEMY BoT

April 30, 2018

October 18, 2023

DATES MODIFIED BY THE ACADEMY BoT

DATES APPROVED BY THE ACADEMY BoT

April 30, 2018

October 18, 2023