

1	Quality of Care (Care, Services, and Supports)	15 questions
1.1 Medical and Nursing Care Practices		
1.1.1	Establish and maintain policies and procedures of care and services for the care recipient's common and acute chronic conditions	
1.1.2	Educate and monitor to ensure interdisciplinary assessments and treatment of care recipient's common and acute chronic conditions	
1.1.3	Provide programs and practices to meet the acuity needs of the care recipient	
1.1.4	Maintain and standardize knowledge of medical terminology (e.g., definitions, abbreviations, prefixes, suffixes, acronyms)	
1.2 Medication Management and Administration		
1.2.1	Establish and maintain policies and procedures for pharmacy services	
1.2.2	Establish security processes for medication management (e.g., self-administration, med carts, med rooms)	
1.2.3	Establish processes to identify, track, monitor, and report medication errors	
1.2.4	Incorporate and monitor processes for medication storage, delivery, documentation, and disposal	
1.3 Nutrition and Hydration		
1.3.1	Establish and implement procedures for nutrition and hydration	
1.3.2	Identify care recipient's personal dietary preferences	
1.3.3	Address nutritional needs through dietary orders, specialized diets, and nutritional counseling	
1.3.4	Ensure appropriate clinical response to a significant change in weight	
1.3.5	Educate staff on recognition of the signs and symptoms of dehydration and malnutrition	
1.4 Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs)		
1.4.1	Establish and maintain policies and procedures for addressing the care recipient's functional needs	
1.4.2	Incorporate functional interventions and accommodations	
1.4.3	Ensure care recipients are assessed and appropriate interventions implemented	
1.5 Rehabilitation and Restorative Programs		
1.5.1	Establish and maintain policies and procedures for therapy programs and services	
1.5.2	Maintain knowledge of various therapy modalities	
1.5.3	Customize programming for restorative, wellness and rehabilitation services	
1.5.4	Ensure the provision of specialty equipment and accommodations	
1.6 Care Recipient Assessment and Interdisciplinary Care Planning		
1.6.1	Incorporate knowledge of service and care planning processes	
1.6.2	Establish and maintain policies and procedures for care recipient assessment and reassessment	
1.6.3	Create and identify holistic care plan goals and interventions	
1.6.4	Establish a process for timely and appropriate updates to the care plan to reflect the care recipient's needs and preferences	
1.6.5	Involve care recipient and/or their representative in the care-planning process	
1.7 Clinical and Medical Records and Documentation Requirements for provision of care		
1.7.1	Establish and maintain policies and procedures for creation and upkeep of medical records	
1.7.2	Maintain knowledge of physical and electronic medical records standards and necessary documentation	
1.7.3	Educate staff in appropriate documentation practices for medical records	
1.8 Physician and Provider Services		
1.8.1	Establish and maintain policies and procedures for physician and provider services	
1.8.2	Maintain oversight and enforce clinical practice guidelines	
1.8.3	Establish and maintain expectations for the role of the medical professionals	
1.9 Emergency Medical Services		
1.9.1	Establish and maintain policies and procedures for emergency response practices	
1.9.2	Ensure appropriate staff training and competencies (e.g., AED, CPR, Heimlich maneuver, first aid)	
1.9.3	Ensure knowledge and understanding of local emergency services	
1.10 Transition of Care		
1.10.1	Establish and maintain policies and procedures for level of care assessment and reassessment	
1.10.2	Maintain knowledge of appropriate services to meet the needs of care recipients' acuity levels	
1.10.3	Ensure appropriate transition of care for admission, move-in, discharge, move-out, facility-initiated discharge and transfer	
1.11 Pain Management		
1.11.1	Establish and maintain policies and procedures to ensure the use of pain management assessments and practices to minimize pain and maximize relief	
1.11.2	Verify appropriate non-pharmacological methods for pain management are utilized prior to pharmacological methods	
1.11.3	Ensure interventions are reviewed on a routine basis to achieve the desired result	
1.12 Ancillary Services		
1.12.1	Establish contracts to ensure access to ancillary services (e.g., dental, diagnostic, hospice, palliative care, transportation, durable medical equipment)	
1.12.2	Establish relationships with non-affiliated medical providers (e.g., physicians, physician extenders) for in-person or telemedicine visits	
2	Quality of Life (Care, Services, and Supports)	12 questions
2.1 Psychosocial Needs		
2.1.1	Identify psychosocial needs (e.g., social, spiritual, community, cultural) that affect quality of life	
2.1.2	Implement practices to ensure a comprehensive evaluation is conducted to maximize care recipient's wellbeing	
2.1.3	Ensure care recipient's psychosocial needs are implemented into the care plan	
2.2 Person-Centered Care		
2.2.1	Promote person-centered care to ensure care recipient's needs and preferences are incorporated to respect their dignity and autonomy	
2.2.2	Provide on-going staff education to promote person-centered care	
2.2.3	Invite the care recipient and/or responsible party to participate in the care of the recipient	

2.4 Care Recipient (and Representative) Grievance, Conflict, and Dispute Resolution

- 2.4.1 Receive, investigate, and respond to complaints from care recipients and family members
- 2.4.2 Educate staff on the grievance process
- 2.4.3 Ensure the care recipient is protected from retaliation

2.5 Care Recipient Advocacy and Support

- 2.5.1 Facilitate opportunities for both care recipients and family members to provide input
- 2.5.2 Provide contact information for potential third party advocates that include the Ombudsman, regulatory oversight groups, etc. and actively participate in the resolution
- 2.5.3 Respond to recommendations or suggestions for improving quality of life for the care recipient

2.6 Advance Decision-Making

- 2.6.1 Encourage the development and regular review of advance directives (e.g., living will and durable power of attorney)
- 2.6.2 Develop a system to ensure care recipient's code status is consistent throughout all documentation and is effectively communicated to all relevant parties

2.7 Surrogate Decision-Making

- 2.7.1 Educate key staff on how to assess when a care recipient's capacity for decision making has declined
- 2.7.2 Initiate processes to establish the care recipient's legal decision-maker, when needed
- 2.7.3 Differentiate between the various legal surrogates (e.g., Guardianship, Power of Attorney, Conservatorship)

2.8 Care Recipient (or Representative) Satisfaction

- 2.8.1 Collect and analyze feedback to enhance care recipient (and representative) satisfaction
- 2.8.2 Implement processes to improve care recipient's (and representative) satisfaction
- 2.8.3 Educate staff on metrics collected for care recipient (and representative) satisfaction

2.9 Maltreatment Recognition and Response

- 2.9.1 Educate staff to identify the signs of abuse, neglect, and exploitation
- 2.9.2 Implement a process for reporting maltreatment, including abuse, neglect, and exploitation
- 2.9.3 Provide the ability to report maltreatment without the threat of retaliation
- 2.9.4 Implement systems to effectively respond to maltreatment incidents and to prevent future occurrences

2.10 Mental and Behavioral Health

- 2.10.1 Establish a process to appropriately assess and treat mental health needs (e.g., depression, anxiety, trauma-informed care)
- 2.10.2 Incorporate assessments to identify and respond to changes in cognition
- 2.10.3 Educate staff on comprehensive approaches to caring for individuals with memory care needs
- 2.10.4 Develop and execute a process to offer appropriate social supports

2.11 Death, Dying, and Grief

- 2.11.1 Educate staff on end-of-life services and practices for care recipients
- 2.11.2 Promote a holistic approach to the dying process based on care recipients' directives
- 2.11.3 Provide increased support for care recipients, family and staff throughout the grieving process

2.14 Therapeutic Recreation and Activity Programs

- 2.14.1 Incorporate therapeutic recreation and activities to provide cognitively and socially stimulating programs
- 2.14.2 Create a process to identify activities programs to address and support individual's needs and preferences

2.15 Community Resources, Programs, and Agencies

- 2.15.1 Identify services that can be utilized to meet care recipient needs (e.g., meals on wheels, housing vouchers, Area Agencies on Aging, Veterans Affairs)
- 2.15.2 Educate staff on the importance of coordinating community supports as part of care transition/discharge process

3 Financial Management (Operations)

10 questions

3.1 Budgeting and Forecasting

- 3.1.1 Develop, implement, and evaluate necessary budgets (e.g., operating, capital, cash)
- 3.1.2 Anticipate and estimate projected revenues and expenses, including fixed and variable costs
- 3.1.3 Manage revenues and expenses (e.g., census, staffing, cost control)
- 3.1.4 Monitor the budget regularly to track financial performance and make necessary adjustments

3.2 Financial Analysis and Reporting Requirements

- 3.2.1 Operate a healthcare organization efficiently to optimize profitability and minimize losses without jeopardizing quality of care
- 3.2.2 Recognize the financial impact of various payor types for care recipients
- 3.2.3 Determine which financial statement provides specific information regarding financial operations
- 3.2.4 Make real-time decisions utilizing ratios and variance analyses (e.g., PPD, staffing, profit margin, break-even point, turnover, occupancy)

3.3 Revenue and Expense Cycle Management

- 3.3.1 Develop procedures for timely and accurate billing process
- 3.3.2 Develop and oversee a systematic approach for monitoring and collecting outstanding accounts receivable
- 3.3.3 Develop and oversee a system for receiving and tracking payments
- 3.3.4 Oversee the payroll process, including assigning responsibilities to managers to review, approve, and process timely payroll

3.4 Revenue and Reimbursement

- 3.4.1 Differentiate between third-party payor sources (e.g., Medicare, Medicaid, Veteran Administration, Private Insurance, Long Term Care Insurance)
- 3.4.2 Utilize health record data (e.g., EMR) to identify areas of favorable clinical outcomes to maximize clinical efficiencies and optimize financial reimbursement
- 3.4.3 Identify alternative payment models (e.g., Accountable Care Organizations (ACOs), Managed Care Organizations, Bundled payment models)

3.5	Internal Financial Management Controls	
3.5.1	Implement a system of duties segregation to ensure the integrity of accounts	
3.5.2	Limit staff access to funds to ensure the integrity of accounts	
3.5.3	Identify potential areas of risk and implement controls to mitigate the risk	
3.6	Supply-Chain and Inventory Management	
3.6.1	Direct a process for ordering, receiving and inventorying supplies to provide quality of care	
3.6.2	Implement a system of controls to ensure fraud, waste, and abuse are minimized	
4	Risk Management (Operations)	9 questions
4.1	Care Recipient Safety	
4.1.1	Design and implement programs to mitigate adverse outcomes (e.g., fall prevention, elopement prevention)	
4.1.2	Establish a process to identify areas and/or care recipients' prone to adverse events	
4.1.3	Investigate and properly report resident incidents, accidents, and adverse events	
4.2	Ethical Conduct and Standards of Practice	
4.2.1	Establish and adhere to policies and procedures to prevent and detect criminal, civil, and administrative violations	
4.2.2	Enforce compliance with ethics standards for conduct	
4.3	Compliance Programs	
4.3.1	Develop and implement policies and procedures for compliance to detect, monitor, and resolve any types of behaviors that do not abide by applicable laws and regulations	
4.3.2	Ensure timely action is taken for identified areas of non-compliance	
4.3.3	Educate employees on recognizing and reporting concerns regarding ethical conduct and behavior	
4.4	Risk Management and Legal Liability	
4.4.1	Identify key areas of risk to develop policies and procedures to identify and mitigate risk exposure	
4.4.2	Educate staff on safety training, risk management, and protocols for incident reporting	
4.4.3	Develop crisis management procedures to respond to any incidents or areas of potential liability	
4.4.4	Educate internal and external stakeholders on the procedure to proactively reduce areas of risk and respond when incidents occur.	
4.4.5	Mitigate legal risk for incidents that may occur in the care setting	
4.5	Quality Improvement Processes	
4.5.1	Utilize effective improvement processes to ensure quality of care (e.g., root cause analysis, PDSA/PDCA, lean six sigma, fishbone, 5 why's)	
4.5.2	Develop, implement, and evaluate the organization's quality assurance and performance improvement programs	
4.6	Internal Investigation Protocols and Techniques	
4.6.1	Ensure staff understand proper procedures for documenting and reporting incidents and adverse events	
4.6.2	Identify situations that require an action plan to assess the need for legal representation	
4.7	Insurance Coverage	
4.7.1	Evaluate different insurance coverages to determine the most appropriate option for various scenarios (e.g., liability, property)	
4.8	Contracting	
4.8.1	Develop and monitor a process to oversee third party contracts and to handle any breach of contract	
4.8.2	Establish and execute a process to guide contract approvals, negotiations, renewals, and terminations	
4.9	Information Systems Infrastructure	
4.9.1	Design, configure, and maintain information systems infrastructure, ensuring technical controls and configurations align with organizational policies and industry best practices	
4.9.2	Implement and monitor data security measures, including access controls and technical safeguards, to protect sensitive information and maintain system integrity	
4.9.3	Ensure staff training on information technology and risks (e.g., AI tools, EMR tools)	
4.10	Disaster and Emergency Planning, Preparedness, Response, and Recovery	
4.10.1	Evaluate and update disaster and emergency policies and procedures	
4.10.2	Coordinate staff training and drills to effectively respond to emergency situations	
4.10.3	Develop and implement emergency preparedness plans to ensure safety, continuity of operations, and regulatory compliance during emergencies	
5	Human Resources (Operations)	9 questions
5.1	Federal Human Resources Laws, Rules, and Regulations	
5.1.1	Educate staff on and monitor compliance with Human Resource laws, rules and regulations (e.g., Americans with Disabilities Act, Family Medical Leave Act and the Department of Labor)	
5.1.2	Educate staff on and monitor compliance with Wage and Hour requirements (e.g., Fair Labor Standards Act, Unemployment Compensation, Workers Compensation and Consolidated Omnibus Budget Reconciliation Act)	
5.2	Selection and Hiring Practices	
5.2.1	Ensure that recruiting, application, interview, and hiring practices are in accordance with FLSA and Equal Employment Opportunity Commission (EEOC) standards (e.g., adverse impact, protected classes, occupational qualifications)	
5.2.2	Implement and monitor staffing to ensure care recipient needs are met and utilize outside resources to supplement staffing as needed (e.g., agency staff)	
5.2.3	Ensure that employees are screened and a thorough background check is completed utilizing required screenings (e.g. OIG Exclusion list, SAMS, State Medicaid Exclusion List)	
5.3	Compensation and Benefits Programs	
5.3.1	Establish and maintain policies and procedures to ensure compliance with compensation and benefit programs applicable to state and federal rules and regulations	
5.3.2	Maintain oversight of the development of compensation and benefit packages within budget and competitive allowances	
5.3.3	Design a competitive compensation package that considers wage (e.g., pay scale, merit system, shift differentials, overtime) and benefits (e.g., paid time off, healthcare insurance, retirement)	

- 5.4 Organizational Staffing Requirements and Compliance**
 - 5.4.1 Establish staffing requirements to meet the needs of care recipients
 - 5.4.2 Ensure staff meet all applicable professional licensing, qualifications, certifications, and credentialing requirements
- 5.5 Employee Training (ongoing education)**
 - 5.5.1 Establish policies and procedures to guide new employee onboarding and ongoing training
 - 5.5.2 Maintain training and competency to professional standards
 - 5.5.3 Explore internal and external opportunities for employee professional development
- 5.6 Performance Evaluation**
 - 5.6.1 Establish and maintain policies and procedures for conducting periodic formal evaluation of employee performance
 - 5.6.2 Establish, maintain and implement policies and procedures for employee counseling, coaching, and job performance
 - 5.6.3 Educate management staff in skills and strategies for carrying out performance evaluation systems (e.g., tools and approaches for conducting performance evaluations, methods of delivering timely and effective feedback, identifying and developing employees who meet or exceed standards)
 - 5.6.4 Establish standards to objectively measure performance routinely and when an employee's performance or behavior does not meet standards
- 5.7 Human Resource Policies**
 - 5.7.1 Maintain and uphold human resources policies and procedures (e.g., drug-free workplace, progressive discipline, job classification, photography and video, social media and mobile phone usage)
 - 5.7.2 Educate and communicate with employees regarding roles and responsibilities (e.g., written job description and expectations of each role, workplace rules, appropriate and sufficient continuing education)
- 5.8 Personnel Recordkeeping Requirements**
 - 5.8.1 Develop and maintain policies and procedures related to state and federal regulations related to personnel records (e.g., Age Discrimination Employee of 1967, The Fair Labor Standards Act of 1938, U.S. Equal Employment Opportunity Commission)
 - 5.8.2 Ensure personnel records are kept in a secured environment with access limited only to authorized individuals
 - 5.8.3 Identify additional requirements related to personnel recordkeeping, and implement practices to assure compliance (e.g., types and retention time of records, information, storage, and confidentiality requirements)
- 5.9 Employee Grievance, Conflict, and Dispute Resolution**
 - 5.9.1 Develop, implement and maintain policies, procedures, and processes to address and resolve conflicts or complaints from employees
 - 5.9.2 Establish formal grievance procedures outlining how employees can communicate areas of discrimination, harassment, abuse, mistreatment and/or other concerns without the fear of retaliation or punitive consequences
 - 5.9.3 Educate employees regarding the formal process for filing and resolving grievances, conflicts and disputes
- 5.10 Employee Satisfaction, Engagement, and Retention**
 - 5.10.1 Analyze organizational culture and develop tools to measure engagement, satisfaction and retention
 - 5.10.2 Formulate a plan to increase the overall success of the organization using appropriate tools and resources (e.g., employee satisfaction surveys, exit interviews, employee retention methods and methods to reduce absenteeism and turnover)
- 5.11 Cultural Competence and Awareness**
 - 5.11.1 Develop a broad understanding of cultural competence to promote a positive, engaged and supportive culture (e.g., training programs, empathy building, conflict resolution strategies)
 - 5.11.2 Establish a supportive culture to empower employees to embrace employee and care recipient rights
 - 5.11.3 Encourage staff to report any violation of employee rights
- 5.12 Labor Relations**
 - 5.12.1 Foster a cooperative relationship between management and the labor force
 - 5.12.2 Maintain knowledge of collective bargaining and labor relations laws and rules, and educate the labor force accordingly
 - 5.12.3 Maintain knowledge of the National Labor Relations Act including negotiation, arbitration, and mediation
- 5.13 Workers Compensation**
 - 5.13.1 Ensure staff are educated on workers compensation protocols
 - 5.13.2 Establish and enforce a comprehensive workers compensation program
 - 5.13.3 Establish an interdisciplinary approach to mitigate risk in workers compensation claims

6	Care Setting (Environment and Quality)	9 questions
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- 6.1 Federal Codes and Regulations for Building, Equipment, Maintenance, and Grounds**
 - 6.1.1 Establish and maintain physical environment policies and procedures that comply with applicable requirements and regulations (e.g., LSC, FDA, EPA, Safe Devices Medical Act, NFPA)
- 6.3 Safety and Accessibility**
 - 6.3.1 Establish and uphold physical environment standards that ensure quality, safety, and accessibility for all care recipients (e.g., ADA)
 - 6.3.2 Promote and sustain staff understanding and adherence to physical environment standards and regulations
- 6.4 Environmental Services and Preventative/Routine Maintenance Programs**
 - 6.4.1 Ensure effective environmental services including housekeeping and laundry services are provided
 - 6.4.2 Develop a routine maintenance schedule to prevent unexpected equipment failures
 - 6.4.3 Maintain documentation to show preventative maintenance is completed as required per policies and procedures
- 6.5 Infection Control and Sanitation**
 - 6.5.1 Plan, implement and validate infection control strategies to provide a safe and healthy environment
 - 6.5.2 Develop and implement policies and procedures to prevent food borne illnesses by following proper food handling and storage protocols
 - 6.5.3 Ensure a safe and secure care environment that includes consideration of infection control and sanitation (e.g., healthcare-acquired infections, linens)
 - 6.5.4 Educate and monitor proper hand hygiene

6.6	Security	
6.6.1	Develop and implement security policies and procedures to protect care recipients and staff including unauthorized entry or exit	
6.6.2	Assess care recipient's environment for safety, security, and accessibility (e.g., cameras, monitoring systems, locks, staff location reporting)	
7	Regulatory Compliance (Environment and Quality)	13 questions
7.7	OSHA Rules and Regulations	
7.7.1	Establish and maintain policies and procedures that comply with OSHA standards (e.g., Safety data sheets, Days Away, Restricted, or Transferred (DART), National Emphasis Programs (NEP), hazard communication, bloodborne pathogens)	
7.7.2	Ensure compliance with OSHA reporting requirements	
7.7.3	Train staff on applicable knowledge related to OSHA standards specific to their department to protect the health and safety of all individuals in the workplace	
7.8	Mandatory Reporting Requirements	
7.8.1	Recognize the different types of abuse (e.g., verbal, mental, physical, sexual, misappropriation of property, neglect)	
7.8.2	Assess and monitor incidents and adverse events and evaluate the need to escalate to appropriate authorities	
7.8.3	Establish, implement, and evaluate internal investigation and mandatory reporting requirements (e.g., Elder Justice Act)	
7.9	Healthcare Record Administrative Requirements	
7.9.1	Establish and maintain policies and procedures related to safeguarding the transmission of healthcare information.	
7.9.2	Ensure compliance with state and federal regulations regarding or pertaining to record keeping systems (e.g., record retention, backup systems)	
7.9.3	Educate and evaluate adherence to privacy acts and standards (e.g., HIPAA, HITECH).	
8	Leadership (Leadership and Strategy)	13 questions
8.1	Organizational Behavior	
8.1.1	Establish and lead an organizational culture that fosters professional development, employee engagement, ethical practice, and sensitivity to diverse backgrounds	
8.1.2	Establish a process for effective interdisciplinary and interdepartmental communication and coordination	
8.1.3	Utilize and adapt mission, vision, and values to drive organizational culture	
8.2	Leadership Principles	
8.2.1	Develop, implement, and evaluate business development and public relations practices	
8.2.2	Build employee trust to navigate change	
8.2.3	Develop strategies, tools, and practices to facilitate employee growth (e.g., mentoring, coaching, personal professional development)	
8.2.4	Employ change management processes, tools, and techniques to promote organizational transformation.	
8.3	Governance	
8.3.1	Fulfill the directives and mission as established by the governing body (e.g., board of directors, corporate entities, advisory boards)	
8.3.2	Effectively communicate with the governing body	
8.3.3	Comply with governing body expectations and requirements	
8.3.4	Ensure all governing body activities are aligned with federal laws and regulations	
8.4	Professional Advocacy and Governmental Relations	
8.4.1	Develop relationships with stakeholders and regulators (e.g., local, state, federal)	
8.4.2	Educate stakeholders and regulators on services provided, regulatory requirements, and standards of care	
8.4.3	Communicate impact of proposed policy changes	
9	Organizational Strategy (Leadership and Strategy)	10 questions
9.1	Strategic Business Planning	
9.1.1	Perform a market analysis to evaluate business opportunities and sustainability (e.g., new lines of service)	
9.1.2	Establish a succession plan to ensure business continuity	
9.1.3	Develop and manage strategic partnerships and alliances to drive growth and improve health care delivery	
9.2	Business Analytics	
9.2.1	Utilize internal and external data and tools (e.g., generative AI tools) to establish, plan, and evaluate organizational benchmarks to set goals, measure success, and guide decision-making	
9.2.2	Utilize practices based on measurable evidence (e.g., satisfaction surveys, health systems, Key Performance Indicators)	
9.2.3	Conduct feasibility studies to determine market opportunities	
9.3	Business Development and Public Relations	
9.3.1	Develop, execute, and evaluate a marketing plan	
9.3.2	Increase awareness of services and differentiate your organization	
9.3.3	Identify and engage in partnerships with a variety of healthcare entities	
9.3.4	Negotiate, interpret, and implement contractual agreements to optimize organizational performance and outcomes	
9.3.5	Foster an environment for business growth	
9.3.6	Utilize public relation strategies to develop meaningful stakeholder relationships	
9.3.7	Develop strategies to promote, monitor, and maintain brand awareness	

DISCLAIMER

NAB has shared a tertiary (task statement) level to the examination blueprint to give you a clear picture of the role of a senior living and health services leader. Please note that this is not an exhaustive list of everything you might need to know. As regulations and business practices change, the exam content is also updated to reflect the most current information.

1	Quality of Care (Care, Services, and Supports)	12 questions
1.1	Medical and Nursing Care Practices	
1.1.5	Ensure that the resident receives treatment and care in accordance with professional standards of practice (e.g., pressure ulcers/injury, bowel and bladder, ostomy, dialysis, pain management) (42CFR483.25)	
1.2	Medication Management and Administration	
1.2.5	Establish, observe and monitor medication preparation and administration processes to ensure regulatory compliance (42CFR483.45)	
1.2.6	Verify appropriate storage and security of drugs and biologicals (42CFR483.45)	
1.2.7	Develop and maintain policies and procedures for drug regimen review, and prevention of the use of unnecessary drugs (e.g., psychotropic) (42CFR483.45(c)(5))	
1.3	Nutrition and Hydration	
1.3.6	Establish and implement procedures for nutrition and hydration (e.g., nutritive value, food temperatures) (42CFR483.60, 42CFR483.25)	
1.5	Rehabilitation and Restorative Programs	
1.5.5	Educate staff to identify changes in condition that would require rehabilitation or restorative nursing services (e.g., range of motion, changes in mobility) (42CFR483.65)	
1.6	Care Recipient Assessment and Interdisciplinary Care Planning	
1.6.6	Ensure an accurate resident assessment instrument (RAI) is initiated and completed on admission and as needed in accordance with professional standards (42CFR483.20)	
1.6.7	Ensure the development and implementation of a baseline and comprehensive person-centered care plan that meets professional standards of quality care (42CFR483.21)	
1.6.8	Ensure compliance with all requirements in completing and submitting a Minimum Data Set (MDS) (42CFR483.20)	
1.7	Clinical and Medical Records and Documentation Requirements for provision of care	
1.7.4	Establish policies and procedures for residents to access personal medical records in a timely manner (42CFR483.10(g)(2))	
1.8	Physician and Provider Services	
1.8.4	Develop policies and procedures to ensure timely visits and physician services (42CFR483.30(b))	
1.8.5	Designate a physician to serve in the role as Medical Director and define their authority (42CFR483.70(g))	
1.9	Emergency Medical Services	
1.9.4	Ensure facility personnel provides basic life support including CPR to a resident requiring such emergency care prior to arrival of emergency medical personnel and subject to related physician orders and the resident's advance directives (42CFR483.24(a)(3))	
1.10	Transition of Care	
1.10.4	Develop policies and procedures to communicate the bed hold policy and adhere to notice requirements (42CFR483.15(d))	
1.10.5	Ensure a Pre-Admission Screening (PASRR) is completed for every resident prior to admission and as needed (42CFR483.20(k))	
1.10.6	Develop a comprehensive program with education to ensure the transfer and/or discharge (facility or resident initiated) is documented in the medical record and notice requirements are met (42CFR483.15(c)(3-5))	
1.11	Pain Management	
1.11.4	Develop policies and procedures to ensure pain management is provided to residents who require such services consistent with professional standards of practice (42CFR483.25(k))	
1.12	Ancillary Services	
1.12.3	Develop policies and procedures to ensure emergency dental care (42CFR483.55)	
1.12.4	Develop policies and procedures to ensure diagnostic services are provided to meet the needs of the resident (42CFR483.50(a), 42CFR483.50(a)(1))	
1.12.5	Assist the resident in arrangement of transportation services to and from the source of service (42CFR483.50(a)(2))	
2	Quality of Life (Care, Services, and Supports)	10 questions
2.2	Person-Centered Care	
2.2.4	Develop policies and procedures to ensure residents with prior trauma receive culturally competent trauma informed care. (CFR483.25(m))	
2.3	Care Recipient Bill of Rights and Responsibilities	
2.3.1	Educate staff and residents on the CMS protected resident rights. (42CFR483.10)	
2.3.2	Develop policies and procedures on informing residents of their rights in a timely manner and in a language they understand. (42CFR483.10(a))	
2.4	Care Recipient (and Representative) Grievance, Conflict, and Dispute Resolution	
2.4.4	Develop policies and procedures to designate a Grievance Official to communicate and oversee the process of how to file a grievance and ensure prompt written summary of the resolution CFR483.10(j)	
2.5	Care Recipient Advocacy and Support	
2.5.4	Develop and implement policies to protect the rights of residents to organize and participate in resident groups in accordance with CMS guidance. (42CFR483.10(f)(5))	
2.9	Maltreatment Recognition and Response	
2.9.5	Develop and implement policies to ensure timely reporting to applicable external agencies. CMS483.12(b)	
2.12	Restraint Usage and Reduction	
2.12.1	Develop policies and procedures to keep residents free from physical and chemical restraints (CMS483.10(e)(1))	
2.13	Dining Experience	
2.13.1	Protect the residents' right to choose the time, place and manner to receive meals in accordance with their personal preferences to enhance the overall dining experience (42CFR483.60)	

2.16	Volunteer Programs	
2.16.1	Develop, implement and maintain policies and procedures related to training volunteers (42CFR483.95)	
3	Financial Management (Operations)	8 questions
3.2	Financial Analysis and Reporting Requirements	
3.2.5	Create and submit cost reports in a timely manner (e.g., Medicare, Medicaid)	
3.4	Revenue and Reimbursement	
3.4.4	Differentiate between third-party payor sources (e.g., Veteran Administration, private insurance, Patient Driven Payment Model (PDPM), value-based purchasing (VBP), consolidated billing)	
3.4.5	Adhere to federal regulations regarding third-party payors (e.g., admissions, expedited admission, continued stay in facility or transfer/discharge) (42CFR483.15)	
3.7	Resident Trust Accounts for Personal Funds	
3.7.1	Create policies to secure, manage, and audit resident funds (42CFR483.10(f)(10))	
3.7.2	Provide documentation to the resident and/or responsible party of fund receipts and disbursements (42CFR483.10(f)(10))	
3.7.3	Create policies to secure, manage, and audit surety bonds (42CFR483.10(f)(10)(vi))	
4	Risk Management (Operations)	7 questions
4.2	Ethical Conduct and Standards of Practice	
4.2.3	Enforce compliance with ethics standards for conduct (42CFR483.95(f))	
4.5	Quality Improvement Processes	
4.5.3	Develop, implement and maintain an effective comprehensive data driven Quality Assurance and Performance Improvement (QAPI) program that focuses on indicators of the outcomes of care and quality of life (42CFR483.75)	
4.5.4	Create an effective Quality Assessment and Assurance committee (QAA) (42CFR483.75)	
4.5.6	Provide mandatory staff training on the elements and goals of the Quality Assurance and Performance Improvement (QAPI) program (42CFR483.75)	
4.10	Disaster and Emergency Planning, Preparedness, Response, and Recovery	
4.10.4	Evaluate and update disaster and emergency policies and procedures (42CFR483.73)	
4.10.5	Coordinate staff training and drills to effectively respond to emergency situations (42CFR483.73)	
4.10.6	Develop and implement emergency preparedness plans to ensure safety, continuity of operations, and regulatory compliance during emergencies (e.g., State Operations Manual Appendix Z) (42CFR483.73)	
5	Human Resources (Operations)	7 questions
5.4	Organizational Staffing Requirements and Compliance	
5.4.3	Adhere to the federal reporting requirements including Payroll-Based Journal (PBJ) and National Healthcare Safety Network (NHSN)	
5.4.4	Ensure staff meet all applicable professional licensing, qualifications, certifications and credentialing (e.g., dietary manager, dietician, social worker, activity professional)	
5.5	Employee Training (ongoing education)	
5.5.4	Develop and administer mandatory employee training to ensure compliance with federal and state regulations, in accordance with their job descriptions (e.g., abuse & neglect, resident rights, fire safety, infection control, advance directives, feeding assistants) (42CFR483.95)	
5.5.5	Adhere to federal regulations regarding training, registry, and ongoing certifications of nursing aids (42CFR483.95)	
5.6	Performance Evaluation	
5.6.5	Conduct performance evaluations to ensure compliance with federal and state regulations (42CFR483.152)(42CFR483.35(d)(7))	
5.8	Personnel Recordkeeping Requirements	
5.8.4	Ensure employee record files contain applications and qualifications, background and abuse registry checks, health screening and immunizations, orientation, education and competency records, and performance evaluations (42CFR483.12)(42CFR483.95)	
5.11	Cultural Competence and Awareness	
5.11.4	Educate nursing staff on competencies and skillsets needed to provide culturally competent and trauma-informed care (F699, F726)	
6	Care Setting (Environment and Quality)	7 questions
6.1	Federal Codes and Regulations for Building, Equipment, Maintenance, and Grounds	
6.1.2	Ensure the building is designed, constructed, equipped and maintained to protect the health and safety of residents, personnel and the public (42CFR483.90, State Operations Manual Appendix Z)	
6.1.3	Implement applicable policies and procedures to comply with Life Safety Code	
6.2	Person-Centered Environment	
6.2.1	Ensure a safe, clean and home-like environment for the resident	
6.2.2	Ensure a person-centered environment and that includes adequate lighting, safe temperature, and sound level control	
6.2.3	Ensure the physical layout of each resident's space incorporates the ability to personalize and maximize independence and safety (42CFR483.24)	
6.3	Safety and Accessibility	
6.3.3	Ensure proper outside and mechanical ventilation systems are in place to maintain a safe environment (42CFR483.90(i)(1))	
6.3.4	Ensure resident call systems are adaptable for all care recipients to include functional adaptability based on need (42CFR.483.90(g))	
6.3.5	Educate and verify a person-centered approach is used when determining the use of bed rails, including conducting a comprehensive assessment, the medical need and the proper use (42CFR483.25 (n))	
6.4	Environmental Services and Preventative/Routine Maintenance Programs	
6.4.4	Maintain an effective pest control program (42CFR483.90 (i)(4))	

6.5	Infection Control and Sanitation	
6.5.5	Maintain an infection prevention and control program designed to provide a safe, sanitary, and comfortable environment and to help prevent the development and transmission of communicable diseases and infections (ref. 42CFR483.80)	
6.5.6	Establish a system for preventing, identifying, reporting investigating and controlling infections and communicable diseases (42CFR483.80(a)(1))	
6.5.7	Routinely educate and monitor staff to ensure compliance with all infection control practices	
6.5.8	Designate an individual who oversees an effective infection prevention and control program (42CFR483.80(b))	
7	Regulatory Compliance (Environment and Quality)	9 questions
7.1	Healthcare Laws, Rules, and Regulations	
7.1.1	Ensure compliance with applicable rules, laws and regulations (e.g., OBRA of 1987, SOM Appendix PP, QSEP, CMS Policies and Memos)	
7.2	Organizational Certification and Licensure Requirements	
7.2.1	Adhere to licensing requirements in accordance with federal, state and local laws (42CFR483.70)	
7.3	Regulatory Survey and Inspection Process	
7.3.1	Develop a protocol for staff response to the regulatory survey process (SOM Chapter 7)	
7.3.2	Ensure knowledge of statements of deficiencies and develop and implement plans of correction to ensure regulatory compliance (SOM Chapter 7)	
7.3.3	Differentiate between the types of surveys (e.g., recertification, abbreviated, extended) (SOM Chapter 7)	
7.3.4	Ensure knowledge of survey terminology, time frames and enforcement remedies (SOM Chapter 7, SOM Appendix Q)	
7.4	Procedures for Informal Dispute Resolution (IDR)	
7.4.1	Differentiate between Informal Dispute Resolution (IDR) and Independent Informal Dispute Resolution (IIDR) (e.g., SOM Chapter 7)	
7.5	Centers for Medicare and Medicaid Services (CMS) Quality Measures	
7.5.1	Analyze and assess the impact of CMS Quality Measures on facility operations (42CFR483.75(a))	
7.5.2	Analyze and assess the impact of CMS Five Star Rating System on facility operations (42CFR483.75)	
7.5.3	Report, review and maintain data to ensure an effective, comprehensive, data-driven QAPI program (42CFR483.75)	
7.6	Facility Assessment	
7.6.1	Conduct and document a facility wide assessment to determine what resources are necessary to care for its residents (42CFR483.71)	

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1	Quality of Care (Care, Services, and Supports)	20 questions
1.1	Medical and Nursing Care Practices	
1.1.6	Determine the ability to meet the changing care needs of the resident in their residential care setting	
1.1.7	Determine when the changing care needs exceed the scope of practice	
1.2	Medication Management and Administration	
1.2.8	Develop policies and procedures in compliance with state laws to optimize a medication management program within the community	
1.2.9	Establish policy and procedures for ongoing evaluation and implementation of resident self-administration of medication	
1.3	Nutrition and Hydration	
1.3.7	Monitor residents to assess changes in nutrition and hydration to determine if a change in level of care is needed	
1.5	Rehabilitation and Restorative Programs	
1.5.6	Assess and monitor residents' functionality and mobility on an ongoing basis to determine if a change in level of care is needed	
1.5.7	Coordinate rehabilitation programs with outside vendors as needed (e.g., home health, outpatient rehab)	
1.6	Care Recipient Assessment and Interdisciplinary Care Planning	
1.6.9	Assess and monitor residents on an ongoing basis to determine if a change in level of care is needed	
1.6.10	Develop and implement criteria and processes to determine appropriate services or alternate settings for the resident	
1.6.11	Educate all staff to monitor residents and report any changes in condition	
1.6.12	Develop criteria to evaluate the appropriateness of placement prior to move in	
1.7	Clinical and Medical Records and Documentation Requirements for provision of care	
1.7.5	Establish and maintain policies and procedures to ensure compliance with state laws regarding clinical medical records and documentation	
1.10	Transition of Care	
1.10.7	Establish policies and procedures on move-in, transfer, move-out, and involuntary discharge based on the scope of services allowed in the care setting	
2	Quality of Life (Care, Services, and Supports)	20 questions
2.1	Psychosocial Needs	
2.1.4	Engage residents to actively participate in community life, such as planning a variety of activities, social engagement and external community events and outings	
2.1.5	Educate staff in addressing the psychosocial needs of residents, encourage community life participation, identify withdrawn behaviors and respond appropriately	
2.2	Person-Centered Care	
2.2.5	Enable residents' choice in management of their daily schedule	
2.2.6	Educate staff to encourage and respect the individual resident needs and preferences	
2.2.7	Develop a framework to embody person-centered care within the community	
2.3	Care Recipient Bill of Rights and Responsibilities	
2.3.3	Establish policies and procedures to address the responsibilities of the community to uphold resident rights	
2.3.4	Create systems to identify infringements on resident rights	
2.3.5	Educate staff and residents on resident rights	
2.5	Care Recipient Advocacy and Support	
2.5.5	Coordinate robust resident and family councils to empower the residents to direct their lives within the community	
2.13	Dining Experience	
2.13.2	Establish a dining experience that promotes resident choice (e.g., menu planning, dining times)	
2.14	Therapeutic Recreation and Activity Programs	
2.14.3	Design activities programs to meet the needs and preferences of the residents (e.g., outings, types of activities, special events)	
2.14.4	Create an environment to enhance resident engagement	
2.14.5	Employ, train, and evaluate appropriately qualified activity staff	
2.16	Volunteer Programs	
2.16.2	Ensure coordination of volunteer programs	
2.16.3	Screen, orient, and train volunteers	
3	Financial Management (Operations)	4 questions
3.2	Financial Analysis and Reporting Requirements	
3.2.6	Determine the financial impact of changes in levels of care, including rate increases and ancillary services	
4	Risk Management (Operations)	4 questions
4.1	Care Recipient Safety	
4.1.4	Develop strategies to identify and monitor residents for changing care needs to mitigate risk for adverse events (e.g., fall prevention, elopement prevention)	
6	Care Setting (Environment and Quality)	8 questions
6.2	Person-Centered Environment	
6.2.4	Establish a culture to promote choice, comfort, and cleanliness	
6.2.5	Implement a home-like environment that supports the well-being and safety of all care recipients (e.g., lighting, sound, temperature, design)	
7	Regulatory (Environment and Quality)	4 questions
7.1	Healthcare Laws, Rules, and Regulations	
7.1.2	Ensure compliance with all applicable rules, laws and regulations	
7.2	Organizational Certification and Licensure Requirements	
7.2.2	Evaluate and monitor community certification and licensure policies and procedures to remain compliant with state and local rules and regulations	

7.3 Regulatory Survey and Inspection Process

- 7.3.5 Maintain knowledge of the survey process
- 7.3.6 Create policies and procedures to comply with rules and regulations relative to the survey process
- 7.3.7 Educate all staff on their responsibilities to comply with all rules and regulations relative to the survey process
- 7.3.8 Establish procedures to respond to survey findings

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1	Quality of Care (Care, Services, and Supports)	14 questions
1.1	Medical and Nursing Care Practices	
1.1.8	Provide skilled professional services in the patient's home to assess, plan, and deliver care in accordance with the patient's individualized plan of care (Home Health 42CFR 484.75).	
1.2	Medication Management and Administration	
1.2.10	Provide care recipient education on medication storage in the home	
1.2.11	Educate staff on content of hospice election statement addendum including medications not covered by hospice (42CFR418.106(a)(1))	
1.5	Rehabilitation and Restorative Programs	
1.5.8	Ensure therapy services are available, and when provided, offered in a manner consistent with accepted standards of practice. (42CFR418.72)	
1.6	Care Recipient Assessment and Interdisciplinary Care Planning	
1.6.13	Assess and monitor care recipients on an ongoing basis to determine if a change in level of care is needed	
1.6.14	Educate all staff to monitor care recipients and report any changes in condition	
1.6.15	Develop policies and procedures to ensure the agency creates the individual plan of care based on each home care and/or hospice care recipient's needs (CFR 484.55, 42CFR418.56).	
1.7	Clinical and Medical Records and Documentation Requirements for provision of care	
1.7.6	Establish policies and procedures to ensure compliance with CMS requirements to complete and transmit comprehensive home health assessment in timely manner (CFR484.45(a))	
1.7.7	Maintain accurate, complete, and secure clinical records for every patient receiving home health services, ensuring documentation meets regulatory standards (42 CFR 484.110).	
1.8	Physician and Provider Services	
1.8.6	Designate a physician to serve in the role as Medical Director and define their authority (42CFR418.102)	
1.10	Transition of Care	
1.10.8	Develop and implement an effective discharge planning process to ensure timely transfer of complete medical information and care goals. (42CFR 484.58, 42CFR418.26)	
1.11	Pain Management	
1.11.5	Develop policies and procedures to ensure pain management and symptom control (e.g., comprehensive pain assessment, interdisciplinary plan of care, patient rights). (42CFR418.52(c)(1))	
1.12	Ancillary Services	
1.12.6	Ensure ongoing compliance with all Federal, State, and local laws and regulations governing laboratory services. (42CFR484.100(c), 418.116(b).)	
2	Quality of Life (Care, Services, and Supports)	13 questions
2.1	Psychosocial Needs	
2.1.6	Develop and maintain policy and procedure for the care recipient's psychosocial services (e.g., social worker, chaplain, bereavement) (42CFR418.64(c & d))	
2.3	Care Recipient Bill of Rights and Responsibilities	
2.3.6	Maintain, monitor and enforce policies and procedures to address care recipients' rights and responsibilities (42CFR418.52)	
2.3.7	Educate staff and residents on resident rights (42CFR418.52)	
2.3.8	Inform home health care recipients and representatives of their rights and protect those rights (42 CFR 484.50)	
2.4	Care Recipient (and Representative) Grievance, Conflict, and Dispute Resolution	
2.4.5	Address complaints for home health care recipients and representatives rights in an accessible and timely manner. (42CFR 484.50)	
2.8	Care Recipient (or Representative) Satisfaction	
2.8.4	Establish policies and procedures to survey the required number of discharged care recipients and ensure data collection to meet specific quality and reporting compliance standards (42 CFR 484.250(a))	
2.8.5	Maintain knowledge of and educate staff on the Consumer Assessment of Healthcare Providers and Systems (CAHPS) Hospice Survey. (42CFR418.312(d))	
2.9	Maltreatment Recognition and Response	
2.9.6	Develop and implement policies to ensure timely reporting to applicable external agencies. (CFR418.52(c)(6))	
2.12	Restraint Usage and Reduction	
2.12.2	Develop policies and procedures to keep care recipients free from restraint or seclusion. (42CFR418.110(n))	
2.13	Dining Experience	
2.13.3	For in-patient hospice individuals, furnish meals that are aligned with care recipient's needs and preferences, consistent with their plan of care, nutritional needs, and therapeutic diet. (42CFR418.110(m))	
2.16	Volunteer Programs	
2.16.4	Develop, maintain and enforce volunteer services policies and procedures to comply with applicable regulations and requirements (CFR418.78)	
2.16.5	Develop and maintain a system for tracking and reporting volunteer hours to create a strong onboarding experience (CFR418.78)	
3	Financial Management (Operations)	4 questions
3.2	Financial Analysis and Reporting Requirements	
3.2.5	Create and submit cost reports in a timely manner (e.g., Medicare, Medicaid)	
3.2.7	Ensure timely and accurate submission of required Hospice Quality Reporting Program data in compliance with federal reporting requirements. (1814(i)(5) of the Social Security Act)	
3.2.8	Develop policies and procedures to submit quality data as specified under the expanded Home Health Value Based Purchasing model and HHCAHPS surveys per CMS regulatory requirements for Home Health Agencies (CFR 484.355)	

3.4	Revenue and Reimbursement	
3.4.6	Identify different payment models and episodic billing. (e.g., PDGM, value-based purchasing)	
3.4.7	Differentiate between third-party payor sources (e.g., PDGM, value-based purchasing)	
3.4.8	Ensure accurate and timely submission of required home health data (e.g., OASIS assessments, RAPS, NOAs and quality reporting measures) to CMS in accordance with Federal requirements to receive proper payment and avoid penalties. (CFR 484.205, 484.215, 484.220)	
4	Risk Management (Operations)	7 questions
4.3	Compliance Programs	
4.3.4	Ensure policies and procedures to comply with all state, federal, and local laws and regulations related to patient safety and health (42 CFR 484.100)	
4.5	Quality Improvement Processes	
4.5.6	Develop, implement, and enforce Quality Assurance and Performance Improvement (QAPI) program policies and procedures, ensuring compliance with regulations and active engagement of the interdisciplinary team throughout the process (42CFR484.65)	
4.5.7	Develop, implement, and maintain an effective, ongoing, hospice-wide data-driven quality assessment and performance improvement program (42CFR418.58).	
4.10	Disaster and Emergency Planning, Preparedness, Response, and Recovery	
4.10.7	Develop and implement emergency preparedness plans to ensure safety, continuity of operations, and regulatory compliance during emergencies (e.g., State Operations Manual Appendix Z) (42CFR484.102, 42CFR418.113(b)(1))	
5	Human Resources (Operations)	4 questions
5.4	Organizational Staffing Requirements and Compliance	
5.4.5	Ensure home health staff meet all applicable professional licensing, qualifications, certifications and credentialing (e.g., Administrator, audiologist, clinical manager, home health aide, physical therapist) (42CFR484.115).	
5.4.6	Ensure hospice staff meet all applicable professional licensing, qualifications, certifications and credentialing (e.g., hospice aide, social worker, physical therapist, licensed nurse) (42CFR484.114).	
6	Care Setting (Environment and Quality)	5 questions
6.2	Person-Centered Environment	
6.2.6	Conduct a comprehensive safety assessment in the home to ensure staff and care recipient safety (e.g., pets, weapons, drugs, bug infestations)	
6.5	Infection Control and Sanitation	
6.5.9	Develop, maintain, and document a comprehensive infection control program that includes prevention, surveillance, control measures, and education for staff, care recipients, and caregivers in accordance with home health agency standards. (42CFR 484.70)	
6.5.10	Maintain and document an effective infection control program for hospice that protects care recipients, families, visitors, and personnel (42CFR418.60, 418.110)	
7	Regulatory Compliance (Environment and Quality)	13 questions
7.1	Healthcare Laws, Rules, and Regulations	
7.1.3	Ensure compliance with applicable rules, laws and regulations (e.g., CMS Policies and Memos, Hospice and Home Health CMS regulations)	
7.2	Organizational Certification and Licensure Requirements	
7.2.3	Evaluate and monitor agency certification and licensure policies and procedures to remain compliant with state, federal rules and regulations	
7.3	Regulatory Survey and Inspection Process	
7.3.9	Ensure the home health/hospice agency is prepared for surveys by maintaining compliance with conditions of participation	
7.4	Procedures for Informal Dispute Resolution (IDR)	
7.4.2	Ensure and maintain informal dispute resolution policies and procedures to comply with federal rules and regulations	
7.5	Centers for Medicare and Medicaid Services (CMS) Quality Measures	
7.5.4	Develop, implement, and evaluate the organization's process and performance for quality reporting	
7.5.5	Analyze and assess the impact of CMS Five Star Rating System on home health and hospice operations	
7.5.6	Analyze and assess the impact of CMS Quality Measures on home health and hospice operations	

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